ECi USERS CONFERENCE

Empowerment 2008

Office Products Order Entry II

ECi DDMS®

Contents

To get the most up-to-date documentation, read your Ensite Pro 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.

About Order Entry II

This session covers additional tasks you can perform using Ensite Pro, including:

- Credit Returns
- Additional Volume Discount Plans
- Order Notes
- Notes Everywhere
- Quote Release Features
- Item Remarks
- Customer Specific Item Substitutions
- Print Groups
- O/E History.

Credit Returns

The Credit Return application streamlines the entire credit process and makes it more efficient. For example, all the search functions and credit functions have been combined into one action code. This eliminates the need to inquire using one action code and create the credit using another.

Credit returns let you search by the original invoice number, customer name and item number, or customer purchase order number. Additionally, the P-MASTER and JOUR-S files and up to twelve renamed sales journals are searched.

Another feature allows you to track items already credited for a specific invoice. This eliminates the possibility of crediting an item more than once. A credit return index also tracks the credits entered against an original invoice.

You also have the ability to create multiple credits for the same invoice during the same day's business. Each credit has its own unique number, all linked to the original invoice number.

The ability to create a list of reason codes displays during the return process. You can specify up to 15 reasons why items are returned, allowing you to track the most common.

You can specify whether the items are automatically returned to on-hand, the RECEIPTS file, trash, or to the vendor. In addition, you can use the item's stock class to specify how to handle the returned merchandise.

A parameter allows you to charge a restocking fee. You can base the percentage that is charged on the number of days that have passed since the item was purchased. You can also exempt customers from the restocking fee, depending on the reason the items was returned.

Note: If you are using the enhanced bin feature and perform a credit return in Order Entry, for the enhanced bin information to be properly updated, set the item's Disposition to Receipts. Next, perform the Release to Bin process in the Warehouse menu. Then, release the item to on-hand inventory by running the [H] Stock Receipts Report function in the (TR) Order Entry Reports screen.

Planning to Use Credit Returns

A small amount of planning can make using the credit return application very simple. The following paragraphs help you plan and help you make decisions to successfully prepare to create credit returns.

First, you should reindex the P-MASTER, JOUR-S files, and any renamed sales journals to search for a particular invoice.

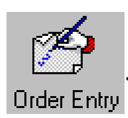
Because DDMS is fully integrated, the information used in credit returns is automatically supplied to other parts of the software. Therefore, you must set parameters in the (LGA) Sales Journals Parameters and (LGB) Credit Order Entry Parameters screens.

Beginning a Credit Return

There are four steps to creating a credit return:

1. Select the order to credit.
2. Specify the global credit information.
3. Specify the credit return information.
4. Complete the credit return.

Select the Order to Credit

1 Double-click 

.

2 Click the down arrow in the Action Code list box, and click Credit.

3 The Order Entry Credit Order Creation Method dialog box opens. Use this dialog box to search for the order to credit. Search using the original order number, the customer's purchase order number, or by selecting the customer and the item being returned.

To search using the original invoice number, see **Searching By the Original Invoice Number**.

To search using the customer's P/O number, see **Searching by the Customer's Purchase Order Number**.

To search using the customer and item, see **Searching By Customer and Item**.

Searching By the Original Invoice Number:

4 Enter the original invoice number in the Original Order # box without the extension, and click OK. For example, if the order number is 13852-Ø or 13852-1, enter 13852 in this box.

Note: If you enter an invalid order number, the system displays the Order Not Found error message. Click OK and enter a valid order number.

---

5 The search begins for the order that contains the information you specified. When the order is found, the Order Entry Credit Order dialog box opens. Click the Return Qty box for the item to return and enter the returned item quantity. For example, if the customer is returning two items, click the Return Qty box for the appropriate item and type 2.

Note: If you select an item by mistake, click the Return Qty box and type Ø to clear the quantity. To view credit history, click the Credit History button. The Order Entry Credit History dialog box opens. When you finish viewing credit history, click Close.

---

6 When you finish marking items, click OK.

7 The Global Credit Data dialog box opens. This dialog box lets you specify the invoice number, pay code, salesperson, purchase order number, and person who called to return the item. For details, see the heading **Specifying Global Credit Data**.

Searching by the Customer's Purchase Order Number

4 Enter the customer's purchase order number in the Customer P/O # box and click OK.

Note: If you enter an invalid purchase order number, the system displays the No Order Found for P/O # error message. Click OK and enter a valid purchase order number.

---

5 The search begins for the order that contains the information you specified. When the order is found, the Credit Order dialog box opens. Click the Return Qty box for the item to return and enter the returned item quantity. For example, if the customer is returning two items, click the Return Qty box for the appropriate item and type 2.

Note: If you select an item by mistake, click the Return Qty box and type Ø to clear the quantity. To view credit history, click the Credit History button. The Order Entry Credit History dialog box opens. When you finish viewing credit history, click Close.

---

6 When you finish marking items, click OK.

7 The Global Credit Data dialog box opens. This dialog box lets you specify the invoice number, pay code, salesperson, purchase order number, and person who called to return the item. For details, see **Specifying Global Credit Data**.

Searching By Customer and Item

4 Click the Customer and Item check box, as shown in Figure 1. Click OK.

5 When the cursor moves to the Name box, select the customer whose invoice to credit. For instructions, see your online documentation.

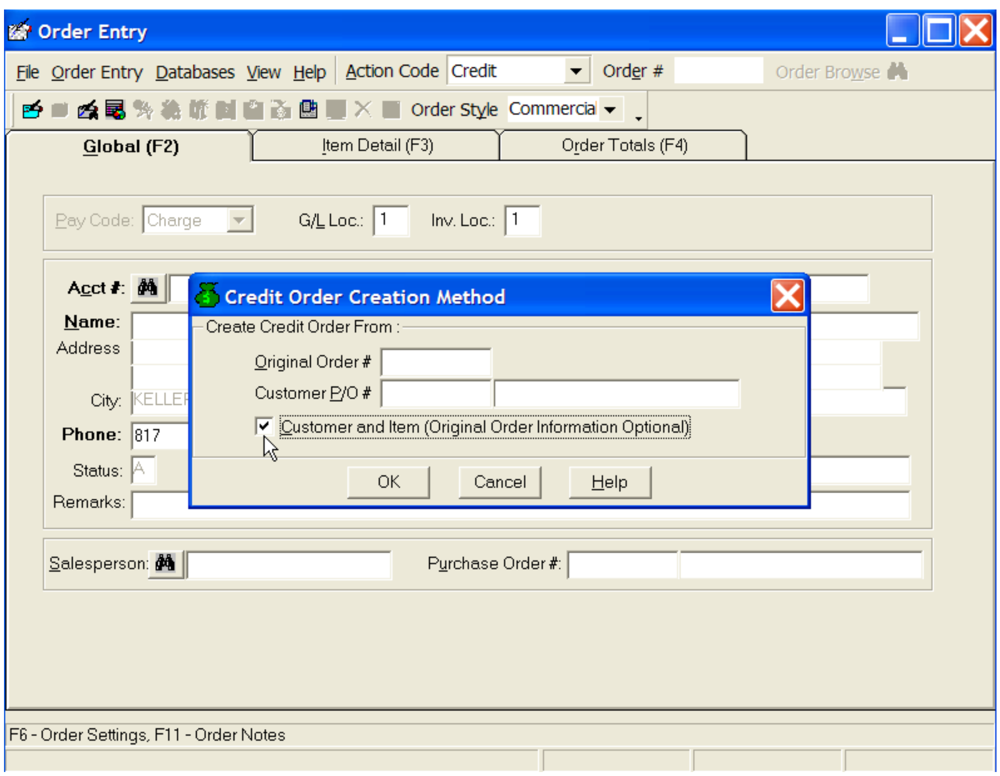
6 After you select the customer, click the Item Detail tab and select the item the customer is returning.

