



Getting Started with Sales Management

Release 8.6.5 (Eterm)

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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.

Sales Management Setup Overview

Sales Management Setup topics include system setup considerations for Sales Order Entry and other sales-related functions. These topics primarily address the control maintenance records and authorization keys used in these processes, but also include other setup considerations where applicable.

Only a System Administrator is authorized to set control maintenance records and authorization keys.

Setup Requirements for Backorders

Following are the control maintenance records and authorization keys used with backorders.

Control Maintenance Records

Set the following control maintenance records:

- Change Ship Date If Required Date Edited On Schedule Screens
- Customer B/O Action Default
- Default Return Goods Quantity Type
- User To Get Tracker When A Tag is Broken
- Limit SOE Branches in Home Territory By User Authorization

Authorization Keys

Assign the following authorization keys:

- OE.OVERCOMMIT.STOCK
- PROCUREMENT
- SOE.PRINT.INVOICE

Setup Requirements for Bids

Following are the control maintenance records and authorization keys used with bids.

Control Maintenance Records

Set the following control maintenance records:

- Bid Date To Order Date
- Consolidate Line Items When Opening A Bid
- Default Product If Not Found
- Disallow Copying COGS Or Cost To A New Sales Order Bid
- Duplicate Bid Days To Check
- Number Of Days Before Bid Pricing Expires
- Order Return to Bid Parameter
- Recalculate COGS and COMM-COST When Changing Bid To Open Order
- Sort Bids In Fast Select From Newest To Oldest
- Valid Job Award Codes
- While Repricing a Bid Should All Open Gens Be Repriced

Authorization Keys

Assign the following authorization keys:

- CONVERT.PROSPECT
- JOB.BID.MAINT
- PRODUCT.FAMILY.MAINT
- SOE.BID.APPRV.EXPIRED
- SOE.BID.COST.EDIT
- SOE.BID.FLWUP.USER.EDIT
- SOE.BID.PRC.EDIT
- SOE.ORDER.TO.BID

Setup Requirements for Cash Sales

Following are the control maintenance records, authorization keys, and additional setup requirements for cash sales.

Control Maintenance Records

- Check Verification: Required Information
- Ignore Cash Required Check When No Ship Via

Authorization Keys

- SOE.CASH.REQD.EDIT

Setting Up a Generic Cash Sales Account

Cash sales orders that do not need to be associated with a specific customer must be attributed to a generic cash sales customer. In Customer Maintenance, create a new customer named "Cash Sales" or something similar, and select **Branch Cash Acct** in the main Customer Maintenance screen.

Once this setup is complete, enter the customer you set up on all cash sales orders.

Cash Sales and the New Customer Entry Prompt

When entering sales orders under your cash sales orders account, the New Customer Entry prompt will display anytime an order meets either of the following conditions:

- An amount due displays on the Totals screen.
- Any order generation is assigned an order status *other than* Pick Up Now.

When the prompt displays and you enter a new customer, the resulting sale is attributed to the newly created customer, rather than to the branch cash account.

Terminal Location

Set up the computer terminals used for cash sales order entry so the default settings prompt users for the most common information. For example, you would not want the terminals located at your cash sales counter to prompt for delivery information.

Menus and Job Functions

Set up each user with a root menu that is appropriate for cash sales order entry. Specify the menu using the **Root Menu** field in User Maintenance. Access to menu choices and screens depends on this setting.

Setup Requirements for Closed Orders

Following are the control maintenance records and authorization keys used with closed orders.

Control Maintenance Record

- Prohibit Quantity Break Repricing On Closed Orders

Authorization Keys

- SOE.CLOSED.CHANGE.CUST
- SOE.CLOSED.ORDER.CANCEL
- SOE.CLOSED.ORDER.EDIT
- SOE.CLOSED.ORDER.EDIT.SHIP
- SOE.CLOSED.ORDER.FAX
- SOE.CLOSED.ORDER.OPEN
- SOE.CLOSED.PRC.EDIT
- SOE.CLOSED.QTY.EDIT

Setup Requirements for Commissions

Following are the control maintenance records and authorization keys used with salesperson commissions.

Control Maintenance Records

- Assign Commission Plan At Time Of Invoice Process
- Calculate Negative Commission When GP Negative
- Minimum Credit Order GP\$ For Commission
- Minimum Sales Order GP\$ To Earn Commission

Authorization Keys

- SOE.SALESPERSON.EDIT

Setup Requirements for Consignments

Following are the authorization keys used with consignments.

Authorization Key

- SOE.CONSIGNMENT.ALLOWED

Setup Requirements for Consolidating Orders

Following are the control maintenance records used with order consolidation.

Control Maintenance Record

Set the following control maintenance record:

- Keep Original Commitments On Order Consolidation

Setup Requirements for Counter Sales

Use the following setup guidelines if you use a cashier to process the majority of your counter sales and the customer will pick up the items on the order.

Following are the control maintenance records and authorization keys used with counter sales, along with additional setup requirements.

Control Maintenance Record

- Log Pick Up Now In Open Order Review Queue

Authorization Keys

Assign the following authorization keys:

- SOE.CASH.REQD.EDIT
- SOE.CLOSED.ORDER.EDIT
- SOE.PAYMENT.TERMS.EDIT
- SOE.REPRINT.PICK.TICK
- SOE.RESERVE.ORDER.EDIT

Shipping method

- Create a ship via code of **PU Pick Up**.
 - Set **Ignore cash req** to **Y** - Prompts for cash from a COD customer order using this ship via.
 - Set **Prt** to **Q** - Sends the invoice to the Invoice Preview Queue.
- Create a sales source of **Counter Sales**.
- On the Terminal Setup screen, assign **Pick Up** as the default ship via value and **Counter Sales** as the sales source for any users assigned only to counter sales.

Automatic unquality event tracking (UET)

- In Control Maintenance, set **Auto UET Enabled** to **Y** for each affected branch.
- On the UET Code Maintenance screen, create a code and set **Auto Group** to **SCKQU**. This will track short ship quantities due to inventory discrepancies and canceled orders.

Setup Requirements for the Customer Calling Queue

Following are the control maintenance records and authorization keys used with the Customer Calling Queue.

Control Maintenance Record

Set the following control maintenance record:

- Order Return to Bid Parameter
- Update Customer Calling Queue When Ship Date Changed By Direct Ack

Authorization Key

Assign the following authorization key:

- CALLING.QUEUE

Setup Requirements for Customer Entry and Display in SOE

Following are the control maintenance records used with customer entry and display in sales order entry.

Control Maintenance Records

- Display Alternate Billing Address In OE
- Display Customers/Vendors Who Are Inactive At A Branch
- Display Products Within A Customer's Product Zones
- Exclude From Ship-To/Ship-From Selection If Excluded From Index
- Force City Verification On SOE Address Change
- New Customer Maintenance Template
- Validate Name In 'Ordered By' Field Against Customer Contact

Setup Requirements for the Detailed Invoice Gross Profits Report

Following are the control maintenance records and authorization keys used with the Detailed Invoice Gross Profits Report, along with additional setup requirements.

Control Maintenance Record

Set the following control maintenance record:

- GP Preview Report Parameters

Authorization Keys

Assign the following authorization keys:

- COGS.VIEW
- COST.VIEW

Minimum Gross Profit Percentages

If a minimum gross profit percentage (GP%) has been set for a product or price line, and the GP% for that product or price line on an invoice falls below that minimum, the invoice is also listed on the report, regardless of the percentages set for the report.

- Use the Product Minimum GP% screen to specify the percentage for a product.
- Use the Price Line Minimum GP% screen to specify the percentage for a price line.

Setup Requirements for Duplicate Checking

Following are the control maintenance records used with checking duplicate items within sales order entry.

Control Maintenance Records:

- Duplicate Customer P/O Number Check
- Duplicate Order Check
- Duplicate Order History Days To Check
- Duplicate Product Check On Current Order

Setup Requirements for Freight and Other Charges

Following are the control maintenance records used with freight and other charges, along with additional setup requirements.

Control Maintenance Records

Set the following control maintenance records:

- Auto Freight Posting MiscChrg Product
- Back Out Pass-Along Freight From COGS
- Clippership Collect Ship Vias
- Default Setting for Bill Incoming Freight To Tagged Sales Order Field
- Expense Incoming Freight If Customer Is Freight In Exempt
- Ignore Tax On Freight On Sales Orders W/O Taxable Line Items
- Include Billed Incoming Freight In GP Calculation
- Pass Along Incoming Freight To Billable Freight Customers
- Product Ranks To Exclude From Pass-Along Incoming Freight Charges

Setting Up G/L Autopostings for Freight and Handling Charges

Before you can enter separate incoming and outgoing freight or handling charges as billable or expense items, you need to assign General Ledger accounts to each type of charge. Do this using the Automatic Postings screen.

Setting Up Customer Freight Charge Exemptions

Use the **Frt In Exempt (Y/N)** and **Frt Out Exempt (Y/N)** fields on the Customer Maintenance screen to designate whether each customer is exempt from incoming or outgoing freight charges.

The default value for each field is **N**. Entering a **Y** does not prevent a freight charge from being billed to the customer. But if you enter a freight charge on the Order Entry Totals screen or the OE Freight Distribution screen, a warning message appears telling you the customer is exempt. Press **Enter** to acknowledge and close the message.

Setting Up Commission Plans

For a freight charge to affect a salesperson's commission, the salesperson's User Maintenance record must have an assigned commission plan that specifies a percentage of unbilled freight gets deducted from order commissions. Specify this using the **Freight** hot key in Commission Plan Maintenance.

Setup Requirements for Inventory Availability

Following are the control maintenance records used to control how inventory availability is handled.

Control Maintenance Records

These records control which items are excluded:

- Auto Show Availability When Product Is Unavail
- Check Availability When Adding Items to Processed Invoices
- Commit Qty From Display Location
- Exclude All Sales Orders Outside The Plenty Date From Avail Calc
- Exclude New Sales Orders From PIL Check
- Flag Product As Exceptional In Sales Order Entry For
- Minimum Days From Today For Open P/O To Show As Available

Setup Requirements for Invoicing

Following are the control maintenance records and authorization keys used with invoicing sales orders.

Control Maintenance Records

- Enable MSDS Print With Invoice
- Invoice Print Copies = 0, Q Status Invoices To Invoice Preview Queue
- Parameters for Documents Imaged Onto Invoiced Sales Orders
- Pass-Along Discount Holdback Percent

Authorization Keys

- INV.INV.STAT
- SOE.SINGLE.INVOICE

Setup Requirements for Kit Sales

Following are the control maintenance records and authorization keys used with product kit sales, along with additional setup requirements.

Control Maintenance Records

Set the following control maintenance records:

- Backordered Partial Kit Comment
- Check Other Dynamic Kits For Needed Parts
- Hit Individual Components' G/L Account For Kits

Authorization Keys

Assign the following authorization keys:

- DYNAMIC.KIT.EDIT
- OE.PRODUCT.USE.REVIEW
- SOE.KITS
- SOE.CANCEL.PARTIAL.KIT

Creating Kits

Create or edit product kits using the **Kit** hot key in Product Maintenance. The hot key opens the Product Kit Maintenance screen, which lets you define the kit and its components. Once created, you can enter the kit on a sales order. For complete information, refer to Creating Product Kits.

Setup Requirements for Miscellaneous Charge Items

Following are the control maintenance records used with miscellaneous charge items, along with additional setup requirements.

Control Maintenance Record

Set the following control maintenance record:

- Exclude MiscChrg Products From Customer Demand Index

Creating Miscellaneous Charge Item Products

Create as many miscellaneous charge item products as needed. Give each item a distinct description that quickly stands out from other real products. For example, you could create a series of miscellaneous items, such as Misc Assembly Charges, Misc Bank Charges, and Misc Service Charges.

After creating phony products that represent frequent categories of customer expenses, you can enter them as itemized charges on the Body of a sales order.

Use Product Maintenance to create products for miscellaneous charges. In the **Status** field, press **F10** and select the **MiscChrg** status. And in the **GL Acct/Product Type** field, press **F10** and specify a Misc Charges account your company uses.

Creating Miscellaneous Charge Item Accounts

Use G/L Account Maintenance to set up accounts used for miscellaneous charge items. You can flag the **Misc. Charge Allowed** field to enable an account for miscellaneous charge items.

Setup Requirements for Multi-Branch Sales Environments

Following are the control maintenance records used with multi-branch environments.

Control Maintenance Records

Set the following control maintenance records:

- Additional Brs To Show Availability On Product Primary Index
- Branch That Controls Branch That Receives Credit For The Sale
- Branch That Receives Credit For The Sale
- Branches To Display In OE Product Availability Windows
- Enable Branch Specific Products For
- Re-Sort Sales Items When Closed For Branch

Setup Requirements for Nonstock Orders

Following are the control maintenance records and authorization keys used with order entry nonstocks.

