Furniture O/E and Purchasing Fundamentals

ECi

ECi DDMS®

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Contents

DDMS Office Furniture Edition is an optional feature.

About Furniture

No matter what your needs, from creating quotes for potential customers, to setting and tracking goals for particular parts of your dealership operation, the DDMS Furniture Edition can help you accomplish them.

The application is a powerful and versatile tool that lets you effectively process and keep track of all your furniture orders. Because it's designed for the furniture dealer, it offers you the options you need to efficiently manage your business.

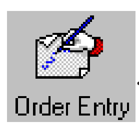
To get the most up-to-date documentation, read your online help. Online help is not only available as part of your software but is updated periodically on our web site. And remember when using the online help program, context-sensitive help is always at your fingertips. Simply place your cursor in the box and press F1.

Placing Orders With SIF File Imports

In addition to importing SIF files when creating orders, you can also import SIFs when changing existing orders.

Third party packages like 20-20 Worksheet or Project-Spec are known as specification or specifier software. They simplify the process of developing specifications for furniture orders. You can easily import the resulting quotes or orders directly into the Furniture application through a SIF file. This application imports standard SIF format specification files and releases them to orders. You can use any specifier program that supports the SIF format and still send your furniture sales through the same order and accounting flow as other transactions.

Since the SIF file is a copy of the original document, you should delete it from your SIF folder once the order is invoiced. This keeps the files stored in the SIF folder up-to-date and not cluttered with outdated files. If necessary, you can always export the file again using the original document.

1 Double-click 

. If the Order Style list box does not default to Furniture, click the down arrow and click Furniture.

2 If the Action Code list box does not default to order, click the down arrow in the Action Code list box and click Order.

Selecting the Project

3 Decide the type of project to create. You can choose from the following

General Project: Click this check box to use a general project number for any orders not to assign to a project, such as a one time purchase. You cannot use general projects when creating multiple tickets. When you use a general project number, the customer's account number is assigned as the project number. If there is a name set in the General Project Default Name field in the (LGC) Furniture Order Entry Parameters screen, the text from this field is assigned as the project's name. You can take the order directly to an invoice and the order flows and is tracked in the same way as other furniture orders.

New Project: Click the New Project check box to add to an order. The Furniture New Project dialog box opens, as shown in Figure 1. This box lets you assign a project number and a project description to the project you're creating. In the Number box, you can assign a project number or automatically assign the next sequential number set in the Next Project field in the (LGC) screen. To manually assign a number, enter the project number in the Number box. You can enter up to 10 alphanumeric characters in this box. To automatically assign the next sequential number, click the Assign Next Project Number check box. In the Description box, enter a descriptive name for the project. You can enter up to 30 alphanumeric characters in this box. When you finish entering new project information, click OK.

You can specify a project as speculative in the Project Overview window.

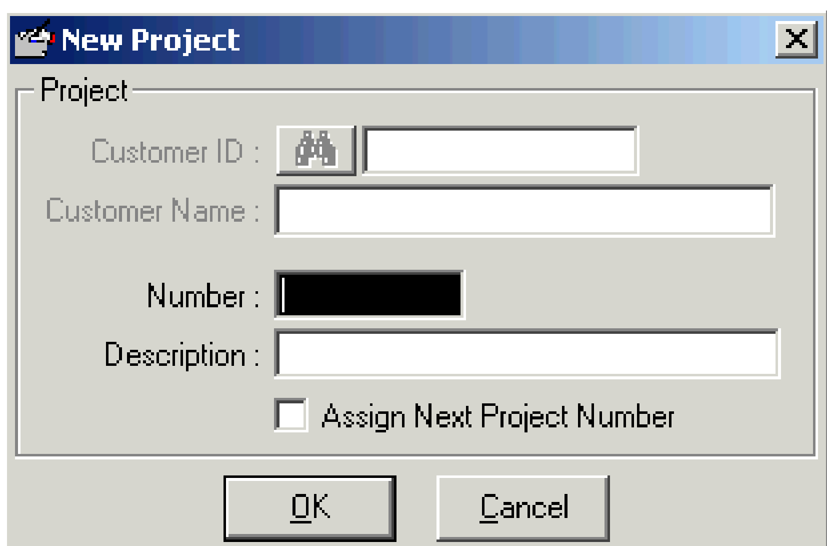
Existing Project: Click the Existing Project check box to select it. The Project Query dialog box opens. This box displays the speculative project number, project number, project description, the customer assigned to the project, the order taker who placed the project, the salesperson assigned to the project, and the date the project was created. You can scroll through the list of projects until the project to select appears. At that point, click the project to highlight it, and click OK.

Selecting the Customer

4 Select the customer for this order.

To select the customer using the Acct #, Name, Acct # and Name, Dept and Dept Name, or Phone boxes, click the appropriate box and type the information for the customer to select. Press Enter. These boxes are shown in bold, indicating you can use them to search. You must press

Figure 1: The New Project Dialog Box



The (find a record) buttons provide multiple ways to search for information. You can use these buttons anytime you don't know the number or name of the record for which you're searching.

Enter to search. If you press Tab, you change the information in the search box instead of searching.

To select the customer using the Customer Query dialog box, click .

The Customer Query dialog box opens. The Name box at the top of the dialog box contains highlighted information. To find the correct customer, you can scroll up and down the list or use the query feature. To locate the customer by scrolling, scroll up and down through the list using your mouse in the scroll bar, or pressing the up and down arrow keys. When you find the customer, click it to highlight. Click OK, double-click the customer, or press Enter. To locate the customer using the query feature, tab to the ID, Dept, Dept Description, Phone, or Street box at the top of the Customer Query dialog box. This highlights the information currently in the box. Type the information for the customer over the highlighted information and press Enter. The first customer with the information you typed is highlighted and moved to the top of the list. When you find the customer, click to highlight it. Click OK, double-click the customer or press Enter.

You can also select customers using the word search feature. You do this using two \\ (back slashes) and specific text. For example, to retrieve all customer accounts containing the word office, click the Name box and type \\OFFICE. The system automatically opens the query dialog box displaying a list where the word office appears in the customer's name, for example, Office Warehouse Supply, Warehouse Office Supply, or Supply Warehouse Office. To retrieve a customer using more than one word, you could type OFFICE AND LAW. The system retrieves each instance where the word office and law appear in a customer's name.

While using word search, you can also use a boolean variable to retrieve customers using more than one word. The words: or — and — are key words that let you search for multiple words in the customer's name. The word or means that only one of the words has to exist in the description. The word and means that both words must exist in the description.

Importing the SIF

5 Click the Item Detail tab.

6 In the Item Detail tab, click or press F12.

7 Scroll to the location on your network hard drive where the SIF file is stored, C:\SIF Files, for example, and import the file.

8 The Process SIF File prompt appears, as shown in Figure 2. Click Yes.

9 The Process message appears while the system imports the file. When the file is imported, the system moves the items from the SIF file to a Furniture order. You can make changes to the items from the SIF file just as you would regular items.

When you import a SIF, the system displays the entire description and wraps the text properly so the entire description can be easily viewed.

10 When you finish making changes, click the Order Totals tab.

11 If you have add-on items set up in the (LGC1) Furniture Add On Item Parameters screen, the items are automatically added to the order (if the items are required) or the Furniture Add On Items dialog box opens so you can select the items to add to this order. Add on items are automatically force shipped on the ticket. If you do not have add-on items set up, go to **Step 12**.

To not add items to the order, click Cancel.

To add items to the order, enter the quantity of each item to add in the Qty box. For example, to add one freight charge, type 1 in the Qty box corresponding to the freight item. When you finish, click OK.

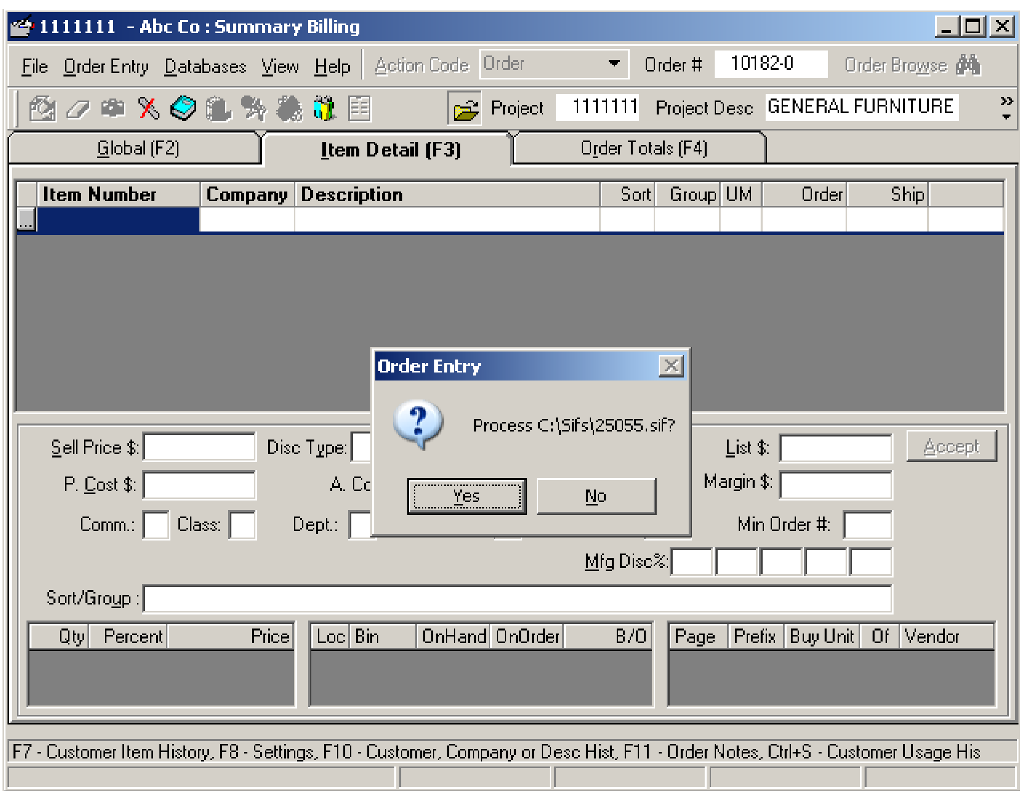


Figure 2: The Furniture SIF File Process Prompt

When you create orders using SIF files, you have the option of building the purchase order without leaving order entry. For details on building the P/O, see the heading **Building the Purchase Order**.

12 When the Order Totals tab opens, you can change the printer information. The default number of copies appears, along with the default format types and format, and the printer where the ticket prints. The information in these boxes comes from the (LGC) Furniture Order Entry Parameters screen. To change the information, click the Copies, Format, and Printer boxes and enter the new information over the existing information.

13 When you finish, click Accept Order.

Manually Creating Orders

1 Retrieve the customer and begin placing an order as you normally would.

2 Click the Item Detail tab.

3 In the Item Number box, enter the number of the item, and press Enter.

If this is an item that you don't stock, click . In the Uncataloged Item Information dialog box, enter the item information. Click OK.

A parameter in the (LGC) screen lets you have the department match to the correct item tax code when placing uncataloged items on a furniture order. To use this feature, set the Use Department as Item Tax Code for Uncatalogs field to Y.

4 In the Order box, press Tab to accept the quantity of one, or enter the quantity of this item to place on the order.

5 In the Ship box, specify how many of this item you have in stock to ship. If the item is in stock, enter the number of this item. If this item is not in stock, leave the ship box set to Ø.

6 You can now change the pricing for this item. Click each box to change and enter the new information. Press Tab to move through the boxes. (If you press Enter, the system adds the item to the order with the information you've specified.)

7 To place this item on the order, click Accept. The item is added and moves down one line, so you can add another item to the order. To change the item, you must double-click it to move it to the first line of the order. The item cannot be changed until it is shown in the first line.

8 Once you accept the item, the system automatically assigns the pick ticket an order number. This number displays in the Order # box in the upper right-hand corner of the window. The number of line items, the gross profit percentage, and the order's subtotal are shown in the lower right-hand corner of the window. These amounts are continuously updated as you place additional items on the order.

9 If you have add-on items set up in the (LGC1) screen, the items are automatically added to the order (if the items are required) or the Furniture Addon Items dialog box opens so you can select the items to add. When you finish, click OK.

10 When the Order Totals tab opens, click Accept Order.

Building the Purchase Order

1. In the Order Totals tab, click the Build P/O option to automatically build the purchase order when the order is ended.
2. Click Accept Order.
3. The Purchase Order Info dialog box opens, as shown in Figure 3. The system views the last item on the order to determine the vendor for this purchase order. When the cursor moves to the P/O Number box, you can click the Next box to have the system assign the next sequential P/O number, or you can assign your own purchase order number.

   One option is to use a combination of the order number and the item manufacturer. For example, you might enter 10203ALS. It is important to remember that if you add to the purchase order at a later date, the items listed on the purchase order do not match the original order because you have added additional orders to the same purchase order.
4. You can use the Due Date box to notify the manufacturer when need the items. Click this box and enter the due date.
5. If you have an acknowledgment number, enter it in the Ack # box. Otherwise, leave this box blank.

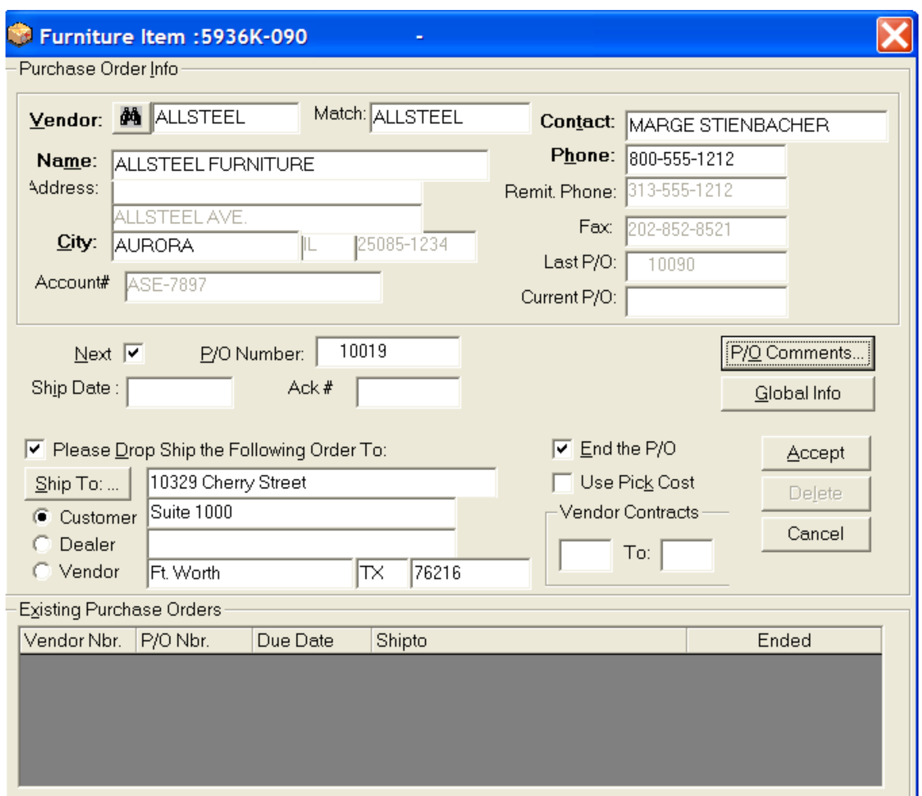


Figure 3: The Furniture Purchase Order Info Dialog Box

6 Click the P/O Comments button to open the Order Notes dialog box. Notice that P/O is the only option selected. This indicates that you can only print these comments on a purchase order and not on any other ticket type. Enter any comments to print on the P/O, and click OK.

7 Check the End the P/O option to end the P/O. If you do, you cannot add to it at a later date.

8 Check the Use Pick Cost option to use pick ticket cost for merchandise on this order.

9 In the Vendor Contract boxes, enter a range of vendor contracts. Enter the beginning of the range in the first box, and the end of the range in the To box.

10 In the Ship To boxes, enter the shipping address where the items are shipped.

11 In the Customer, Dealer, Vendor options, specify whether the items should be drop shipped to the customer's, dealer's, or a vendor's site. If you click either the Customer or Vendor option, the system sets a D flag for this order. This flag notifies the system that this is a drop ship order. This D flag is then available when printing reports through Report Writer. In addition, you can use this drop ship flag when viewing project information in the Furniture Project Management window using either the P/O or Detail levels.

You might need the items delivered to your site if you won't be installing them for a long time and if the customer has no available storage area. The item might need to be shipped to a different vendor if it is to be processed first by that vendor, perhaps it is a chair upholstered in the customer's own materials or fabric, for example.

