

*Phase III: Setting Up and
Using Furniture
Acknowledgments*



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Setting Up Furniture Acknowledgments

Once you have completed the steps in the Phase II handout for your individual furniture vendor, you can set up the acknowledgment program. The Furniture Acknowledgments function gives you the ability to default to a specific printer for acknowledgments by user or by vendor. It also gives you the option to update the cost on the purchase order and ticket automatically, allows you to print only exceptions on the acknowledgment report or print all items, and allows you to reprint the acknowledgment without requesting it again from the vendor.

Setting Up Furniture Acknowledgments involves:

- 1 Setting Global Parameters
- 2 Setting Vendor Parameters
- 3 Setting User Parameters.

Setting Global Parameters

- 1 Click



Figure 1: The (LGC) Furniture Order Entry Parameters Screen

```

15:35:42                (LGC)  FURNITURE ORDER ENTRY PARAMETERS                05/16/08
=====
ACTION [C] (C=Change, I=Inquiry, 1=Additional Parm)      G/L Location [ 1]
=====
Next Project #      1003                Create A/P when Final Receiving Y/N ?
On Simple Invoice, Sub-Total By (S)ort/Group or (T)ag ?
Display Only One Line Item at a Time Y/N ?      Only Show Zero Cost/Sell Once ?
Use Department as Item Tax Code For Uncatalogs Y/N ?
Default Furniture Order Department [ ] Allow Changing Y/N ?
Prompt to Flush and Batch Print Furniture Orders Separately Y/N ?Y
General Project Default Name [                ]
Automatically Sequence Y/N : Order:[ ] Quote:[ ]
Default Selector for P/O's : [ ] Printer: [ ]
Default Form Formats & Printers:  Default Form [ ]
    0) No Print Out
    1) Pick Ticket          Format [ ] Printer [ ]
    2) Pro Forma           Format [ ] Printer [ ] -- Add. Invoice Formats --
    3) Acknowledgment      Format [ ] Printer [ ] Description Format Ptr
    4) Delivery Ticket     Format [ ] Printer [ ] [ ] [ ] [ ]
    5) Install Work Order  Format [ ] Printer [ ] [ ] [ ] [ ]
    6) Quote               Format [ ] Printer [ ] [ ] [ ] [ ]
    7) Invoice              Format [ ] Printer [ ] [ ] [ ] [ ]
=====
    
```

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- 2 Double-click



- 3 Click Text-Base Parameters.
- 4 Go to the (LGC) Screen.
- 5 In the Action field, type C.
- 6 In the Acknowledgment Format field, enter the default acknowledgment format. See Figure 1.
- 7 In the Acknowledgment Printer field, enter a printer to default to for printing acknowledgments.

Setting Vendor Parameters

- 1 Double-click



The Vendor window opens.

- 2 Click the RemitTo/Settings tab.
- 3 Click the Update Cost checkbox to automatically update costs on the P/O and pick ticket based on the acknowledgment cost. See Figure 2.

Figure 2: The RemitTo/Settings Tab in the Vendor Window

A screenshot of a software window titled "Vendor:". The window has a menu bar with "File", "View", and "Help". Below the menu bar is a toolbar with various icons. The main area is divided into three tabs: "Master", "RemitTo/Settings" (which is selected), and "Account Status". The "RemitTo/Settings" tab contains two main sections: "Remittance Address" and "Settings". The "Remittance Address" section has fields for Name (containing "ND"), Address, City, St, Zip, Phone (containing "817-456-8790"), and Contact. The "Settings" section has fields for Recv Days, Max Lines, Contract From, To, Remit Id, Default Due Date, Suppress Ck Detail, Auto 850, and MAC. Below these are "1099 Settings" with fields for 1099 Required, Print YTD Amount in Box, and Tax ID. At the bottom of the window, there are fields for Drop Ship Comment, Cross Reference, Ack Printer ID, Ack Print Format, P/O Printer ID, and P/O Print Format. There is also a checkbox labeled "Update Cost" which is checked.

