

Introduction

Welcome to this beginner’s guide to the parameter settings and profile settings for DDMS Office Furniture Edition. Planning to the Office Furniture edition involves:

- Setting up your (LGØ) Order Entry Parameters and (LGC1) Furniture Additional Parameters.
- Setting up your project defaults in Furniture Profile Settings within furniture order entry.
- Setting up your furniture terminals in the (L1) Terminal Settings screen.
- Setting up past due days, freight, and uncatalogued item defaults in (LGØ) Order Entry Parameters.
- Setting up the non-taxable department and uncatalogued item cost basis in (LG3) Order Entry Pricing Parameters.
- Setting up automatic queries in (LG5) Additional Order Entry Parameters.
- Setting up returns, credits, fees, and passwords in (LGB) Credit Order Entry Parameters.

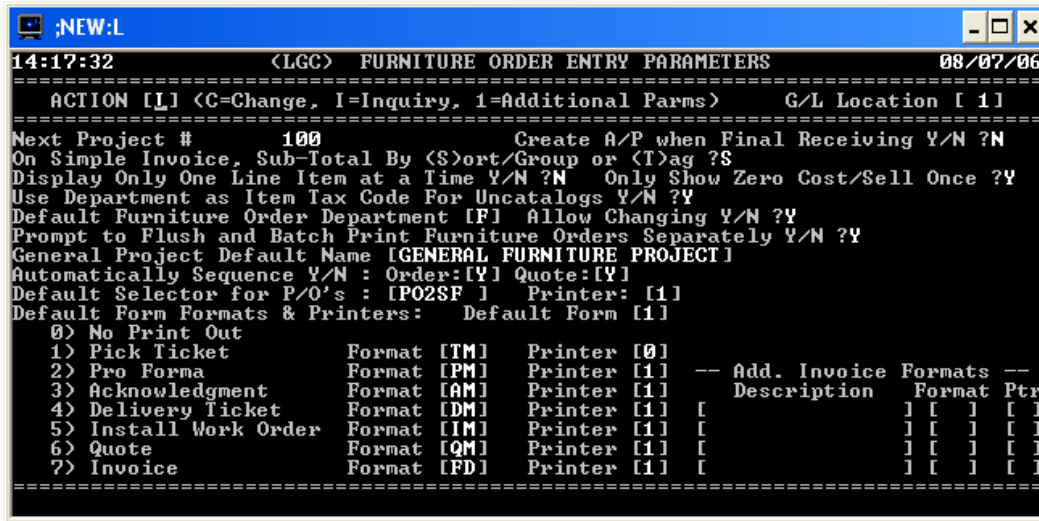
Note: *Parameter* settings are saved at the server, and therefore apply to the entire Ensite Pro system in the location specified. *Profile* settings typically apply to the individual “order taker (OT)” salesperson, and are saved per user login.

For additional details, see your online help.

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(LGC) Furniture Order Entry Parameters



Next Project #: When you create a new project, if you let the system assign the number, the system uses the number in this field. Each time you let the system assign a project number, the number in this field increases by one. *Field Size: 10 characters, numeric only.*

Only Show Zero Cost/Sell Once: You can use this field to specify that the system prompt you when a furniture order has no cost or sell price. If you set this field to Y, the system displays the prompt when you final-verify a furniture order.

Default Furniture Order Department: In this field, specify the default department for furniture items. This department will be assigned to uncatalogued items, whether placed on the order manually or imported through a SIF file, when the following conditions are met:

- o If there is no department assigned to the vendor alias or there is no vendor alias, and
- o If the Default Item Department in the Furniture Profile Settings is blank.