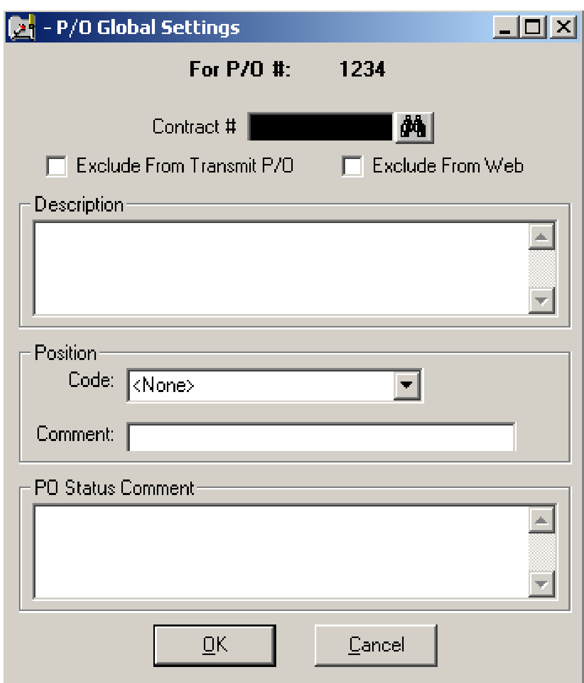


Figure 4: The P/O Global Settings Dialog Box

12 Click the Global Info button to open the P/O Global Settings dialog box. See Figure 4. The Contract # box lets you enter a vendor contract for the P/O. If you can't recall the vendor contract to use, you can click  to query. You can also enter a purchase order description of up to 50 characters in the Description box. When you finish, click OK.

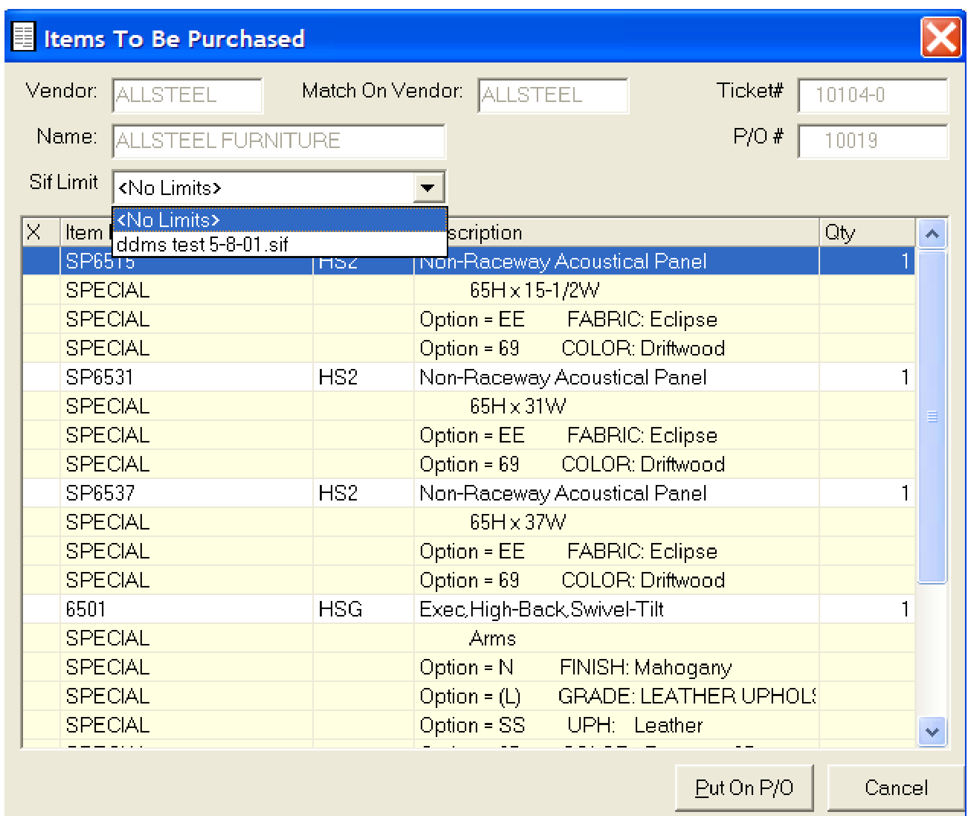
13 The cursor returns to the Purchase Order Information dialog box. When you finish entering information, click Accept.

14 The Items to Be Purchased dialog box opens. The system automatically checks the items that match on the vendor alias, HON, for example, and displays them in this box. To deselect an item, click it. To reselect an item, click it again.

If you placed several SIF files on the order, you can limit to one SIF file when you build the P/O. To do so, click the down arrow in the SIF Limit box and select the file by which to limit. See Figure 5.

15 Once the items are checked, click the Put On P/O button. The system builds the purchase order.

Figure 5: The Items to Be Purchased Dialog Box



16 If you have additional items to purchase, the Still Have Items to Purchase message appears. Click Yes to continue to build purchase orders.

17 The Purchase Order Information dialog box opens for every vendor match the system finds on the order. Enter the appropriate information, and click Accept.

18 When the Items to Be Purchased dialog box reopens, select the items to purchase and click Put On P/O.

19 When all the items on the order have been placed on a P/O, the Finished Adding Items to P/O # message appears. Click OK. The order is ended and the cursor returns to the Global tab.

Transmitting Purchase Orders

Before you can transmit purchase orders using these instructions, the vendor must be properly set up in the DDMS system and capable of receiving electronic purchase orders.

You can transmit purchase orders using the Purchase Order Entry window. Before building and sending the purchase order, you must set up the vendor in the Vendor database. This assures proper communication with the correct vendor. This set up is done in the Comm box in the Vendor Master tab. Once you have set up the vendor, you can build the purchase order for transmitting.

1 Double-click 

.

2 Click the Action Code list box and click Communicate. The Communicate P/Os window opens, displaying the Vendor Information Tab.

3 Click a vendor name to select it.

If you cannot find a specific purchase order, make sure it was Ended (Mark as Ended), not just Finished. Only purchase orders that have been Ended display in this box to be sent.

4 The purchase orders for this vendor display in the Purchase Order Browse dialog box. Click the check box next to the purchase order to send. You can select multiple purchase orders.

5 When you finish, click OK.

6 Click Next. The Vendor Options tab opens, displaying the vendor default options. Some boxes must be completed before you can build the purchase order. Required boxes are shown in yellow and marked with a Y in the Required column. To add to the vendor options, click the cursor in the line to add or change and enter the new text. You can also add or change the vendor default information.

7 You can add special shipping instructions, order notes, and so on.

7.1 Select a feature from the Note Type drop down list. You may Select Shipping Instruction, for example.

7.2 Enter text in the text box below the Note Type drop down list. For example, since we selected shipping Instructions, you could enter Don’t deliver after 3 p.m.

7.3 You can also enter a contact phone number (S. Phone) or a contact person name (S.Contact).

7.4 Repeat these steps for each note type you add.

8 When you finish, click Next.

9 The Complete tab opens. The Build Options Out Folder box displays the folder where the transmission is sent and saved. This folder is set up in the Communications Options dialog box. Click Build.

When the purchase order is built, a Complete message appears in the box on the left-hand side of the tab.

Modifying Furniture Orders

You can modify furniture orders in Furniture Order Entry Change mode. This feature gives you the ability to fully view item information and is similar to viewing information through specifier software. You can easily see all the selling prices, costs, gross profit percentages, and list prices for the items on the order. You can verify that the quantities, costs, and extended costs are accurate.

This feature lets you perform different pricing scenarios by allowing you to mass change information for the items on the order. You do this by specifying a percentage or dollar amount by which to adjust the cost, gross profit percentage, selling price, and list price. This lets you change the pricing that comes from the specifier to the actual pricing.

You can also specify that the system recalculate the actual/average cost and pricing cost on the manufacturer’s discount for the line items on the order. You can specify to mass change the items according to vendor, vendor alias, or by individually selecting the items to change. You can also specify to view or hide specials for items on the order.

Notes: When you change the manufacturer’s discounts in the Modify Order dialog box, the changes apply to this order only. Changes are not made to the manufacturer’s discount settings in the Vendor Alias dialog box.

If the item you are attempting to change is not in the P-MASTER or PO-MASTER files and has been received, the system displays the Cost Can Only Be Updated on P/Os in PO-MASTER message. You can only change information for items that are currently in the P-MASTER and PO-MASTER files.

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1 In the Order Entry window, click the down arrow in the Action Code box, and click Change.

2 Select the order to modify.

3 The Enter Furniture Limits dialog box opens. You can limit the order to modify by purchase order or acknowledgment number. When finished, click OK.

4 The order appears in the Change tab. Click the Order Entry menu and select Modify Order.

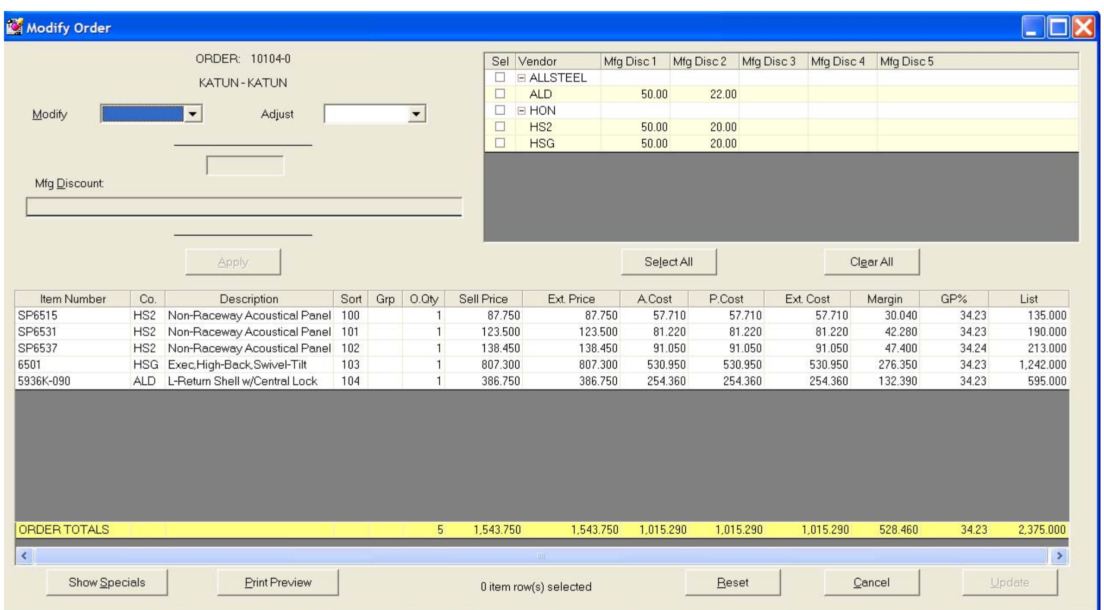
5 The Modify Order dialog box opens, as shown in Figure 6. The item information shown in the bottom section of this tab appears in columns. You can click the column heading to resort the data. This allows you to more easily find the information you need. For example, if you click the Item Number column, you can sort the displayed items by number, from highest to lowest. If you click the Sell Price column, you can sort the data by selling price, and so on.

6 To view specials for the line items on the order, click the Show Specials button. By viewing specials, you can also determine which items to modify.

7 You can mass change information by vendor, vendor alias or you can select specific line items to modify.

To modify the items by vendor, click the Sel box at the top of the dialog box that corresponds to the vendor to change. The items for the vendor and all vendor aliases are automatically highlighted in the bottom section of the dialog box.

Figure 6: The Modify Order Dialog Box



If you make a mistake, you can click Reset to clear the changes you made and return to the original pricing information.

To modify the items by vendor alias, click the Sel box at the top of the dialog box that corresponds to each vendor alias to change. The system highlights the appropriate items in the bottom section of the dialog box.

To modify items by item number, click the Item Number for the item to change in the bottom section of the dialog box. To select more than one item, hold down the Ctrl key and click each line item. The system highlights each item you select in the bottom section of the dialog box.

To select all line items, click Select All.

8 Click the down arrow in the Modify box and select to change the item's Cost, List, Sell Price, GP% or Margin.

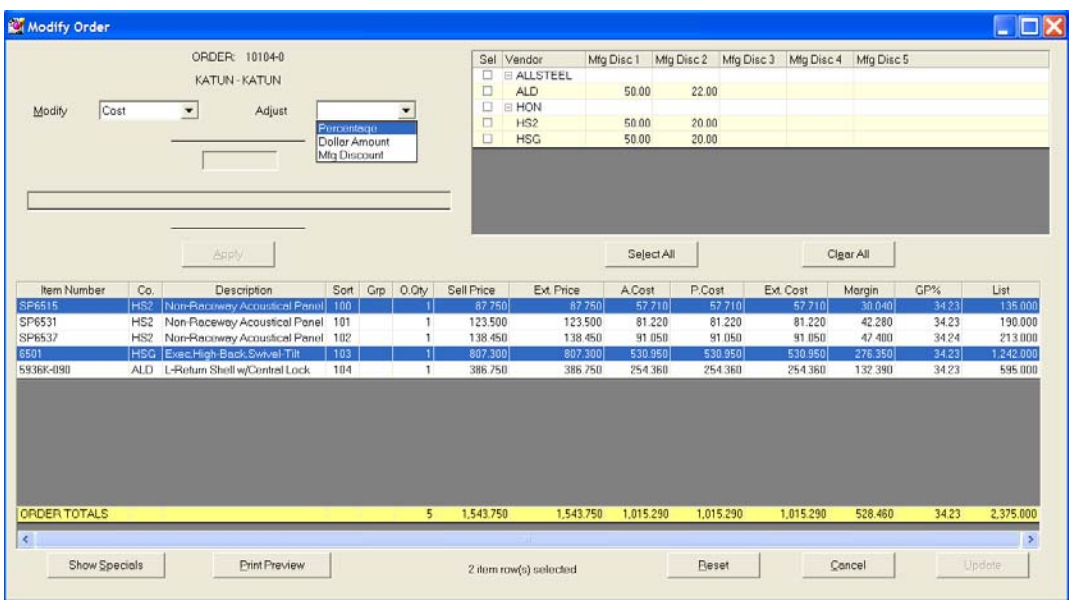
9 Click the down arrow in the Adjust box and select the information to change.

To change the percentage, click Percentage. See Figure 7. The system displays the Change By % box so you can enter the percentage by which to adjust the selected items. Enter the amount by which to increase the percentage for items on the order, .5 for example. Press Enter.

To change the dollar amount, click Dollar Amount. The system displays the $ box so you can enter the dollar amount by which to adjust the selected items. Enter the dollar amount, 2.00 to increase the amount by $2.00 and enter -2.00 to decrease the amount by -$2.00, for example. Press Enter.

To change the manufacturer's discount, click Mfg Discount. You can select this option in the Adjust box when you specify to change the cost. The Mfg Discount boxes become highlighted so you can enter the

Figure 7: The Adjust Drop Down Box



manufacturer's discounts to use. The system calculates discounts by the percentages you specify. For example, if the existing discount percentages are 62%, 50%, and 2%, the system discounts all items by the first discount 62%, then takes an additional 50% off the remainder, and then the last 2% from the resulting remainder. Enter the discounts to use in the Mfg Discount boxes; press Enter. You can specify up to five discounts.

To change the gross profit percentage, click GP Point. You can select this option in the Adjust box when you specify to change the selling price. To change the gross profit percentage, click the Change By Points box and enter the new percentage. When finished, press Enter.

10 When you finish, click Apply. The pricing changes are immediately made to the lines you selected.

10.1 To print the information or export it to a file, click Print Preview. See Figure 8.

10.2 To change a specific line item, click the box to change in the bottom portion of the dialog box and enter the new information over the existing information. For example, to change the selling price for a specific line item, click the Sell Price box corresponding to the item and enter the new price over the existing price. Press Enter. You can change the following boxes for each line item: Sell Price, A Cost, P Cost, GP %, and List.

11 When you finish changing information, click Update.

12 The system displays the Modifying Orders message. When the process is complete, the cursor returns to the Change tab, highlighting the items you modified.

Note: After you click Accept Order in the Order Totals tab, the system updates the cost, sell price, and list price changes in the P-MASTER and PO-MASTER files.

