



# *Customer Xtensions*



eCommerce Industries, Inc.



June 2007 Item # H-CUSX

## Contents

<b>About Ensite Xtensions .....</b>	<b>3</b>
<b>Advanced Contracts .....</b>	<b>3</b>
<b>Customer Evaluation .....</b>	<b>8</b>
Using Customer Evaluation .....	9
Viewing Customer Evaluation in Order Entry .....	10

## About Ensite Xtensions

Ensite Xtensions are features to enhance your Ensite Pro system. These features are not included in all software packages. They may require authorization, either individually or as a group.

There are Xtensions available for Customers, G/L, Distribution, Workflow, E-commerce, Line of Business, Contract Office Furniture, and Office Machines and Equipment.

This document details Customer Xtensions. These include Advanced Contracts and Customer Evaluation.

## Advanced Contracts

Using Ensite Pro, you can assign a customer up to four different contracts. You set up contracts in the (ET) Inventory Contract Price screen and assign each one a contract number. You can then assign each customer four different contracts using the Contracts fields in the Customer database.

Ensite Xtensions users have expanded customer contract capabilities. You can assign a customer or a customer's departmental account as many contracts as needed. You can also assign groups of customers to a contract number. Also, now you can create a new contract, then assign a customer to that contract. Previously, you could only assign contracts to customers.

---

**Note:** These expanded contract capabilities work with fixed and flexible contracts, not specialty contracts.

---

**Figure 1:**  
New Fields in  
the (ET) Screen

```

08:25:31      (ET) INVENTORY CONTRACT PRICE REV. (11/08/XX)      12/03/01
ACTION [ ] (A=Add C=Chg D=Del E=Date I=Inq F=Fig S=Sub X=Xerox M=Mass Add
L=Line Del T=Fig Type Chg B=Back to E)      Prices O/N/A ?_ By Item Y/N ?_
Customer #_____ Dept:___ To #_____ :___ Contract # :__ To :__
FIxed/Flexible I/L : Specialty : Cost :_ List :_ Gross% .00 Disc.% .00
-----
Dates / / To / / Set Cost : Set List : Desc.
Item Number Co. Description Unit List G-% D-% Contract Qty
-----

```

## Customer Xtensions

---

*Specialty contracts offer a specific price on all inventory items or on selected groups of items.*

---

The Customer # and Dept fields in the (ET) screen, shown in Figure 1, let you assign a contract to a group of customers, a specific customer, or a customer that has yet to be created in the Customer database.

There are also a few slight changes when assigning contracts. These affect both Ensite Pro and Ensite Xtensions users. First, you can choose the contract default type by setting the Contracts Default Category parameter in the (LE1) screen. This lets you customize the (ET) screen so that the Fixed/Flexible field defaults to the contract type you use most.

---

*A fixed price contract guarantees a particular price on specific items.*

---

The second change affects the way you assign specialty contracts. Previously when you assigned the contract number, the first character you entered had to be a symbol, for example, %, !, \$ or #. This signaled you were setting up a specialty contract. The new Specialty Type prompt in the (ET) screen lets you enter the specialty symbol. Since you can assign the specialty symbol when the prompt appears, you can use the Contract # field to specify a specialty contract number of up to two alphanumeric characters instead of one. This greatly increases the number of specialty contracts you can have.

---

*Existing contracts are not changed. The Customer # field is blank for all existing contracts.*

---

In addition, the way a fixed contract's best price is determined has also been slightly modified. For advanced contracts, the Customer # and Dept fields in the (ET) screen are searched first, the Customer # field in the (ET) screen are searched second, and the Group field in the (AQ) screen is searched next. If a price is found on a fixed contract, the search stops. These fields are searched before the Contracts fields in the Order Entry Record of the (A) screen or Customer Order Entry tab.

To set up contracts in the (ET) screen:

- 1 Go to the (ET) screen and select the [A] Add action code.

---

**Note:** Depending on how your parameters are set, additional prompts and messages may appear.

---

- 2 At the Cost To Use prompt, press Enter to accept the default cost or enter the cost for this contract.
- 3 If the Allow Contract Dates By Line field in the (LE1) screen is set to Y, the Set Dates By Line prompt appears. Press Enter to set the effective contract dates for each individual line item, or type N if you do not want to set contract dates for each line item.
- 4 At the Specialty Type prompt, enter the type of specialty contract you want to set up. For example, type + (plus sign) to set up a restrictive contract, or \* (asterisk) to set up a limit contract. If you are not creating a specialty contract, press Enter and leave this prompt blank.