Control Maintenance Records

Set the following control maintenance records:

- Assign Prices To All Price Sheet Effective Dates For New Nonstock
- Display Pricing/Availability In WOE For Nonstocks
- New Nonstock Buy Line Default
- New Nonstock Price Line Default
- New Nonstock Primary/Catalog Index
- New Nonstock Procure Group Default
- Nonstock Comment
- Product Location Default

Authorization Keys

Assign the following authorization keys:

- NONSTOCK
- OE.NSTK.PLINE.EDIT
- OE.NSTK.UM.EDIT

Setup Requirements for On-Account Sales

Following are the control maintenance records and authorization keys used with on-account sales.

Control Maintenance Records

Set the following control maintenance records:

- Change Credit Hold Order Statuses To
- Check Credit When Adding Items to Processed Invoices
- Disable Phantom Processing For Credit Sales Orders
- Include Open Orders In Credit Balance
- Maximum Collection Days Date
- Notify Credit Manager Of All Live Credit Releases
- Notify Credit Manager of Pick Up Now Credit Holds
- Order Status To Change To When Credit Is Denied
- Prompt For Ship Date Change When Releasing Order From Credit Hold
- Warn User If Customer Within X% Of Credit Limit
- Warn User If Customer Within X% Of Past Due Limit

Authorization Keys

- SOE.CREDIT.OVERRIDE
- SOE.CREDIT.RELEASE

Setup Requirements for Order Fulfillment

Following are the control maintenance records and authorization keys used with order fulfillment, along with additional setup requirements.

Control Maintenance Records

Set the following control maintenance records:

- Change Ship Date If Required Date Edited On Schedule Screens
- Change Ship Date On P/O When Ship Date On Invoiced Direct Changes
- Days Before Ship Date to Reserve Product
- Disable Cycle Count Generation In SOE
- Force Required Date To Match Ship Date On Phantom Process
- Minimum Days Past Bid Ship Date Before Purge
- Mirror Required Date And Ship Date For New Orders
- Notify Buyer When Canceled Item Is On An Open Purchase Order
- Percentage Of Order To Fill Before Automatically Shipping
- Prompt For Edit Of Required Date On Change Of Ship Date
- Prompt For Required Date In Sales Order Entry
- Remove Orders from the OOSRQ When Prt Status Changed To
- Reprice/Recost Order On Change Of Shipping Branch
- Restrict Pick Up Now Shipdates To Today
- Shipping Branch Override for SOE
- Stock Availability Service Level Tracking
- Verify Ship Date/Ship Via For Ready To Manifest
- Verify Shipping Address In SOE
- Warn About Additional Lead Time During OE

Authorization Key

Assign the following authorization key:

- OE.OVERCOMMIT.STOCK
- SOE.SCHEDULE

Procurements and Transfers

For information on setting up your system for procurements, see [Setting Up Procurement](#) and [Setting Up Transfers](#) in the Purchasing section.

Setup Requirements for Order Numbers

Following are the control maintenance records used with order numbers.

Control Maintenance Record

- Order Number Length

Setup Requirements for Payments

Following are the control maintenance records and authorization keys used with payments.

Control Maintenance Records

Set the following control maintenance records:

- Disallow Auto Apply Of Credit Card Payments
- Post Invoicing Auto Apply Mode
- Sales Order Entry Auto Apply Mode
- Sales Order Entry Terms Code Override

Authorization Key

Assign the following authorization key:

- CK.CHECK.AUTH.OVRD
- SOE.PAYMENT.APPLY
- SOE.PAYMENT.EDIT
- SOE.PAYMENT.TERMS.EDIT

Setup Requirements for Point Of Sale Order Entry

Use the Point of Sale companion product to open a cash drawer and print a receipt when you finish entering a payment on the Sales Order Entry Totals screen. The receipt records the items purchased, a subtotal, any additional charges, the tax due, and a grand total.

Following are the control maintenance records and authorization keys used with point of sale entry, along with additional setup requirements.

Control Maintenance Record

Set the following control maintenance record:

- POS Receipt Message

Authorization Key

Assign the following authorization key:

- POS.OPEN.DRAWER

Additional Setup

See Formatting Point-of-Sale Receipts and Assigning Slave Printers to Terminals.

Setup Requirements for Posting Sales Orders From Other Systems

Following are the control maintenance records used when posting sales orders from another system.

Control Maintenance Record

Set the following control maintenance record:

- Restrict Post OE IDs to Pre-Assigned IDs

Setup Requirements for Pricing and Costing

Following are the control maintenance records and authorization keys used with pricing and costing, along with additional setup requirements.

Control Maintenance Records

Set the following control maintenance records:

- Base Currency For Exchange Rates
- Base Minimum GP% Price Check Off COMM-COST
- Best Price Check Through Matrix Cells
- Best Cost Check Through All Matrix Cells For Sales Orders
- Change Both COGS And COMM-COST On Override
- Check For Line Items With Zero Pricing
- Copy COST To COGS For IAO Items In SOE
- Copy Override Costs From Sales Order To Tagged P/O
- Default Best Price Check In Sell Matrix Maint To No
- Default Retail Price Class
- Direct COGS Always Vendor Price
- Disallow Copying COGS Or Cost To A New Sales Order Bid
- Disallow Inv/Cus Inquiry From Changing Price In Quick Price Screen
- Display All Quantity Breaks
- Enter Sell Matrix Maintenance in Edit Mode From Sales Order Entry
- Notify User When COGS Is Updated
- Number Of Days Before Bid Pricing Expires
- Number Of Digits Of Accuracy - Override For Sales Pricing Only
- Number Of Digits Of Accuracy For Pricing
- Override Basis Name For Last Price Calculation
- Prevent Cost Update On Order From Tagged Order If Matrix Override
- Price Ceiling Global Basis Name
- Price View Level
- Prohibit Quantity Break Repricing On Closed Orders
- Prompt For Cost Code On Cost Override In SOE

- Prompt For Price Branch When Absent In Terminal Setup
- Quantity Break Display Percentage
- Recheck Matrix Cost Override During Process
- Reprice/Recost Order On Change Of Shipping Branch
- Reprice Sales Order Upon Invoicing
- Respect Price Branch When Searching For Last Price Of Last Sale
- Round Up Any Fraction After Sales Pricing Accuracy Digits
- Search For Cost Overrides During Pricing
- To See Standard Global Basis When Costing, User Must Have Level
- Update Cost On Sales Order From Tagged Purchase Order
- Update Cost On Sales Order From Tagged Transfer Order
- Update Generic Cost During Processing
- Use Costing Matrix Override For Both COGS And COMM-COST
- Use Last Price/Cost Logic
- Valid Cost Override Codes
- Valid Customer Types
- When Costing, Do Not Show Basis With Level Below

Authorization Keys

Assign the following authorization keys:

- AR.ALLOWED
- COGS.EDIT
- COGS.EDIT.DIRECT
- COGS.EDIT.NONSTOCK
- COGS.VIEW
- COST.VIEW
- OE.PRICE.CLASS.LEVEL
- OE.PRICE.DATE.EDIT
- OE.PRICE.VIEW.LEVEL
- SOE.BID.PRC.EDIT
- SOE.CLOSED.ORDER.EDIT
- SOE.CLOSED.PRC.EDIT

- SOE.COST.EDIT
- SOE.COST.EDIT.DIRECT
- SOE.COST.EDIT.NONSTOCK
- SOE.EDIT.IAO.INV.COGS
- SOE.EDIT.IAO.INV.COST
- SOE.EDIT.IAO.INV.PRICE
- SOE.GP.CONTROL.EDIT
- SOE.MAX.DISC
- SOE.MAX.PRICE
- SOE.MIN.GP
- SOE.OPEN.ORDER.EDIT
- SOE.OPEN.PRC.EDIT
- SOE.OVRD.NO.PRC.CHANGE
- SOE.SPLIT.PRICING
- TO.PRICE.VIEW

GP% Control Parameters

Assign each user a minimum gross profit and maximum discount from standard price. Do this on the GP% Control Parameters screen. These stock and direct order settings restrict pricing overrides. Because users with the SOE.MIN.GP and SOE.MAX.DISC authorization keys can still override pricing, the settings only serve as a warning threshold for these users.

Order Entry Pricing Views

Assign each user the appropriate order entry views. Do this using the OE View Selection screen. Different order entry views display prices, costs, and components of pricing and costing formula columns. With proper authorization, you can edit the price and cost columns on the order's Body screen.

Note: Users able to view either Cost or COGS can see the corresponding cost, regardless of their assigned level with the OE.PRICE.VIEW.LEVEL authorization key. Order entry views displaying Cost/COGS override this authorization key.

Customer Pricing

Set pricing preferences for customers. Do this using the **Use Last Price (Y/N/P/NULL)** field on the Additional Customer Pricing/Printing Data screen. This field setting works together with the Enable Last Price Pricing control maintenance record, and lets you control how last price pricing is used:

Field	Specifies...
Y	yes, use last price pricing. the system disregards all other pricing or matrix setups except contract pricing and customer specific (ship-to and bill-to) matrix cells. The system generates price based on percentage of markup on last sale of product to customer. If last price pricing is found, the system overrides any promotional pricing and the best-price-check logic.
N	no last price pricing for customer, regardless of the control maintenance setting.
P	prompt, by displaying the Last Price Verification screen.
Null (blank)	use the control maintenance record setting.

The Last Price Verification screen lets you compare a customer's current price for a product to their last price for the same product.

Setup Requirements for Printing and Reprinting Orders

Following are the control maintenance records and authorization keys used with order printing and reprinting, along with additional setup requirements.

Note: This setup is only needed to use the Order Reprinting Options screen with the Shipping Manifest Queue and the Eclipse RF Warehouse Management system.

Control Maintenance Records

Set the following control maintenance records:

- Manifest COD Message
- Manifest Queue Enabled
- Maximum Line Count Per Day
- Order Status Print Status Defaults
- Override Print Status On Credit Card Denial
- Print All Open Gens Of An Order On First Print Of Acknowledgement
- Print Phantom Waits For In-Process Receipts
- Print Shipping Instructions On Manifest
- Print Status Override On Manifest Close
- RF Enable Warehouse Inprocess Queue For Types
- RF Order Status After All Items Are Staged
- RF Valid Order In-Process Statuses
- Set Print Status When Order Placed On Manifest
- Shipping Manifest AutoSched Default Set To ON
- Valid Package Types
- Verify Ship Date/Ship Via For Ready To Manifest

Authorization Keys

Assign the following authorization keys:

- SERIAL.OVRD
- SOE.CLOSED.ORDER.EDIT
- SOE.MANIFEST.EDIT

- SOE.PROCESS.OPEN.SERS
- SOE.REPRINT.SHIP.TICK
- SOE.PRINT.INVOICE
- SOE.REPRINT.INVOICE

Accessible Branches

Verify that the **Home Branch** and **Home Territory** fields, as well as any inventory inquiry territory and appropriate branches, are set up for needed access.

To enable access to branches, ensure they are listed on the Accessible Branches screen. To add a branch, press **F10** from a blank line in **Branches** area and select a branch. Press **Alt-Delete** to remove a branch.

Setup Requirements for Printing Consolidated Invoices

Consolidated invoicing combines a customer's invoices for multiple orders. Depending on the forms you use for printing, a consolidated invoice can list all the products, can list all the transaction numbers and amounts, and provide the total amount due.

Following are the control maintenance records used when printing consolidated invoices, along with additional setup requirements.

Control Maintenance Records

Set the following control maintenance records:

- Consolidated Invoice Reports Remit To
- Consolidated Invoicing Product
- Default Invoice/Statement Sort
- Only Consolidate Multiple Invoices

Product Maintenance

In Product Maintenance, create a placeholder product used only for consolidated invoices. This miscellaneous charge product should have a product status of MiscChrg (as designated in the **Status** field). Give the placeholder product a meaningful description, such as Consolidated Product, which distinguishes it from a real product. The description is used for consolidated invoicing.

After you create this placeholder product, specify it using the Control Maintenance record Consolidated Invoicing Product.

Customer Maintenance

In Customer Maintenance, specify whether a Ship-To customer gets consolidated invoices by default.

Sales Order Entry

You can set a sales order for consolidated invoicing. To do this, enter a **Y** in the **Consolidated Invoicing** field on the order's Job Maintenance screen. This screen is also used when creating master job bids.

The initial setting on the order's Job Maintenance screen comes from the customer's Job Maintenance screen. A setting for the order overrides the customer's default setting.