Figure 8: Viewing Print Preview Information

D.D.M.S. INC.
P.O.BOX 507
KELLER TX 76248

MODIFY ORDER
ORDER: 10104-0
KATUN - KATUN

1/30/2007
12:58:29 PM
Page 1 of 2

Item Number	Co.	Description	Sort	Grp	O.Qty	Sell Price	Ext. Price	A.Cost	P.Cost	Ext. Cost	Margin	GP%
SP6515	HS2	Non-Raceway Acoustical Panel	100		1	87.750	87.750	57.710	57.710	57.710	30.040	34.23
SP6531	HS2	Non-Raceway Acoustical Panel	101		1	123.500	123.500	81.220	81.220	81.220	42.280	34.23
SP6537	HS2	Non-Raceway Acoustical Panel	102		1	138.450	138.450	91.050	91.050	91.050	47.400	34.24
6501	HSG	Exec,High-Back,Swivel-Tilt	103		1	807.300	807.300	530.950	530.950	530.950	276.350	34.23
5936K-090	ALD	L-Return Shell w/Central Lock	104		1	386.750	386.750	254.360	254.360	254.360	132.390	34.23
ORDER TOTALS					**5**	**1,543.750**	**1,543.750**	**1,015.290**	**1,015.290**	**1,015.290**	**528.460**	**34.23**

After this installation, open the EBS SQL Import Panel and import the SalesOrderJournal files and any current sales order files. To import current sales order, select Import Data to SQL from the Diagnostic Tasks menu. To import sales history files, select Sales Journal Import from the Diagnostic Tasks menu. For details, see Using the EBS SQL Import Panel *handout by visiting our website at www.ddms.com/Resourses/Support/faq/utilities/EBSSQLimport.pdf.*

Using the Tag Feature

Recently, the Office Furniture industry standardized its system of tagging items. In compliance with these industry standards, the system imports, stores, modifies, displays, communicates and reports on these new tag fields. You can now import the same tag field as in previous versions, now Tag 1, but instead of seven characters, the system lets you import all characters from specification software packages. Existing Tag Descriptions populate the Tag 2 field. However, new SIF imports include the generic code tag populated by your specification software as tag 2 in DDMS. We've also added new fields to make up a total of five tag fields: Tag 3 correlates to your specifier software's alias 1 field, while Tag 4 is alias 2, and Tag 5 is alias 3. If you use a specifier program, such as 20-20 Worksheet or Project-Spec, you can export these five tag types into a SIF file that can then be imported into Furniture Order Entry. You can also view, change, and add tag information using the Order Notes (F11) dialog box. You can use tags when assigning Print Groups. The Modify Tags function has been added to Furniture O/E that lets you mass change tags. You can access tags during Order, Change, Initial Verify, Final verify, and Delete modes in Furniture Order Entry, and view tags in O/E History and P/O History. Also, when releasing quotes to an order, the system automatically brings the tags over to the new order. This new tag information can be viewed and changed in Purchase Order Entry when a P/O is built for the furniture order. New formats have also been created so you can print the new tag information. Tag detail can also be printed in Report Writer.

Industry Field Names	DDMS Field Names
TG = Tag	Tag 1
GC = Generic Code	Tag 2
L1 = Alias 1	Tag 3
L2 = Alias 2	Tag 4
L3 = Alias 3	Tag 5

If you use a specifier program, such as 20-20 Worksheet or Project-Spec, you can export these five tag types and tag descriptions into a SIF file. After you do, you can import this information into Furniture Order Entry. The tags appear in the Item Detail tab's Description column as yellow text. They are shown beneath the item's options and display beneath the heading PLEASE TAG AS FOLLOWS.

Using the following tag example:

Industry Field Names	DDMS Field Names
TG = Tag	RM-237
GC = Generic Code	Seating
L1 = Alias 1	Second Floor
L2 = Alias 2	Billing Department
L3 = Alias 3	Bill Johnston's Office

The text would appear in the Item Detail tab as:

PLEASE TAG AS FOLLOWS:
RM-237
Seating
Second Floor
Billing Department
Bill Johnston's Office

Before You Begin

To use the Tag Description feature:

1. Install version 8.14.0 or higher DDMS software.

Note: During the installation, the system automatically converts the current Tag Type field to Tag 1 and the current Tag Description field to Tag 2. The conversion views the P-MASTER, JOUR-S and all files listed in your (LGA) journals as well as the PO-MASTER and JOUR-PO files. Depending on the amount of tag information to be converted, installation time for furniture dealers may be increased.

2. Manually convert and compress older sales journal files not stored in the (LGA) screen.

Note: This is a dedicated function. Determine the file names to be converted and use the [B4] Execute Program function in the (Z) Master Utilities screen. In the Enter File Name field, type **;SPCCVOTAG** and press Enter. When the conversion program opens, enter the journal name and volume, as shown in Figure 9.

Figure 9: Running the Manual Conversion Function

```
This program will convert P-LINE Tag fields to the new style
     P-SPECIAL tag specials for any journal you select.

Main Journal Name [JOUR-S    ]  Volume [SR  ]
```

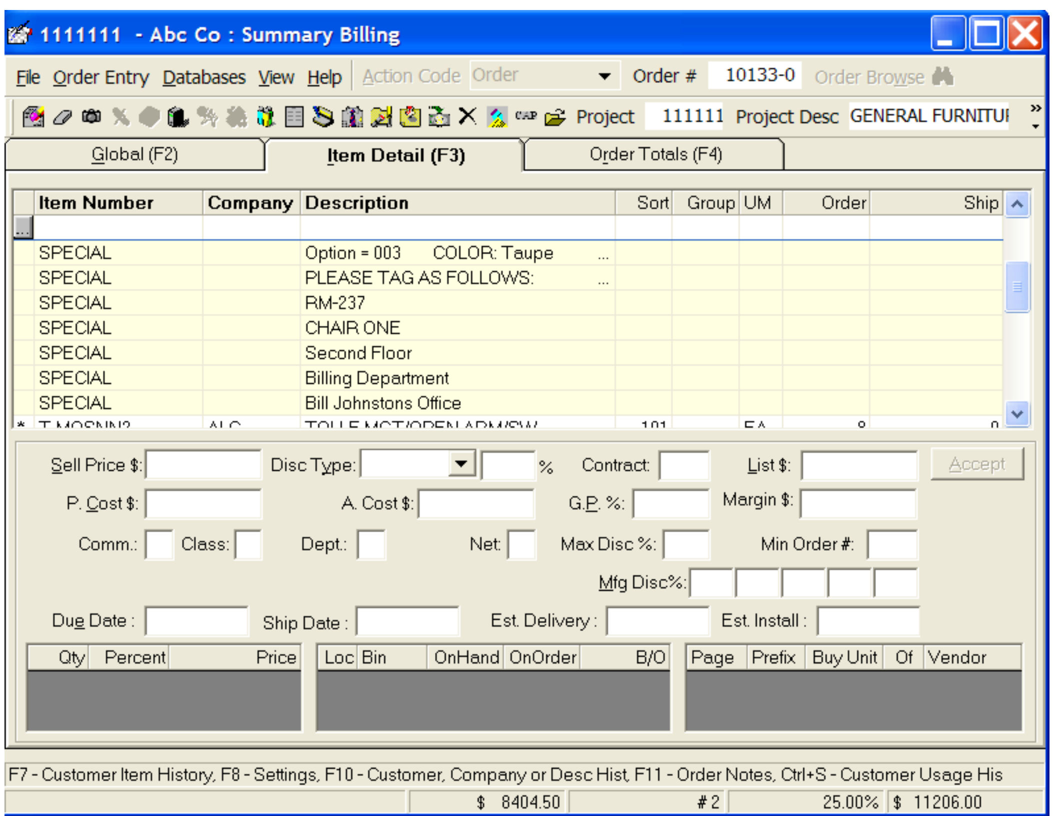
After the journal has been converted, you must compress the file using the [B4] function in the (Z) screen. Enter **;SPCCMPJR** and press Enter. When the Compress Journal Files screen opens, type **F** in the Journal Type field. Specify the journal name and volume to compress.

Using the Tags Feature

In Furniture Order Entry, begin by importing the SIF file you created using specification or specifier software.

1. Begin the order in the usual manner until you click the Item Detail tab.
2. Click  or press F12.
3. Scroll to the location on your network hard drive where the SIF file containing the tags is stored, C:\SIF Files, for example, and import the file.
4. At the Process SIF File prompt, click Yes.
5. The Process message appears while the system imports the file. When the file is imported, the new tag information appears under the item options in the Description column, as shown in Figure 10.

Figure 10: Viewing the Tags in the Item Detail Tab



6 Notice the Item Detail tab no longer displays the Tag # and Tag Desc boxes in the bottom section of the tab. The option to view tag information has also been removed from the View menu. See Figure 11.

The Tag # and Tag Description boxes are also no longer available in the Item Settings dialog box.

7 To change tags, a new feature has been added to the Order Notes dialog box. Double-click a line item to move it to the Item Number box.

8 Click or press F11.

9 In the Order Notes dialog box, click the down arrow to the right of the Line Item box. Click Tag. The tags for the line item you specified appear in the Tag 1 though Tag 5 boxes. To change a tag, click the text to change and enter the new text. You can specify up to 50 alphanumeric characters. The text you enter is stored in the P-SPECIAL file. See Figure 12.

The Tag option in the Order Notes dialog box is available in all Furniture Order Entry modes, including Order, Change, Initial and Final Verify, and Delete.

10 When finished, click OK.

11 The Tag 1 box has also been added to the Print Group dialog box. To use print groups, click the Order Entry menu and select Print Groups.

12 As shown in Figure 13, Tag 1 appears as the first column in the dialog box, in this example, RM-237. Tag 1 through Tag 5 are not shown. You can create print groups as needed. When finished, click .

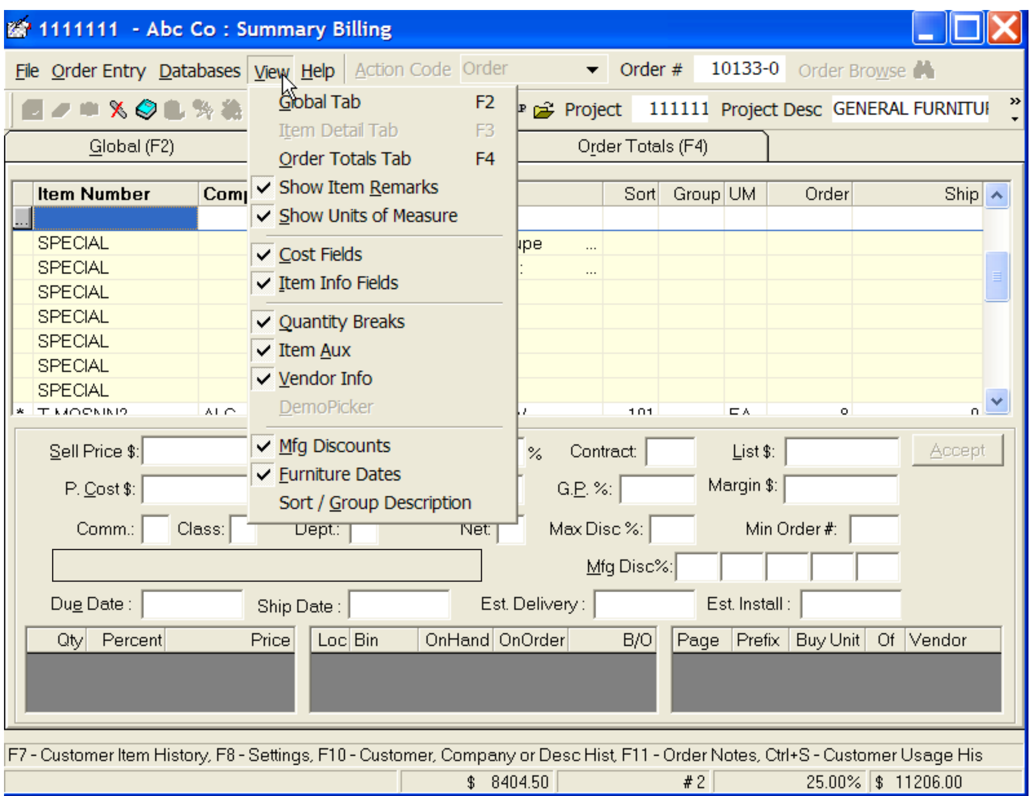


Figure 11: The Removed Tag # and Tag Desc Boxes

When releasing a quote to an order, the system automatically includes the new tag information.

13 Build the purchase order as you normally would and complete the order.

Note: When you build the purchase order, the new tag information also appears in the Items to Be Purchased dialog box.

Figure 12: Changing Tags in the Order Notes Dialog Box

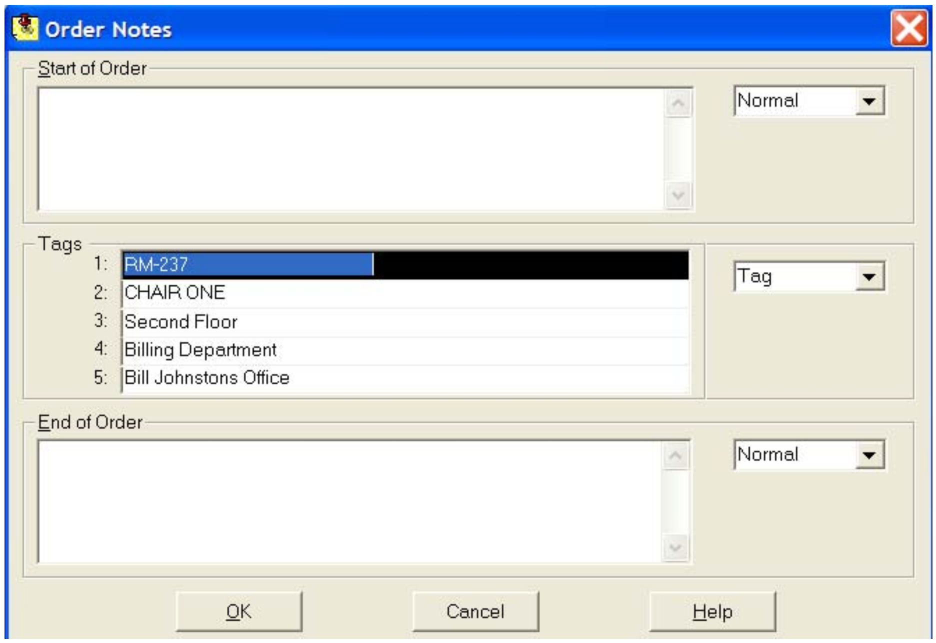
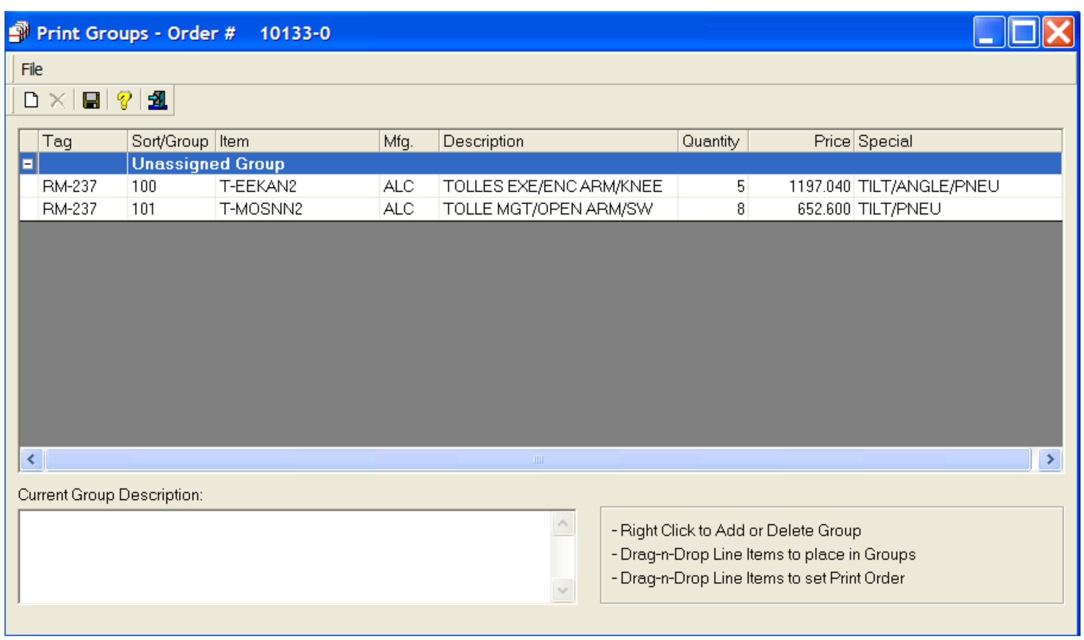


Figure 13: The Print Groups Dialog Box



Modifying Furniture Tags

In addition to individually changing tags in the Order Notes dialog box, you can also mass change furniture tags. You do this using the new Modify Tags dialog box.

1 In Furniture Order Entry, click the down arrow in the Action Code box and select Change.

2 Select the order to modify.

3 When the Enter Furniture Limits dialog box opens, you can limit the items to change by purchase order or acknowledgment number. When finished, click OK.

To view specials for the line items on the order, click the Show Specials button.