Note: If the item the customer is returning is an item you don't stock (uncataloged), click  to open the Uncataloged Item Information dialog box and specify the item information. When finished, click OK. Go to **Step 8**.

---

7 After you select the item, a dialog box opens listing all the orders on which this item appears for this customer. Double-click the appropriate order.

Figure 1: Searching By Customer and Item



8 The order appears in the Item Detail tab and the cursor moves to the Return box. Specify the returned item quantity. For example, if the customer is returning 1 item, type **1**. Press Enter.

9 After you enter the return quantity, click Accept.

10 The Global Credit Data dialog box opens. This dialog box lets you specify the invoice number, pay code, salesperson, purchase order number, and person who called to return the item. For details, see the following heading **Specifying Global Credit Data**.

Specifying Global Credit Data

When you create a credit return, the Global Credit Data dialog box opens. This dialog box lets you specify the invoice number, pay code, salesperson, purchase order number, and person who called to return the item.

1 In the Original Invoice #, Assign Invoice #, and Next Invoice # boxes, assign an invoice number to the credit return.

To accept the original invoice number as the number attached to the return, check the Original Invoice # box. The original invoice number appears in the Credit Order # box.

To assign a new invoice number, check the Assign Invoice # box. In the Credit Order # box, specify a unique invoice number for this credit return.

To automatically assign an invoice number, check the Next Invoice # box.

2 In the PayCode list box, click the down arrow and select the pay code that corresponds to this transaction. You can choose from Charge Credit, Cash Credit, or Credit Voucher.

Note: The PayCode list box defaults to the pay code that corresponds to the original transaction. For example, if this was a cash transaction, the PayCode list box defaults to Cash Credit.

---

3 In the Salesperson box, you can accept the default number of the salesperson who created the original order or you can enter a different salesperson number. If you don't know the salesperson's number, you can also use the Query feature to find the salesperson to assign this credit return.

Note: The G/L Loc and Inv Loc boxes display the general ledger and inventory location for this credit return, respectively. These boxes default to the information that corresponds to the original transaction and are for display only.

---

4 In the Purchase Order # boxes, accept the default purchase order number attached to this order or enter a different purchase order number.

5 If an individual was specified in the Who Called box in the Order Settings dialog box when the order was placed, the name appears in the Who Called box. You can accept the default name or enter the name of the person returning the merchandise.

6 When you finish entering information about the credit return, click OK.

Specifying Credit Return Information

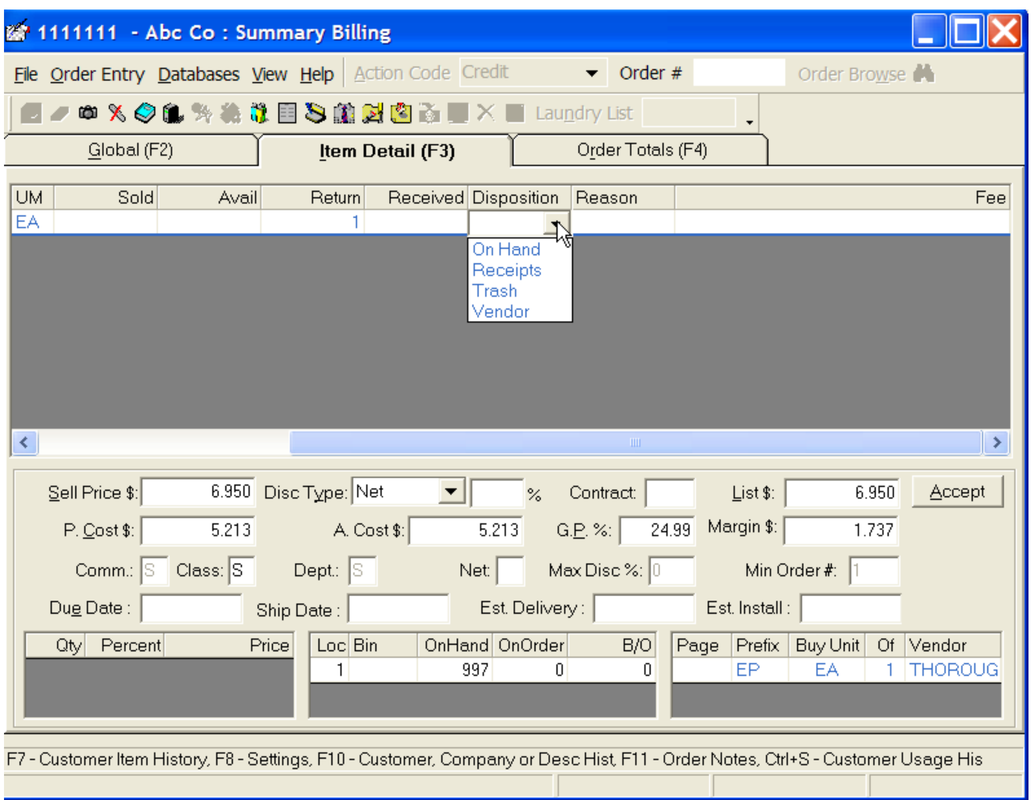
1 After you enter information for the item in the Global Credit Data dialog box, the Item Detail tab reopens, displaying information for the item(s) being returned. This includes the returned quantity, the disposition of the item (how the returned merchandise is handled), and the reason the item was returned. You can change the default information.

2 To change the disposition of the item, click the Disposition box.

3 When the Disposition list box opens, click the down arrow and choose how to handle the returned merchandise. See Figure 2.

- To return the item to on-hand, click On-Hand. The item is returned to your on-hand inventory for resale.

Figure 2: Entering Return Information



- To return the item to the RECEIPTS file, click Receipts. The information in this file is used when you flush merchandise to customer backorders. After backorders are flushed, the remaining merchandise can be released to update on-hand quantities.
- To return the item to trash, click Trash. The item cannot be resold. A cash or credit return is recorded in your sales journal and reflected in your sales figures, (on-hand quantities and the RECEIPTS file are not affected).
- To return the item to the vendor, click Vendor. The item is not resold and is returned to the vendor for credit. Like the Trash option, a cash or credit return is recorded in your sales journal and reflected in your sales figures, (on-hand quantities and the RECEIPTS file are not affected).
- To return the item to an unknown source, click Unknown. This response lets you specify how to handle the item.