Note: If a junior order is related to a master job bid on the Job Bid Tracking screen, the master job bid's setting is the default for the junior order's **Consolidated Invoicing** field.

Setup Requirements for Product Entry

Following are the control maintenance records and authorization keys related to entering products in sales order entry.

Control Maintenance Records

- Activate Country of Manufacturer Search on Process of Sales
- Always Prompt For The Unit Of Measure In OE
- Auto Show Availability When Product Is Unavail
- Display Active Primary Index Products First In Product Search
- Force Sell Package From Print Phantom And OE
- Log Product Replacements on New Orders
- Multiply Product Family Quantities By The Order Quantity
- Number Of Digits Of Accuracy For Product Weight
- Order To Inventory Factor For SOE

Authorization Keys

- SOE.ALLOWED
- SOE.DUP.ORDER.OK
- SOE.OPEN.QTY.EDIT
- SOE.PACKAGE.QTY
- SOE.PIL.DAYS.OVRD
- SOE.SCHEDULE

Setup Requirements for Reminder Notes

Following are the control maintenance records used with reminder notes.

Control Maintenance Record

Set the following control maintenance record:

- Display Reminder Notes Until Next Product Is Entered

Setup Requirements for Reordering Products

Following are the control maintenance records and authorization keys used for reordering products, along with additional setup requirements.

Note: The same setup applies to the Sales Order Entry Reorder Pad.

Control Maintenance Records

Set the following control maintenance records:

- Exclude Exceptional Sales From Customer Demand Index
- Number Of Years To Be Included In Customer Demand Index
- Reorder Pad Availability Display For

Authorization Key

Assign the following authorization key:

- SOE.ORDER.PAD

Customer Product by Demand Index Build

Use the Customer Product by Demand Index Build screen to generate the information used by the Eclipse Reorder Pad. You can then show all the products the customer purchased in the last 365 days, sorted in a variety of ways.

Because the index generation can take considerable time, we recommend doing this over a weekend.

Products Excluded from Reorder Pad

The Products Excluded from Reorder Pad feature lets you specify certain products to exclude from the customer's Reorder Pad. Enter the products or a list of products on a common Product Selection screen.

Setup Requirements for Returns and Credits

Following are the control maintenance records and authorization keys used with returns and credits.

Control Maintenance Records

Set the following control maintenance records:

- Append Return Comments To Product Description
- Check History On Sales Order Returns With
- Default Handling Charges For Returns
- Default Location For F, O, R Type Returns
- Default Location For S Type Returns
- Default Location On All Credits To The Primary Location
- Default Return Goods Quantity Type
- Default Warranty Information Screen
- Demand Hit Definition
- Display Inventory History If No Order # Entered For Returned
- Exclude Negative Quantities From Item Demand Calculation
- Exclude SOE Returns From PIL Check
- Include Original Customer P/O # In SOE Return Comment
- Maximum Days Allowed For Returns On Nonstock Items
- Maximum Days Allowed For Returns On Stock Items
- Prompt For New Date On Credit/Rebill
- Recalculate Tax on Credit
- Require Credit/Rebill Code
- Require Reason For Return Code
- Restocking Charge Item
- Restrict Quantities on Return Orders to Package Quantity
- Return Goods Standard Comments
- Return Items Affect The Required Deposit
- Should Credit Sales Order Update Avg/Last Cost
- Skip Ret Goods Verif For Product Types

- Types Than Can Be Returned Any Time
- Update MAC When Credit/Rebill Generations Are Created
- Use Tax Rate From Original Sale Order For Returns
- Valid Reason For Return Codes
- When Creating A Return Order, Use Writer From Original Order

Authorization Keys

Assign the following authorization keys:

- SOE.CREDIT.REBILL
- SOE.CREDIT.QTY
- SOE.RETURN.ALLOWED

Setup Requirements for Sales Order Comments

Following are the control maintenance records used with sales order comments, along with additional setup requirements.

Control Maintenance Records

Set the following control maintenance records:

- Copy Internal Notes From Direct Sales Order To P/O
- Exclude Procure Comments From OE Group Procurements
- Hazard Comment
- Line Item Standard Comments
- Nonstock Comment
- Procure Comment
- Return Goods Standard Comments

Creating and Enabling Comments

Use the OE Comment Type Maintenance screen to create and enable comments in order entry. Once you have set up these comments, you can access them while adding or removing order comments.

Setup Requirements for Sales Order Header Information

Following are the control maintenance records and authorization keys used with sales order Header information.

Control Maintenance Records

Set the following control maintenance records:

- Allow Users To Pick Orders Outside Their Home Branch
- Default Copy Mode for OE Header Screen
- Display Invoice Print Date In SOE Header
- Shipping Branch Override
- Valid Customer Invoice Status Codes
- Valid Product Catalogs
- When Creating A Return Order, Use Writer From Original Order

Authorization Keys

Assign the following authorization keys:

- GL.BRANCH.EDIT
- INV.INV.STAT
- SOE.EDIT.CLOSED.PERIOD
- SOE.EDIT.VIEW.ONLY.NOTES
- SOE.SALESPERSON.EDIT
- SOE.WRITER.EDIT

Setup Requirements for Sales Order Inquiries

Following are the control maintenance records and authorization keys used with sales order inquiries.

Control Maintenance Records

Set the following control maintenance records:

- Disallow Inv/Cus Inquiry From Changing Price In Quick Price Screen
- RF Enable Warehouse Inprocess Queue For Types

Authorization Keys

Assign the following authorization keys:

- COGS.VIEW
- PRD.LOCATION.MAINT

Setup Requirements for Sales Order Views

Following are the control maintenance records used with sales order entry views.

Control Maintenance Record

Set the following control maintenance record:

- Show Unit Price And Unit Of Measure Based On Order Unit Of Measure

Setup Requirements for the Selling Price and Cost Overrides Report

Following are the control maintenance records and authorization keys used with the Selling Price and Cost Overrides Report.

Control Maintenance Record

Set the following control maintenance record:

- Log Sell Price, Purchase Price & Cost Overrides

Authorization Keys

Generic Cost or Cost of Goods Sold can be displayed on the report if you are assigned either of these authorization keys. Select one of the costs or None when exiting the Sell Price/Cost Overrides Report screen.

- COGS.VIEW
- COST.VIEW

Setup Requirements for Showroom Sales Upgrades

Following are the setup requirements for showroom sales upgrades.

Note: The showroom sales upgrade features are included in the system without the need for authorization keys or control maintenance records. However, control maintenance records are required if you are setting up new customer templates.

Setting Up New Customer Templates

Many companies set up their customer templates so new showroom customers are initially set for COD Only. Once the customers pass a credit check, you can individually modify a customer's credit settings based on their credit worthiness.

Control Maintenance Records

The following control maintenance records are used for templates:

- New Customer Maintenance Template
- New SOE Customer Template

Setup Requirements for Taxing Line Items

Following are the control maintenance records used with line item taxation, along with additional setup requirements.

Control Maintenance Records

Set the following control maintenance records:

- Default Tax Jurisdiction Method
- Enable FET Calculation
- Enable GST/PST Hot Key In Tax Jurisdiction Code Maintenance
- Recalculate Tax On Rebill

Authorization Key

- SOE.TAX.EDIT

Sales Tax

Determine whether order takers are prompted to enter the tax status for line items. When prompted, order takers can specify whether each line item is taxed or not, or taxed at a reduced rate. Do this using each customer's Sales Tax screen. For details, refer to Enabling Line Item Taxability for Customers.

In the Sales Tax screen's **Line Item Taxability** field, press **F10** and specify:

- **Disabled** - Do not prompt or permit line item taxability.
- **Always Prompt** - Order takers are prompted to specify each line item's taxability, regardless of whether the customer has bought the same item before.
- **Prompt if Not Bought** - Only prompts the first time this customer buys the item.
- **Enabled** - Order takers are prompted to specify each line item's taxability and are allowed to update the TAX field in the Line Item Taxable view.

Tax Jurisdiction Code Maintenance

If products are taxed at a reduced rate in certain circumstances, specify the reduced tax rate. Do this using the **Reduced** field in Tax Jurisdiction Code Maintenance.

Setup Requirements for Vendor Direct Shipments

Following are the control maintenance records and authorization keys used with vendor direct shipments, along with additional setup requirements.

Control Maintenance Records

Set the following control maintenance records:

- Copy Internal Notes From Direct Sales Order To P/O
- Direct COGS Always Vendor Price
- Exclude Direct Sales Orders From PIL Check
- Require Direct Invoices Upon Reconciliation
- Update COGS On P/O When COGS Is Overridden On Invoiced Direct

Authorization Keys

Assign the following authorization keys:

- COGS.EDIT.DIRECT
- COGS.VIEW
- SOE.COST.EDIT.DIRECT
- SOE.CREDIT.RELEASE
- SOE.DIRECT.EDIT
- SOE.EDIT.LOCKED.DIRECT

Direct Shipments and Credit Holds

If the customer for a direct shipment order is on a credit hold, you cannot send the purchase order to the vendor without SOE.CREDIT.RELEASE authorization. Instead, the order goes to the Open Order Status Review Queue.

Setup Requirements for Warranty Tracking

Following are the control maintenance records used with warranty tracking, along with additional setup requirements.

Control Maintenance Record

Set the following control maintenance record:

- Default Warranty Information Screen

Using the Default Warranty Information Screen

The system provides a default, generic Warranty Information screen, which is used whenever no user-defined Warranty Information screen is linked to a buy line. None of the fields on this screen require entries, so you can complete only the fields your supplier needs to honor the warranty.

Specify the default screen using the control maintenance record Default Warranty Information window.

Creating a Custom Warranty Screen

You can create a user-defined Warranty Information screen, which can be linked to a buy line. The screen can be general enough for use by many buy lines, or it can be specifically tailored to gather the warranty information for one buy line.

When you create a user-defined screen, you have considerable control over the fields. For example, you can specify whether a field requires an entry or not. You can also create validated fields, in which pressing **F10** displays a list of valid options.

The process of creating user-defined screens is beyond the scope of this help topic. The system requires administrators to attend a class before creating user-defined files or screens.

Linking a Custom Warranty Screen to a Buy Line

To use a custom Warranty Information screen, establish a link between it and the buy line. This is done using the **Warranty** field on the Additional Buy Line Data screen within Buy Line Maintenance. Press **F10** in the field and specify which user-defined screen displays to gather the buy line's warranty information. For more information, see Identifying Warranty Information for Buy Lines.

Specifying a Return Policy Message

Use the Return Policy Message screen to enter the text that displays for the buy line's return policy. For example, enter a message such as "No returns after 30 days." For more information, see Entering Return Policies for Buy Lines.

The message can be viewed on the Return Goods Verification screen.

Creating Warranty Reports

The system provides a Warranty Report that you can use with the default Warranty Information screen. You can also customize your own warranty reports. For more information, see [Running the Warranty Report](#).

Sales Order Entry Body Attributes

Sales Order Entry consists of four main screens: Body, Header, Status, and Totals. These four screens divide the order creation process into four logical steps, so you can enter related details, one screen at a time.

Use the Body screen to identify the customer and the products on the order. You also use this screen to add, edit, delete, price, and schedule products on orders.

The status line, located above the hot keys, displays the order number, order status, pricing branch, shipping branch, required date, and ship date.

For more information, see any of the following:

- Beginning Any Type of Sales Order
- Entering Existing Customers During Order Entry
- Entering Products and Prices on Sales Orders

Bill To				Ship To				
Rotgers Plumbing 8520 Van Gordon Ct. ARVADA, CO 80005-1190				Rotgers Plumbing 8520 Van Gordon Ct. ARVADA, CO 80005-1190				
Qty/Unit	Product Description			Client Pri	Unit Cost	Margi	U	
2ea	101 1/2 CXC CPLG W/ST			0.000	0.336	43.1	e	
5ea	100-RS 1/8 CXC W/ROLL STOP			0.000	0.279	43.1	e	
4ea	100 1/4 CXC CPLG W/ST			0.000	0.262	43.0	e	
10ea	100 11/4 CXC CPLG W/ST			0.000	1.892	43.0	e	
Order #		Stat	PrcBr	ShpBr	ReqrDate	ShipDate	Item 5 of 4	
S1409045		S	1	1	12/19/03	12/19/03	Cash or Check COD orders	
Comment	View	NonStk/Lot	Header	SuBs	Label	Sched-Off	Imp	ShipDates
Pricing	Mode	SUbttotal	Totals	Find	Cr/Rbl	Quick Prc	InQ	ReordPAd

Sales Order Entry Header Attributes

Sales Order Entry consists of four main screens: Body, Header, Status, and Totals. These four screens divide the order creation process into four logical steps, so you can enter related details, one screen at a time.