4 When the Change tab opens, click the Order Entry menu and click Modify Tags or type **Ctrl + F4**.

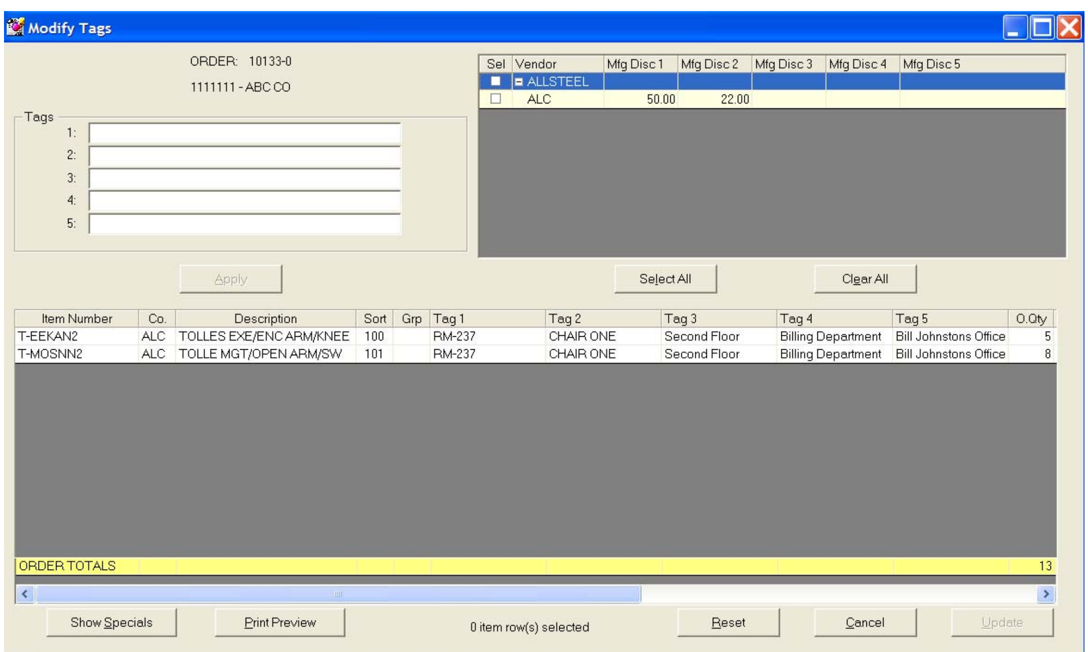
5 The Modify Tags dialog box opens, as shown in Figure 14. The item information shown in the bottom section of this tab appears in columns.

6 Select the tag(s) to change. You can mass change tags, or select specific tags.

The tags you specify can include up to a maximum of 50 alphanumeric characters.

- To mass change tags by vendor, click the Sel box corresponding to the vendor to change. The tags for the vendor and all vendor aliases are automatically highlighted in the bottom section of the dialog box.

Figure 14: The Modify Tags Dialog Box



Click the column heading to resort the data. This helps you find the information you need. For example, if you click the Item Number column, you can sort the displayed items by number, from highest to lowest.

- To mass change tags by vendor alias, click the plus sign (+) to the left of the vendor. Click the Sel box corresponding to each vendor alias to change. The system highlights the appropriate tags in the bottom section of the dialog box.
- To select a specific tag, click the appropriate line at the bottom of the dialog box. To select more than one, hold down the Ctrl key and click each line. The system highlights each line you select.
- To select all the tags shown, click Select All.

7 After the tags to change are highlighted in the bottom section of the dialog box, you can change the text using each of the following methods.

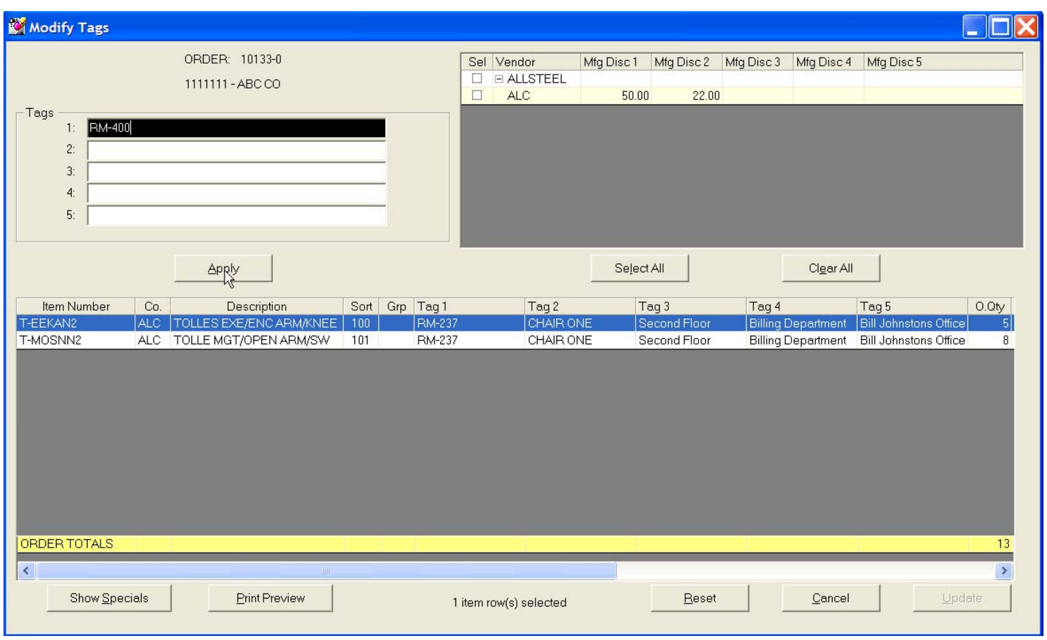
- In the top section of the dialog box, click the Tag 1 through Tag 5 box. Enter the new tag text. Click Apply. See Figure 15.
- In the bottom section of the dialog box, click the Tag 1 through Tag 5 box, enter the new text over the existing text, if any. Press Enter.

8 To print tag information or export to a file, click Print Preview.

9 When you finish changing information in the Modify Tags dialog box, click Update.

10 The system displays the Modifying Orders message. When the process is complete, the cursor returns to the Change tab so you can make additional changes to the order. For details on changing orders, see Changing a Furniture Order.

Figure 15: Modifying Tags Using the Tags 1 Through Tags 5 Boxes

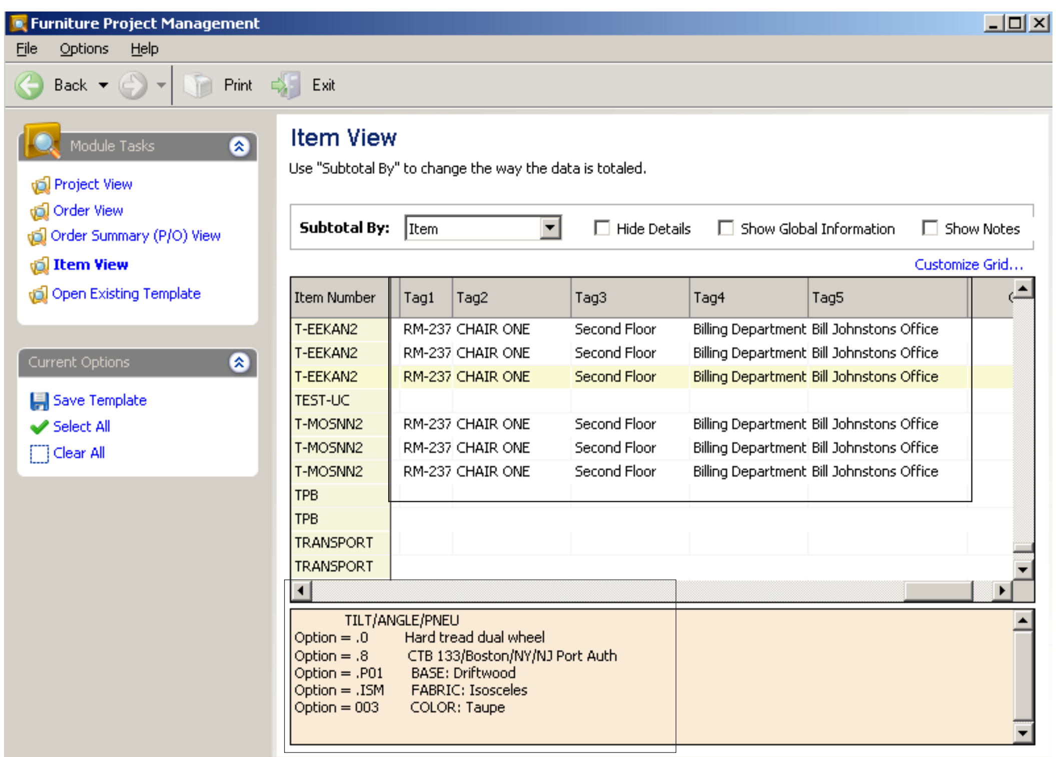


Viewing Tags in Project Management

When you use the Project Management feature, the system displays the tag information in the Invoice Detail dialog box. The Tag column displays the text for Tag 1, and the Line Item Specials box displays detail for Tag 1 through Tag 5 for the line item you selected. See Figure 16.

Note: The Tag # and Tag Desc boxes have been removed from the Project Management Item Detail dialog box. These boxes can no longer be edited using this dialog box.

Figure 16: Viewing Tag Information in the Project Management Window



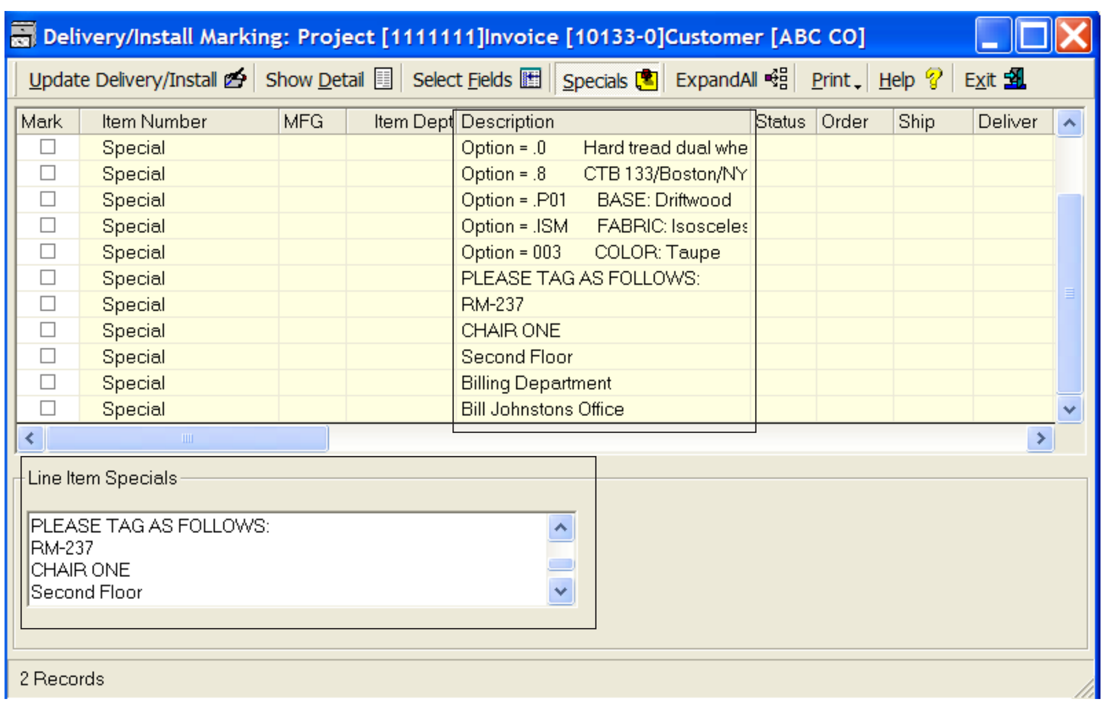
The Tag feature is also available when billing shipped lines.

Viewing Tags in Delivery/Install Marking

The Delivery/Install Marking window has also been updated to include the new tag information. To view tag information, click Specials.

As shown in Figure 17, the Description column displays the tag information under the item's options. The Line Item Specials box displays tag information for the line item you selected. You can also click the Description column to re-sort the data. This allows you to more easily find the tag information you need.

Figure 17: Viewing Tag Information in the Delivery/ Install Marking Dialog Box



Using Tags in Purchase Order Entry

The Purchase Order Entry window also includes the new tags feature. You can view tags, as well as change tag information. See Figures 18 and 19.

Figure 18: The Purchase Order Entry Receive/ Change Tab

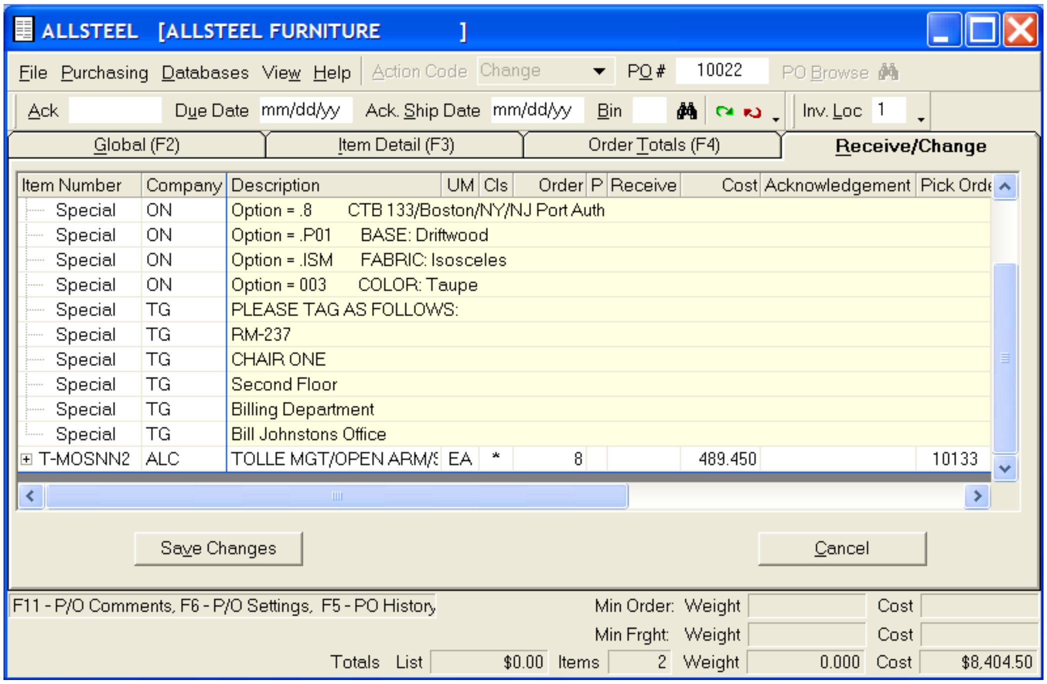
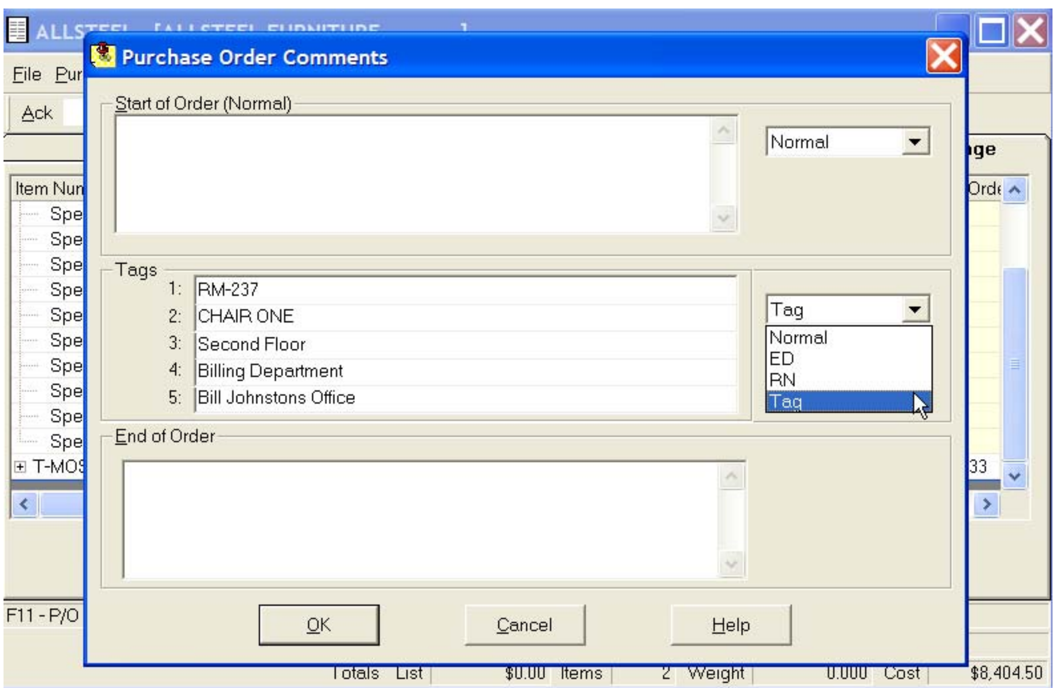


Figure 19: Changing Tags in the Purchase Order Comments Dialog Box



Using Tags in O/E History and P/O History

After the order and purchase order have been invoiced, the system displays the tag information in the Description column in the O/E History and P/O History windows.

Using Tags Text-Based Systems

The new tag feature is also available for text-based users. To use this feature, simply go to the text-based Furniture Order Entry screen and begin placing the order as you normally would. With the cursor in the Item field, type SPECIAL TG. The system automatically adds the text PLEASE TAG AS FOLLOWS after the special text is entered. See Figure 20.