Note: If you are using the enhanced bin feature and perform a credit return in Order Entry, for the enhanced bin information to be properly updated, set the item's Disposition to Receipts. Next, perform the Release to Bin process in the Warehouse menu. Then, release the item to on-hand inventory by running the [H] Stock Receipts Report function in the (TR) Order Entry Reports screen.

---

4 To change the reason the item was returned, click the Reason box. Enter the text explaining why the item was returned, DAMAGED, for example. Press Enter.

5 To specify a restocking fee, click the Fee box. Enter the restocking fee to charge and press Enter.

Note: The default restocking fee is based on a percentage of the item's sale price and the number of days the customer waits to return the merchandise. This amount is calculated based on your response in the Restocking Fee Percentage fields in the (LGB) Credit Order Entry Parameters screen. To delete an item from a credit return, right click the item and click Delete. You can also click the item to highlight it and click .

---

6 When you changing credit return information, end the credit return. If you're completing a credit return, see the heading **Completing Credit Returns** for details. If you're completing a cash return or a credit voucher, see the heading **Completing Cash Returns and Credit Vouchers**.

Completing Credit Returns

Unlike Cash Return and Credit Voucher pay codes, Credit Returns do not require a refund when the merchandise is returned. When you finish creating a Credit Return, you must end the return. You do this in the Order Totals tab.

Note: If you are creating a Cash Return or a Credit Voucher, you must specify how you refund the customer for the returned merchandise. For details, see the heading **Completing Cash Returns and Credit Vouchers**.

---

1. If the Order Totals tab is not displayed, click the Order Totals tab. The Order Totals tab opens listing the order's subtotal, discount, tax, and total amounts.
2. The cursor moves to the Ticket Printer box. At this point, you can end the return or make changes to the ending return status, printer information, and enter an end line special.
3. To end the credit return, click Accept Order. The order is ended at the status you selected. Unless you indicated not to print any tickets, the number of tickets you entered print. In addition, the pick tickets are faxed or emailed if you so specified. The cursor returns to the Credit Order Creation Method dialog box.

Completing Cash Returns and Credit Vouchers

When a transaction with a Cash Return (pay code 6) or Credit Voucher (pay code 7) is ended, you must specify how you credit the customer for the merchandise. You could reimburse the customer by cash, check, or credit card, for example. This method by which the customer pays for the order is called tender. The Order Entry application uses default tender codes but you can also create your own. The default tender codes are set in the (LG7) Tender Code Master screen.

Note: Credit Vouchers (pay code 7) only applies when using the point-of-sale application.

These instructions assume that you are using the default tender codes set in the (LG7) screen. If you choose to create your own tender codes, the codes you use and the boxes that appear differ.

1. If the Order Totals tab is not displayed, click the Order Totals tab. The Order Totals tab opens, listing the subtotal, discount amount (if any), the sales tax, and the total amount of the credit return. The Due $ box displays the amount due the customer.

Note: If this is a cash transaction containing only backordered items, there are no shipped items on the order. In this case no money is due and the Due $ box defaults to Ø. At this point, you can end the order and print the invoice for the customer.

2 The available tenders display at the bottom of the tab with cash shown as the default tender. Select the method of payment for this return. You can choose cash, checks, credit cards, manufacturer's coupons, in store coupons, dollar and percent discounts, gift certificates, and miscellaneous tender. Click the method of payment to use. For example, if the customer is paying by check, click Check.

3 Depending on the method of payment you select, additional tender information boxes open so you can enter additional information. For example, if you choose check as the method of payment, the Account # through Phone # boxes open so you can enter the check information.

4 When you finish entering the payment information, you can end the return or make changes to the ending return status, printer information, and enter an end line special.

5 To end the credit return, click Accept Order. The order is ended at the status you selected. Unless you indicated not to print any pick tickets, the number of pick tickets you entered print. In addition, the pick tickets are faxed or emailed, if you so specified. The cursor returns to the Credit Order Creation Method dialog box.

Print Original Vendor on Credit

This feature applies when creating a credit order in Order Entry. If the item you're crediting is on a purchase order and you use the original invoice number to create the credit, the system replaces the P/O Due Date in the P-MASTER file with the first four digits of the vendor's number. Through Report Writer, you can customize your credit return to include this information so the warehouse can better manage those returns brought back with the drivers. See Figure 3.

Note: The first two characters of the vendor's number are written to the two-digit year field of the P/O Due Date. The second two characters of the vendor's number are written into the two-digit month field of the P/O Due Date.

Using Additional Volume Discount Plans

This feature lets you offer discounts and item gift rewards to customers that place orders within a certain dollar amount. It gives you two options:

- You can reduce the customer's order by a discount percentage whenever the order falls within a set dollar amount, $100 to $200, for example. This discount applies to the entire order total and is based on the subtotal amount before tax is added. The discount is given in addition to the customer's regular pricing.
- You can give the customer a gift item when placing an order within a specific dollar amount, $50 to $100, for example. In this case, a gift item is added to the order at no charge.

Note: This feature is not included in all software packages and may require authorization. For more information, contact ECi sales.

You use the Order Entry parameters to set up plan codes, dollar amount ranges, and discount and gift items. For each code, you can set up to four different dollar amount tiers. Suppose you assign a plan code of D1 for the first discount. For that code, you could set up a range of dollar amounts for $50 to $100; $101 to $200; $201 to 300; and $301 to $5000. You can set up as many codes and corresponding dollar amounts as necessary, D2, D3, and so on.

Within the specific dollar range of $50 to $100, you could specify that the customer receives a gift item, a free box of pens, for example. The second dollar range of $101 to $200 could have a 2% discount given for the entire order and so forth.

Figure 3: Using Report Writer to Customize a Credit Return

```
========== P-MASTER SELECTION ========== |REPORT NAME - [4C     ON SR??] [!USR]
PICK #........-.  SORT :...  GROUP :.... |              SEND TOF? [Y] LINES [42]
ITEM #..............  COMPANY :........ |TITLE -       RPT [ ] WIDTH [  ]
DESC :...............................    |[                                    ]
CUST #..........  DEPT :....   STATE :.. |MASTER FILE >> 1 P-MASTER   <<
SLSM:.... O.T. :.... O.V.:.... O.P.:.... |
ORDER ../../.. INV ../../.. DUE ../../.. |PAGE BREAKS IN FILE Y/N ?
ROUTE:.... P/O ORD ../../.. DUE 11/../33 |PRINTER SETUP FILE-[                 ]
CUST. P/O #..........    P/O #.......... |
PAY CODE :.    DISC. :. ...%     HOLD :. |
CONTRACT :..  TAXABLE :.  DISTRICT :.... |
G.L. LOC :..   INV. LOC :..    STATUS :. |HEADINGS (1-20)   BREAKS    (21-25)
CLASS :.  DEPT :.  UNIT :.. ASSORT :.... |DETAIL   (26-35)  SUBTOTALS (36-40)
A.COST $.........     P.COST $.......... |TOTALS   (41-55)  TRAILERS  (56-65)
 PRICE $..........      LIST $.......... |LINE  [27] BOILERPLATE [  ]
O.QTY #.....  B.QTY #.....  S.QTY #..... |FONTS [  ] [  ] [  ] [  ] [  ] [  ]
TERM.ID :..  COMM. :.  ASMB :.  TRASH :. |SKIPS BEFORE [  ] AFTER [ 1] LAST [55]
EDI :.    PICK #..........  SEQ #....... |FILE TO SELECT FROM [ 1]  TYPE F/T [F]
P/O #...................................             ** ENTER 99 FOR TEXT ONLY **

--------------------------------------------------------------------------------
ORIGINAL VENDOR: 3311

FILL THE FIELDS WITH CHARACTERS TO SELECT
```