Use the Header screen to maintain administrative information that typically applies to an entire order, such as a customer's purchase order number, tax exempt information, salesperson information, and shipping instructions, such as the following:

- Enter or edit the order's Header information
- Enter additional order information that does not seem to go on this screen
- Add customer contacts

If the customer requires you to enter a purchase order number, the Header screen displays automatically. You can also use the Header hot key from other Sales Order Entry screens to access this screen.

You are *not* required to have the SOE.SALESPERSON.EDIT authorization key before selecting or entering a different salesperson for the normal default entry. You can change the salesperson entries for both inside and outside sales using the **Out Salesperson** and **In Salesperson** fields.

For more information on entering information using the **Add'l** hot key, see Entering Sales Order Header Information.

Bill To		Ship To	
Rotgers Plumbing 8520 Van Gordon Ct. ARVADA, CO 80005-1190		Rotgers Plumbing 8520 Van Gordon Ct. ARVADA, CO 80005-1190	
Order #	: S1409045	Customer P/O #	: <input type="text"/>
Branch #	: 1 -Branch 1	Customer Rel #	:
Date Ordered	: 12/18/2003	Ordered By	:
Picked By	:	Phone Number	: 303-456-4728
Written by	: ALLANR	Payment Terms	: SOR SOR Test
Out Salesperson	: HYA	Tax Jurisdiction	: 0805903455
In Salesperson	:	Tax Exempt ID #	:
Freight In Exempt (Y/N)	: N	Tax Exempt Code	:
Freight Out Exempt (Y/N)	: N	Sale Source	: SHOWROOM SALES
Shipping Instructions		Internal Notes	
Add'l	Chg Log	Shipping	Instr
Notes	CoPy To All : Prompt	Esc-Body	

Sales Order Entry Status Attributes

Sales Order Entry consists of four main screens: Body, Header, Status, and Totals. These four screens divide the order creation process into four logical steps, so you can enter related details, one screen at a time. For each order generation, you specify an order status, printing status, shipping date, and shipping method.

For a description of order statuses, see [Viewing Order Statuses](#).

The Status screen details when and how various shipments leave your warehouse, such as the following tasks:

- Choose shipping options for an order
- Learn how the system determines the shipping branch
- Create a vendor direct shipment
- Assign or change shipping dates
- Learn how the system determines the ship via
- Schedule individual or multiple backorders
- Procure products
- Ship products to another address

This screen displays automatically after you press **Esc** to save the Body screen information. If any Header screen information is required, you must also enter and save that before the Status screen displays.

Note: When using the e-mail selection through the **Print Opt** hot key for order reprinting, the invoice number for invoiced orders and received purchase orders displays in the subject line of the email when it is sent using this method.

Prc Br	Shp Br	Order Status For S1409045	ShipDate	Ship Via
1 1	1 1	Ship On 12/19/2003 Payment # .001 Received on 12/18/2003	12/19/2003	OT - OUR TRUCK
				1 of 2
Status:	P-Pick Up Now	M-Ship Item Complete	D-Direct Shipment	
B-Bid	L-Call When Available	C-Call When Complete	W-Call When Specified	
X-Cancel	A-Ship When Available	H-Ship When Complete	S-Ship When Specified	
Header	Body	Totals	View	Manifest Q
			Detail Scheduling	View Items
All Compl		Bid Follow Up	Ship Available	Print Opt
			Procure Confirm	

Note: When a sales order status is changed to Invoice, the order is removed from the Open Order Status Review Queue.

Sales Order Entry Totals Attributes

Sales Order Entry consists of four main screens: Body, Header, Status, and Totals. These four screens divide the order creation process into four logical steps, so you can enter related details, one screen at a time.

Use the Totals screen to apply payments or charges to an order generation and accomplish other tasks, such as the following:

- Apply payment to an order
- Reprint a point-of-sale receipt
- Distribute freight and handling charges
- Review order totals or a summary of order totals
- View a payment

The Totals screen displays automatically when entering orders for customers who are required to pay immediately; COD or Cash Only, for example. In this case, the Totals screen displays after you enter the Status screen information. You can also use hot keys from the Body or Status screen to display the Totals screen. For more information, see [Viewing Sales Order Totals Summaries](#).

By default, the Totals screen displays the earliest available order generation, but you can change the ship date to display totals for other order generations. If your customer requires one invoice for a multi-generation order, enter **Y** in the **Single Invoicing (Y/N)** field.

If the **Sales Order Entry Terms Code Override** control maintenance record is set to Yes, then the Totals tab displays a selection box with the three payment totals for cash, check, and credit card amounts due. The three selections may be different based on how the control record is set. The control record allows sites to override the standard customer or order terms upon cash-on-delivery (COD) payment. For example, many customers may not want to give a standard 2% discount if the customer is paying with a credit card at the time that the order is picked up.

If you require distributing freight throughout the generations of the order, use the **Freight** hot key. The **Total Freight** field is only available with outbound freight situations. The system calculates freight and handling charges before calculating sales tax.

The Totals screen is divided into two primary areas:

- Ship date totals on the left
- Payment details on the right

ShipDate : 12/19/03		Total Freight : 0.00		Total Handling : 0.00							
-----ShipDate Totals-----		-----Payments-----									
Subtotal...	38.67	Cash or Check COD orders Only!									
Freight...	3.87	Amount Due....	0.00	Payment Date :	12/18/03						
Handling...	0.00	Cash Recvd....	0.00	Change:	0.00						
Sales Tax..	3.15	Check Recvd...	0.00	Check#:							
F.E.T.....	0.00	CrCard Recvd..	0.00								
Disc Taken.	0.00	=====									
Less Paymt.	-41.82	Amt Over/Under	0.00								
Unearned...	0.00										
-----		Single Invoicing (Y/N) :	N								
Total.....	3.87	Avail Disc :	3.87	Net Total :	0.00						
H eadr	C hng	S hpDate	C ash	C hEck	C RedtCrd	T otSUM	P ymts	A pplyPymt	C C	I nfo	F reight
B ody	V iewAll	T otals	B ox	L ot	T ots	R ecept	S ig	C redit	O verride		

Order Generation Principles

A single order can include multiple items that ship on different dates, via different methods. To identify which items ship together, the system groups all order items into *order generations*. All items in an order generation have the following four things in common:

- Order status
- Ship via
- Ship date
- Shipping branch

Any product for which one of these criteria is different is placed on a new order generation.

The system also creates order generations when you enter a deposit or payment, as well as when you print a ship ticket or an invoice. To identify each generation, the system automatically appends a three-digit suffix to the original order number.

The order's Status screen displays each generation on the order on a separate line, including the shipping branch, order status, ship date, and ship via. Payment and invoice generations also display on separate lines.

Note: When you assign the Cancel order status to a generation, the system cancels the order quantities for the products. The order generation remains associated with the order for your reference. To break the association so that a generation no longer displays on the Status screen, change the products' ship quantities to zero.

Combining Order Generations

You can combine order generations by making the order status, ship via, ship date, and shipping branch identical. For example, when two generations differ only by the order status, you can edit one generation's status so that it matches the other. Once the generations are identical, the two generations merge into a single generation, which improves order handling efficiency.

Committing Inventory to Sales Orders

Understanding how the system commits inventory is essential. Often the system shows that products are unavailable, even though these products are *physically* on hand. This occurs because the system puts a hold on, or *commits*, inventory for existing orders. Therefore, products that are physically on hand can be unavailable for sale, and taking the product off the shelf will likely short another customer.

When committing inventory, the system considers the product's order status, ship date, and Plenty Date. The system also considers products that are expected to arrive, based on existing purchase orders and transfers.

The system uses the ship date to determine whether sales commitments for all the products can be kept. If not, the order status changes to Call When Complete. Monitor the Trouble Queue regularly to track these orders and notify affected customers.

Use the Future Ledger to examine inventory commitments and replenishment schedules. This ledger can help you decide how to best fill orders with immediate needs. See Over-Committing Inventory, below.

The system commits inventory for a customer when you order a stock item and do one of the following:

- Assign it an order status of Pick Up Now.
- Assign it an order status of Ship When Specified or Call When Specified, if the specified date is before the Plenty Date. If the date is beyond the Plenty Date, the system assumes you will have plenty anyway and does not put a hold on the item.

▶ To commit inventory for a customer:

1. Create or open a sales order and display the Body screen.
2. Enter all the products and their quantities.
3. Ensure that the products are available by the customer's required date. If needed, use the **View** hot key to choose a screen view that shows product availability.
4. Once you have verified that the inventory is available, press **Esc** to display the **Status** screen.

If prompted to enter a purchase order number on the Header screen, do so, and then press **Esc**.

5. In the **Order Status** field, enter one of these order statuses for the products:
 - Pick Up Now
 - Call When Specified
 - Ship When Specified

6. Check the **ShipDate** and **Ship Via** field settings to make sure the products will arrive by the customer's required date. If not, edit these fields as needed.
7. Press **Esc** to exit the screen. The order is processed and inventory is committed.

Over-Committing Inventory

The system lets authorized users over-commit inventory. If a product is over-committed, the sales order normally does not print until the inventory becomes available. You can still print a pick ticket in this case by using a Pick Up Now order status. Over-committing inventory also automatically triggers the item for a cycle count.

Any time you over-commit inventory, use the Future Ledger. Find other orders on which the item is committed, and then reschedule these orders to a date beyond the calculated Plenty Date. This lets you borrow the committed inventory from an order that can wait and use it for an order with a more immediate need. Regardless of how you over-commit inventory, the order's Change Log records inventory over-commitments.

Note: In addition to over-committing inventory, you can fill customer order needs by procuring products, by transferring products from another branch, or by direct-shipping from a vendor.

How the System Shows Product Availability in Order Entry

When you enter a product on the Sales Order Entry Body screen and your current view includes an **Avail** column, this column can display different information, depending on an item's availability. This topic describes the availability information that can display.

Items Showing "Now" Availability

When the **Avail** column displays "Now," followed by an available quantity, the system has determined that there is enough product to fulfill the current order, and that the quantity shown will be available after this order is satisfied.

Items Showing a Date

When the **Avail** column displays a calendar date, the system has determined that there is *not* enough product to fulfill the current order, but that enough product will become available on or before this date.

Items Showing "Today" Availability

When the **Avail** column displays "Today," the system has determined that no product is available at this moment, but enough of the item to fulfill the order is expected today.

Items Showing "Plenty" Availability

When the **Avail** column displays "Plenty," the system has determined that plenty of the product is available to fill all current sales commitments, or that plenty *will be* available by a date that also displays. The system calculates the plenty date using the following equation:

$$\text{Plenty Date} = \text{Order Cycle} + \text{Lead Time} - \text{Days Into Order Cycle}$$

The system identifies the normal order cycle for each product in the system and adds to it the lead time. The system then subtracts the number of days that have already passed in the current order cycle, to arrive at the Plenty Date — the date by which your branch will have a sufficient amount of the item in stock to meet demand.

Do not plan purchasing based on the plenty date. Purchase items when the Suggested P/O Queue alerts you to products on backorder. Use the Plenty Date only to estimate when you can expect to have plenty of items on hand.

The Plenty Date and Central Warehouse Setups

In a central warehouse scheme, the Plenty Date calculation for a baby branch is Next Purchase Order Date + Mother Branch Lead Time + Transfer Cycle.

The Plenty Date and Buy Line Overrides

Some companies choose to override the Plenty Date calculation for one or more buy lines for a specified period of time. When this option is used, the Plenty Date is based on the following calculation:

Plenty Date = Today + (Override Days for the Buy Line - Days Since Last Line Buy)

For more information, see Overriding the Plenty Date for Buy Lines.

Items Displaying *I* Availability

When *I* displays in the **Avail** column, it can mean either of the following:

- ***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.

Management and Administration Overview

The system offers many features that help make management and administration more efficient. The topics in this section of the help system explain how.

Managing Credit Customers

Manage credit customers by learning how to release credit holds, when appropriate.

Reviewing Sales and Orders

Review orders by comparing year-to-year sales, purchases or transfers, by using various reports, by tracking sales sources, and by viewing changes to orders.

Managing Your Sales Force

Use the system to more effectively manage your sales force. For example, you can change price and profit control parameters, charge back commissions, edit commission percentages, and report on commission pools.

Managing Printing

Manage printing tasks with activity triggers and print styles, and set up ship tickets to print automatically.

Managing Comments, Messages, Notes, and Prompts

Create and enable order entry comments, messages, reminder notes, customer notes, and shipping instructions, and create general and customer-specific order entry prompts.