Figure 20: Using the New Tag Feature in Text-Based Order Entry

```
11:18:34          (GF) Furniture Order Entry (12/05/07)                01/17/08
--------------------------------------------------------------------------------
Order Writer :ROBI       G/L Loc # 1   Inv Loc # 1       Transaction #   10135-0
  Furn.Order                       Charge                    Project #    TEST22
Name :ABC CO                          Account #   1111111
      122                             Slsm : 101  Status :N   P/O    #
                                                              Lines #  1  61.0%
      ROANOKE              TX  76262        800          Sub-Total $    190.00
--------------------------------------------------------------------------------
# Sort/Grp Item                   Mfg.      Description            Order  Ship
   105     SPECIAL TG     140 ..................................................
-- --- --- ---------------------- --- ---------------------------- ----- -----
 1 100     5193N          HON      HON HON 24X20 STRAIGHT TABLE MAH     1
           SPECIAL  TG    100 PLEASE TAG AS FOLLOWS:
           SPECIAL  TG    110 RM-237
           SPECIAL  TG    120 CHAIR ONE
           SPECIAL  TG    130 SECOND FLOOR





Enter Item or <??> For Options
```

If you previously used delivery and installation formats DT and IT, the new DS and IS formats contain line 27 and display only tags 1 and 2. The remaining formats display the tags in the special lines.

Reporting with Tags

Since older report formats did not include this tag information, new formats have been created for use with the tag feature. These report formats are shown below.

Format Code	Format Type
TN	Pick Ticket
PN	Proforma
AN	Acknowledgment
DN	Delivery Ticket
IN	Install Ticket
QN	Proposal/Quote
FE	Invoice
DS	Delivery
IS	Installation.

In addition, you can use the tag feature with Report Writer, as shown in Figure 21.

Figure 21: Using the New Tag Feature with Report Writer

```
========= P-SPECIAL SELECTION ========== |REPORT NAME - [AM     ON SR??] [!RPT]
PICK #        -   SORT :    GROUP :      |              SEND TOF? [C] LINES [60]
ITEM #                 CO:               |TITLE -       RPT [ ] WIDTH [  ]
SPECIAL TYPE :      SEQUENCE #           |[FURNITURE ACKNOWLEDGEMENT W/SALE-EX]
TEXT :USETAGS TAG-NUMBER-TAG-NU          |MASTER FILE >> 1 P-MASTER   <<
     :SPECIAL TEXT SECOND HALF.          |
P/O #................................... |PAGE BREAKS IN FILE Y/N ?
    ATTN :.............................. |PRINTER SETUP FILE-[                ]
WHO CALL :.............................. |
SCAN :..............................     |
TAG NBR  :.........................      |
         :.........................      |HEADINGS (1-20)   BREAKS    (21-25)
TAG DESC :.........................      |DETAIL   (26-35)  SUBTOTALS (36-40)
         :.........................      |TOTALS   (41-55)  TRAILERS  (56-65)
PREPAY ORIGINAL ORDER TOTAL $..........  |LINE  [91] BOILERPLATE [  ]
PREPAY PREVIOUS PAID TOTAL  $..........  |FONTS [19] [  ] [  ] [  ] [  ] [  ]
PREPAY CURRENT PAID TOTAL   $..........  |SKIPS BEFORE [  ] AFTER [ 1] LAST [54]
==== Tax Included Line Item Totals ===== |FILE TO SELECT FROM [45]  TYPE F/T [F]
 Sell Price $.......... ext. $..........          ** ENTER 99 FOR TEXT ONLY **

v--------------------------------------------------------------------------------
                                  SPECIAL TEXT FIRST HALF..SPECIAL TEXT SECOND HALF.

<CTRL F>,BACKSPACE MOVES CURSOR,<ENTER> PLACES FIELD | ---- LINE =  1 COL =   1
```

We also recommend you set up a custom SIF DDMS Export Profile in ProjectSpec.

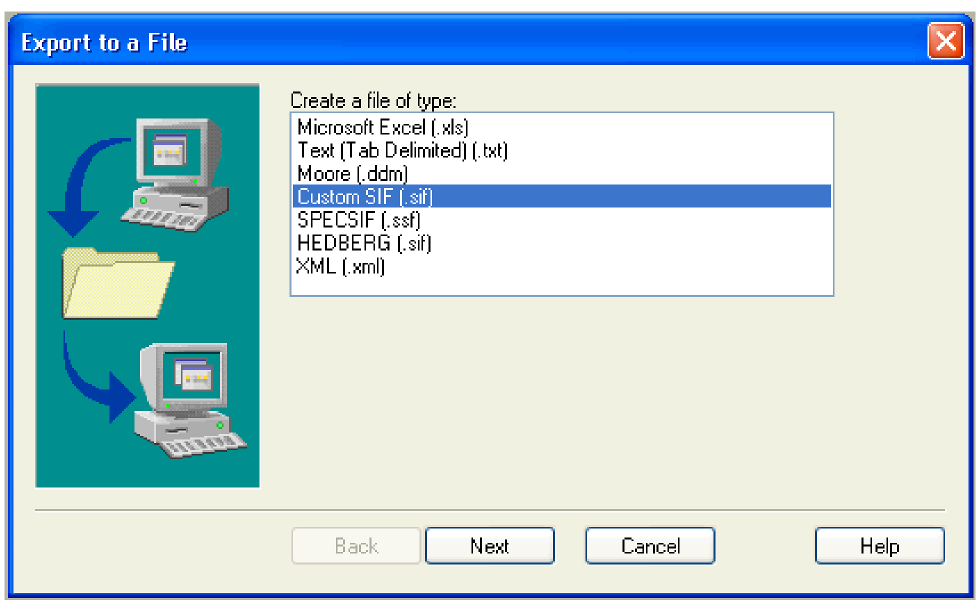
Setting Up A Custom SIF DDMS Export Profile in ProjectSpec

One of the specifier software programs available is ProjectMatrix™ ProjectSpec®. After creating a quote or an order based on manufacturer catalog options and pricing in ProjectSpec, you can export the SIF for seamless integration with your DDMS flow for sales, purchasing, warehouse, installation, accounting, and project management.

ProjectSpec lets you map certain record fields to specification codes in the exported SIF file. To ensure proper integration of the SIF file with your DDMS system, you should set up a DDMS Export profile.

1. Open a ProjectSpec file that is ready to convert to a SIF file.
2. Click File, the Export.
3. When prompted to Create a file of type, select Custom SIF (.sif), shown in Figure 22.
4. Click Next.
5. Select a location to save the SIF file, such as C:\SIF Files.
6. Name the SIF file.
7. Click Next.

Figure 22: Selecting the Custom SIF (.sif)



8 In the Record Codes box, shown in Figure 23, double-click to edit the following codes:

- Tag 1 = TG
- Tag 2 = GC
- Tag 3 = L1
- Unit List = PL
- Dealer Net = BP
- Unit Customer = PS
- Unit Dealer = PB

9 When finished, click the Save Profile button.

10 Enter the profile name, DDMS, for example, and click OK.

Note: For subsequent SIF files, you can click the Load Profile button to select DDMS.

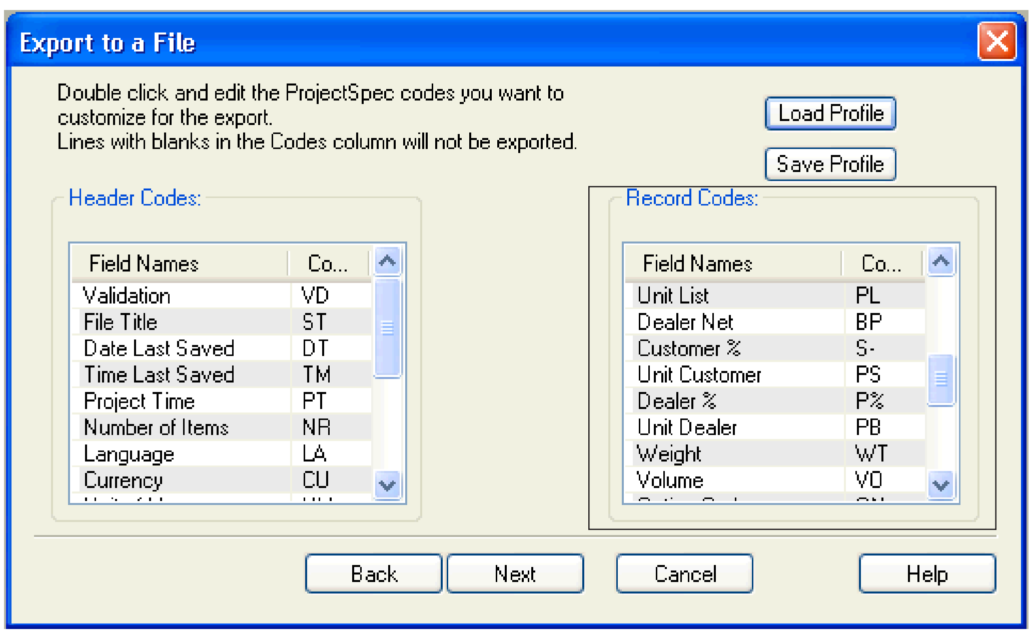
---

11 Click Next to export the SIF.

12 When completed, click OK.

Note: You can then import the SIF file in the Order Entry Detail tab in the normal manner. For instructions, see the previous heading **Importing the SIF**.

Figure 23: The Record Codes Box



Print Groups

You can use the Print Groups option to group and arrange line items on an order. You can specify a group name and indicate which items added to the order are assigned a specific group name. The Print Groups function is available when using all order entry types, including Commercial Order Entry, Furniture Order Entry, and Serialized Order Entry and can be used in Order, Change, and Verify modes.

For example, you could create a print group named Accounting Department and group five items on the order under this heading. You could then create another print group named Training Department and group three items under this heading. You can create as many print groups and assign as many items to the group as necessary. Once you print the ticket, the system displays the items within the group you specified. This can be helpful when delivering items or when invoicing items on the ticket.

In the O/E History window, items on the ticket appear in the sequence in which they were added to the order. They do not appear in print group order.

Adding and Changing Print Groups

1 To access the Print Groups function, being placing, changing, or verifying an order as you normally would.

2 Click the Order Entry menu and select Print Groups.

3 The Print Groups dialog box opens, displaying the line items on the order. If you have not created a group, the items appear under the heading Unassigned Group. If you have created a group, the items appear under the group heading you specified.

The information in the Sort/Group through Special columns cannot be changed. It is for display only.

4 To add a new group, click . You can also right-click a displayed item to add a new group and select Add Group. You can also type **Ctrl + A**.

5 The cursor moves to the Current Group Description box, and the text New Group appears. The text New Group also appears under the Sort/Group column. Enter the description to assign this print group in the Current Group Description box, Accounting Department, for example.

Note: You can use the Current Group Description box to change the description for an existing group. To do so, click the group to change under the Sort/Group box to highlight it. The text appears in the Current Group Description box. Enter the new description over the existing description. Click the group you changed under the Sort/Group box again. The system changes the description to the one you specified.

The Sort/Group column displays the sort or group code for the item. You can enter sort codes of up to four characters in length. Sort codes are user-defined and let you categorize the items on a project. You can group the items by automatically assigning sequential sorts, or you can manually assign sorts and groups to the items.

6 Click the text New Group in the Sort/Group column. It changes to display the print group description you specified. Using the same example, the description Accounting Department would replace the description New Group.

Note: If you need to change the group description, click the group name under the Sort/Group column to highlight it. The group description you selected appears in the Current Group Description box. Enter the new description. Click the group name you changed under the Sort/Group column. The new name appears.

---

7 Click the item to assign to this group to highlight it. Drag the item to the group name. For example, to assign the Accounting Department group name to the third item on the order, drag the third item to the Accounting Department text. The system adds the item to the print group. After you add the first item to the print group, the system displays a + (plus sign) to the left of the group print name. You can click the + (plus sign) to display or hide the items assigned to the group.

8 You can continue to add as many print groups and move items to these print groups as necessary.

9 When you finish, click .

10 To print the items on the order within the groups you specified, you must use a custom format. In the Order Totals tab, click the Format box and type the two-character name of your custom Print Groups format.

11 Click Accept Order. The system prints the ticket, displaying the items within the print groups you specified.

The Furniture Terms and Conditions feature is not included in all software packages and may require authorization. For more information, contact ECi sales.

Creating Orders with Terms and Conditions

You can assign terms and conditions documents to orders. These documents detail the terms and conditions of the sale. The system tracks these documents in the Customer Terms and Conditions dialog box. This allows you to receive the document and indicate the individual who signed off and the date it was received.

Terms and Conditions are set up in the Parameter Editor window. You must set up term and condition documents in the Parameter Editor window before using this feature.

In the Commercial OE Path box, enter the path to store all of your commercial order entry documents. For example, you might enter C:\terms and conditions\commercial oe.

In the Machine OE Path box, enter the path to store all of your machine order entry documents. For example, you might enter C:\terms and conditions\machine oe.

In the Furniture OE Path box, enter the path to store all of your furniture order entry documents. For example, you might enter C:\terms and conditions\furniture oe.

In the TC password box, enter the terms and conditions password.

1. Begin placing an order in the normal manner until you click the Order Totals tab.
2. In the Order Totals tab, click the Terms and Conditions check box.
3. Click Accept Order.
4. If you specified to build the P/O, the Purchase Order Information dialog box opens. Enter the information for this P/O as you normally would and click Accept.
5. Since you marked the Terms and Conditions check box, the system automatically opens the Terms and Conditions File List dialog box. This dialog box displays the appropriate folder for the order entry type you selected, commercial, furniture, or serialized.
6. Click the document to assign this customer (to highlight it) and select Open or double-click the document.
7. Unless you indicated not to print any pick tickets, the number of pick tickets you entered print.

Placing Prepay Credit Card Orders

Previously, we recommended that you did not use the Prepay pay code for furniture orders. You can now use the Prepay pay code when placing customer credit card orders. Since government orders require that they not be billed until the product is received, this is a handy feature for dealers who process government orders using procurement cards.

Before you use this feature, set up a credit card for the customer in the Customer Credit Card dialog box. Set the Prepay Amt box to Zero.

1. In the Furniture Order Entry window, begin placing the order.
2. Click the down arrow in the Paycode box and click Prepay.
3. Click the Item Detail tab and place the items on the order by backordering all the items on the ticket.
4. Click the Order Totals tab.
5. Set the credit card amount to zero.
6. End the order as you normally would.
7. Next, final verify the order.

8 Once you receive part or all of customer's order, run the [P] Credit Card Service Capture and Invoicing of Prepay Orders function in the (TR) Order Entry Reports screen.

This function takes each received prepay order and processes the credit card for the billed amount on the ticket. It also moves any remaining amount to a dash numbered ticket.

Changing Furniture Orders

We added boxes to the Order Entry Change tab that let you view acknowledgment numbers and ship dates. If there is a purchase order assigned and purged to the JOUR-PO file, the system displays this information in these boxes in gray in the Change tab.

When you specify to change a furniture order, the system automatically opens the Enter Furniture Limits dialog box. In addition to changing items on the order, this dialog box gives you the flexibility of receiving, un-receiving, acknowledging and un-acknowledging items on the order, thereby allowing you to perform multiple tasks in one tab. Since you can perform these functions in the Change tab, there is no need to flush the orders. You can also assign all line items to a set bin or limit the items to assign to a bin. This gives you the ability to place different quantities of the item in different staging bins, which splits the line item on the order.

1 In the Furniture Order Entry window, click the down arrow in the Action Code list box and click Change.

2 Select the order to change.

3 The Enter Furniture Limits dialog box opens, defaulting to Change mode. See Figure 24. At this point, you can select the option to perform.

- To Change the order, click Change.
- To Acknowledge items on the order, click Acknowledge.
- To Receive items on the order, click Receive.
- To Un-Acknowledge items on the order, click UnAcknowledge.
- To Un-Receive items on the order, click UnReceive.

4 You can use this dialog box to limit the information to change. For example, you can limit the items by a specific purchase order number or acknowledgment number. When you finish, click OK.

5 The order appears in the Change tab. To view line item specials, click . (Displaying item specials can help you decide which items on the order to change.)

Note: The number of line items, the gross profit percentage, and the order's subtotal are shown in the lower right-hand corner of the window. The cost total of items displayed in the Change tab also appears. This amount is updated when changes are made to the cost of an item. If the display has been limited by purchase order, the cost reflects the cost of the P/O.

If you increase the shipped quantity, a window opens with the Deduct Change From On Hand message. To deduct the displayed amount from your on-hand quantities, click Yes. To not deduct the amount from your on-hand quantities, click No. When you decrease the shipped quantity, a window opens with the Enter Quantity to Restock message. Enter the quantity to restock. The on-hand quantity is increased by this amount.