When you set up discount percentages in the Additional Volume Discount Plans window in the Order Entry parameters, the system links the discount percentage you specify to an existing inventory item. Linking the discount to an item is useful for tracking and reporting purposes. Unless you have items in your inventory that can be used as discount items, you must add new items for use with this feature in the Item window. Not only does this help the order-taker distinguish between discount plans and regular items while placing an order, you need the ability to track and report on these discount plans when printing reports.

Therefore, you should carefully consider how you want to report these discounts. To report the various discount amounts given for specific code plans and dollar range tiers, you should create several different unique items for each level and for each table. If you only need to view one total amount of volume discounts across all your sales, you only have to set up one unique item, volume discount, for example. For details on setting up these parameters, see the heading **Setting Up Additional Volume Discount Plans**.

After you set up your items in the Item window and your plan discounts in the Additional Volume Discount Plans window, assign the customer a plan code in the Additional Volume Discount Plan box in the Customer Order Entry tab. Using the same example, you might assign customer ABC with plan code D1, and customer XYZ with plan code D2.

In Order Entry, when the customer's order falls in a specified dollar range, the system adds the discount amount to the entire order as a credit, reducing the amount of the entire order. See Figure 4.

Figure 4: Additional Volume Discount Message in Order Entry

Figure 5: Additional Volume Discount Gift Item Message in Order Entry

If the specified dollar range is set up as a gift item, it is added at no charge to the order. A message displays in Order Entry, notifying the order-taker that the item or discount was added. See Figure 5.

In addition, if the customer's order falls within 30% of the next dollar range, the system prompts the order-taker so the customer can consider adding more items to the order to reach the next dollar range. See Figure 6.

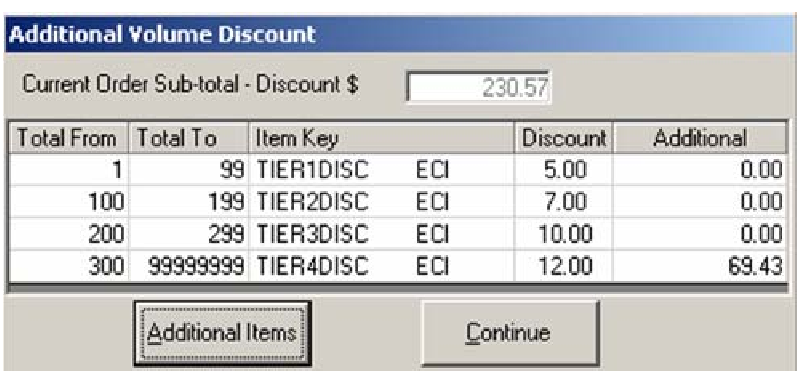
Note: When a volume discount line is added to an order in Order Entry, the system updates the P-GLOBAL file. If the order has a negative shipped total, the system prevents invoicing the order with the additional discount line items. Instead, the system holds the order at a status 6. The system also prints a message on the ticket indicating that the order cannot be invoiced. The system also holds a negative shipped total order with additional discount items to a status 6 or 7 when using the (TR)[G] or (TR)[V] functions. An AAAA special line is added with the text Negative Total – Invoicing Not Allowed and an exception is created. When final-verifying a ticket, if the order has a negative total, the system holds the order at a status 6 or 7 and creates an exception. In addition, additional volume discount items cannot be placed on a picking manifest. These factors only apply to discounted items, not gift items placed on the order.

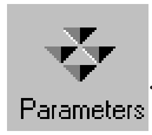
Setting Up Additional Volume Discount Plans

Before using this feature, you must set up the parameters in the Parameter Editor window.

1 From the Master Menu, double-click 
.

Figure 6: The Additional Volume Discount Window



2 Double-click 

.

3 From the Parameter Editor window, double-click Order Entry.

4 Double-click Additional Volume Discount.

5 The Additional Volume Discount Plans window opens. In this window, you can add plans, change plans, or delete plans. See Figure 7.

6 To change a plan, highlight the plan to change and make your changes.

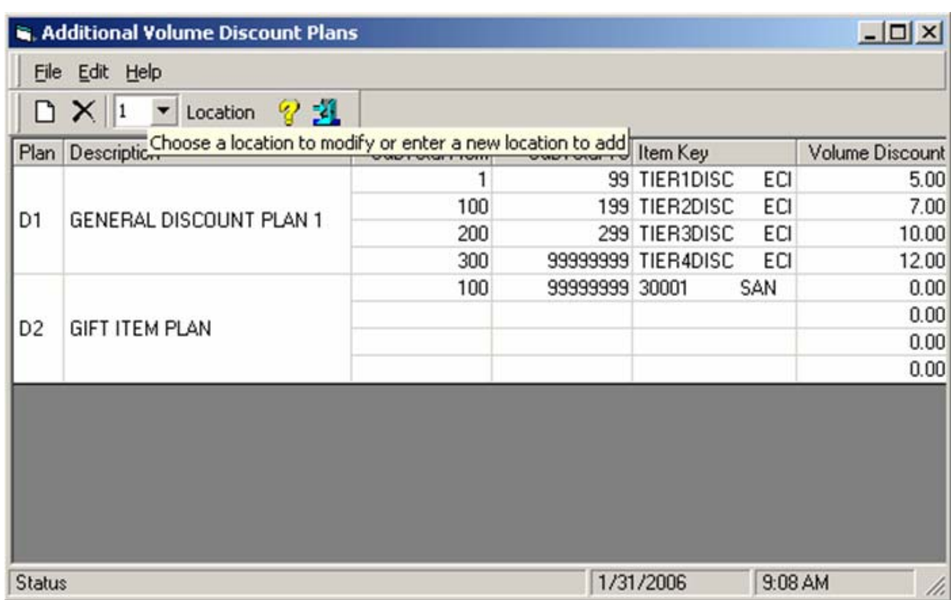
To delete a plan, highlight the plan and click .

To create new plans, click .