- 5 The cursor moves to the Customer # field. You can use this field and the Dept field to enter the customer account number and department. This is the customer to whom you want this contract to apply. You can also enter a user-defined customer group code. You set up customer group codes in the Group field in the (AQ) screen and Customer Master tab.
- If you do not want to specify a customer account number or group code for this contract, press Enter. The cursor moves to the Contract # field.
  - To specify a customer account number, enter the number in the Customer # field and press Tab. When the cursor moves to the Dept field, you can specify the customer department by which you want to limit this contract. If you do not want to specify a department number, press Tab and leave this field blank. The customer that most closely matches the one you specified is displayed. Type Y at the Correct Record prompt. The cursor moves to the Contract # field.
  - To specify a user-defined group customer code, enter the code in the Customer # field and press Enter. The customer that most closely matches the one you specified displays, along with the Correct Record prompt. Type X to indicate you are setting up a contract using a group code. The Customer Not On File message appears, and the cursor moves to the Contract # field.

---

**Note:** You can also set up contracts for customers not yet entered in the system. When the Correct Record prompt appears, type X.

---

- 6 In the Contract # field, enter the contract number.
- To add items to an existing contract, enter the contract number. If you enter the number of an existing contract, the dates and description for that contract display.
  - To create a new contract, specify a unique contract number. The number you enter links this contract to the customer's account number and department, or the customer group code you specified, if any. Enter the contract number, 10, for example. (You must enter a contract number.) At the Create New Contract prompt, type Y.
- 7 You can use the Gross % and Disc % fields to set the default gross profit margin or discount percentage for a contract. If you do, the contract selling price is calculated, based on the gross profit or discount percentage you enter. However, you can override this figure as you enter each item on the contract.

---

**Note:** If you are adding items to an existing contract, changing the gross profit or discount percentage changes the default contract price for new items that you add, but it does not affect items that are already on the contract.

---

- If do not want to set a default gross profit or discount percentage, tab past the Gross % and Disc % fields.
- To set the default gross profit percentage, enter the percentage in the Gross % field and Tab past the Disc % field. The percentage you enter and the cost you chose at the Cost To Use prompt are used to calculate the contract price.
- To set the default discount from list price, tab past the Gross % field, and enter the discount percent in the Disc % field. The percentage you enter and the list price you chose at the List To Use prompt are used to calculate the contract price.

**Note:** You can choose either gross margin *or* discount percentage, but not both.

- 8 At the Fixed or Flexible prompt, type I to create a fixed contract, or type L to create a flexible contract. The default for this field is set in the Contracts Default Category field of the (LE1) screen, as shown in Figure 2.
- 9 Use the Dates and corresponding To fields to enter a beginning and ending date for this contract. The beginning date is the date the contract goes into effect. The ending date is the date it expires. The dates you enter do not apply to the contract price unless the system date falls within this range. If you leave these fields blank, the contract goes into effect immediately and there is no expiration date.
- 10 In the Desc field, enter a description that helps you identify this contract.

**Figure 2: Setting the Contracts Default Category in the (LE1) Screen**

```

09:40:48                (LE1) Inventory Parameters (Con't.)                03/08/02
=====
Action [I] (C=Change, I=Inquiry)   G/L Location [ 1 ]
=====
Update Manual "E" Screen Item # Changes to Other Files during "MA" Y/N/X ?X
Which Aliases to Check in Order Entry ? [123] (1=Customer, 2=Common, 3=Print)
Class Range to Build History From [1] To [Z] + Additional Classes [      ]
Class Range to Force Ship (O/E) From [ ] To [ ] + Additional Classes [      ]
Force Ship on Ned Y/N ?                Inventory Pulling Location ?
Companion Locations From ? 2 To ?99      Companion Locations ? [ , , , ]
Default to Loc 1 For "I-COLUMNS" Y/N ?   Default to Loc 1 For "I-PRICE" Y/N ?
Update "I-AUX" Sales For Inventory Location (Not G/L Location) Y/N ?
Multiple Bin Pulling Codes: First [A] to [H], Last [I] to [Z], Never [ ] to [ ]
Amount to Increment Bom Sequence Number by [ 1 ] (1 - 99, Blank = 10)
Cost for Col. Price Disp. ?M (A=Avg,M=Mfg,L=Mfg Lst,W=Whl,X=Whl Lst,P=Purch Ven)
Display GP% on $ Type Col. Y/N ?Y        Track Drop Ship Sold Quantities Y/N ?
CONTRACTS: Default Category I/L/N ?      (I=Fixed, L=Flexible, N=Sale Flyer Range)
Apply Weight Rate to Cost When Using WHL, MFG or FUTURE Y/N ?
Apply Up Cost % to Cost Y/N ?            Apply Con % to List Y/N ?
Prompt to Save Price Changes Y/N/X ?     Cost To Use W/M/F/L/A/P/2-9 ?
Display Cost Window Y/N ?Y               Lower Price when Refiguring Y/N/P ?
Allow Contract Dates by Line Y/N ?Y      Other Lists to Discount Price Y/N ?Y
Default List W/M/L/2-9 ?W                "ET" Passwords: Update ?DDMS Set Cost/List ?DDMS
    
```