6 The Ship column defaults to receive the items on the order. To change the shipped quantity for an item, click the Ship box and enter the new shipped quantity over the existing shipped quantity. Press Enter

7 At any time in the Change tab, you can re-open the Enter Furniture Limits dialog box to make additional changes to the items on this order. For example, you may need to change the staging bin for a specific item on the order.

To do so, click the item to change to highlight it. Right-click and select the P/O Receive/Acknowledge option. (To change more than one line item at a time, hold the Ctrl key down while clicking each line item to change.) The Enter Furniture Limits dialog box re-opens.

8 Make the appropriate changes and click OK. The cursor returns to the Change tab. You can perform this function as many times as necessary.

9 You can also open the Mass Change Fields dialog box to change dates and item departments for line items on the order. To do so, click an item to highlight it and right-click.

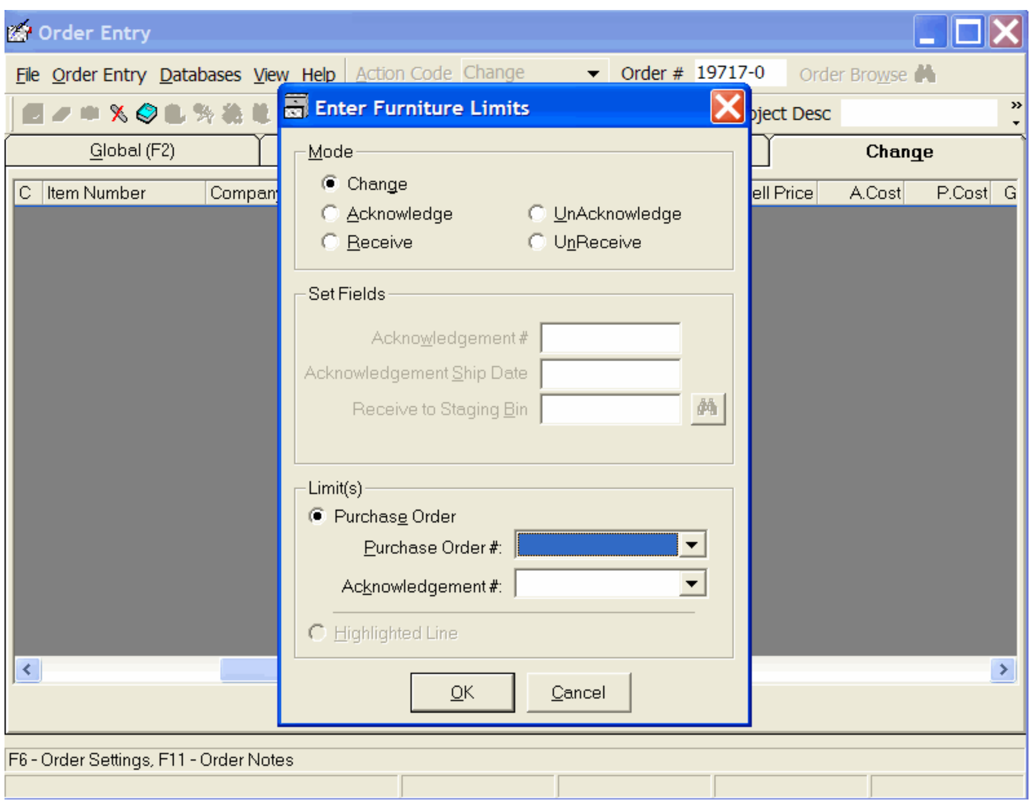


Figure 24: The Enter Furniture Limits Dialog Box

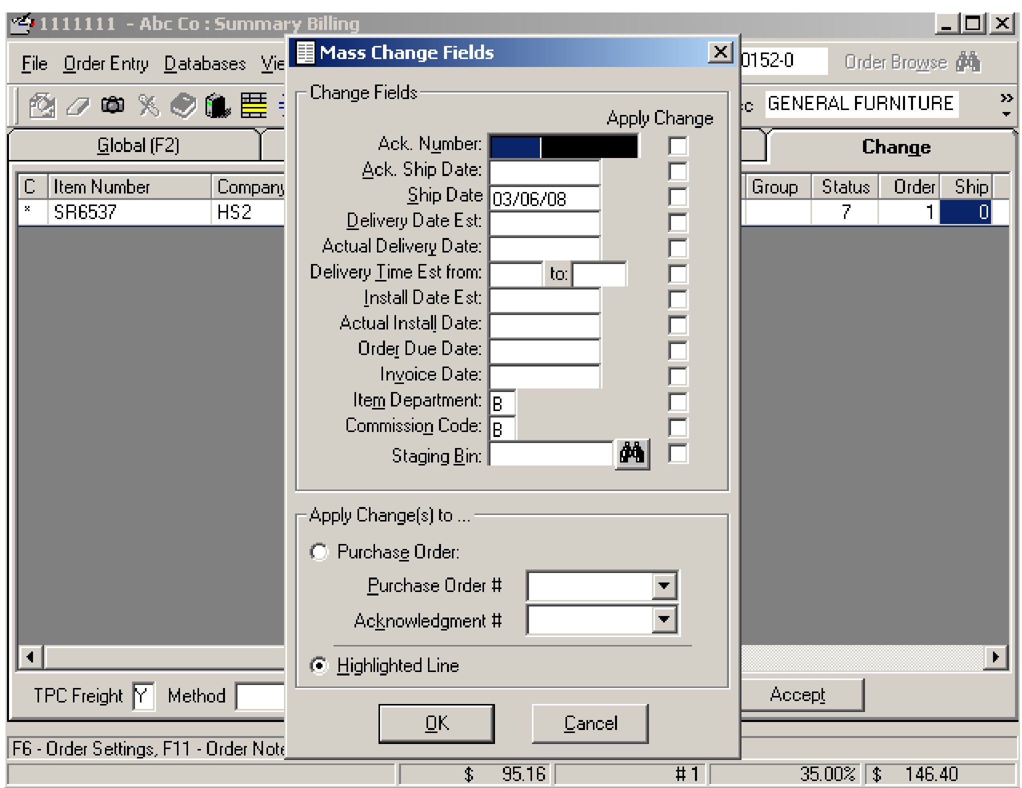
10 Choose the Change Furniture Dates/Dept option. The Mass Change Fields dialog box opens. See Figure 25. You can use this dialog box to apply changes to all line items or to a specific P/O or acknowledgment number. Click each box and enter the information over the existing information. When you finish, click OK. The cursor returns to the Change tab.

11 To change purchase order information, you can also open the P/O Global Settings dialog box. Click the purchase order to highlight it and right-click.

12 Choose the PO Global Info option. The P/O Global Settings dialog box opens. If the item you selected is in the PO-MASTER file, you can change the contract, description, status comment, shipping address, and so forth. (If the purchase order has been moved to a journal, there is some information you cannot change, the shipping address, for example.) Click each box and make the necessary changes.

13 To assign received quantities to staging bins, click the item to highlight it, and right-click.

Figure 25: Managing Order Changes and Project Dates



You can make as many changes to the items on the order as necessary. Remember that until you click Accept, the changes you make are not applied to the items on the order.

14 Select the Multiple Staging Bins option. The Receive to Staging bin dialog box opens so you can specify the bins to assign the item. When finished, close the dialog box to return to the Change tab.

15 When changing orders, you can also change each of the following:

15.1 While the dates for an entire order are set in the Furniture Profile Settings dialog box, you can change the dates for line items. Click the Date boxes to enter different dates for this specific item.

15.2 Click the Tag # and Tag Desc boxes to enter information. For example, you might set the Tag # box to WKST1 for workstation area 1, and the Tag Desc box to JANE’S OFFICE. This information prints on the pick and installation tickets.

15.3 Change the manufacturer’s discount by using the Mfg Disc % boxes. Click each box and enter the new discount over the existing discount.

15.4 Add order notes by pressing F11 or click . Enter the new text over the existing text. When you finish, click OK. You can enter notes that print at the beginning or end of the order. You can also enter notes that apply to line items such as, MAKE SURE THIS CHAIR GOES TO MARY’S OFFICE. To enter a line item note, you must enter it before you accept the item and place it on the order. When you finish entering order notes, click OK.

Any changes you make in the Order Settings dialog box apply to this order only.

15.5 Change settings for a line item by pressing F8. The boxes in the Item Settings dialog box let you change the taxable setting of the item, as well as the item’s tax district. You can also change the commission code for this item. When you finish, click OK.

To use the Labelz feature, you must set up a list of contact names in the Furniture Labelz Contact List parameters. Then set the Allow Labelz to Flow to P/O box in the Furniture General Configuration Parameters to Y.

15.6 Change settings for the entire order by clicking the Global tab. Click  or press F6. At the warning message, click Yes. In the Order Settings dialog box, you can change the tax settings for the entire order, specify the primary and secondary salespersons, and enter a Labelz special. The Labelz special has been expanded to let you print contact names on tickets as well as purchase orders. On the second line of the Labelz Special text box, you can select a contact’s name. If you cannot recall the contact’s name, you can click  to open the Labelz Contact List from the furniture parameters and choose a name. The contact’s name you select prints on the ticket. If you set the Allow Labelz to Flow to P/O box to Y, the contact’s name also prints on the P/O. (Since the Labelz name does not transmit to their kiosk, this feature does not work with Herman Miller.)

15.7 Change the attention for an order by clicking the Order Entry menu, and selecting Global. Click Attention or type **Ctrl + A**. The Attention dialog box opens, and the cursor moves to the Attention box. Enter the new attention's name over the existing attention. Click OK. The cursor returns to the Change tab.

15.8 View customer history for an item by pressing F7. A window opens listing the customer's account number. The item's number, company, and description appears. The total orders, total quantity, last sold price and last sold date also appear.

Note: If you change the order quantity of a line item and the item is already on a P/O, the system prompts you to update the P/O with the new quantity. For this feature to work, the Allow Updating the Purchase Order Qty from Change Mode box in the Furniture General Configuration parameters window must be set to Y. In addition, when changing furniture orders, you can also have the ability to import SIF files. However, to use this feature, be sure the Check Customer P/O in Order Entry field in the (LGA) Sales Journals Parameters screen is blank. For information on importing SIF files, refer back to the heading **Placing Orders With SIF File Imports**. In addition, if the Build P/O in Change if Lines Added box in the Furniture Profile Settings General tab is checked and you add new items to the order, the system automatically defaults to build the P/O when the order is ended. This ensures that any items added to the order are placed on a P/O.

Deleting Orders

A password is required when performing this function to prevent accidental deletions.

When you delete orders, you have the option of deleting part or all of the pick ticket. You may delete part or all of any pick ticket with a status code of 7 or lower, even if the pick ticket has not been initial-verified. When you do, the on-hand quantities for items listed as shipped are adjusted.

When you delete line items from an order, if the item is on a purchase order, you are prompted to delete the items from the P/O as well as the order. At this prompt, you should click Yes. If you click No, you receive this prompt for every item on the order, making deleting numerous items a time-consuming task.

Note: If you have already sent the purchase order to the manufacturer, received the acknowledgment and have exceeded the time period when you can cancel the manufacturer's order or an individual item on the order, you should leave the item on the P/O and move the item to on-hand inventory.

Deleting Entire Orders

1 In the Furniture Order Entry window, click the down arrow in the Action Code list box and choose Delete.

2 Enter the delete password, and click OK.

3 Select the order that contains the line items to delete.

Note: To delete more than one order, to select additional orders, hold down the Ctrl key and click the orders to delete. You can select as many orders as necessary.

To view line item detail for a particular item, click the item, and click View Detail. When you finish viewing item detail, click Close.

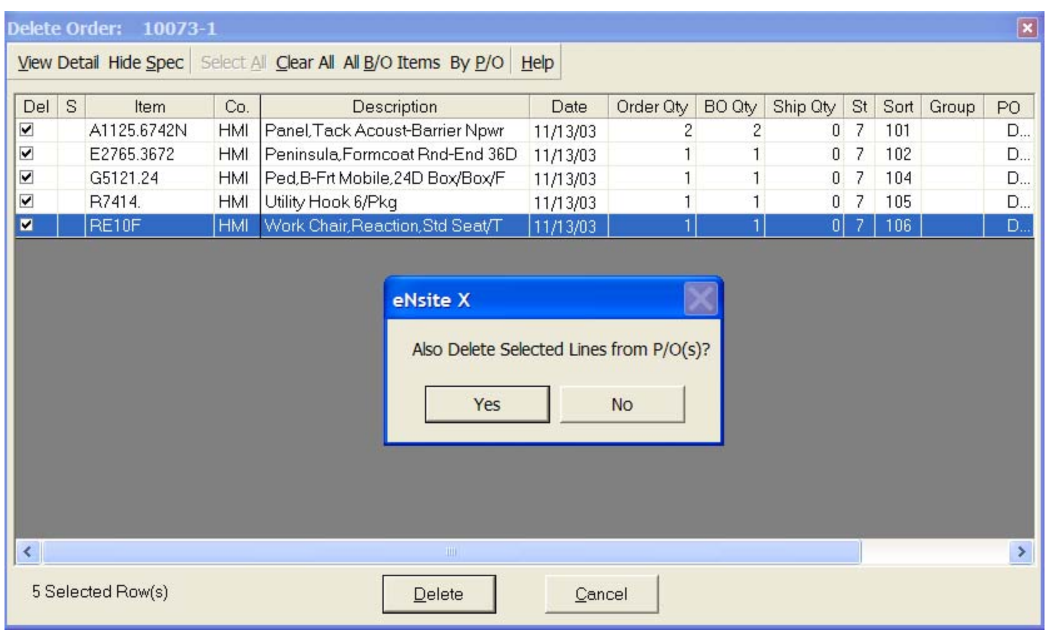
4 The items currently on the order appear in the Delete Order dialog box. Click Select All to delete the entire order.

5 After all the items have been marked for deletion, click Delete.

6 If the line items are also on a purchase order, the system displays the Delete Selected Lines from P/O's prompt, as shown in Figure 26. To delete the line items from the P/O as well as from the order, click Yes. If you click No, you are prompted for each item on the order, making deleting numerous items a time-consuming task.

Note: If you have already sent the purchase order to the manufacturer, received the acknowledgment and have exceeded the time period when you can cancel the manufacturer's order or an individual item on the order, you should leave the item on the P/O and move the item to on-hand inventory.

Figure 26: The Delete Selected Lines from P/O(s) Prompt



7 At the Selected Lines Have Been Deleted message, click OK.

8 If you're deleting more than one order, the next order appears in the Delete Order dialog box so you can delete all the items. When you finish, the cursor returns to the Global tab.

Deleting Line Items

1 In the Furniture Order Entry window, click the down arrow in the Action Code list box and choose Delete.

2 Enter the delete password, and click OK.

3 Select the order that contains the line items to delete.

Note: To delete line items from more than one order, to select additional orders, hold down the Ctrl key and click the orders that contain the items to delete. You can select as many orders as necessary.

To view line item detail for a particular item, click the item, and click View Detail. When you finish viewing item detail, click Close.

4 The items appear in the Delete Order dialog box. Click the Del box corresponding to each item to delete from the order.

5 After all the items have been marked, click Delete.

6 If the line items selected for deletion are also on a purchase order, the system displays the Delete Selected Lines from P/O’s prompt. To delete the line items from the P/O as well as the order, click Yes.

Note: If you sent the purchase order to the manufacturer, received the acknowledgment and have exceeded the time period when you can cancel the manufacturer’s order or an individual item on the order, you should leave the item on the P/O and move the item to on-hand inventory.

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7 At the Selected Lines Have Been Deleted message, click OK.

8 If you're deleting items from more than one order, the next order appears in the Delete Order dialog box so you can delete the items. When you finish deleting items, the cursor returns to the Global tab.

Releasing Furniture Quotes to an Order

When you release a quote to an order, the system recognizes the project and can retain all of the project information, including the project number, customer, and salesperson. This ensures that all original information you specified when placing the quote is released to the order. There is no need to change the information. However, if you need to make changes, you can easily do so.

Note: If you need to change the customer for the quote or the order, you must first create a new order in Order mode. Assign the new order a project number and description. Then, release the previous order or quote to the new customer.

If you specified shipping address information, order notes, LabelZ information, or third party billing data when the quote was created, you can click the corresponding buttons to view the appropriate detail. Information shown is for display only; it cannot be changed in the Order Release dialog box. The Shipto, Order Notes, LabelZ, and Third Party Billing buttons are only enabled if this information exists for the quote you retrieved.

1 In the Furniture Order Entry window, click the down arrow in the Action Code list box and choose Release. The Order Release dialog box opens, and the cursor moves to the Quote # box. See Figure 27.

2 Select the quote to release to an order.

- If you know the order number, enter it in the Order Nbr # box and press Enter.
- If you don't know the order number, click to open the Order Browse dialog box opens. Click the quote to release and click OK. If the customer account or quote you need is not displayed, you can use the Order # through Status list boxes to enter information for the quote to release. Click the appropriate box and enter the information. Click Find. The quote that most closely matches the one you specified appears.