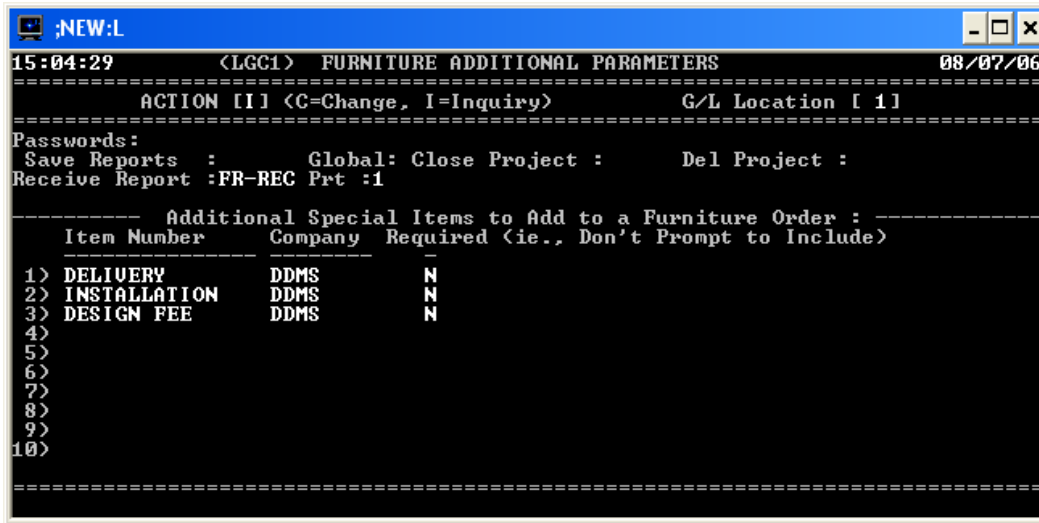
General Project Default Name: If you have a furniture order that you do not want to assign to a project, such as a one-time purchase, you may not want to assign a project number to the order. In this case, you can assign the order to a general project. *Field Size: 25 characters, alpha-numeric.*

Automatically Sequence Order & Quote: When you are placing items on a furniture order or a quote, you can have the system automatically assign sequential line sorts to the items. If you answer “Y” for yes, the system assigns line numbers to the items as you enter them on the order, and sorts them by line number.

Default Selector for P/O's & Printer: In the Default Selector for P/O's field, enter the selector that you want to use when printing purchase orders. In the Printer field, enter the printer that you want the purchase order to print on.

Default Form Formats & Printers: Any of the seven forms (0-No Print Out, 1-Pick Ticket, 2-Proforma, 3-Acknowledgment, 4-Delivery Ticket, 5-Install Work Order, 6-Quote, 7-Invoice) can print when you complete an order. In the Default Form field, enter the default form by entering the number that corresponds to the form you want to use as the default.

(LGC1) Furniture Additional Parameters



Receive Report: You can use the Receive Report field to specify the format you want the system to use for the report. You can enter up to six characters in this field.

Additional Special Items to Add to a Furniture Order: There are a number of standard costs that you add on to furniture orders when you create an order, such as labor, design, installation, freight, and delivery. You can list up to 10 of these costs in this screen, and the system will prompt you to add each of these costs to a furniture order when you end the order. If you specify **Y** in the Required field in this screen for a cost, the system will automatically add that cost to each furniture order without prompting you. You can specify both uncatalogued and cataloged items in the Item Number fields.

Furniture Profile Settings: General Tab

In the **Furniture Order Entry** window's **Global** Tab, click on the Furniture Profile Settings button to open the Furniture Profile Settings window.

In the **General** tab, set up the **Project Pype** and **Default Options**:

General Project: Select this option to specify that the system default to create a general project when you begin a furniture order.

Existing Project: Select this option to specify that the system default to select an existing project when you begin a furniture order. If you select this option, after you end an order or quote, the system automatically opens the Furniture Project Browse dialog box so you can select an existing project.

New Project: Select this option to specify that the system default to create a new project when you begin a furniture order. If you select this option, after you end an order or quote, the system automatically opens the Furniture New Project dialog box so you can assign the new project number and project description.

Bill On Line: Click this check box to have this order default to an invoice when it is ended.

Build P/O At End of Order: Check this box if you want the system to default to build the P/O when the order is ended in the Order Totals tab. If you select this option, the system automatically checks the Build P/O box in the Order Totals tab. This option allows you to place the items on the P/O without being prompted to individually add each one to the P/O.