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- 4 In the Ack Print Format box, enter the acknowledgment selector.
- 5 In the Ack Printer ID, enter the printer name.

Setting User Parameters



- 1 Double-click **Order Entry**. The Order Entry window opens.
- 2 Select Furniture in the Order Style drop down box.
- 3 Click Furniture Profile Settings. The Furniture Profile Settings dialog box opens. See Figure 3.
- 4 Click the Acknowledgment checkbox under Furniture Update Defaults section.
- 5 Enter the format in the Format box.
- 6 Enter the printer name in the Printer box.
- 7 To only print acknowledgments with exceptions, click the Only Print Acknowledgments with Exceptions checkbox.

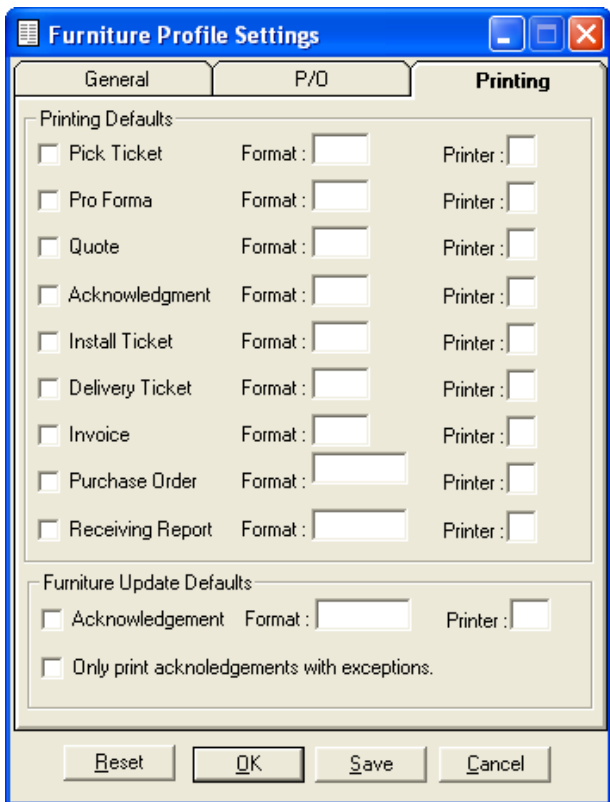
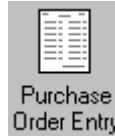


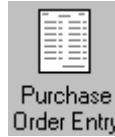
Figure 3: The Furniture Profile Settings Dialog Box.

Using Furniture Acknowledgments

Receiving Acknowledgments

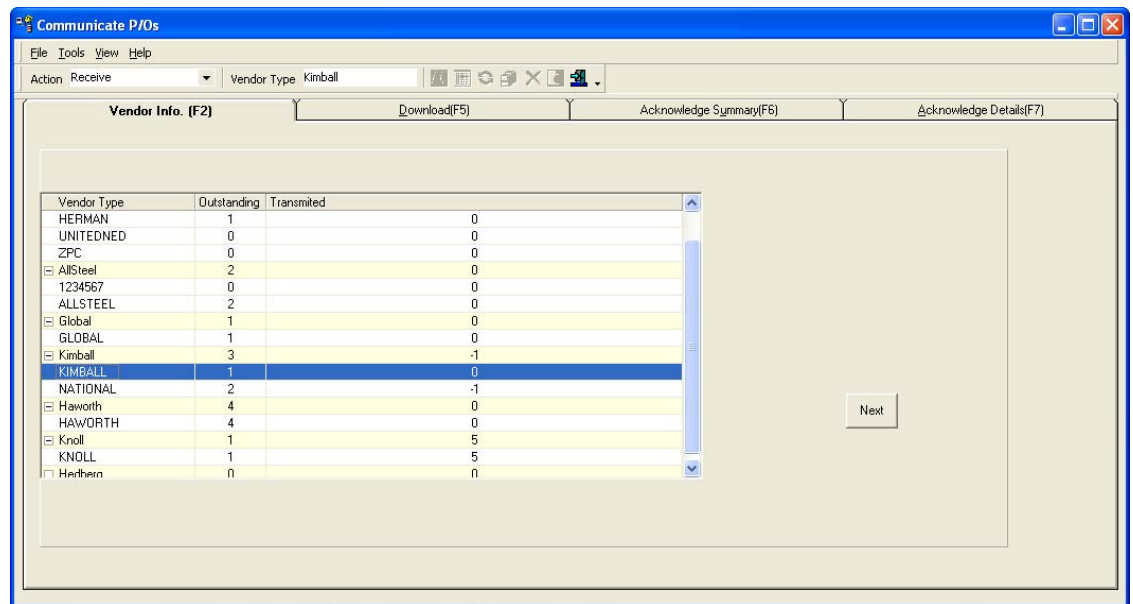
Use the Receive action in the Purchase Order Entry Communicate dialog box to import the acknowledgment.