3 Check the Release Entire box to release the entire order without making any changes. To make changes to the quote, leave the Release Entire box blank.

4 Check the Delete Quote box to delete the quote once it has been released. To retain the quote once it is released, leave the Delete Quote box blank.

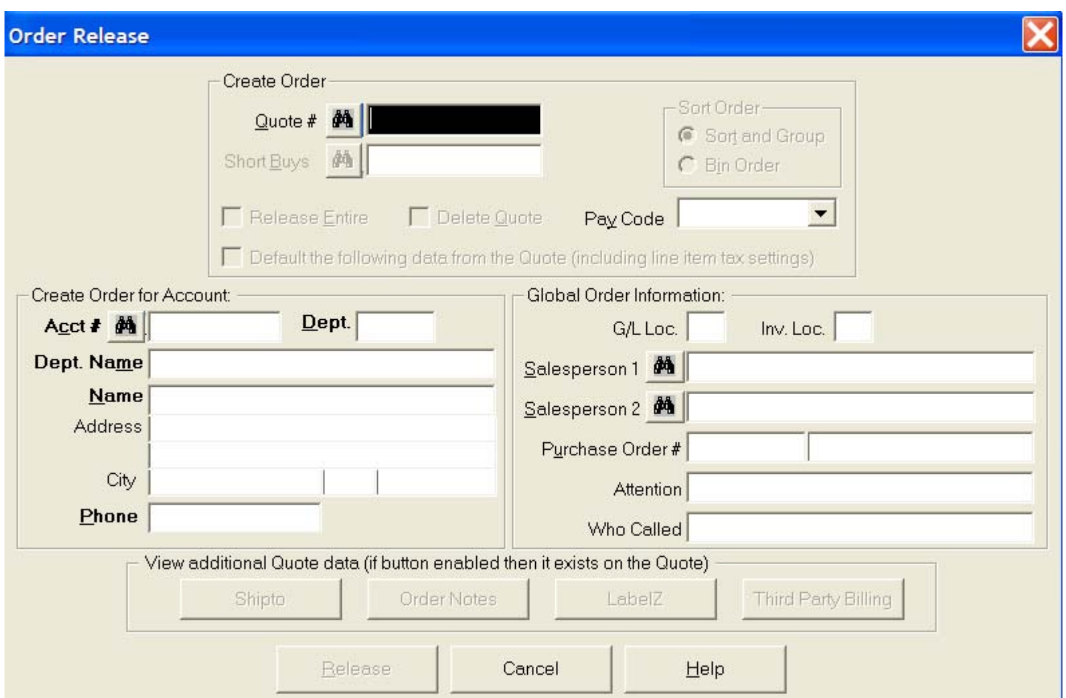

Figure 27: The Order Release Dialog Box

5 In the Default the Following Data from the Quote check box, indicate whether to use the original information from the quote for this order.

- If you do not check this box, customer default information is used for the order. To change it, press Tab to move from box to box.
- If you check this box, information from the quote appears in the corresponding boxes. You can press Tab to move from box to box to change the data.

Note: Once you click the Release button, information you specified in the Order Release dialog box is used when creating the order.

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6 When finished, click Release.

7 If you did not specify to release the entire order, the Release Line Item Selection dialog box opens listing all the items on the order. To change the ordered or shipped quantities, or the item price, enter the information and click OK.

8 The cursor returns to the Item Detail tab. At this point, you can add more items.

9 When you finish adding items, click the Order Totals tab. The Order Totals tab opens, listing the order's subtotal, discount, tax, and total amounts.

10 The cursor moves to the Printer box. At this point, you can complete releasing the quote, or change the printer information and enter an end line special.

11 To complete the procedure, click Accept Order. The pick ticket is ended at the status you selected. Unless you indicated not to print any pick tickets, the number of pick tickets you entered print. The cursor returns to the Global tab.

Third Party Billing

There may be times when you sell items to a customer, while billing a third party for the account. For example, you can use this feature when you sell items to a customer, but a third party, such as a leasing company, receives the bill for the order. You can also use this feature when the items have been sold directly to the customer by the manufacturer but you've been hired to install the furniture at the customer's site. In this case, you would receive a set fee for the job. In addition, if you do business with the Government Services and Administration (GSA), you can use this feature to easily keep track of your furniture orders even though you aren't handling the billing process.

Since you're billing the third party for this order, you must create a record for the customer in the Customer window. For example, if you're creating an order for ABC Company, but the manufacturer being billed is HON, you must create a customer record for HON. Using another example, if you're billing a leasing company, you must create a record for the leasing company. This way, the system can bill the correct customer for the order and can properly update accounts receivable when the order is invoiced.

Note: You can change the status of an existing third party billing order. When using Order Entry Change mode, you can change an order from a third party billing order to a regular order, as well as change a regular order to a third party billing order. In addition, you also have the ability to change the pricing information for the order and the customer for the order.

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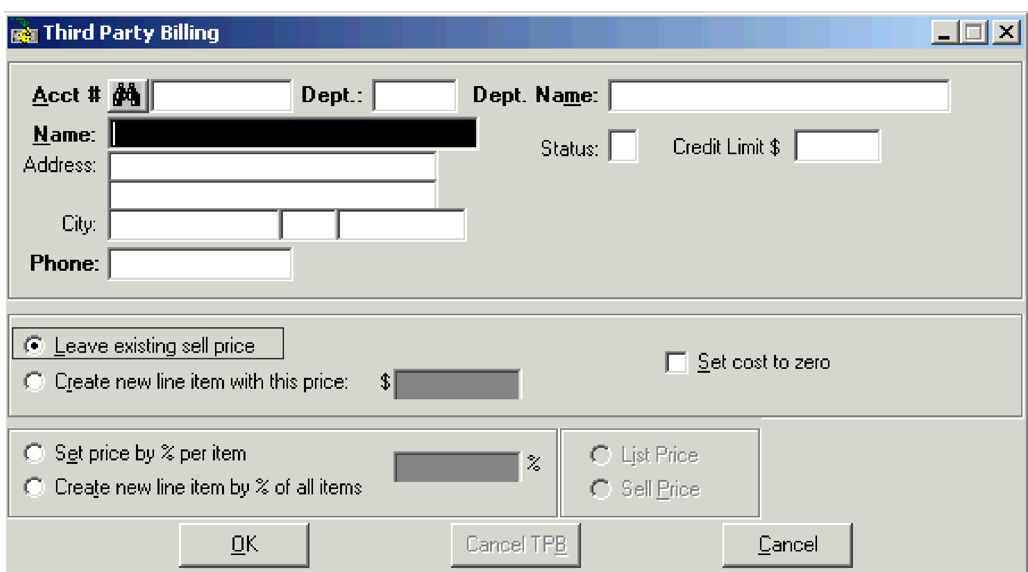
1. Begin placing an order until you click the Order Totals tab.
2. Click . The Third Party Billing dialog box opens, and the cursor moves to the name box.
3. Retrieve the customer who receives the bill for this order, the leasing company account or GSA, for example. You can retrieve the customer by name, account number, account number and department, or phone number. If you can't remember the customer's information, you can also use the Customer Query dialog box.
4. After you retrieve the customer, the lower portion of this dialog box displays the options available for third party billing.

Figure 28: The Third Party Billing Dialog Box



Note: If you are receiving a set amount for a specific job, such as installing furniture items at a customer's site, select the Create New Line Item with this Price option, and enter the amount you'll receive. Similarly, if you are billing a leasing company for the amount, set the sell price, cost, and so forth, but be sure to retrieve the customer who receives the bill.

Leave Existing Sell Price: Click this option to leave the existing sell price on the line items for this order. You mainly use this option for lease orders, as shown in Figure 28.

Create New Line Item with this Price: Click this option if you are going to be paid for the entire project by a total dollar amount. Use the corresponding box to enter the amount. For example, if you are paid $8500 for the total project, enter 8500 in the corresponding $ box. This option is primarily used when you are paid a set amount for the entire job, such as installing furniture at a customer's site.

Set Cost to Zero: This box works with the Create New Line Item with this Price box. Check this box to set your cost for the items on this order to zero. Selecting this option prevents the cost of the items from affecting your general ledger.

Set Price By % of Item: Click this option if you are going to be paid by a percentage of each line item on the order. You can use the % box to enter the percentage. For example, if you are going to be paid 10% for each individual line item, enter 10 in the corresponding % box.

Create New Line Item By % of All Items: Click this option if you are going to be paid for the entire project, not individual line items, by a percentage of the total amount. You can use the corresponding % box to enter the percentage. For example, if you are going to be paid 10% for the entire project, enter 10 in the corresponding % box.

List Price/Sell Price: These boxes work with the Set Price By % of Item and Create New Line Item By % of All Items boxes. In the List Price and Sell Price boxes, specify whether the dollar amount or percentage you are paid is based on using the items' list or selling price. To base the amount or percentage using the items' list price, click the List Price option. To base the amount or percentile using the items' selling price, click Sell Price.

5 When you finish entering third party billing information, click OK. The Repricing Third Party billing message appears.

6 The cursor returns to the Order Totals tab. Click the Build P/O option to build the P/O when the order is complete.

7 When you're ready to end the order, click Accept Order.

8 Since the last item placed on this order was the fee which you receive, the Uncataloged Item Information dialog box opens. Use this dialog box to enter the item number, the name or abbreviation of the manufacturer, a description, the general ledger department the fee is assigned to, a selling unit of measure, the list price, and the cost. For example, if this is a GSA order, you could enter FEES as the item number, GSA FEES as the description, and the department where the fees are posted to in the GL Dept box.

9 When you finish, click OK.

10 The Purchase Order Information dialog box opens. Since the last item placed on the order was for fees, retrieve the vendor by entering the vendor's account number or name. Complete the purchase order.

Re-Specifying Furniture Items

Third party packages are known as specification or specifier software. They simplify the process of developing specifications for furniture orders. You can easily import the resulting quotes or orders directly into Furniture through a SIF file. After you do, you can use the Re-Specifying Item feature to change information for the items on the order. When you do, the system reopens the specifier program so you can make any necessary changes. After you finish, the items are automatically imported back to the DDMS order, including the changes you made.

1 In the Order Entry window, click the down arrow in the Action Code box, and click Change.

2 Select the order to change.

3 The Enter Furniture Limits dialog box opens. You can limit the order to change by purchase order or acknowledgment number. When you finish, click OK.

4 The system opens the order you selected in the Change tab. To view specials for the items on the order, click .

5 Locate the item on the order to re-specify. Click the item to highlight it.

6 Right click the item and select the Respecify Item option. See Figure 29.

Note: If the item is on a purchase order, the system displays a corresponding message and automatically moves the item to a status 6.

7 The system opens the specifier program so you can change the item information. When you finish, the system returns the cursor to the Item Detail tab, displaying the changes you made. At this point, you can complete the order in the normal manner.

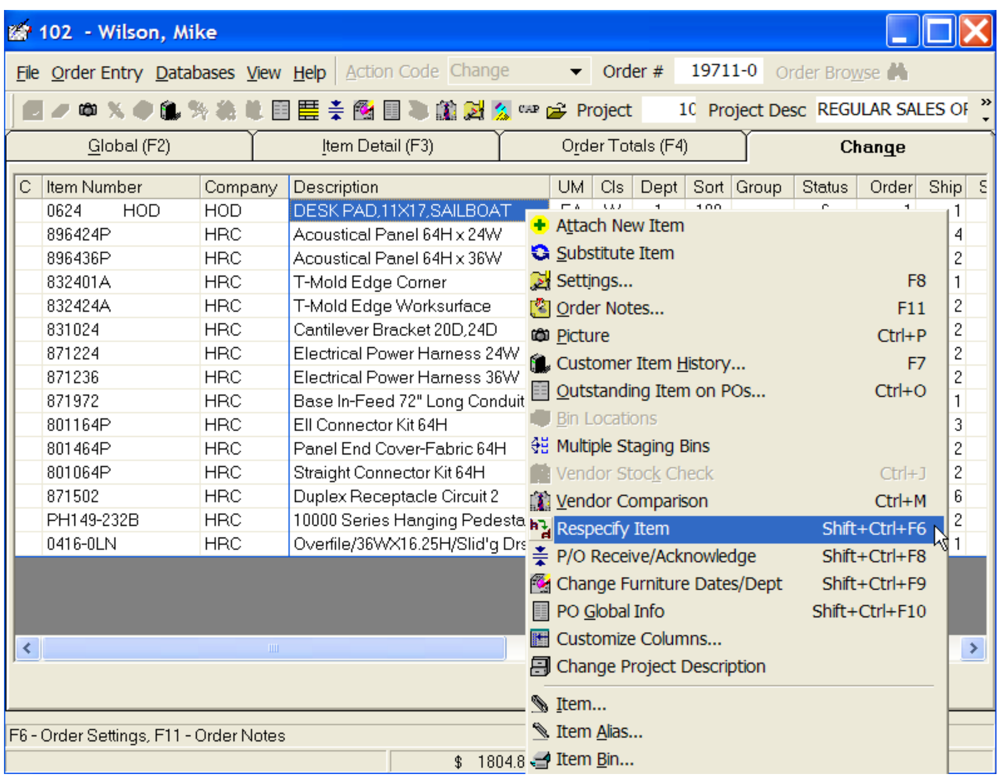
Prorating A/R Deposits

You can now prorate A/R deposits. Previously when you invoiced the ticket, the system applied the entire deposit amount against the ticket, regardless of the amount billed. Prorating A/R deposits lets you apply a percentage of the deposit amount as a payment against the ticket when it is partially invoiced, rather than the entire deposit amount. The system does this by using a pro-rated percentage equal to the invoiced amount versus the total amount. For example, if you invoice the ticket only once for 100%, the entire 100% of the paid deposit is applied to the invoice. But if you invoice 50% of the items on the order, the applied deposit is 50% of the initial deposit received. The balance of the deposit is not applied until the remainder of the order is invoiced.

Suppose you create a ticket containing ten items selling for $100 each. The ticket amount is $1000. You post a deposit of $500 to the -0 ticket. You invoice the customer for four of those ten items, totaling 40% of the items on the ticket. The system calculates the amount of the deposit posted to the -0 ticket as follows:

40% of $500 = $200 to be applied to the -0 invoice. The resulting 60% of $500 = $300. The $300 remains in the liability account attached to the base ticket and is applied to ascending tickets, -1, -2, -3, and so on.

Figure 29: Re-Specifying a Furniture Item



If you use this feature, the A/R Deposits dialog box has been enhanced to display the original deposit, the amount applied to each ticket, as well as the remaining amount to be applied. See Figure 30. When you print the invoice, the system shows only the deposit amount that was applied, not the entire deposit amount. If you print a Pro Forma invoice, the system prints the total deposit available at the time the Pro Forma is printed. The Deposit Report has also been modified to sort by customer and then order number. This lets you easily see the original -0 ticket information, along with the -1 or -2 tickets that were created.

To use the prorating A/R Deposit feature, you must set the Prorate Deposit Amount Across Dash Numbers field in the (LA5) screen to Y. If you set this field to Y, the system immediately begins prorating invoices when the deposits are invoiced. If you leave this field blank or set it to N, the system continues to apply the full deposit amount when the ticket is invoiced.

Note: When you apply deposits to projects, the project is not affected by this feature, with one exception. If you allocate tickets under the project, the allocated tickets go through the prorated deposit process.

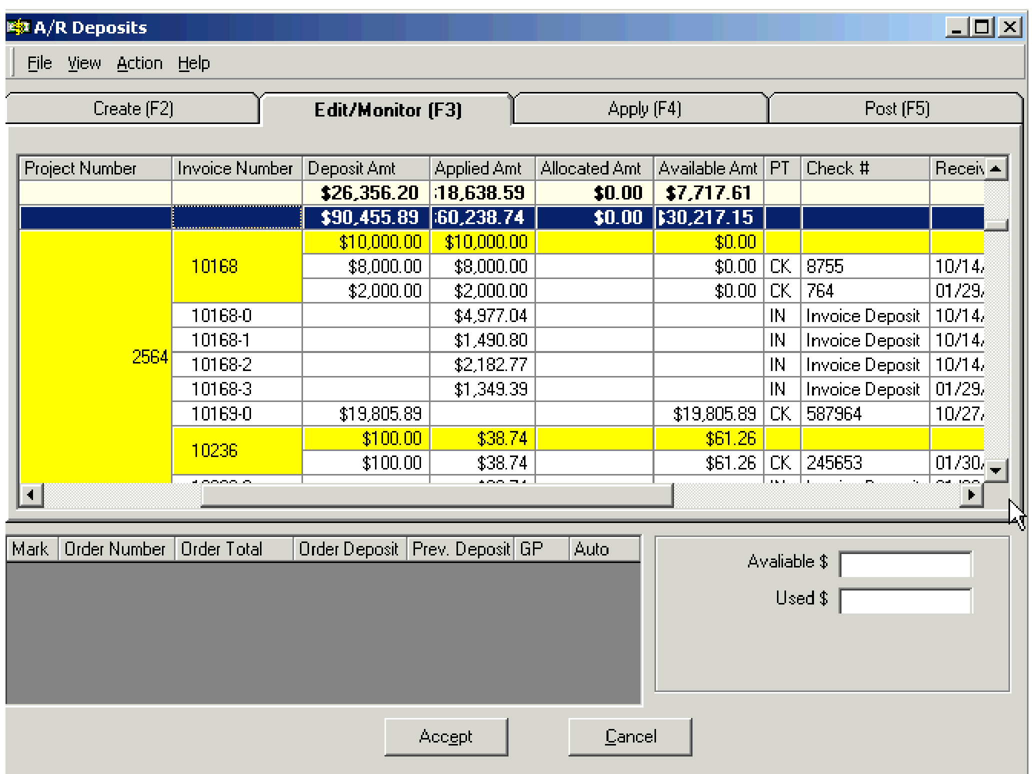


Figure 30: Viewing Information in the Edit/ Monitor Tab When Using the Prorating A/R Deposits Feature

Calculated load factors are used as installation costs added to the quote or ticket. Load factor items also affect your salesperson commissions.