The screenshot shows the 'Furniture Profile Settings' dialog box with the 'General' tab selected. The 'Project Type' section has three radio buttons: 'General Project', 'Existing Project', and 'New Project' (which is selected). The 'Posting Dates' section has two text boxes: 'P/O Ship' and 'A/R Invoice'. The 'Default Options' section has four checkboxes: 'Bill On Line' (unchecked), 'Build P/O At End Of Order' (checked), 'Build P/O During Order' (unchecked), and 'Build P/O in Change if Lines Added' (unchecked). There is also a 'Default Item Dept.' text box. The 'Dates' section has three text boxes: 'Customer Due', 'Est. Delivery', and 'Est. Install'. The 'View Options' section has three checkboxes: 'Tag Info' (checked), 'Dates' (checked), and 'Sort/Group Desc.' (unchecked). The 'Sif Options' section has one checkbox: 'Exclude "Option =" on Option Items' (checked). At the bottom, there are four buttons: 'Reset', 'OK', 'Save', and 'Cancel'.

Build P/O During Order: Check this box to build a purchase order while placing this furniture order. If you select this option, the system prompts you to add each item to the P/O individually. This can be time consuming for large purchase orders since the system prompts for each item.

Build P/O in Change if Lines Added: If this box is checked and you add new line items in Furniture Change mode either by manually adding an item or by importing a SIF file, the system automatically opens the Order Totals tab and marks the Build P/O check box to build the purchase order. This feature ensures that purchase orders are built whenever new items are added to existing furniture orders.

Default Item Department: In this field, specify the default department for furniture items. This department will be assigned to furniture items, whether placed on the order manually or imported through a SIF file, when there is no department assigned to the vendor alias or there is no vendor alias.

Customer Due: Enter when the order is due to the customer using the mm/dd/yy format.

Est Delivery: Enter the estimated date the order will be delivered using the mm/dd/yy format.

Est Install: Click this box to enter the estimated installation date for this order. Enter the estimated date the items will be installed using the mm/dd/yy format.

Exclude “Option =” on Option Items: When you create a furniture order and release a SIF file, you can use this check box to specify that the system excludes the word Option. This word previously appeared in front of all option lines on the order.

Furniture Profile Settings: P/O Tab

Next P/O #: If you select this option, the system automatically assigns the next sequential number and displays it in the P/O Number box in the Furniture Purchase Order Info dialog box.

Ticket/MAC P/O#: Since a single order can have multiple P/Os, you can check this box to specify that the system default to use a combination of the pick ticket number and the vendor's MAC code (manufacturer's code), followed by an alphanumeric digit as the purchase order number. Using this combination helps the receiving department quickly match the purchase order directly to the ticket (sales order).

Customer Shipto: If you select the Customer Shipto as the default shipto type, the system uses the shipto address from the pick ticket (sales order) as the default shipto address when creating a purchase order.

Dealer Shipto: If you select the Dealer Shipto as the default shipto type, the system displays the dealer name and address in the Dealer Shipto block and uses this address as the default shipto address when creating a purchase order. Changes made in the Dealer Shipto block will be reflected on the default shipto address when building a P/O but will not display elsewhere.

Vendor Shipto: You might want to enter a vendor's address if the item is to be shipped to the vendor's site. Suppose it is a chair that needs to be covered in specific fabric, for example. In this case, you would ship the chair directly to the vendor who is upholstering the chair.

Furniture Profile Settings: Printing Tab

Printing Defaults: Click any combination of the check boxes in the Furniture Profile Settings Printing tab to specify which formats you want to print when you end the order.

You can use the corresponding Format box to specify the format you want to use. In addition, the Printer box lets you specify the logical name of the printer where you want each format to print.

Note: If you leave the format and/or printer fields blank, the system defaults to the information set in the Format and Printer boxes in the (LGC) Furniture Order Entry Parameters screen.

Printing Defaults	Format	Printer
<input checked="" type="checkbox"/> Pick Ticket	TM	1
<input type="checkbox"/> Pro Forma		
<input type="checkbox"/> Quote		
<input checked="" type="checkbox"/> Acknowledgment		
<input type="checkbox"/> Install Ticket		
<input type="checkbox"/> Delivery Ticket		
<input type="checkbox"/> Invoice		
<input checked="" type="checkbox"/> Purchase Order	PO2SF	1
<input checked="" type="checkbox"/> Receiving Report		