Managing Month-End Reporting

Learn how to manage month-end reporting by changing invoice ship dates to exclude certain orders from reports, or to move certain invoices outside a fiscal month.

Converting to Eclipse

Use the Post Sales Order Entry program to transfer sales orders from your old system into the new system, or in other special circumstances.

Unlocking Order Records

To ensure that records open by one user are not overwritten by another user, the system locks the record for the first user that opens the order. For example, you open order S1609948 for editing using your user ID. If another user tries to open this order or if you move to a new terminal and try to open this order again, the system displays an alert that the order is already open for editing.

Generally, Eclipse cleans up locked records on its own by using a cleanup routine which runs regularly on the system. However, if you find that a record remains locked and you need to unlock it, you can do so manually.

Note: You must have the SYS.ADMIN authorization key assigned to unlock records.

▶To unlock a record:

1. From the **Files > System Programming > System Maintenance** menu, select **Current Record Locks** to display the Current Record Locks screen.

If the SYS.ADMIN authorization key is not assigned, the system displays an error message.

2. Select the record you want to unlock.
3. Use the **Unlock Record** hot key to unlock the record.

Note: You cannot unlock more than one record at a time.

4. Press **Esc** to exit the screen.

Overriding Credit Holds or Denying Credit

Use the Sales Order Credit Override screen to release a credit hold on a sales order or order generation, or to deny credit when a credit hold already exists. You can access this screen from a specific sales order, or if you routinely handle credit holds, access the screen from the Open Order Status Review Queue.

Be sure to contact your credit department before releasing the hold; the customer is typically on credit hold for a reason. You must be assigned the SOE.CREDIT.OVERRIDE and SOE.CREDIT.RELEASE authorization keys to override credit holds.

If you deny credit, the order is changed to a Bid or Call When Complete status, depending on how the Order Status To Change To When Credit Is Denied control maintenance record is set.

► To override a credit hold or deny credit:

1. Open the Sales Order Credit Override screen in either of these ways:
 - Open a sales order, and display the Sales Order Entry Totals screen. Use the **Credit Override** hot key to display the Sales Order Credit Override screen.
 - Use the Open Order Status Review Queue to select the orders you want to see. Place the cursor on the order you want to address, and select the **Credit Override** hot key.

Note: The Sales Order Credit Override screen displays in view-only mode if the order you are overriding is already open for editing by you or another user.
2. Use the **A/R Inquiry** hot key to display the A/R Inquiry screen. Use this screen to review the customer's credit status and history.
3. Press **Esc** to return to the Sales Order Credit Override screen.
4. Approve or Deny a credit override, as follows:
 - **To approve** a credit override, enter the minimum dollar amount required to process the order in the **Credit Override Amount** field, and then press **Esc** to exit the Sales Order Credit Override screen. When releasing a credit hold, you may be prompted to enter a new ship date, depending on how your company sets the **Prompt For Ship Date Change When Releasing Order From Credit Hold** control maintenance record.

When you release a direct sales order from credit hold, the system removes that sales order from the credit queue on this Open Order Status Review Queue.

- **To deny** a credit hold override, select the **Deny** hot key. The system exits the Sales Order Credit Override screen automatically.

The system notifies the order writer via a job queue when any order is denied, or when a direct order is approved. The job queue identifies the user who denied or approved credit.

How the System Prints Orders Released from Credit Hold

When a sales order is released from credit hold, the system selects a printer location for the order based on the following hierarchy:

What the System Checks	Where Identified
1. The printer location override defined for the order's ship via and shipping branch.	The PickTicketPtrLoc column in Ship Via Branch Overrides/Auto Scheduling. For more information, see Assigning Ship Vias to Branches.
2. The printer location assigned to the shipping branch in Printer Location Maintenance.	The Ship Ticket Branch field in Printer Location Maintenance. For more information, see Defining Printer Locations.
3. The printer location defined in the Control Record: "Default Printer Location For Branch."	Control Maintenance. For more information, see Control Maintenance General Defaults.
<p>4. The list of locations for which the user is authorized that also have the PICK.TICKET document loaded.</p> <p>Note: The document that the PICK.TICKET form is assigned to is respected.</p>	<p>To identify authorized locations:</p> <ul style="list-style-type: none"> • Use the Location hot key in User Maintenance. For more information, see Creating User Records. • To change your current location, select System > Change Location. <p>To set up printers for pick tickets:</p> <ul style="list-style-type: none"> • Map the PICK.TICKET document to the correct form (paper type). For more information, see Assigning Forms to Documents. • Add the printer to be used for pick tickets. For more information, see Defining Printer Locations. • Make sure that, for the printer you added in Printer Location Maintenance, the correct form is loaded. For more information, see Assigning Forms to Printer Trays.
5. The printer location the user is assigned in Terminal Setup.	Identify a printer location in Terminal Setup. For more information, see Setting Up Terminals.

Sales Reporting Overview

The Reports menu includes the following standard reports that let managers track sales and orders. Additional End of Month Reports are also available.

The sections below give more information on how to use these reports. The following reports are available:

Order Entry Reports

- Open Sales Orders
- Detailed Invoice Preview
- Invoice Register
- Detailed Invoice GP%
- Nonstock Products Returned
- Customer Calling Queue
- Customer Product Sales History
- Product Sales Comparison
- Detailed Open Credits
- Cancelled Invoices/Orders
- Sell Price/Cost Overrides
- Commissions
- Customer Expediting
- Warranty

Managing Financial Results

To track financial performance, consider using these reports:

- Invoice Register Report - Lets managers and the accounting department see the total accounts receivable.
- Sell Price/Cost Overrides Report - Lists selected orders that had a selling price or cost manually overridden. This report helps you control profit margins, by viewing the order writer and gross profit on each order with manual overrides.

To manage workflow through your warehouse, consider using these reports:

- Open Sales Orders Report - Shows all the orders that remain unshipped.
- Customer Expediting Report - Helps you proactively monitor your important customers' open orders to see which ones need expediting.

Preventing Billing Errors

Find billing or other errors before sending invoices. Before printing and sending invoices, you can examine the orders that are set for invoicing. One way to do this is by running the Detailed Invoice Preview Report to inspect detailed replicas of selected invoices.

Using Report Hot Key Features

Use hot keys for more report features. Refer to the general Report Hot Keys topic for details on features including:

- Using the **Hold** hot key (instead of the **Print** hot key) to save the report to your Hold file before printing. You can then examine the report details in your Hold Entry Pre-View screen. With some reports, such as the Detailed Invoice Preview Report, you can use the Pre-View screen's **Edit Detail** hot key to drill down and edit a selected order.
- Using the **Slet** hot key on report screens to open an Additional Selection Input screen. You can use this to add more criteria that limits the report. The **Currency** field on this screen is used to select transactions that were entered in a specified currency; however the report is still printed in your company's base currency.
- Using the **Opts** hot key to display a list of report options. For example, you can schedule, fax, add a user-defined heading, forward a report, or send a report to the synchronized Reporting Server companion product.

Repeating and Customizing Reports

There are various ways to repeat or customize reports:

- Selecting the Scheduling option (**Opts** hot key), the Phantom Scheduler screen lets you run or repeat the report at the intervals you specify. The scheduled reports conveniently remember all your settings, including the use of variable dating. This is especially important with complex reports like the Commissions Report. This report has over 20 fields and hot keys that let you precisely customize the report information and appearance. Use the Phantom Scheduler to recall all your report settings.
- Using the Eclipse Report Writer utility program, you can create your own reports from scratch, or customize sample reports that the system provides. One example is the Warranty Report. Instead of opening a preset report screen, this report opens in a Report Driver screen, letting you use the Report Writer features to edit the report itself.

Reporting Details, Summaries, or Totals

Many reports can be run in either a *Detail* or *Summary* format. For example, the Product Sales Comparison Report lets you compare product sales from one year to another. See which products or categories show growth or decline. This report lets you choose:

- Detail format, which lists every product.
- Summary format, which lists just Product Select Code categories like Electrical or Plumbing.

Note: Some reports, such as the Sales Tax Code Report, also provide a *Totals* format. The Totals format is even more brief than the Summary format, because it removes the additional subtotal information.

Showing Costs

If you have COGS.VIEW or COST.VIEW authorization, before printing reports you are often prompted to specify which cost shows on the report:

- Generic Cost (the cost you want others to think you pay)
- Cost of Goods Sold
- None

These choices help protect the confidentiality of your cost information, for example on the Detailed Invoice GP% Report.

Other Reports

Each subject within the system (sales, purchasing, accounting, and so on) has its own reports. Refer to the documentation on those subjects for information on their reports. In addition, there are some reports used by various departments, including sales. For example, see the End of Month Reports documentation.

Running the Product Sales Comparison Report

Run the Product Sales Comparison Report to see how sales, purchases, or transfers of individual products, or Product Select Code groups, compare from one year to another. Use the report to identify products that show growth or decline in sales, purchases, or transfers. Because of the thoroughness of the report, it can take a while to complete.

The Product Sales Comparison Report shows the following information:

- Branch
- Part number
- Product description
- Quantities sold, ordered, or transferred for the:
- Report year
- Prior year
- The percentage of difference in quantities between the two years
- Dollar amounts sold, ordered, or transferred for the:
- Report Year
- Prior Year
- The percentage of difference in dollar amounts between the two years.

Note: Instead of comparing individual products, you can compare product categories, such as Electrical or Plumbing. The Summary report format categorizes the products by their Product Select Code. These codes are set up using the Valid Product Select Codes control maintenance record.

► To run the Product Sales Comparison Report:

1. From the **Orders > Reports** menu, select **Product Sales Comparison**.
2. In the **Br/Tr/All** field, enter the branch, branches, or territories for which you want to generate a report. Enter ALL to generate reports for all branches and territories.
3. In the **Mode** field, press **F10** and specify whether to compare Sales History, Purchase History, or Transfer History.
4. In the **Start Date** field, enter the first date of the period you want to run the report for.
5. In the **End Date** field, enter the last date of the period you want to run the report for.

Note: The time period you specify is always compared to the same time period of the previous year.

6. If desired, in the **Price Line** field press **F10** and specify a price line. This limits the comparison to that price line. Use the **Line** hot key to specify additional price lines; in this case the field displays *Multi* as the status.

7. In the **Status** field, press **F10** and specify a product status. This limits the comparison to the specified product status. Use the **Status** hot key to specify additional statuses; in this case the field displays *Multi* as the status.
8. In the **Sort By** field, press **F10** and specify how to sort the report. You can sort by Price Line, Description, Select Code, or Budget Group.
9. In the **Summary/Detail** field, press **F10** and specify whether to show the report in Detail or Summary format. Summary format shows Product Select Code groups, instead of individual products.
10. In the **Report Currency** field, press **F10** and specify which currency the report uses. For example, you can report using U.S. dollars, Canadian dollars, Pesos, Francs, etc.
11. To limit the report to certain price lines, use the **Line** hot key to open the Price Line Selection screen. Then edit the list as desired. By default, all price lines are included.
12. To limit the report to certain product statuses, use the **Status** hot key to open the Product Status Selection screen. Then edit the list as desired. By default, all statuses are included.
13. Set options, if needed, and generate the report.

Running the Sell Price/Cost Overrides Report

Run the Sell Price/Cost Overrides Report to list selected orders that had a selling price or cost manually overridden. Manual overrides are a prime source of invoicing errors. Take control over profit margins by using this report to view the order writer and gross profit on each order with manual overrides.

The report lists each of the following:

- Order number, and customer or vendor name.
- Order's gross profit percentage.
- Product type, quantity, description, and price line.
- Regular price, net price, net difference, regular cost, and net cost. (A regular price or regular cost reflects the system price or cost, and is only listed if overridden.)
- Product's gross profit (after the override).

Note: After you run the report once, the system saves the selections you made and associates them with your user ID. When you run this report again, the system displays the selections you made the last time. A "Save" message at the top of the screen indicates that your previous selections are being used. If there is no default or saved setting, the field is blank. For more information, see *How the System Saves Settings on Reports*.

► To run the Sell Price/Cost Overrides Report:

1. From the **Orders > Reports** menu, select **Sell Price/Cost Overrides**.
2. In the **Start Date** and **End Date** fields, press **F10** and specify the desired calendar date range.
3. If desired, enter a date in the **Purge Through** field. This permanently removes the prerequisite price override records from on or before that date.

The purge date only affects sales order override logs if all the generations of the sales order are invoiced or cancelled. Logs for older bids are saved in case they are turned into orders at a later date.