The Calculated Load Factor Feature

The Calculated Load Factor feature gives you the ability to assign a load factor percentage to a furniture item. Suppose you have an item that costs you more to install or deliver. By assigning a load factor to the item, you can easily recoup the extra installation or delivery costs involved. While the calculated load factor feature is similar to Job Costing, set up is minimal and you can quickly begin using it right away.

When you place load factor items on the order, the system can prompt you to add the item. You begin placing the furniture order in the normal manner. In the Item Detail tab, place the load factor item on the quote or ticket. When you click the Order Totals tab, the system displays the Add Load Factor Line Item prompt. See Figure 31. You can then click Yes to place the load factor item on the ticket or quote.

When the load factor is added, the system calculates the percentage using this sequential order:

- The percentage set for the vendor alias in the Load Factor Pct box in the Change Alias Information dialog box, if any.
- The percentage set for the customer in the Load Factor box in the Customer Order Entry tab.
- The percentage set in the Global Load Factor Pct box in the Furniture Parameters window, if any.

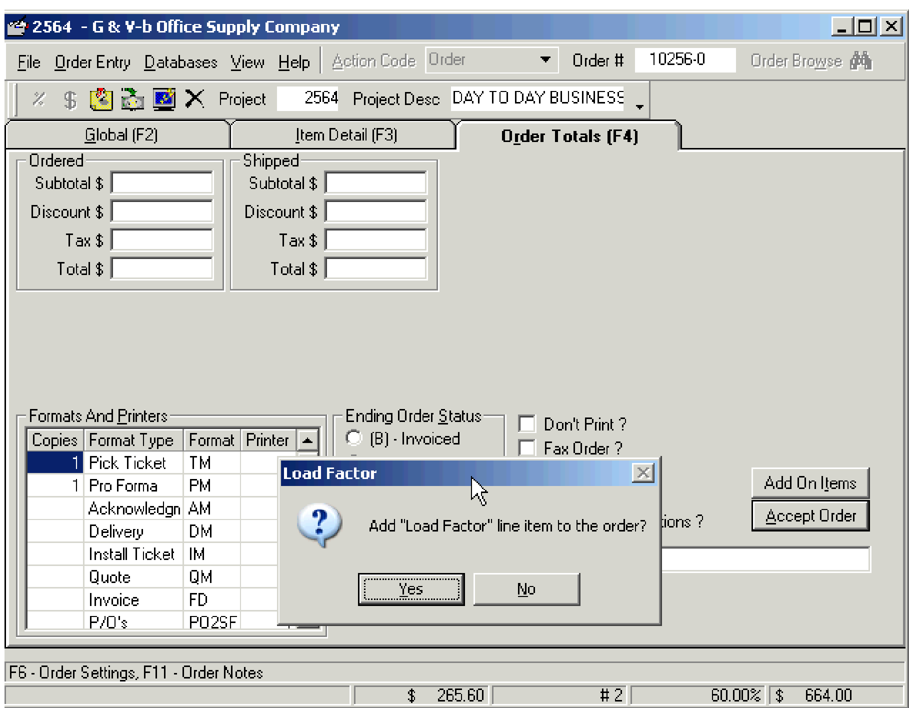


Figure 31: The Add Load Factor Line Item Prompt

Once the resulting percentage is found, it is multiplied by the order's extended dollar amount. The system also updates the P-GLOBAL and P-LINE files with the load factor information.

Enhanced Order Settings (F6)

Beginning with software version 8.17.0 and higher, you have additional flexibility when making global changes in the Order Settings (F6) dialog box. See Figure 32. We have added the ability to permanently save the default order taxable flag setting and tax district with each order.

- **Order Mode:** Adjust the global tax settings for the entire order before you begin placing it. When you do, the system retains any non-taxable item settings while globally adjusting tax settings for taxable line items. (This applies when using Order, Change, or Verify modes.)

Note: Previously when you made global tax adjustments in the Order Settings (F6) dialog box, the system changed all line items. To reset the taxable flag for a non-taxable item, you used the Item Settings dialog box (F8)

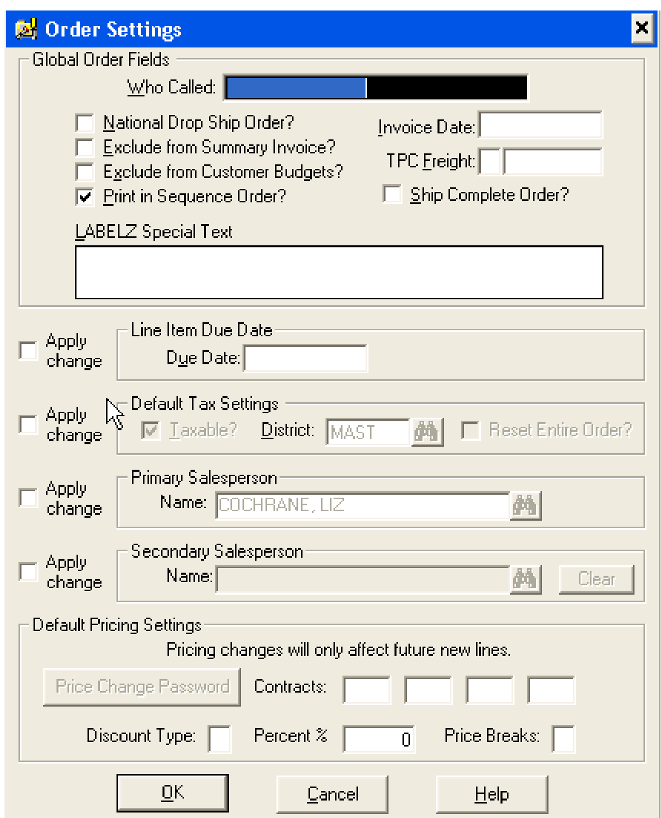


Figure 32: The Enhanced Order Settings Dialog Box

and manually reversed the taxable flag. This step is no longer necessary. When making global (F6) changes, the system recognizes the department setting for each line item. Non-taxable items retain their non-taxable setting even when global tax changes are made.

- **Change and Verify Modes:** Adjust tax settings for the entire order after it has been created. In Change and Verify, you can also add new items to the order using different tax settings while retaining the previous tax setting for the original items. Thus, a single order could contain many different tax districts for separate line items.

To enable this feature, the Order Settings (F6) dialog box has been enhanced as follows:

- **Apply Change check box:** Line Item Due Date, Default Tax Settings, as well as Primary and Secondary salespersons, are initially disabled (the Apply check box is gray). To enable changes, you must click the Apply Change check box. By clicking this box, you can globally change some line item settings without affecting others for which you may need to keep manual line item changes.
- **Default Tax Settings boxes:** You can change the taxable flag and/or enter a different tax district. Each time you make changes and end the order, the last tax setting you specified is saved with the order. If you later open the order in Change or Verify mode, the system defaults to use the last taxable flag and setting you used. This applies to any additional items you may add to the order.
- **Reset Entire Order check box:** If you make tax setting changes, the Reset Entire Order box automatically checks by default, indicating that all line items on the order should be updated with the new tax settings. *If you uncheck the Reset Entire Order box, the new tax settings apply only to additional items you may add to the order. Existing items retain the previous tax setting. A single order could have several items, each with different tax settings. Non-taxable items would retain their non-taxable setting.*
- **Primary/Secondary Salespersons boxes:** These boxes let you change the primary and secondary salespersons for the entire order. A new option lets you remove the secondary salesperson's number. To do so, click the Clear button beside the Secondary Salesperson Name box. The secondary salesperson's name is removed.

After you make changes and click OK, the system updates the order with the information you specified. To provide an audit trail, individual exceptions are written to the VER-EXCEPT file for each box and line that was changed. This applies when using Order, Change, or Verify. The new default order tax boxes are stored in the P-GLOBAL file so they can be used in both Change and Verify modes.

When you release a quote to an order, the order uses the tax settings you specified for the quote, either the default tax settings, or any you specify in the Order Settings dialog box. The EBS SQL Data Import Panel has also been changed to import the new P-GLOBAL boxes to the Sales Order table.

Note: If you change the order's shipping address, the Update Tax Settings on Order prompt opens, letting you update the tax for the new shipping address you selected.

Global Order Settings (F6) Example

Suppose you create an order and import a SIF file containing 10 items. You open the Order Settings dialog box (F6) and change the tax district for the entire order (the Reset Entire Order check box is checked). The order is ended with the new tax district. Later, you must add 5 new items, so you open the order in Change mode. The system retains the last tax district specified. Suppose you now need to use a different tax setting for the 5 new items. You would open the Order Settings dialog box and change the tax district for the order. But this time, you clear the Reset Entire Order box. This ensures that only the new 5 items have the new district. After ending the order, it contains a total of 15 items, 10 with the first tax district, and 5 with the last tax district. Finally, you make one last change to the order, adding another 3 items. When you re-open the order, the system defaults to use the last district you specified when you added the previous 5 items. To specify a different tax district, open the Order Settings dialog box again and change the tax district, clearing the Reset Entire Order box to apply the district only to the last 3 items. You save and end the order. The order now contains a total of 18 items, 10 with the first tax district, 5 with the second, and the last 3 having the last tax district you entered.

Enhancements for Version 8

The following details important enhancements added to version 8 software.

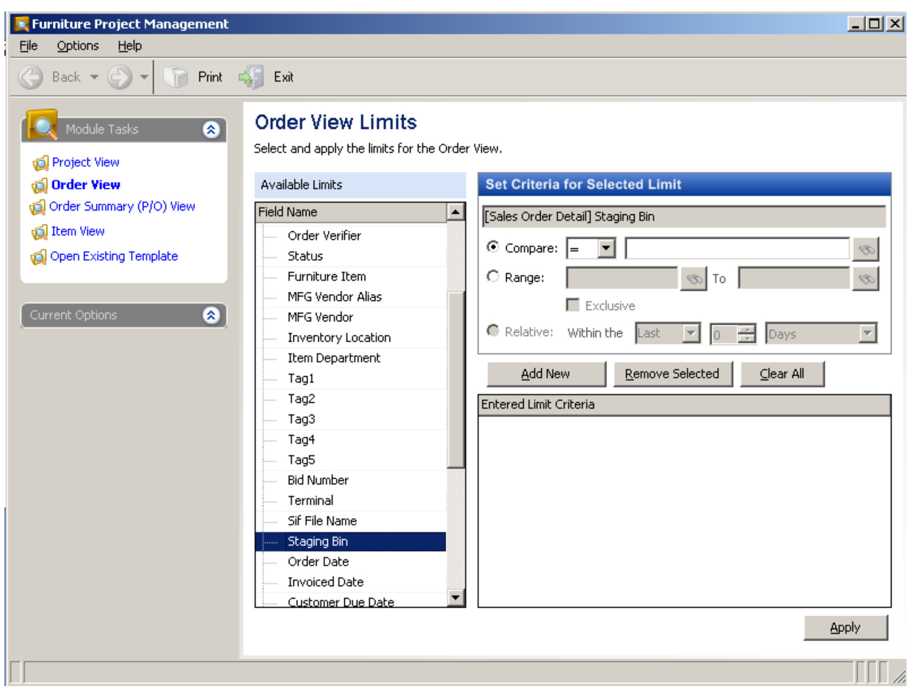
- **v8.17 Changing On Hold Orders:** When you change an on hold order in Furniture O/E, the Build P/O option in the Order Totals tab is unavailable. This option is grayed when changing held orders. In addition, if you import a SIF file in Furniture O/E Change mode and the order is on hold, the hold status remains until you continue the held order.
- **v8.17 Clear Secondary Salesperson:** When in Order Entry Change mode, we've added the ability to allow you to remove the secondary salesperson from an order. This is a handy feature if you add a secondary salesperson when placing the order for reporting purposes but the order later changes. To do so, begin changing an order and open the Order Settings (F6) or Item Settings (F8) dialog boxes. In the Secondary Salesperson box, click the Clear button.

- **v8.17 Modifying Furniture Orders:** We have added two new columns to the Furniture O/E Modify Orders dialog box: Extended Margin and Extended List. The system multiples the order quantity to the current margin and current list to calculate the extended margin and extended list totals. We have also altered the total columns at the bottom of the dialog box to display only extended column information. This includes the Extended Price, Extended Cost, Extended Margin, Extended List and Gross Profit Percentage.
- **v8.17 Updating P/O Item Departments and Responsibility Center when Changing Furniture Orders:** When changing an order's line item (general ledger) department in Change or Final Verify modes, the G/L department is now updated on both the ticket and the purchase order, as long as the line on the P/O has not been posted to payables using the A/P Post P/O feature. To do this, the system checks the PO-MASTER and JOUR-PO files, as well as the first journal listed in the (LF2) screen. If the P/O lines have been posted, the Changing the Order's Department Will Make the Order and P/O Not Match warning message appears. The system also now updates the responsibility center (RC) for the new department. By updating the ticket, the P/O, and the RC, this ensures that the Cost of Goods and account payable information properly match. The responsibility center feature is not included in all software packages and may require authorization. For more information, contact ECi sales.
- **v8.17 Updating P/O Notes When Changing Furniture Orders:** When adding new P/O communication notes in Furniture O/E Change mode (F11), the notes you specify update the P/O header notes as well as the items linked to the P/O. This is a useful feature if the P/O has already been sent to the manufacturer who later asks for this P/O to be updated with special notes. It allows the order-taker to return to the Furniture window and make the necessary changes. To use this feature, open the Order Notes dialog box (F11) and add the necessary notes. Check the Prompt to Update PO Notes check box and click OK. When the system displays all the purchase orders attached to this order, click the box corresponding to the P/O number to update. If the P/O has already been transmitted, the text Transmitted appears after the P/O number. This notifies the order-taker that the P/O can be reprinted or retransmitted, as necessary.
- **v8.17 New Project Management Limits:** Two additional limits have been added to the new, re-designed Project Management window. This includes the Staging Bin limit, shown in Figure 33, which limits multiple bin information and appears under Sales Order Detail, along with the Entire Order Complies with Limits option which appears under Sales Order limits. By adding both these limits, you can now specify to in-

clude not only staging bin orders in the result, but also limit to only those orders that include all line items. For example, if one or more items are not included when limiting, the entire order is excluded from the display. This ensures that you can view only those orders that are completely ready for delivery. This is a useful tool if you receive orders containing damaged items. You can assign the damaged items to a staging bin while you wait for the undamaged goods to arrive. This helps your warehouse personnel easily determine which orders have been physically received and are ready for delivery.

- **v8.16 Continue Invoiced Order:** In Furniture Order Entry, you can continue an invoiced order. This is a useful feature if you have already invoiced the order but find you ordered the incorrect item or an insufficient quantity of the item. This gives you the ability to continue the order even after it has moved to an invoice (status B). You cannot use this feature with prepay or credit orders nor for bill-complete customers.

Figure 33: The Staging Bin Limit in the Project Management Window



For more information concerning the new Project Management window, see the handout Furniture Project Management *on our Website.*

Note: In order to use this feature, you must set the Allow Continue Invoiced Order Option box in the General Configuration Furniture Parameters to Y. You can also password protect this function. This feature is not included in all software packages and may require authorization. For more information, contact ECi sales.

To use this feature, in the Order Entry window, click the Global tab. Then, click the Order Entry menu, select Global and click Continue Invoiced Order. When the Continue Invoiced Order dialog box opens, in Original Base Order # box, enter the number of the invoice to retrieve without the dash, 1000, for example. See Figure 34. Click the Retrieve Original Order button. The system begins searching for the invoice number. When the invoice is found, the information appears in the Order Account and Global Account boxes. The Next Dash Number box displays the original ticket number, along with the new dash number, 1000-1, for example. This information is for display only. Click the Create Next Dash button. The cursor returns to the Order Entry window so you can continue placing the order.

Figure 34: Continuing an Invoiced Order