- 1 Double-click . The Purchase Order Entry window opens.
- 2 Click the down arrow in the Action Code box and click Communicate.
- 3 The Communicate P/Os dialog box opens. Click the down arrow in the Action box and click Receive.
- 4 In the Vendor Info (F2) tab, select the vendor for whom to receive an acknowledgment. See Figure 4.
- 5 Click Next. The Download (F5) tab opens. See Figure 5.
- 6 In the Download (F5) tab, you can select View or Download. If you select View, the Acknowledge Summary (F6) tab opens. Go to the heading **Viewing Acknowledgment Summary Information**.

If you select Download, the acknowledgments are received. First the acknowledgments are downloaded from the specified vendor. Then, the inbound volume is checked for any acknowledgment files for the specified vendor, so preexisting files are also processed.

Figure 4: The Vendor Info (F2) Tab



Note: For PSN enabled vendors, the files are deleted immediately after being processed. For non-PSN vendors, the files are archived into a time-date stamped folder in the inbound volume.

Each time the user downloads:

- All acknowledgment files are processed and all received vendor data is stored.
- All stored acknowledgment data is processed, retrieving corresponding P/O data for each one and storing.
- All acknowledgments are analyzed, comparing their received data with data pulled from their corresponding P/O, generating exceptions.

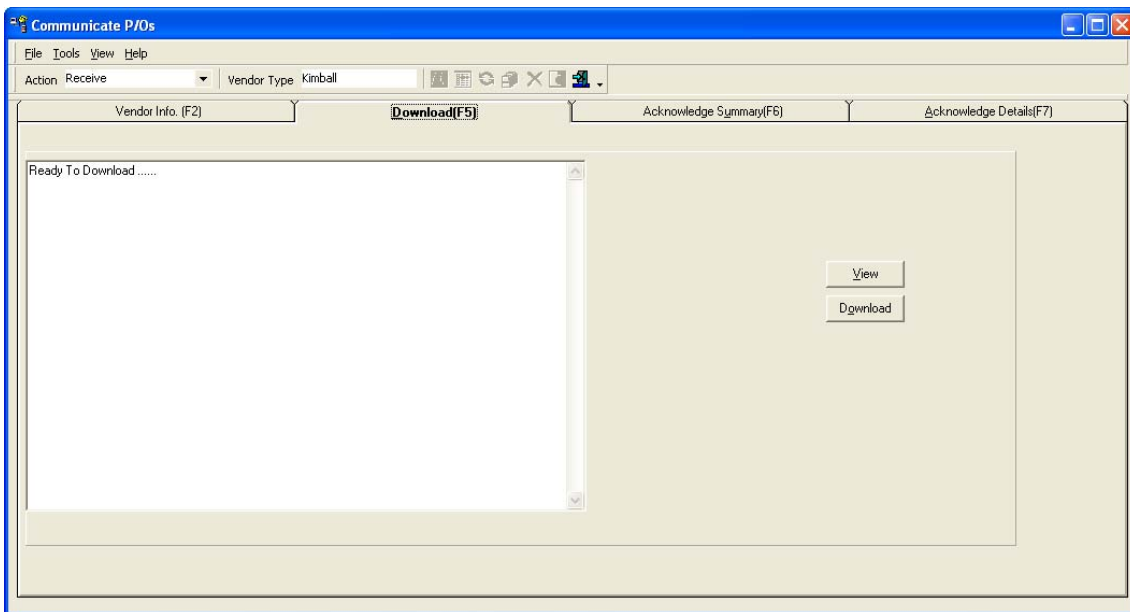
After the acknowledgements are downloaded, the Acknowledge Summary (F6) tab opens.