(L1) Terminal Settings

```

;NEW:L
15:57:57          <L1>  TERMINAL/TICKET/PRINTER PARAMETERS          08/07/06
=====
ACTION [I] <C=CHANGE, I=INQUIRY, H=HELP, W=WINDOWS, L=LASER, P=O/E PRINTERS>
=====
Starting Terminal to have Order Entry as Master [TE]
KEY:  AHD=Ahead, ST.=Status, ONL=Print online, P=Printer number
LOG.  TER.  LOC.  AHD  TYPE  ST.  ONL  FORM  P  SLIP  LABELS  INVOICES  OPTION
      [T0] [ 1] [Y]  [ ]  [6]  [Y]  [4T]  1]  [ ]  [ ]  [Y]  [4I]  1]  [BT ]
2 [T1] [ 1] [Y]  [F]  [6]  [Y]  [TM]  1]  [ ]  [ ]  [Y]  [FD]  1]  [  ]
3 [T2] [ 1] [Y]  [Z]  [B]  [Y]  [4T]  1]  [ ]  [ ]  [Y]  [4I]  1]  [B  ]
4 [T3] [ 1] [Y]  [P]  [6]  [Y]  [4T]  1]  [ ]  [ ]  [Y]  [4I]  1]  [B  ]
5 [T4] [ 1] [Y]  [ ]  [8]  [Y]  [4T]  1]  [ ]  [ ]  [Y]  [4I]  1]  [B  ]
6 [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]
7 [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]
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14 [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]
15 [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]

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O/E Type: This field lets you specify the type of order entry application the terminal is set up for. Specify F to default to Furniture Order Entry.

(LG0) Order Entry Parameters

```

;NEW:L
16:00:09          <LG0> ORDER ENTRY PARAMETERS          08/07/06
=====
ACTION [L] <C=Change, I=Inquiry>   G/L Location [ 1 ]
=====
Invoice # 10388          Cash Receipt #          Quote # 113
Serial # 1000          Serial Prob. # 1000
Pricing Info ?Y Shipto Info ?Y A/R Info ?Y Pay Code Msg ?Y Pastdue Days #30
Set Commission Code Y/N ?N Archive Specials Y/N ?Y Freight Default Dept ?N
Use Billto as Shipto Y/N ?Y No Partial Ships Y/N ? Only Print Assemblies ?
Have Page# & Vendor Display Match the Prefix & Carton Display Y/N ?
Allow Auto Verifying with Batch Printing <"TR-U"> Y/N ?Y All Shipped Y/N ?
Keep All PICK Fields in JOUR-S Y/N ?Y Build Sales Journal Item Index Y/N ?Y
Allow Sequence on "Pick Nbr" Orders Y/N ? Build Debit Memo Data File Y/N ?
PASSWORDS:  Drawer ?OPEN Delete ?DDMS Reindex ?DDMS
            Pick Nbr ?DAUE Change Loc ?LOC Credits ?
UNCATALOGS : Not allowed on remotes Y/N ? Default Dept ?9 Add-on -UC Y/N ?Y
BACKORDER PRINT : <All Items or Flushed> Future Shipping Y/N/A ?N
            Print Code ?A <A=Uen,B=Bin,N=Uen,O=Bin> No Print From ?A To ?Z Status 8 ?
            Split to a Separate Line Partial Backorders Y/N ?Y Specials B/S/X ?
            Always Print Pick Tickets in Bin Order Y/N/Z ? <Z=Invoices and Tickets>
TRANSFERS : A/R Master Y/N ?N A/R Batch Y/N ?Y Sales Journal Y/N ?Y
            A/R Location same as Transfer From Location Y/N ?
SHIPPING LABELS : Print Company Logo Y/N ?Y Customer Logo Y/N ?N
    
```

Past Due Days: Enter the number of days after which you consider an account to be past due. Valid entries in this field are 30, 60, and 90. (The default is 30.)

Freight Default Dept.: This field lets you enter a default sales department number for freight charges. When you verify an order, click the Add Freight button to add a freight charge. If you leave this field blank, it will default to department 1.

Uncatalogs Add-On -UC: This field lets you specify whether you want the suffix -UC to print after each uncataloged item on invoices and purchase orders.

Uncatalogs Default Dept: Specify the default item department that is assigned to uncataloged items. The default is 9. If you want the system to prompt you to specify an item department, enter a question mark (?) in this field.

(LG3) Order Entry Pricing Parameters