- 11 At the Cost Set In Contract prompt, specify whether you want to manually set the cost for items on the contract.
  - Y Set cost for each item on the contract.
  - N Do not set cost for each item on the contract.
  - X Set cost for each item on the contract, but do not let this cost affect order entry. This option lets you use the cost in purchasing.
- 12 At the Figure Contract to 3 Decimal Places prompt, type Y to figure the contract price to three decimal places, 21.886, for example. Type N to figure the contract price to two decimal places, 21.87, for example.
- 13 When the cursor moves to the Item field, retrieve the first item you want to place on this contract. You can retrieve items by item number or press Tab to enter the item description. After you enter the item number or description, press Enter.
- 14 At the Is This the Item Record prompt, type Y.
- 15 If you specified Y at the Set Dates By Line prompt, the beginning and ending effective date fields for this item display. Press Tab to accept the displayed dates, or enter the beginning and ending dates for the item. At the Correct Dates prompt, type Y.
- 16 The Minimum Buy Quantity prompt is shown in Figure 3. If there is a minimum quantity that a customer must order to receive the price specified in this line of the contract, enter the quantity. If you do not want to enter a minimum quantity, press Enter.

**Figure 3:**  
**Specifying a**  
**Minimum Buy**  
**Quantity**

```

14:37:49      (ET) INVENTORY CONTRACT PRICE REV. (11/30/XX)      12/14/01
ACTION [A] (A=Add C=Chg D=Del E=Date I=Inq F=Fig S=Sub X=Xerox M=Mass Add
L=Line Del T=Fig Type Chg B=Back to E)      Prices O/N/A ?_ By Item Y/N ?_
Customer #      12 Dept:      To #      :      Contract # :A1 To :
FIxed/Flexible I/L :L Specialty : Cost :W List :_ Gross% .00 Disc.% .00
-----
Dates 12/14/01 To 99/99/99 Set Cost :N Set List : Desc. FLEXIBLE CONTRACT
Item Number    Co. Description      Unit      List G-% D-% Contract Qty
-----
0              SEL MAILER,JEFFY PADDED, .EA      58.980
    
```

Minimum Buy Quantity [    ]


## Customer Xtensions

- 17 The cursor moves to the G-% field. In the G-%, D-%, or Contract fields, you set the item's contract price.
  - To accept the displayed contract selling price, tab to the Qty field. Go to **Step 18**.
  - To set the contract price according to gross profit, enter the percentage in the G-% field. For example, if you want to make a gross profit of 5 %, you would enter 5.00.
  - To set the contract price according to discount percentage, tab to the D-% field and enter the discount percentage for the item. For example, if you want to specify a discount percentage of 2 %, you would enter 2.00.
  - To manually enter a contract price, press Tab until the cursor moves to the Contract field and enter the contract price for this item. For example, if you want to charge \$5.50 for this item, enter 5.50. Press Enter. The Set Figure Type prompt appears. This prompt lets you indicate which price field you want to mark with an asterisk, indicating that it is the figure type for this item. To mark the D-% (discount percentage) field as the figure type for this item, type **D**. To mark the G-% (gross percentage) field as the figure type for this item, type **G**. To mark the Contract (contract price) field as the figure type for this item, type **\$**.
- 18 In the Qty field, you can set up several quantity breaks by creating several lines for a single item, and by specifying a different price for each minimum quantity. For example, you might place file folders on a contract at list price, and leave the Qty field blank. On the next line, you offer a 10% discount for the file folders, with a minimum order of six boxes.
- 19 The cursor returns to the Item Number field. You can continue to add as many line items to this contract as necessary.