4. In the **Br/Tr/All** field, enter the branch, branches, or territories for which you want to generate a report. Enter **ALL** to generate reports for all branches and territories.
5. In the **Override Type** field, press **F10** and specify whether to report on:
 - Price Increases
 - Price Decreases
 - Cost Increases
 - Cost Decreases
 - All

6. In the **Sort by** field, press **F10** and specify whether to sort the report by order writer or by price line.
7. In the **Override/Ship Date** field, press **F10** and specify whether to include the orders by:
 - **Override Date**
 - Ship Date
8. If desired, use the **Min GP%** and **Max GP%** fields to specify which invoices to select:
 - Specify a **Min GP%** setting, which selects invoices at or below this percentage (after override).
 - Specify a **Max GP%** setting, which selects invoices at or above this percentage (after override).

Invoices *outside of* this acceptable range will appear on the report.

9. In the **Comm Cost Overrides (Inc/Exc)** field, press **F10** and specify whether you want to **Include** or **Exclude** commission cost overrides on the report.
10. In the **COGS Overrides (Inc/Exc)** field, press **F10** and specify whether you want to **Include** or **Exclude** COGS overrides on the report.
11. In the **Price Overrides (Inc/Exc)** field, press **F10** and specify whether you want to **Include** or **Exclude** price overrides on the report.
12. In the **Stock/Nonstock/Both** field, press **F10** and specify which price or cost override products to report on. Specify either **Stock** products, **Nonstock** products, or **Both** types of products.
13. In the **Open/Closed/Both** field, press **F10** and specify which overridden orders to include:
 - **Open** includes orders without printed ship tickets.
 - **Closed** includes invoiced orders with printed ship tickets.
 - **Both** includes both open and closed orders.
14. In the **Include Cancelled Orders (Y/N)** field, specify whether to include orders that have already been cancelled. The default **Y** includes these orders in the report.
15. If you want to specify a stock type, such as *Stock* or *Defective*, press **F10** and select a stock type in the **Qty Type** field.

To enter multiple stock types, place your cursor in the **Qty Type** field, and then use the **Multi** hot key. Type a new quantity type on each line, and then press **Esc** to save your settings.
16. Set options, if needed, and generate the report. If prompted for a display cost, select **Generic Cost**, **Cost of Goods Sold**, or **None**.

More Options for Selecting Report Criteria

To enter additional selection criteria for this report, use the **Incl/Excl** hot key and then select any of the following:

In this field...	Select...
Bids	Include, Exclude, or Only.
Credits	Include, Exclude, or Only.
Directs	Include, Exclude, or Only.
Include Cancelled Orders	Y (Yes) or N (No).

Running the Canceled Invoices/Orders Report

Run the Canceled Invoices/Orders Report to list your canceled sales orders. This lets you see whether certain customers, users, seasons, or products generate more wasted orders than others.

You can list canceled orders using a variety of criteria, including a product you specify.

For each canceled order, the report gives the following information:

- Branch
- Order number
- Customer name
- Order amount
- User who canceled the order
- Cancellation date

▶ To run the Canceled Invoices/Orders Report:

1. From the **Orders > Reports** menu, select **Canceled Invoices/Orders**.
2. In the **Br/Tr/All** field, enter the branch, branches, or territories for which to run the report.
3. In the **Start Date** and **End Date** fields, press **F10** and specify the desired calendar date range. You can also specify dates using variable dating.
4. If you want to run the report about a particular product, enter the product name in the **Product** field.
5. In the **Sort by** field, press **F10** and specify how to sort the report. You can sort by customer, by order number, or by date.
6. In the **Invoices/Orders/Both** field, press **F10** and specify whether to report on just **Invoices**, just **Orders**, or **Both** invoices and orders.
7. Set options, if needed, and generate the report.

Tracking Order Sales Sources

Use a sales source to track where a sales order originated, or to categorize it with other similar orders. This is useful for accounting and reporting. For example, if orders have a sales source assigned, you can compare orders with a source of Phone Sales to orders for Showroom Sales.

Some companies use a sales source for broad categories of sales, perhaps for categories like Plumbing or Electrical sales. Administrators create sales sources in G/L Sales Source Maintenance.

► To assign a sales source to an order:

1. Create or open a sales order and display the order's Header screen.
2. In the **Sale Source** field, press **F10** and specify the source for the sale. For example with retail showroom sales, select the Showroom Sales source.
3. Complete the order as usual.

Viewing Changes to Orders

View an order's change log to see the order's history. You can view who changed the order, when it was changed, and why. Because you cannot edit the log, it provides a secure audit trail for each order and each order generation.

► To view changes made to an order:

1. Create or open an order and display the order's Header screen.
2. Use the **Chg Log** hot key to display the Change Log Viewing screen.
3. Review the following fields, as needed, for each transaction:

Field	Description
Change Log for	The sales order number.
ShipDate/Inv#	The shipment date of the order generation. To view changes for a different ship date or invoice, use the Change ShipDate/Inv# hot key.
User ID	The user who made the change.
Date	The date the user made the change.
TimeEST	The time the user made the change (based on Eastern Standard Time).
Port	The terminal port from which the change was made.
Comment	A system-generated description of each change, or user comments.

4. Use hot keys, as needed.

To...	Use this hot key...
display changes for a different ship date	Change ShipDate/Inv# A selection list displays. Select a date or select ALL to display changes for all ship dates and press Enter .
view the order	View The Sales Order Entry Body screen displays in view-only mode.
change the order	Edit The Sales Order Entry Body screen displays in edit mode.
add comments to a transaction	Add Comment The Reason for Change prompt displays. Enter your remarks and press Esc to add the comment to the end of the log.

5. Press **Esc** to return to the Header screen.

Changing Price Control Parameters

The GP% Control Parameters screen lets authorized users adjust the minimum gross profit percentage or maximum discount from standard price, for both stock items and direct shipments.

This feature allows managers to control how much discretion salespeople have in making price adjustments. Depending on your authorization level, making price adjustments greater than those set here requires a manager to enter a confirming password. Authorized users receive a warning before they finalize price adjustments greater than those set here.

You can assign a minimum required GP% at the following levels:

- Order
- Product
- Price line
- Customer
- User

Note: The Base Minimum GP% Price Check Off COMM-COST control maintenance record determines whether you base the minimum GP% price check off COMM-COST or COGS cost.

When the user makes a change that affects the GP% for an item in sales order entry, the system looks for a specified minimum, in the sequence listed above. The system stops checking once it finds one setting for minimum GP%, and does not check subsequent settings. If the new GP% falls below the first detected minimum, the system displays a warning that identifies the parameter (such as product, price line, or user) affected by the change and what the minimum GP% for that level is. To override the warning, the user must be assigned the SOE.MIN.GP authorization key.

You can set default price control parameters in Product Maintenance, Price Line Maintenance, and User Maintenance. Or, you can override the defaults from Sales Order Entry, as described here.

► To change price control parameters:

1. Create or open an order, and display the order's Body screen.
2. Use the **Pricing** hot key to display the Pricing Override screen.
3. Use the **GP%Cont** hot key to open the GP% Control Parameters screen.
4. In the **Min GP% Required** fields, specify the minimum gross profit percentage for **Stock** items and **Direct** shipped items.
5. In the **Max Disc from Standard Price** fields, specify the maximum allowable discount percentage for **Stock** items and **Direct** shipped items.
6. Press **Esc** to apply your settings.

Charging Back Commissions

Use the Commission Charge Back screen, along with the Commissions Report screen, to calculate refunds ("charge backs") from salespeople for commissions they were already paid.

Some companies pay commissions based on orders that have been invoiced, even though the invoices are not actually paid. If the invoices remain unpaid, the company usually needs to charge back the paid commissions to get reimbursed by the salespeople. While running the Commissions Report, you can use its **Charge Back** hot key to specify charge backs. You can also specify the charge back percentage.

Charge backs are only valid with the Commission Report's **Invoiced/Paid** field set to report on Invoiced orders. Paid invoices are not subject to charge backs.

►To charge back sales commissions:

1. From the **Orders > Reports > Commission Reports** menu, select **Commissions Report**. Alternatively, from the **Other > Reprts > End of Month Reports > Salesperson & Writer Reports** menu, select **Commissions**.
2. In the **Branch** field on the Commissions Report screen, press **F10** and specify the branches and territories to charge back, or select **all**. Once you specify this, the screen's **Charge Back** hot key is active.
3. Use the **Charge Back** hot key, which opens the Commission Charge Backs screen.
4. In the **Start Date** and **End Date** fields, press **F10** and specify the desired calendar date range for the charge backs. You can also specify dates using variable dating.
5. In the **Charge Back Percent** field, specify the percentage of paid commissions to charge back. The default is 100.00 percent.
6. In the **Apply Charge Back to** field, specify if you want to apply the charge back to the **Invoice Amount** or the **Remaining Balance**.
7. If desired, use hot keys to save or recall screen settings.
8. Press **Esc** to return to the Commissions Report screen.
9. Complete the Commissions Report screen, and then run the report. The charge back amounts are included on the report.
10. Use hot keys, as needed.

To...	Use this hot key...
save the current screen settings for future use	Save You are prompted to enter your user ID at the Save Work ID prompt.
reapply previously saved screen settings	Recall You are prompted to enter your user ID at the Recall Work ID prompt.

Editing Commission Percentages

Use the Salesperson Split Commission Percentage screen to review or change the commissions percentages earned on a specific order. Commissions can go to one or more sales representatives who played a role in the sale.

► To edit a commission percentage:

1. Create or open a sales order and display the order's Header screen.
2. Use the **Add'l** hot key, and then the **Salesperson %** hot key, to display a prompt.
3. At the Writer/Outside/Inside prompt, enter one of the following to display the Salesperson Split Commission Percentage screen:

- **W** – Show the commission percent for the writer.
- **I** – Show the commission percent for the inside sales representative.
- **O** – Show the commission percent for the outside sales representative.

Note: The header area of the screen shows the sales order to which this applies and the type of sales representative you selected.

4. Review and edit the following fields for each participating sales representative, as needed:

Field	Description
Salesperson	The person who entered the sales order.
CommGrp	The commission group to use when calculating commissions for this order. Note: If assigning a commission group, you cannot split the commission between more than one salesperson. The percentage for a commission group must be 100 percent.
Percentage	The part of the commission to which they are entitled.

5. Press **Esc**. If the percentages you entered did not total 100%, the system alerts you. Correct the percentages and press **Esc** to display a prompt.
6. If prompted to copy the change to all open generations, enter **Y** to do so; otherwise, enter **N**.
7. Press **Esc** to return to the order's Header screen.

Running the Pooled Commission Report

Use the Pooled Commission Report to calculate individual commissions for each salesperson who is part of a commission pool. Pooled commission plans are set up in Commission Plan Maintenance.

►To run the Pooled Commission Report:

1. From the **Orders > Reports > Commission Reports** menu, select **Pooled Commission Report** to display the Pooled Commission Report screen.
2. In the **Br/Tr/All** field, enter the branch or territory for which you want to generate the report. Enter **ALL** to generate reports for all branches and territories.
3. In the **Start Date** and **End Date** fields, press **F10** and specify the desired calendar date range.
4. In the **Detail/Summary** field, press **F10** and specify whether you want to run a detailed or summarized version of the report.
5. In the **Invoiced/Paid** field, press **F10** and specify whether you want to report on commissions for orders that have been invoiced, or orders that have been paid.
6. In the **Sort by Price Branch (Y/N)** field, enter **Y** or **N** to specify whether you want to sort by price branch. The default is **Y**.
7. In the **Secondary Sort** field, press **F10** and specify one of the following:
 - Plan by Writer
 - Plan by In Salesperson
 - Plan by Out Salesperson

Note: Your company's sort options may be different than these defaults, depending on what your commission plans are named.

8. In the **Pooled Commission Plan Override** field, press **F10** and choose the commission plan you want to report on.
9. In the **Directs (Include/Exclude/Only)** field, specify whether the report should *include* directs, *exclude* directs, or include *only* directs.
10. Set options, if needed, and generate the report.

Note: When using the **Multi** hot key to run the report for multiple commission plans, keep in mind that the **Secondary Sort** option you select in the main screen will dictate which commission plans you can choose. If you include commission plans that contain multiple types of employees (such as inside and outside salespeople) and then select a **Secondary Sort** option such as "Plan by In Salesperson," the sort will only work for inside salespeople.

Printing Shipping Tickets Automatically

Use the Automatic Shipping Ticket Printing screen to specify how often shipping tickets print for a branch printer location. Shipping tickets will only print for order generations with a *ship* status, such as Ship When Specified, Ship When Complete, Ship When Available, or Ship Item Complete.