Viewing Acknowledgment Summary Information

Once you select View in the Download (F5) tab, the Acknowledge Summary (F6) tab opens. See Figure 6. In the Acknowledge Summary (F6) tab:

- Acknowledgments for the vendor or comm service selected on Vendor Info (F2) tab are shown.
- Acknowledgments are grouped according to P/O.

Figure 5: The Download (F5) Tab



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- If the P/O cannot be found, it is placed in a list of all acknowledgments where the P/O cannot be found. Listed next to each of these acknowledgments is the P/O number listed on the acknowledgment.
- Only acknowledgments that have not been processed are shown.

The following options allow you to navigate the Acknowledge Summary (F6) tab:


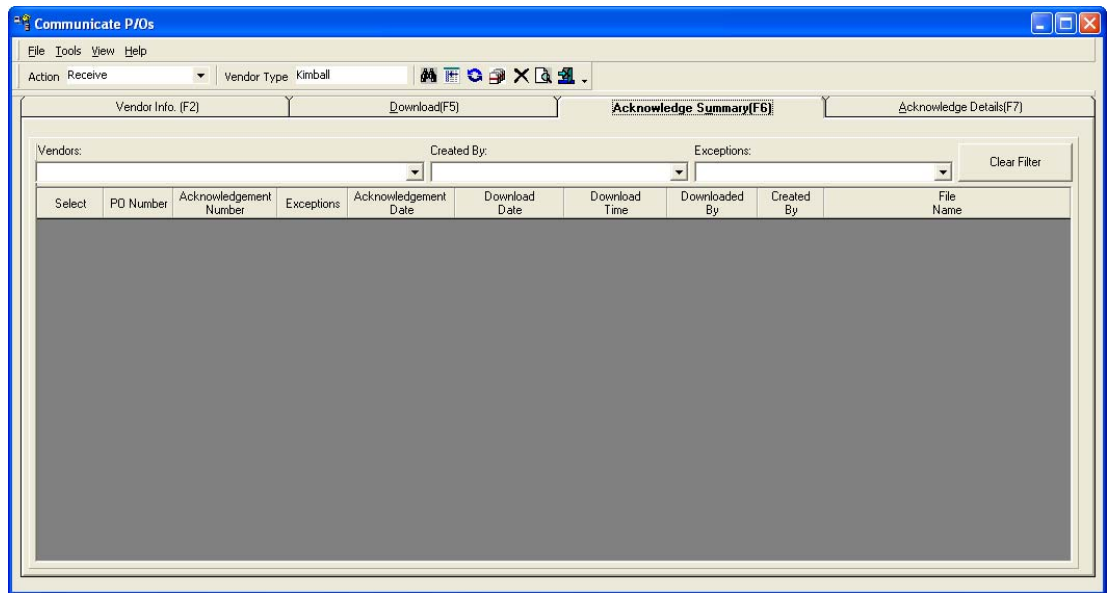
- Click Acknowledgment Search  to find an Acknowledgment. A search box opens on the left of the screen. See Figure 7. You can search through all processed and unprocessed acknowledgments using this feature. The following search options are available:
 - Vendor
 - Acknowledgment Number
 - PO Number
 - Acknowledgment Date
 - Acknowledgment Ship Date
 - Download Date
 - Created By
 - Process State
 - Comm Type.

Figure 6: The Acknowledge Summary (F6) Tab



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You can select From and To values for each search option. When you have selected the criteria and from and to values, click Add Limit. You can add multiple limits. To delete a limit you've added, click Remove Limit.

When you are finished, click Search.

To close the search window, click .