7 The cursor moves to the Plan box. Click each box in this window to enter the discount plan information.

- **Location**: Use this box to enter the location to use when creating additional volume discount plans.
- **Plan:** Use this box to enter the name to assign to this additional volume discount plan. You can enter a two-character identifier.
- **Description:** In the Description box, enter the description of the additional volume discount plan you are creating. The description can be up to 30 alphanumeric characters.

Figure 7: Setting Up Additional Volume Discounts



- **SubTotal From/SubTotal To:** Use these boxes to enter a range of dollar amounts for each tier of the plan. (You can enter up to four tiers.) Enter the beginning of the range in the SubTotal From box and the end of the range in the SubTotal To box.
- **Item Key:** Use this box to enter the item number to discount. You can use the query button to select an item. The item number entered in this box corresponds to the dollar amount entered in the SubTotal From and SubTotal To boxes and the discount entered in the Volume Discount box. (You can enter up to four tiers.)
- **Volume Discount:** In this box, enter the volume discount to apply to the corresponding item and subtotals on this line. The discount entered in this box allows the customer to get either a free or discounted item added to their order when the subtotals match what is entered here. (You can enter up to four tiers.)

8 When you finish, click .

9 When you finish making changes, click .

Using Order Notes

You can attach notes (also known as specials) to a particular item on an order or to an entire order. Notes print on your pick tickets, invoices, purchase orders, short buys, and backorders.

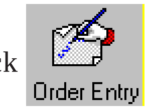
You add notes using the Order Notes dialog box. This box lists the start of order (AAAA) and end of order (ZZZZ) specials that you can enter on the pick ticket when the order is placed, along with any line item notes that may have been specified.

These notes help you keep track of any circumstances or situations surrounding the order. For example, you can keep track of any delays, damaged goods, or dissatisfied customers. You can add or change notes when you:

- Create an order or quote
- Change an order or quote
- Verify an order or quote
- Release an order or quote
- Add items to an order.

Adding Order Notes

You can attach a note to an entire order or a particular item. If you attach a note to an order, it is called a global note. If you attach a note to an item, it is called an item note. You can attach a global note at any time. To attach an item note, you enter the note immediately after you enter the item on the order.

1 From the Master Menu, double-click .

2 Begin placing the order as you normally would.

The information you enter in the Shipping Attention, Shipping Instructions, and Shipping Tag boxes print on all purchase orders attached to the order and appears as Start of Order (AAAA) special lines. It also appears in the Description box in the O/E History and P/O History windows.

3 To use the Order Notes feature, in Order Entry, click  or press F11.

You can also right-click the order and select the Order Notes option in the context menu. The Order Notes dialog box opens, as shown in Figure 8.

4 Enter the text in the appropriate box and click OK. Notice the option to the right of each box defaults to Normal. This indicates that the notes print on pick tickets and invoices. You can also select S/B to print the notes on short buys only or P/O to print the notes on purchase orders only. If you select the B/O option and are printing Start of Order or End of Order notes, the notes print on purchase orders as well as backorder and short-buy reports. If you select the B/O option and are printing Line Item notes, the notes print below the item on a pick ticket.

Additional options have been added including Shipping Attention, Shipping Instructions, Shipping Tag, Manifest Instructions, Warehouse Instructions, Option, Tag, Install, or Delivery option.

- **Shipping Attention:** Click the down arrow to the right of the Start of Order box and click Shipping Attention. The Shipping Attention and Phone boxes display. Enter the attention's name in the Shipping Attention box. You can enter up to 16 characters. In the corresponding Phone box, enter the attention's phone number. You can enter up to 12 characters. When finished, click OK.

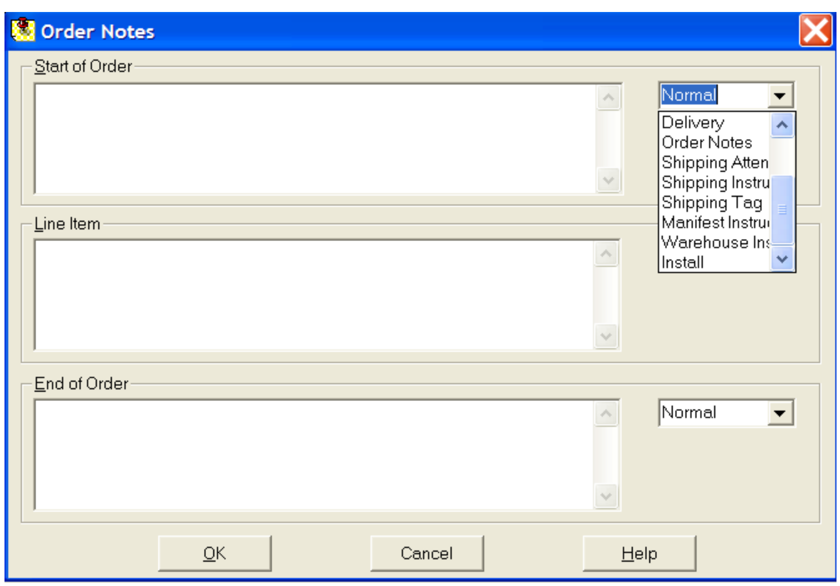


Figure 8: New Options When Specifying Order Notes

You can modify shipping attentions, shipping instructions, and shipping tags when changing and verifying furniture orders. When you do, you can specify that the system change the information for a specific purchase order or for all purchase orders attached to the order.

- **Shipping Instructions:** Click the down arrow to the right of the Start of Order box and click Shipping Instructions. The Shipping Name, Phone, and Instruction boxes display. Click each box and enter the information. You can enter up to 16 characters in the Shipping Name box and up to 12 characters in the Phone box. You can enter up to 30 characters in the Instruction box. When finished, click OK.
- **Shipping Tag:** Click the down arrow to the right of the Start of Order box and click Shipping Tag. The Shipping Tag box displays. Enter the shipping tag information. You can enter up to 30 characters. When finished, click OK.
- **Manifest Instructions:** To select this option, click the down arrow in the Start of Order Normal box and click Manifest Instructions. The system displays any instructions stored in the C-MANIFEST file. If you entered manifest instructions for this customer in the Shipping Manifest Instructions box and also checked the Import Instructions to Order Entry box in the Customer Buyers / Manifest tab, the system displays the text as Start of Order notes. They appear at the beginning of the order. You can add or edit existing instructions. To do so, type the new instructions over the old. You can enter up to a total of 200 characters, four lines of specials containing 50 characters each. The system automatically wraps the text as needed. The instructions you specify print after the detail lines on the delivery manifest. This option only applies when using Start of Order notes.
- **Warehouse Instructions:** To select this option, click the down arrow in the Start of Order Normal box and click Warehouse Instructions. Enter instructions in this box to print on the picking ticket or packing slip. These instructions can inform the warehouse team of customer issues, advise them to double-check the order before it goes out, specify whether to assemble or remind them to double-check the units of measure. This option only applies when using Start of Order notes. You can use this option to enter any special warehouse instructions for this order.
- **Option:** To select Option, click the down arrow to the right of the Line Item box and click Option. Enter your line item notes in the Line Item box. When finished, click OK.
- **Tag:** In addition to sorts and groups, you can use tags as another way to group furniture items on the order. To specify tags for an item, click the down arrow to the right of the Line Item box and click Tag. The Tag 1 through Tag 5 boxes open. Click each box and enter the tag information. You can enter up to 50 alphanumeric characters. When finished, click OK.