Depending on your warehouse workflow, you can schedule printing runs for every few minutes, a couple times a day, or just print the tickets as needed. You can enter specific date information or use variable dating. You can also edit a printing job that is already scheduled to run by using the **Edit** hot key on the Phantom Job Scheduler Maintenance screen.

Before printing a ticket, the system rechecks the availability of products and the customer's credit status. If there is a problem with either, the order status is automatically changed to Call When Complete. The order's Change Log then indicates that either products are not available or there is a credit hold.

Once shipping tickets are printed, orders are available for invoicing. If you preview invoices before printing, you can catch and correct any shipping discrepancies before actually printing and sending the invoices. While previewing, you can open an order generation for editing. For example, you can change the order status from Invoice to another status that results in an open order.

Note: Routing tickets also print for any orders that require them, based on ship via.

►To print shipping tickets automatically:

1. From the **Orders > Printing** menu, select **Automatic Shipping Ticket Printing**.
2. In the **Branch** field, press **F10** and specify the branch to print tickets for.
3. In the **Location** field, press **F10** and specify where the printer is located.
Note: For details on how default printer location is determined, see the Default Printer Location For Branch control maintenance record description.
4. In the **Stop Printing Time** field, enter the time of day after which no more printing is done. For example, enter **06:00pm** to stop automatic printing at that time.
5. In the **Print Intervals (Minutes)** field, enter the number of minutes in between print runs. For example, enter **60** to print every hour.
6. To log the orders in the Open Order Status Review Queue, enter **Y** in the **Log Prints For Confirm** field. This lets you check the queue to confirm which tickets were printed.
7. In the **Print All Available Ship Dates Thru** field, specify the ending date for the print run. You can also use the **Invoice Dt** field to specify a date used for the corresponding invoices.
8. If you want to print tickets for future Ship When Specified orders, use the **After <Time> Includes All Ship Dates Thru** fields. In the time area, specify a time like **03:00pm**, after which you print tickets for the next day's Ship When Specified orders. Also specify the

ending date, which is usually the next day. You can also use the **Invoice Dt** field to specify a date used for the corresponding invoices.

9. Use the **Print Incomplete Ship When Available After** field to specify when to print shipping tickets for orders with partial quantities available. You can leave this blank to always print shipping tickets when any quantity is available.
10. Use hot keys to finalize the printing:

To...	Use this hot key...
begin using the specified print settings	Begin Now
display the Phantom Scheduler screen, to schedule printing whenever desired	Schedule
specify ship via settings. Use to restrict printing to orders with those ship via settings.	Ship Vias When the Ship Vias screen displays, press F10 for a list.
display an Enter Work ID prompt	Recall Enter the Work ID name to reuse its field settings. Press F10 for a list.
save the current settings as a new work ID	Save Use to save current settings. Enter a name for saving and recalling the field settings.
delete the active Work ID. Confirm when prompted	Delete The field settings remain until you edit or close the screen — but you can no longer recall the settings by name.

Printing Documents Automatically with Activity Triggers

You can use activity triggers to automatically perform some order entry printing tasks. For example, the receipt of a new sales order can trigger the system to automatically send your customer a document by e-mail, fax, or EDI (Electronic Document Interchange).

The Outbound E-Mail Commerce companion product is required to use activity triggers.

On the Activity Trigger Maintenance screen, specify events that trigger activities. For order entry, four common events include:

- New sales orders
- New purchase order
- Pick ticket print
- New direct order

Once an event is specified, you specify the activity it triggers. Numerous triggers can be chosen from a list. Four popular activities include:

- E-mail statement
- EDI sales document
- E-mail message
- Fax sales document

Using Print Styles

Selecting a print style lets you simultaneously apply an entire set of print options. A print style specifies which information is included on the form, where it is positioned, and how it is formatted. Companies usually save different print styles for different printed forms; for example, one invoice print style for wholesale customers, another for retail showroom customers.

Print styles are named and saved on the Print Style Maintenance screen. An administrator uses the screen to determine which price information displays and the overall look of the form. For more information, refer to the general Maintaining Print Styles topic. Selecting a named print style applies all of its settings.

You can assign a print style to a customer using the Customer Pricing/Printing screen. You can also assign a print style to an order, which is described here.

Important: Eclipse recommends not using BLIND as the print style for any invoices, bids, or acknowledgements, if you plan to send them through e-mail for plain HTML text. If you do, the system does not recognize the BLIND style and uses NET instead and as a result your customers will see NET costs or prices.

► To assign a print style to an order:

1. Create or open a sales order and display the order's Header screen.
2. Use the **Add'l** hot key, then the **Add'l Header Info** hot key, to open the Additional Header Information screen.
3. In the **Print Style** field, press **F10** and select a named print style. For example, select the Showroom style for a showroom customer.
4. Press **Esc** to close each screen, until you return to the Body screen.
5. Complete the order as usual.

Formatting Point-of-Sale Receipts

Use the Define Forms screen to set up the format of your receipts. When you do this, you want to consider how you want the receipt to look; for example, the amount of space you want to appear at the top, bottom, right, and left edges, and how much information you want to fit on one line.

►To create a receipt format:

1. From the **System > System Files > Printer Setup** menu, select **Forms Definition** to display the Valid Forms screen.
2. Select **New** and press **Enter** to display the Define Forms screen.
3. In the **Form Name** field, enter a name that describes the type of receipt form. If you use only one type of receipt form, enter **RECEIPT**.
4. In the **Orientation** field, enter **Portrait**.
5. In the **CPI** field, enter the number of characters to print per inch across the page. The default value is **10**.
6. In the **LPI** field, enter the number of lines to print per inch down the page. The default value is **6**.
7. In the **Width** field, enter the number of characters to print per line. Average receipt line width is **20** characters per line.
8. In the **Length** field, enter the number of lines to allow per page. The default value is **66**, but since receipts usually print on a roll, use your best judgement.
9. In the **Top Marg** field, enter the number of lines to leave blank between the top edge of the form and the first line of print. The default value is **0** (zero).
10. In the **Left Marg** field, enter the number of character spaces to leave between the left edge of the form and the first printed character. The default value is **0** (zero).
11. Press **Esc** to save the form parameters and return to the Valid Forms screen.
12. Press **Esc** to return to the menu.

►To change a receipt format:

1. From the **System > System Files > Printer Setup** menu, select **Forms Definition** to display the Valid Forms screen.
2. Select the form name, such as **RECEIPT**, and press **Enter** to display the Define Forms screen.
3. Edit any of the following fields:

Field	Description
CPI	The number of characters to print per inch across the page.
LPI	The number of lines to print per inch down the page.

Field	Description
Width	The number of characters to print per line.
Length	The number of lines to allow per page.
Top Marg	The number of lines to leave blank between the top edge of the form and the first line of print.
Left Marg	The number of character spaces to leave between the left edge of the form and the first printed character.

4. Use hot keys, as needed:

To...	Use...	Result
remove the receipt form parameters	Delete	The system removes the receipt from the Valid Forms list.
return to the previous parameters	Recall	The system undoes your edits.

5. Press **Esc** to save the form parameters and return to the Valid Forms screen.
6. Press **Esc** to return to the menu.

How Order Status Drives Document Printing

The system generates one of the following documents based on the order status of the generation:

When the order status is...	This is what prints...
Bid	Bid
Cancel	Nothing
Pick Up Now	Invoice
Call When Available	Acknowledgement
Ship When Available	Acknowledgement
Ship Item Complete	Acknowledgement
Call When Complete	Acknowledgement
Ship When Complete	Acknowledgement
Direct Shipment	Acknowledgement
Call When Specified	Acknowledgement
Ship When Specified	Acknowledgement

How Print Status Drives Document Printing

The print status of an order generation determines when and how documents, such as invoices or order acknowledgements, are printed. Administrators can set defaults for different types of documents using the Order Status Print Status Defaults control maintenance record. Some statuses are unavailable for particular types of printing.

Note: Use the **Remove Orders from the OOSRQ When Prt Status Changed** To control maintenance have the system remove orders from the Open Order Status Review Queue when the print status has changed to a specific print status.

Code...	Status...	Specifies this...
Y	Print	Print document. If you have the SOE.REPRINT.INVOICE authorization key, but not the SOE.PRINT.INVOICE authorization key, and an invoice has not been printed, this option is not available to you for invoice generations.
N	No Print	Do not print document.
F	Fax	Fax document.
A	E-mail	E-mail document. Note: You can also e-mail a single order generation from the Status screen by selecting that generation and choosing the Print Opt hot key, and then the E-mail hot key.
B	Batch Print	Print with next batch of these documents.
H	Hold	Hold document for printing later. For example, use when transaction is waiting on P/O number or review before processing.
P	Preview	Include in the Detailed Invoice Preview Report, before any printing. A typical status for invoices.
Q	Queue	Include in the Invoice Preview Queue, which some companies use before the Detailed Invoice Preview Queue.
M	Manifest	Use on shipping manifest, and use its printing rules.
E	EDI	Send using Electronic Data Interchange (EDI).
C	Credit Card Authorization	A user has specified a status of B and the following conditions exist: <ul style="list-style-type: none"> • Credit card information is attached. • There is an open balance. • The credit card authorization method is set to Authorize After Review.
T	Ticket	A Ship Ticket status. Do not use without instruction.

Creating and Enabling Order Entry Comments

You can add comments to sales orders using the **Comment** hot key on an order's Body screen. This lets you personalize the orders with special product or order information.

Before comments can be selected in order entry, you must create the comment types, and enable their use within the desired areas of order entry. For instance, you can make a certain type of comment available in Sales Order Entry, but not in Purchase Order Entry or Transfer Order Entry.

Specify each order entry area that the comment type can be displayed in. Also specify where the comment type is available for entry.

► To create and enable comment types in order entry:

1. From the **System > System Files** menu, select **Order Entry Comments Maintenance**.
2. In the **Comment Type** field, press **F10** and select a comment type. Alternatively, select the option to create a **New** comment type, then enter a new description when prompted.
3. In the **Areas Displayed** area, enter a **Y** to display or print the comment. For example, to make the comment visible in sales order entry, enter a **Y** adjacent to SOE. To make the comment print on sales order entry forms, enter a **Y** adjacent to SOE Printing.
4. In the **Entry Allowed** area, enter a **Y** to enable entry and editing of the comment. For example, to make the comment available in sales order entry, enter a **Y** adjacent to SOE.
5. Use hot keys as needed. For example, use the **Comment Header** hot key to enter text that always displays above the comment as an introduction.

To...	Use this hot key...
copy an existing comment type, so you can reuse its settings	<p>Copy</p> <p>When prompted, enter a new description for the copy. Then customize the copy as needed.</p> <p>Note: You cannot give a copied comment type the same name as an existing standard comment.</p>
permanently delete the current comment type	<p>Delete</p> <p>Confirm when prompted. Any existing comments of the deleted type are kept on the orders, but re-categorized as a General Comment. Use the Change Type hot key on the Comments screen to re-categorize as a different type.</p>
rename the current comment type	<p>Change Description</p>
enter information that displays above the comment itself	<p>Comment Header</p> <p>Use to separate and identify the comment that follows. On an order, this text signals the beginning of the comment and what it pertains to. For example with a replacement product description comment, you could enter a header that always reads, "*** Replacement Description**."</p>

Creating Customer-Specific Order Entry Messages

Use an order entry message to alert order takers to special information about a customer. The message displays prominently when opening a new or existing sales order. The message disappears once you begin entering or editing the order. The message displays only for that customer.

Administrators and managers can use a message to relay a specific credit alert or other special instructions. For example, you could create a message that reads, "Ask to see a Smith Co. employee ID card for all counter sales."

Because order entry messages are for individual customers, the messages are created on the Customer Maintenance screen.

►To create an order entry message:

1. From the **Files** menu, select **Customer**.
2. In the **Customer/New** field, enter the name of the customer for whom you are creating a message to display that customer's record.
3. Use the **OE Msg** hot key to display the Order Entry Message screen.
4. Enter your message, using up to four lines of text.
5. Press **Esc** to save and close the message screen.
6. Press **Esc** to save and close the Customer Maintenance screen. If prompted for a Reason for Change, enter the explanation that you created an order entry message.

Creating Reminder Notes

Creating a reminder note lets you alert your employees to special information about a customer, vendor, or process. The note displays on the screens you specify. You can also use a note to display a reminder to your employees when they log in or out.

Unlike order entry prompts and messages, reminder notes can be used with more entities and in more parts of the system. For example, below, you can display reminder notes on screens in Sales Order Entry, Transfer Order Entry, R/F Receiving or Shipping, A/P or A/R Inquiries, or Activity Log Entry or Viewing. You can even display these reminders in Direct Order Entry, so they appear when entering a purchase order for a direct shipment — but not when entering a purchase order being shipped to you.