```

;NEW:L
16:07:06      (LG3) ORDER ENTRY PRICING PARAMETERS      08/07/06
=====
ACTION [L] <C=Change, I=Inquiry>   G/L Location [ 1 ]
=====
Sale Contracts From #95 To #99      Have Specialty Contracts Price like
Mask Cost 1-9/Y/N/L ?N              F=Flexible, X=Fixed, O=Fixed but
When No On-Hand, Use Average Cost as Overrides Flexible F/X/O ?O
  Actual Cost in P-Master Y/N ?      On Specialty Contracts, Set Cont. # Y/N ?
Set Price as Last Price if Lowest Y/N? Set "P.Cost" To "L.Cost" Y/N ?
Assortment Pricing Y/N ?Y          Apply Assortment Pricing to All Price Types Y/N ?
Contract Break Assortment Pricing Contracts : [ , , , , ] + [ ] to [ ]
Allow Cost Plus Over List Y/N ?N    Default to P. Ven Cost if no Mfg Cost ?Y
Tax Hold Discount Y/N ?N            Hold Disc on Auto Bill .0% Type: #
Item Tax Based on Price or Cost P/C ? Display Item Remarks in O/E Y/N/X ?
First Non-tax Dept ?J              Use Item SIC Field as a Tax District Y/N ?
Minimum Amount to Charge Tax On $    Per Invoice or Line I/L ?
Max Item Order Amount $             Max Item Order Qty #
Under Min. Gross Profit % Password ? Skip Min Margin on Cost Plus Y/N ?
UNCATALOGS : Cost %60.0            Cost Plus Y/N ?N          Discount Y/N ?N
Force Contract on Every Item ?      Prompt For Order Type ?    Re-stock Prompt ?
Put Buyer's List to Who Called Special ? Allow Changing Ship Quantity ?
Minimum Order: Amount $             Add On Dollar Amount $    Dept :Z
Charge Description :UNDER MINIMUM ORDER AMOUNT FEE   Auto Apply Y/N ?Y
  
```

First Non-tax Dept: On invoices for taxable customers, the system uses the item department to determine whether an item is taxable. This field lets you specify the first nontaxable department. If the department assigned to an item is lower than the first nontaxable item specified in this field, the item is taxed. If the department is the same or higher than the first nontaxable items specified in this field, the item is not taxed. If you leave this field blank, all departments are nontaxable.

Uncatalogs Cost %: This field is used to specify the percentage of the list price to be used as the cost of uncataloged items. The percentage entered here will be used if a cost is not entered at order entry.

(LG5) Additional Order Entry Parameters

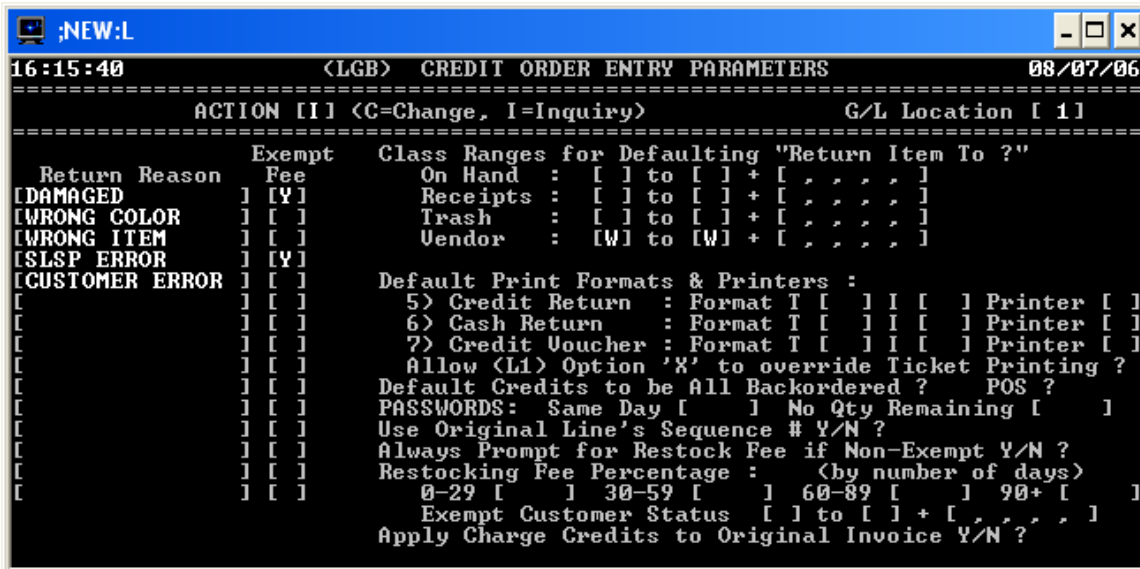
```