- **Install:** To select this option, click the down arrow in the Normal box and click Install. If you select this option and are printing Start of Order or End of Order notes, the notes print on the installation work order. If you select the Install option and are printing line item notes, the notes print below the item on all installation work orders.
- **Delivery:** To select this option, click the down arrow in the Normal box and click Delivery. If you select this option and are printing Start of Order or End of Order notes, the notes print on a delivery ticket. If you select the Delivery option and are printing line item notes, the notes print below the item on a delivery ticket.

5 When you finish adding notes, click OK.

Note: The Prompt to Update PO Notes check box is used when building purchase orders and changing and verifying furniture orders. This box does not apply when creating the order.

---

6 The cursor returns to the Item Number box so you can place the next item on the order. You can continue to place as many items on the order as necessary.

Setting Up and Using Notes Everywhere

In addition to using the Order Notes dialog box in Order Entry, you can use notes throughout Ensite Pro to provide important information. This feature keeps details directly at your fingertips. Notes Everywhere lets you create customer notes and vendor notes. Customer notes are associated with the Customer database; Order Entry application; Accounts Receivable application and A/R invoices; and existing project notes. Vendor notes are associated with the Vendor database; purchase order numbers, Accounts Payable application and A/P invoices.

Note: This feature is not included in all software packages and requires authorization. For more information, contact the ECi sales department.

You begin using notes by setting up parameters. You can set parameters so that the Notes Everywhere dialog box automatically opens each time you open Ensite Pro. This dialog box remains on top of other windows so you can easily view notes for the selected customer, vendor, or invoice. What’s more, the selected customer or vendor is automatically recognized when you retrieve the record and the notes display. The Notes dialog box blinks, notifying you that there are notes for the selected customer. You can also set passwords and set up parameters for Campaign Manager. See **Setting Up Notes Everywhere Parameters**.

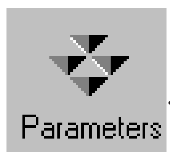
Next, you set up the codes and descriptions to use in the Note Setup dialog box. You can set up notes for email. Using Notes Everywhere parameters, you can also password-protect this feature. Give the password to only those people with access to the Notes Setup dialog box.

After you enter the codes and descriptions, you can begin setting up notes for Customers, Vendors, Order Entry, Purchase Order Entry, Accounts Receivable, Accounts Payable, Furniture, and so on. You do this using the Notes Monitor. See **Setting Up Notes Everywhere**.

Setting Up Notes Everywhere Parameters

Notes Everywhere works with Campaign Manager. When setting up parameters for Notes, you are also setting up Campaign Manager parameters.

1. From the Ensite Pro Master Menu, double-click 

, then double-click 

.
2. From the Parameter Editor window, double-click Notes Everywhere.
3. Click General Configuration.
4. In the Auto Launch text box, you can specify whether to launch notes when opening Ensite Pro. Type **Y** to automatically open notes when opening Ensite Pro. Type **N** so Notes do not open automatically. *We recommend that you set Auto Launch to Y.*
5. In the Path to Attachments box, enter the path where attachments are stored. *Attachments must be stored on a network for this function to work.* (This box works with Notes Everywhere and Campaign Manager.)
6. In the SMTP Server Name text box, enter the IP address from which emails are sent. *This box must be completed for the email function to work.* (This box works with Notes Everywhere and Campaign Manager.)
7. In the Email From Name box, enter the email name from which you are sending the email, Marketing, for example. (This box works with Notes Everywhere and Campaign Manager.)
8. In the Email From Address, enter the email address from which you are sending the email, marketing@ddms.com, for example. *This box must be completed for the email function to work.* (This box works with Notes Everywhere and Campaign Manager.)

9 In the User Name Used for Email Authentication box, enter the email user name from which you are sending the authentication email.

10 Click Passwords. See Figure 9.

11 In the Delete Password text box, enter the password for deleting notes.

12 In the Restricted Note Fields text box, enter the password to restrict user access when adding on to notes. You must enter this password when changing notes.

13 In the Setup Password text box, enter the password to restrict user access to notes setup.

14 In the View Private Notes Password text box, enter the password for viewing private notes.

15 In the Authenticate User Password text box, enter the password for authenticating users.

16 When you enter the information, Notes Everywhere and Passwords appear in bold. Click to save.

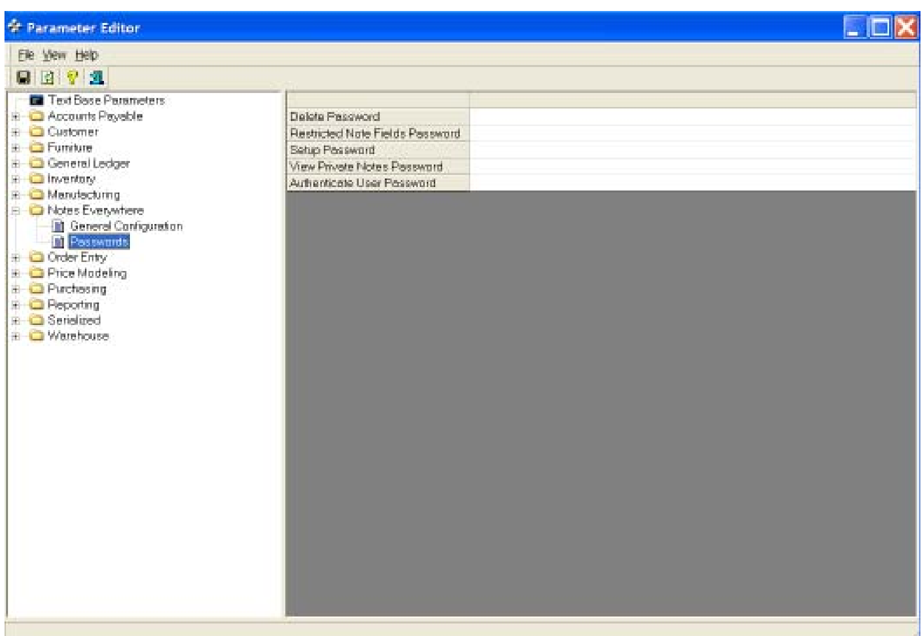
Setting Up Notes Everywhere

When setting up Notes Everywhere, you can also set up notes for Campaign Manager.

1 From the Ensite Pro Master Menu, click the Databases menu.

2 Click Notes then select Notes Setup.

Figure 9: The Notes Everywhere Passwords Parameters



Note: If you set up passwords in the Notes Everywhere Parameters, you are prompted for the password you entered in the Setup Password text box. Enter the password and click OK.