## Customer Evaluation

The Customer Evaluation dialog box allows you to view the customer's complete buying history quickly and easily. Viewing this screen allows you to evaluate your customer in every aspect of their buying history from sales to delivery. You can view pie charts and graphs by customer sales, categories, service, or credit.



You can access the Customer Evaluation dialog box from the Customer database or Order Entry.

- From the Customer database menu, click . You can also click View then select Evaluation or type **Ctrl + F11**.

- In Order Entry, click Order Entry from the menu then select Customer Evaluation. You can also type **Ctrl + F11**.

In the Customer Evaluation dialog box, simply click the drop down arrow under each section and select the information that you want to view. You can also click the buttons at the bottom of the box to select Sales, Categories, Service, or Credit. See Figure 4.

## Using Customer Evaluation

- 1 Double-click  .
- 2 In the Customer database, select the customer for which you want to view pie charts and graphs.
- 3 Once you've selected the customer, click  .

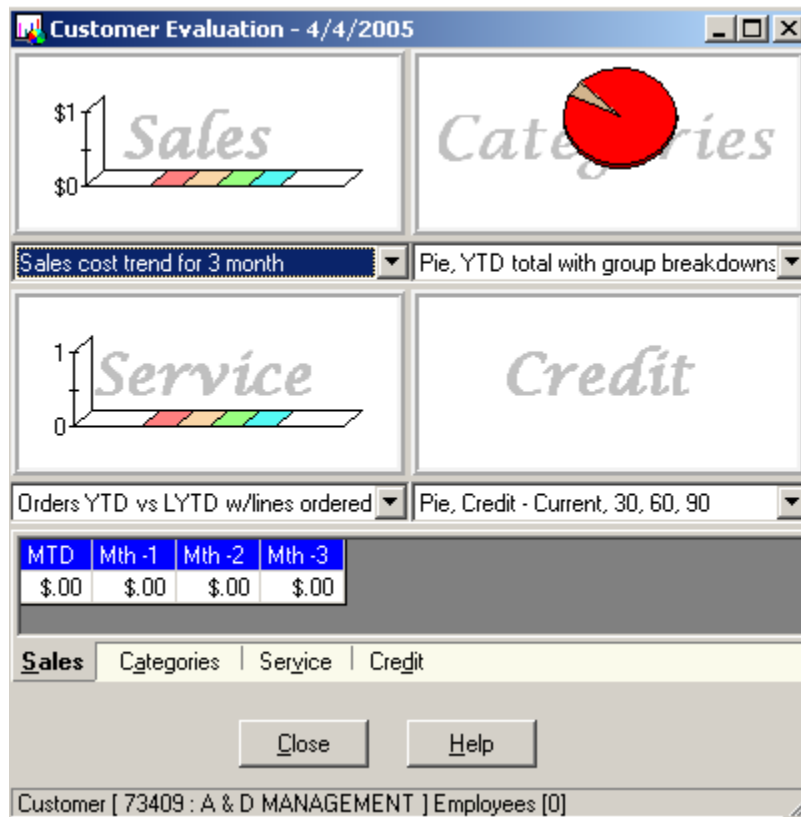


Figure 4: The Customer Evaluation Dialog Box

## Customer Xtensions


- 4 In the Customer Evaluation dialog box, simply click the drop down arrow under each section and select the information that you want to view. You can also click the buttons at the bottom of the box to select Sales, Categories, Service, or Credit.

When you click the down arrow on each section, the graph changes accordingly. For example, the first box displays sales information. Click the down arrow to select to view Sales vs Budget 12 months. The graph changes and the dollar figures for the graph are shown at the bottom of the dialog box.

You can also view information by clicking on the tabs at the bottom of the dialog box. Click Credit, for example, to view Current, 30, 60, and 90 day figures. This information is for display only.

- 5 When you finish viewing information, close this dialog box. The system returns to the Customer database.

### Viewing Customer Evaluation in Order Entry

- 1 From the Order Entry window, click the Global tab.
- 2 Select the customer for which you want to view customer evaluation.
- 3 Click . The Customer Evaluation dialog box opens.
- 4 To view different information, click the down arrow in the Sales, Category, Service, or Credit section and click the information you want to view. This information is for display only.
- 5 When you finish viewing information, close the Customer Evaluation dialog box. The cursor returns to the Order Entry Global tab.