;NEW:L
16:12:14      <LG5>  ADDITIONAL ORDER ENTRY PARAMETERS      08/07/06
=====
ACTION [L] <C=Change, I=Inquiry>                          G/L Location [ 1 ]
=====
PASSWORDS: Uerify : Final :          Reverify :          Cost Chg :          Price Chg :
O/E Chg : Price Only :          Price/Cost :          Journal Functions :
Uoids :DDMS Print Uoids Y/N ?Y          Uendor Screen :
Print PrePay Credit Cards Orders Y/N ?Y          Use Super Index Y/N ?Y
Disp Cust. Rem. Y/N ?Y          Disp List on Query Y/N ?N          Disp Prin. Whl Page# Y/N ?
Display Quantity Breaks Y/N ?Y          Display On-Hand by Location Y/N ?Y
"Show Companion List" Default Y/N/A ?          Maximum Discount %
Default Prepay Due as 100% of Backorders          Non-Tax District Number #
Use Next Invoice # for Credits Y/N/X ?N          Order Taker From :          to :
Set Status if Adding New Customer Y/N ?          Display Laundry List Y/N/X/Z ?Y
Automatically Accept Alias Match Y/N ?          Force All Items to be B/O Y/N ?
Allow Adding New Bar Codes to the Alias File Y/N ?
Disable Pay on All PrePays Prompt Y/N ?          Price Check Format [ ] Printer [ ]
Require Authorization Code When Over Credit Limit Y/N ?Y          Password :DDMS
Don't Prompt Customer Over Credit Limit on Paycodes ? [ ]
Auto. Query When there is No Exact Match on Y/N : Customer ?Y Item ?Y
Force "Who Called" Special For Customer Status TM1 : [W] to [W] + [B. . . . ]
Dedicated On-Line Slip, Invoice, & Ticket Printers : [ ] to [ ] + [ . . . . ]
How Many Seconds to Wait Before Clearing Screen After Order #          <30=Default>
    
```

Auto. Query When There is No Exact Match on Customer: Normally, when you retrieve a customer in order entry, the system displays the customer that most closely matches the one you specified. If you set this field to Y, the system displays the Customer Query dialog box automatically when you enter a name that is not an exact match for a customer in your database.

Auto. Query When There is No Exact Match on Item: Normally, when you retrieve an item in order entry, the system displays the item that most closely matches the item you specified. If you set this field to Y, the system displays the Item Query dialog box when an exact match for the item you specified cannot be found.

(LGB) Credit Order Entry Parameters



Return Reason: This field lets you specify text that describes the most common reasons items are returned. You can specify up to 15 different reasons.

Exempt Fee: This field works in conjunction with the Return Reason field. The Exempt Fee field lets you specify whether customers will be charged a restocking fee, depending on the reason the item is being returned.

Default Credits to be All Backordered: This field lets you specify whether all credit returns automatically default to backorders, and is used primarily for the pick up of return merchandise.

PASSWORDS: Same Day: If you attempt to issue multiple credits for the same item on the same day on the same ticket, you will be prompted for this password. If you enter a password in this field, the prompt Same Day Credit Password will be displayed when you attempt to issue multiple credits.

PASSWORDS: No Qty Remaining: You can prevent credits from being issued for items that have been previously credited and there are no remaining quantities, or when a quantity greater than the original order amount is specified. If you specify a password in this field, and either of these scenarios occurs, the prompt No Remaining Quantity Password displays.

Restocking Fee Percentage: The restocking fee is based on a percentage of the item's sale price and the number of days the customer waits to return the merchandise. The restocking fee is added before tax is calculated.