3 The Notes Everywhere Note Codes dialog box opens, as shown in Figure 10. In this dialog box, you can create new codes, modify codes, or delete codes. You can set up notes for A/P, A/R, Customers, Order Entry, Furniture, Purchase Order Entry, Serialized, and Vendors.

First, you must select the zone for which to create a note. Click the drop down arrow in the Zone box and select the zone, Customer, for example.

4 You must set up note codes. You use codes to identify notes throughout the system. To add a code, click Codes then select Add Code. (You can also right-click the Code or Description boxes to add, open, or delete codes.) The Note Setup dialog box opens, shown in Figure 11.

5 In the Note Code box, enter a three-digit alphanumeric code to identify this note.

6 If this note is to be used with Campaign Manager, click Campaign Note.

7 In the Description box, enter the description for this note.

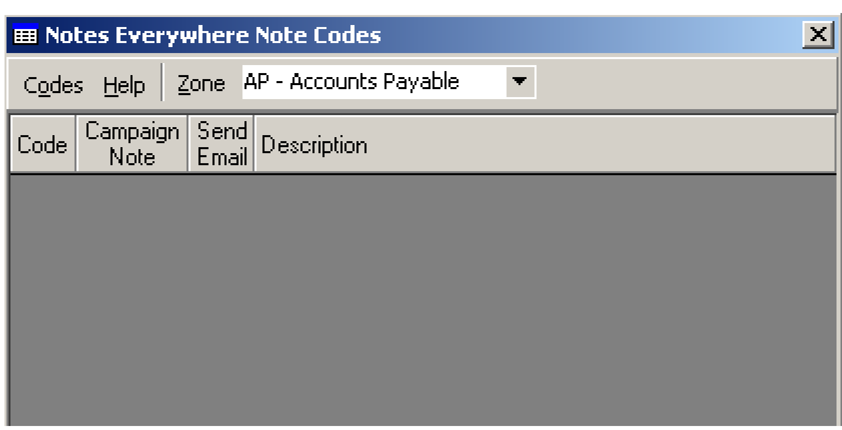
8 If you are emailing this note, you must select either Send Internal Email or Send External Email or you can select both.

To send an internal email, click Send Internal Email. Go to **Step 9**.

To send an external email, click Send External Email and go to **Step 15**.

9 The To Primary Salesperson button is automatically selected. You can enter the contact type in the Contact Type box. This information comes from the Type box in the Contact database.

Figure 10: The Notes Everywhere Note Codes Dialog Box



10 Use the Specify Address box to enter the email address for this salesperson.

11 Enter the subject of the email in the Subject box.

12 Enter the text of the email in the Body box.

13 You can also include the text of the note with this email. Click Include Text of Note.

14 You can also include the log with this email. The log contains the customer list showing which names were removed or added. To send the log with the email, click Include Log. If you are sending an external email, go to **Step 15**. If finished, click OK.

15 Complete the boxes for sending an external email. First, you must select to whom you are sending the email. If you click C-INFO, all the customers in the C-INFO file receive the email. If you click Customer Contact Type, you must enter the contact type in the text box. This information comes from the Type box in the Contact database.

16 In the Subject box, enter the email subject.

17 In the Body box, enter the body text for this email.

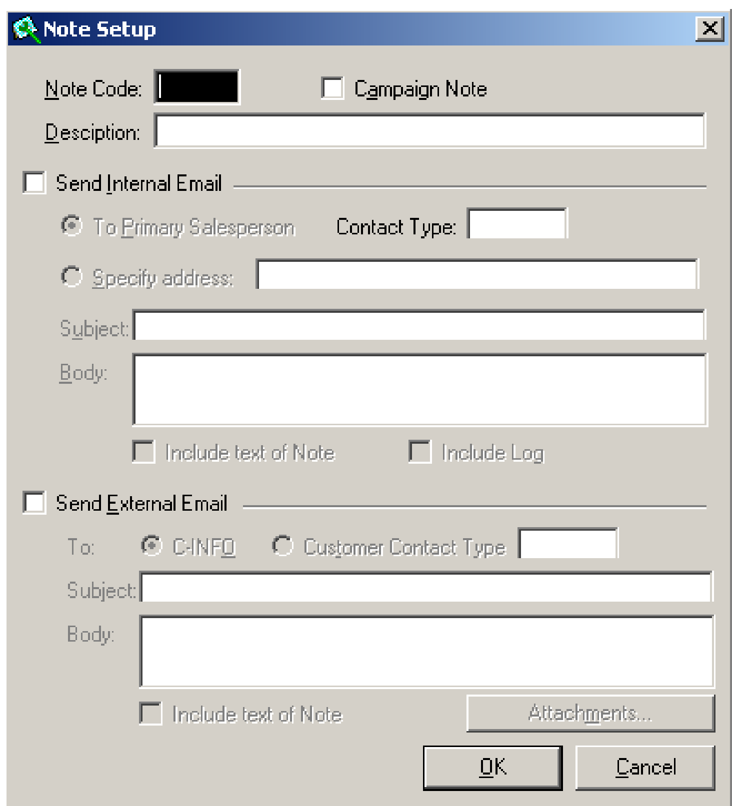


Figure 11: The Note Setup Dialog Box

18 Click Include Text of Note to include the text of the note with this email.

19 To add an attachment to this note, click Attachments and select a file as you normally would. *Attachments must be stored on a network for this function to work.*

20 When finished, click OK.

21 The Notes Everywhere Note Codes dialog box opens and displays the note you just created.

Using Notes Everywhere

1 From the Ensite Pro Master Menu, click the Databases menu.

2 Click Notes, then select Open Monitor or type **Ctrl + M**. The Notes Everywhere Monitor dialog box opens. You can minimize it or close it. You can also use this box to set up preferences.

Note: If this dialog box is blank when you open it, for example, the New and Add-On buttons are grayed out, click . In the Note Options dialog box, click Customer and enter an ID number. Click OK. For more information, see **Setting Up Options**.

If you have campaigns set up for Campaign Manager, these display first in the Notes Monitor. Campaigns are displayed with a light blue background.

You can use this dialog box to add notes or you can open the Notes Manager by clicking 

. (You return to the Notes Monitor by clicking 

.)

On the left side of the Notes Manager dialog box, notes are sorted in folders. For example, double-click the Customers folder to view customer notes. Under the Customer folder, notes are sorted by department (if you selected the Display Customer Departments option in the Note Options dialog box). The system indicates how many notes are stored for each department. Department notes appear on the right side of the dialog box.

Note: You can sort notes by clicking the grid at the top of the screen. For example, click Priority to sort by priority. However, if you have campaign notes created, these are always at the top. A line separates campaigns from notes.

---

3 In the Notes Monitor and Notes Manager dialog boxes, you can create new notes, add to notes, delete notes, or set preferences.

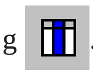
- To create a new note, click New. In the Notes Manager dialog box, right-click the folder name and select New, as shown in Figure 12.