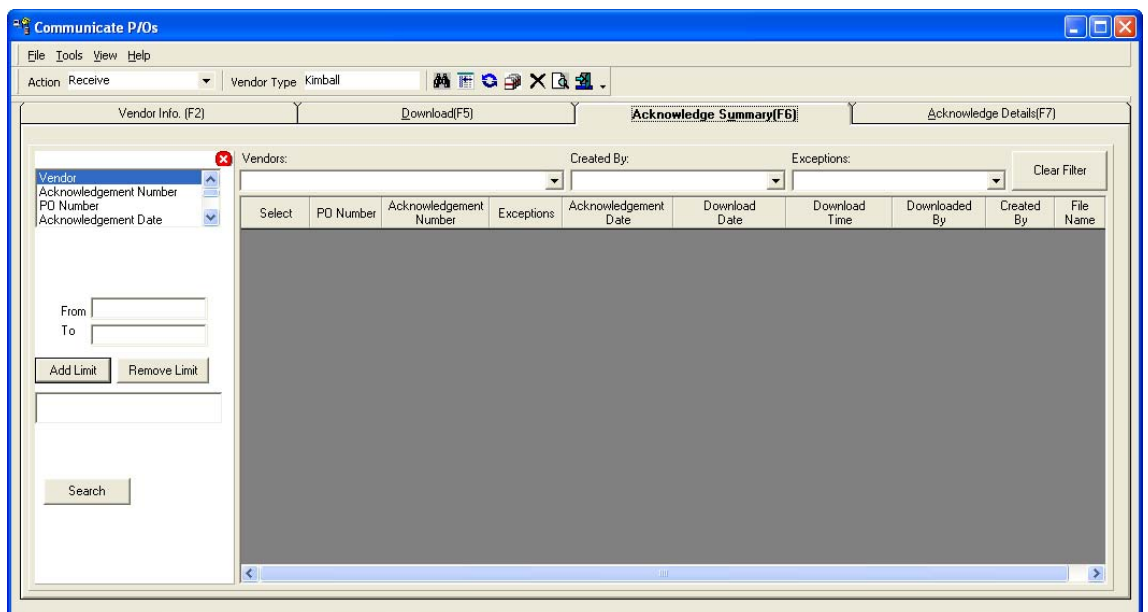




- Click the Choose Fields to Display  button. The Select Fields dialog box opens. Only the fields that you select are displayed on the grid below. You can sort and move the rows using the mouse. You can select the following fields to display:
 - PO Number
 - Acknowledgment Number
 - Exceptions
 - Acknowledgment Date
 - Download Date
 - Download Time
 - Downloaded By
 - Created By
 - File Name.

Figure 7: The Acknowledgment Search Function



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- Click the Reprocess icon  to reprocess selected acknowledgments.
- Click the Update icon  to update the purchase orders from the selected acknowledgments. The purchase order is updated from the acknowledgment's ship date and acknowledgment number.
- Click Delete Selected  to delete the selected acknowledgments or right click and select Delete Selected. Enter the password and all selected acknowledgments are deleted.
- Click the Print Acknowledgments  button to preview the grid in a new window. The information appears as a screen print of the grid and not as a separate report.


Filtering Acknowledgment Summary Information

You can filter the results in the Acknowledgment Summary (F6) tab using the boxes above the grid. Only results already in the grid are filtered. Select a blank line to clear a particular filter or click Clear All to clear all filters. You can filter by the following options:

- Vendors: If a Comm Type is selected on the Vendor Info Tab, all the vendors for that Comm Type show up in the box. If a vendor row was selected, just that vendor shows up in the box.
- Created By: The user can use this box to show all acknowledgments created by a specific user.
- Exceptions: You can choose to show only acknowledgments with exceptions, only acknowledgments with no exceptions, or only those where the P/O was not found.