You can also specify an expiration date for a note, so it only displays during the month of December for instance. You could use that type of reminder to suggest expedited shipping during the holiday season.

You can create and manage reminders on a blank Reminder Notes Maintenance screen, as described next. Or, you can create them for a customer or vendor, with their information already entered in the **Entity** field.

- For a customer, select **Files > Customer > Add'l Info** hot key / **Reminder Notes** hot key.
- For a vendor, select **Files > Vendor > Add'l Data** hot key / **Reminder Notes** hot key.

▶ **To create and manage reminder notes:**

1. From the **System > System Files** menu, select **Reminder Notes Maintenance**.
2. Specify where the note is attached by doing one of the following:
 - In the **Cust/Vendor** field, enter the name of a customer or vendor.
 - In the **User/Group** field, enter a user or Message Group.
3. In the **Note Title** field, enter the title that will display across the top of the note screen.
4. If desired, press **F10** in the **Expire Date** field and specify an expiration date.
5. In the **Note** field, enter the complete text for the reminder note.
6. Use the **Where Displayed** hot key to specify where the note displays. For example, specify the SOE Status screen.
7. Press **Esc** to save your changes and close the screen.

To...	Use this hot key...
open the Where Displayed Selection screen	<p>Where Displayed</p> <p>Press F10 on a blank line to specify where the note displays. For a customer or vendor, you can specify multiple screens or use a list. For a user or group, you can use the choices below or use a list.</p>

To...	Use this hot key...
permanently delete the current note	Delete Confirm when prompted.
specify when and how a user or group is reminded	User Reminder Control The User Reminder Control screen displays.

► **To control reminders for users:**

1. Create or edit the reminder note, as described above.
2. Use the **Where Displayed** hot key, then specify where the reminder displays:
 - First Logon or Every Logon.
 - First Logoff or Every Logoff.
3. Use the **User Reminder Control** hot key, which opens the User Reminder Control screen below.
4. Control when the reminder note displays:
 - In the **Start Date** and **Time** fields, specify when the reminder starts.
 - In the **Expir. Date** and **Time** fields, specify when the reminder expires.
5. In the **Send Read Receipt (Y/N)** field, enter a **Y** to get a message once the user has read the reminder.
6. In the **Send Reminder Once Only (Y/N)** field, enter **N** to repeat the reminder during the specified time period.
7. In the **Display Time from** and **to** fields, if desired specify the hours the reminder is displayed.
8. When you are finished, press **Esc** to return to the Reminder Notes Maintenance screen.

Creating Customer Notes and Shipping Instructions

Use the Customer Maintenance screen to create or edit default internal notes or shipping instructions for a customer. These notes or instructions appear on the sales order Header screen, where they can be edited as needed.

- Internal notes do not print on invoices or other forms, so default notes are useful for confidential reminders needed on each of the customer's orders.
- Shipping instructions print on pick tickets. Use them to alert delivery people to the customer's special delivery needs, such as specific delivery location.

▶To create default shipping instructions for a customer:

1. From the **Files** menu, select **Customer** to display the Customer Maintenance screen.
2. With the desired customer displayed, use the **OE Instr** hot key.
3. Use the **Shipping Instructions** option, which displays the Default Shipping Instructions screen.
4. Enter the text to use for the default shipping instructions. Alternatively, use the **Standard Instructions** hot key to select from a list of standard shipping instructions.
5. Press **Esc** to save your changes.

Note: To create or edit standard shipping instructions, use the **Customer Standard Shipping Instructions** feature.

▶To create default internal notes for a customer:

1. From the **Files** menu, select **Customer** to display the Customer Maintenance screen.
2. With the desired customer displayed, use the **OE Instr** hot key.
3. Use the **Internal Notes** option, which displays the Default Internal Notes screen.
4. Enter the text to use. Alternatively, use the **Standard Notes** hot key to select from a list of common notes.
5. Press **Esc** to save your changes.

Note: Use the **Customer Standard Internal Notes** command (System > System Files > Customer/Vendor Control > Customer/Vendor Standard Notes) to create or edit standard internal notes.

Creating Customer-Specific Prompts

Improve customer service and order accuracy by creating custom prompts for Sales Order Entry.

Here are some benefits of using custom prompts:

- Provide an extra level of customer service. You can prompt for preferences when a customer places their first order, then display those preferences on future orders.
- Improve order entry speed and efficiency. Prompt order writers to ask customers for frequently needed information. For example, if a customer often requires special freight or handling, you can create a prompt to ask for this information.
- Enter and save customer information that is unique to your business. Once you know how to create custom prompts, you can use them to store customer information that is not already included in the system.

Creating Prompts

Follow these steps to create a custom prompt for a customer:

1. Create or use a user-defined file on the File Definition Maintenance screen. A user-defined file lets you store the response to a custom prompt. You can use an existing user-defined file, or create a new one to store the response from a new prompt.
2. Create or use a dictionary item on the Eclipse Dictionary Maintenance screen. A dictionary item defines the prompt's field characteristics, such as the field size and whether a response is required. This is also where you specify whether the response is a date, number, yes or no, and so forth.
3. Specify when and how the prompts are displayed. This is done on the customer's User Defined Order Entry Prompts screen. You can display a prompt when exiting the Body screen, for example.

Note: The Body screen has a hidden hot key for those with SUPERUSER authorization. Pressing **Alt-plus (+)** displays a screen with all the prompts created for the order, and their current response values. You can edit any of the response values on the screen.

Setting Prompt Placement and Timing

When you create an order entry prompt, you have considerable control over how the prompt is used. You can display the prompt for a line item, or when you enter or exit an order's Body, Header, Status, or Totals screen. For example, you specify:

- Where the prompt is used, perhaps on the order's Body screen.
- When the prompt displays, perhaps when exiting the screen.
- How the response information is stored, perhaps stored with the customer's Ship To information.

Note: The Body screen has a hidden hot key for those with SUPERUSER authorization. Pressing **Alt-plus** (+) displays a screen with all the prompts created for the order, and their current response values. You can edit any of the response values on the screen.

Creating Order Entry Prompt Files

You need to define a new file to store the results of a custom order entry prompt. Once defined, you can use the file as needed.

Before using the file as an order entry prompt, you also need to specify its formatting, and then specify when and how it displays.

► To define a file for the prompt:

1. From the **System > System Files** menu, select **File Definition Maintenance**.
2. In the **File Name** field on the File Definition Maintenance screen, enter the name for the file.

When creating a new file, the system displays another screen indicating that the file name is new. Press **Enter** to confirm that you are creating a new file.

Note: To identify user-defined files, we recommend that you always use the prefix "UD." to start file names you create. For example, use UD.BIGINC for a Big, Inc. customer.

3. In the **Description** field, enter a useful explanation for the file. Provide a description that helps everyone identify its purpose.
4. Press **Esc** to create the file.

Creating Order Entry Prompt Files Dictionary Items

Once you have defined a new file to store the response for a custom order entry prompt, you need to format the field display using a dictionary item. A dictionary item defines the field characteristics, such as the field size and type of response needed.

Before using the formatted dictionary item as an order entry prompt, you also need to specify when and how it displays.

► To define a prompt's dictionary item:

1. From the **System > System Files** menu, select **File Definition Maintenance**.
2. In the **File Name** field on the File Definition Maintenance screen, enter the name of the file you defined. The screen fills with the information about this file.
3. Use the **Dict Maint** hot key, which opens the Eclipse Dictionary Maintenance screen.
4. In the **Dict ID** field, enter a concise yet useful identifier for the field.
When creating a new dictionary item, the system displays another screen indicating that the item is new. Press **Enter** to confirm.
5. In the **Attr#** field, enter which number this attribute is. For example, enter 1 for the first field in a file, 2 for the second, and so on. Do not use the same attribute number more than once in a file.
6. Edit the **Description** field by entering a useful explanation for the field. Provide a description that helps everyone identify its purpose.
7. In the **Prompt** field, enter the text for the order entry prompt. For example: Ship overnight or ground?
8. In the **Justify** field, specify whether to align (justify) the text to the left or right. Typically, text is left justified and numbers are right justified. Always right justify dates.
9. Verify that the field's **Maximum Width** setting allows enough character space for the prompt.
10. In the **Required (Y/N)** field, enter a **Y** if a response to the prompt is required.
11. Enter an asterisk (*) to specify the type of prompt, from the choices below:

Field	Description
Date	Specifies a date. Then specify the number of digits (0, 2, or 4) for the Year .
Numeric	Specifies a number field. Also specify how many decimal places, and whether to accept a negative amount.
Y/N Only	Specifies a Yes or No field.
'*' Only	Specifies any entry displays as an asterisk. An asterisk entry is active; a blank entry is inactive.
Time	Specifies a time, displayed in military format.

12. Press **Esc** to save the dictionary item.
13. If desired, repeat steps 3–12 to create additional dictionary items for the defined file.
14. Press **Esc** to close the Eclipse Dictionary Maintenance screen.

Creating Order Entry Prompt Files Displays

Once you have defined the prompt file and formatted its display characteristics, you specify when and how the prompt displays for the customer.

►To display an order entry prompt:

1. From the **Files** menu, select **Customer**.
2. In the **Customer/New** field, enter the name of the customer for which you are creating a message.
3. Use the **Add'l Info** hot key, then the **OE Prompts** hot key. This displays the customer's User Defined Order Entry Prompts screen.
4. In the **File Name** field, press **F10** and select the user-defined file.
5. In the **Dictionary ID** field, press **F10** and select a dictionary item (defined field) in the file.
6. In the **When** field, press **F10** and specify when to display the prompt. You can display a prompt when you enter or exit Sales Order Entry screens. Or, choose **Line Item** to display a prompt after entering each line item on the order.
7. In the **Frequency** field, press **F10** and specify how often the prompt is displayed:
 - **New Order** – Displays the prompt only when creating a new order.
 - **Null Value** – Displays the prompt only when no (null) response has been entered. For instance, once the customer's Tax ID has been entered, the prompt no longer displays.
 - **Always** – Displays the prompt every time specified. The current response is stored.
8. In the **Key** field, press **F10** and specify where to store the customer's response. The key is the unique identifier for the data field. You can store the response value with the order, the bill-to or ship-to account, or the product, etc. Choose the key depending on the type of reporting you do. For example, to use the customer's response data in an order-level product report, select **Detail** as the key.
9. Repeat steps 4–8 to display additional prompts. If you display multiple prompts at the same time during order entry, they display in the order listed on this screen. To reorganize screen items, press **Alt-Insert** to create a blank line for a new entry, or press **Alt-Delete** to remove the line.
10. Press **Esc** to save and close the screen.

Note: The Body screen has a hidden hot key for those with SUPERUSER authorization. Pressing **Alt-plus (+)** displays a screen with all the prompts created for the order, and their current response values. You can edit any of the response values on the screen.

Posting Sales Orders From Another System

Post Sales Order Entry is used primarily for transferring sales orders from your old system into the new system. It can also be used in other special circumstances.

The process is similar to entering a sales order, except that the system first prompts you for an ID for the batch of orders you are entering. After you provide a required date for the first order in the batch, the system uses the same editable date for subsequent orders. For orders created outside the new system's inventory control, the ship date becomes the same as the required date, and all shipped quantities become the same as the ordered quantities.

When you enter an order using this feature, the system converts it to an invoice order generation. The Status screen displays the generation, which uses the **Prt** field setting from the Order Status Print Status Defaults control maintenance record.

► To post a sales order:

1. From the **Orders** menu, select **Post Sales Order Entry** to display the Post Order Entry prompt.
2. Enter a **Batch ID** identifier and press **Enter** to display the Body screen.

Note: Entering a Batch ID selects an entire group of orders for monitoring, processing, and printing. You can change the Batch ID on the order's Header screen, if needed.

3. In the **Ship To** field, enter all or part of the customer's name to do one of the following:

Note: If this is a new customer, type **New** and press **Enter**. For more information, see Entering New Customers During Order Entry.

If...	Then...
the order selection screen displays	continue with the next step.
the Customer Primary Index list displays	select the customer from the list and press Enter to display the order selection list.

4. Select **New** from the order selection list and press **Enter** to return the customer's information to the Body screen.
5. In the **Order #** field, enter a unique seven-digit transaction number for the order. The system alerts you if the number is invalid or already in use.

If the old system invoice number has...	Enter...
under seven digits	extra zeros before the first number to bring the total up to seven.
over seven digits	the last seven digits.

Note: The number you enter may begin with up to two alphabetic characters; for example, AB12345.

6. In the **ReqDate** field, enter a date within the current accounting period by which the customer requires the order.
7. Process the order as usual.

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