Viewing Acknowledgment Details

The Acknowledge Details (F7) tab shows details for all acknowledgments selected in the Acknowledge Summary Tab. See Figure 8. The following options allow you to navigate this tab:

- Click the Choose Fields to Display  button. The Select Fields dialog box opens. Only the fields that you select are displayed on the grid below. You can sort and move the rows using your mouse. You can select the following fields to display:
 - PO Number
 - Acknowledgment Number
 - Item Number
 - Furniture Company

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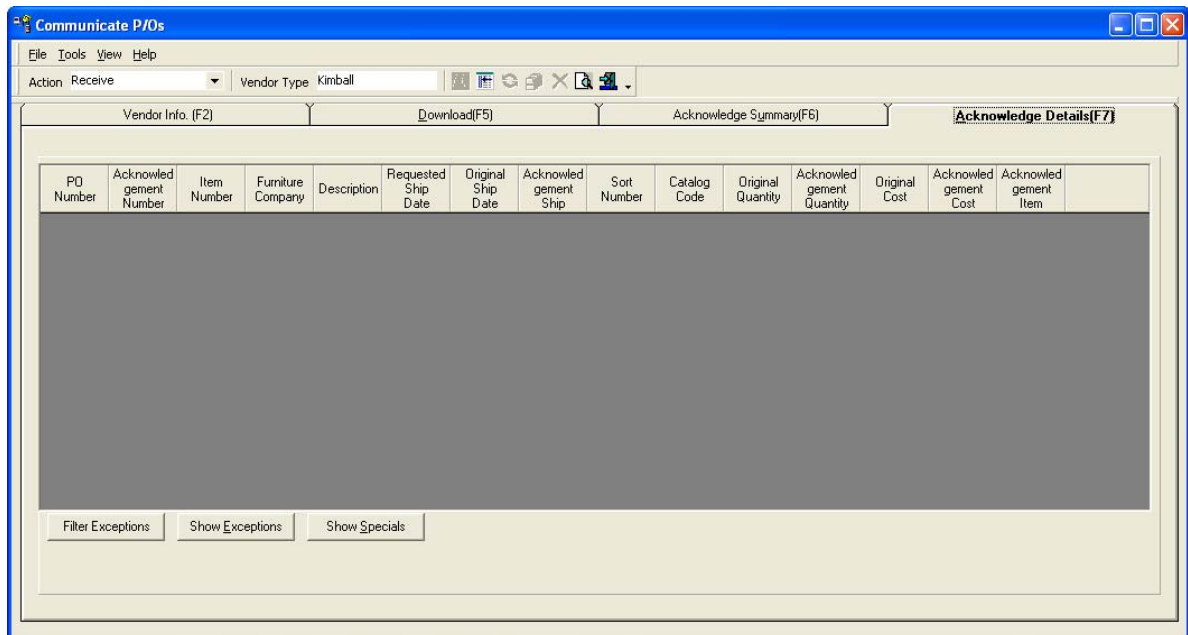
- Description
 - Requested Ship Date
 - Original Ship Date
 - Acknowledgment Ship Date
 - Short Number
 - Catalog Code
 - Original Quantity
 - Acknowledgment Quantity
 - Original Cost
 - Acknowledgment Cost
 - Acknowledgment Item
 - CurrentSort
 - SortKey.
- Click the Print Acknowledgments  button to preview the grid in a new window. The information appears as a screen print of the grid and not as a separate report.

Figure 8: The Acknowledge Details (F7) Tab



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- Click Filter Exceptions. The filter exceptions dialog box opens. Click All Exceptions to select all the acknowledgments with exceptions or Show All to select all acknowledgments regardless of exception status. To show specific exceptions use the check boxes to select from the following exceptions (you can select as many as necessary):
 - Purchase Order Not Found
 - Item Not Found on P/O
 - Item Number Discrepancy
 - Cost Discrepancy
 - Quantity Discrepancy
 - Ship Date Discrepancy
 - Option Number Discrepancy
 - Line Already Processed
 - Acknowledgment Number Set
 - Invalid Ticket Status
 - Item Already Processed.
- Click Show Exceptions to display the exceptions associated with the line item. Click Hide Exceptions to hide these exceptions.
- Click Show Specials to display the specials associated with the line item. Click Hide Specials to hide these specials.