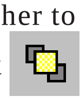
  You can also highlight a note in the right side of Notes Manager and right-click. Select New. See **Adding Notes**.

- To add to a note, highlight the note and click Add-On or right-click and select Add-On. See **Adding to Existing Notes**.

- To delete a note, highlight it then click , or right-click and select Delete. See **Deleting Notes**.

To set preferences:

- Change grid (column) information by clicking . (You can also highlight a note, right-click and select Modify Columns or type **Ctrl +M**.) The Hide/Show Columns dialog box opens. Click the columns to show and clear the columns to hide. Click Apply. To not make any changes, click Cancel.

- In the Notes Everywhere Monitor dialog box, you can specify whether to have the dialog box float on top of other windows. Click  to toggle the floating option on and off.

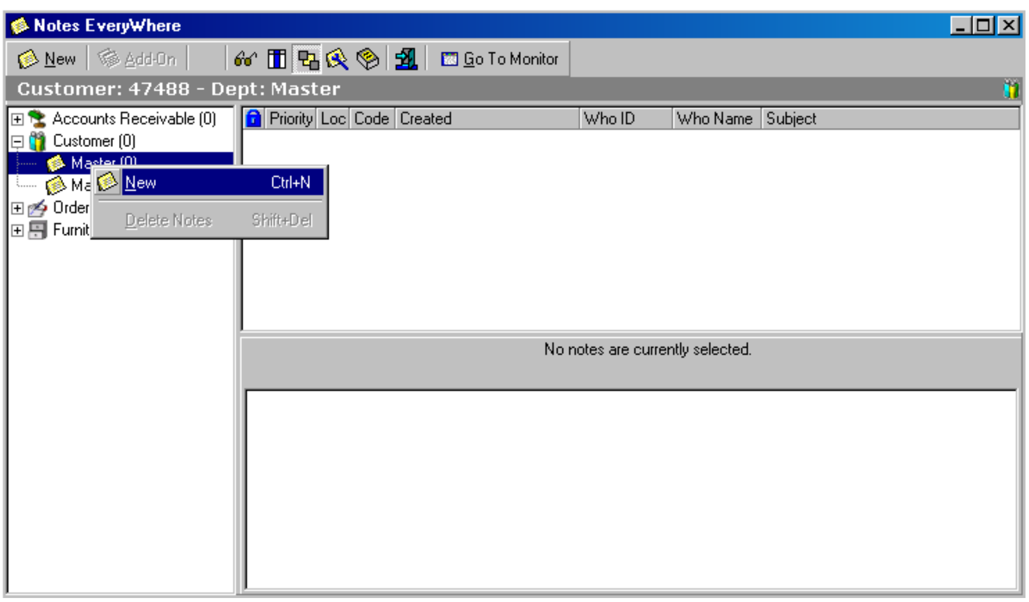


Figure 12: The Notes Everywhere Manager Dialog Box

- Change the appearance of the information in the Notes dialog box by clicking .

  The Note Options dialog box opens. You can use this dialog box to change the folders that appear and change how the notes display. Click each box to change and enter the new information over the existing information. For details, see **Setting Up Options**.

4 To add notes, go to the heading **Adding Notes**. To add on to notes, see **Adding to Existing Notes**. To delete notes, see **Deleting Notes**. To view private notes, see **Viewing Private Notes**.

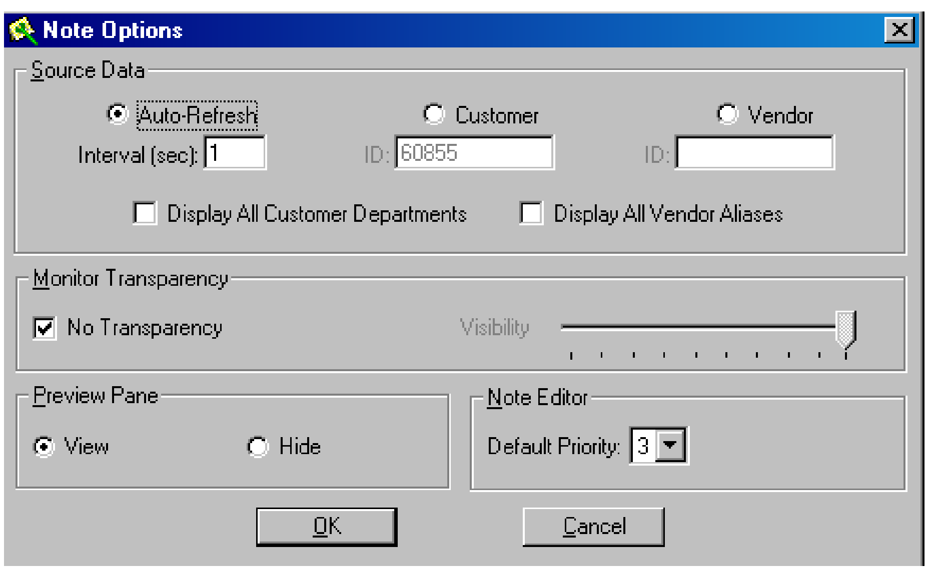
Setting Up Options

1 From the Notes Everywhere Monitor dialog box or Notes Everywhere Manager dialog box, click  to set options.

2 The Note Options dialog box opens, shown in Figure 13. You use this dialog box to customize Notes Everywhere.

Click Auto-Refresh to automatically refresh the notes information when you make changes. For example, if you are going to create notes for several different customers, you could have the Notes Monitor dialog box refresh with each new customer you select in the Customer database. To use this option, select Auto-Refresh. As you scroll through the Customer database, the Notes Monitor dialog box displays the notes for each customer you are viewing. In the Interval box, enter the number of seconds for the information to auto-refresh.

Figure 13: The Note Options Dialog Box



Note: If you set the Auto-Refresh option and do not have the Customer or Vendor databases open, the Notes Monitor and Notes Manager dialog boxes are blank. To view notes, go to the Note Options dialog box and click Customer or Vendor and enter the ID.

You can also select whether to work with customer notes or vendor notes. If you normally use customer notes, click Customer. If you normally use vendor notes, click Vendor. You can also specify a specific customer number or vendor number. Enter the number in the corresponding ID number box.

3 Click the Display All Customer Departments check box to display customer departments in notes.

4 Click the Display All Vendor Aliases check box to display vendor aliases in notes.

5 You can set the level of transparency for the Notes dialog box. To make the box solid, click No Transparency. To set transparency, clear the No Transparency box. Drag the Visibility arrow to set the transparency.

6 Click View to display the preview pane in the bottom right hand section of the Notes dialog box. Click Hide to not display the preview pane in the bottom right hand section.

7 Use the drop down arrow in the Default Priority box to select the priority of this note. You can select a number between one and five, with one being the highest priority.

8 Click OK.

Adding Notes

You can add notes in several places. You can repeat the following steps in other windows to add notes. For example, to add vendor notes, open the Vendor window and add vendor notes. This example includes instructions for adding notes in the Customer window using the Notes Everywhere Monitor and Manager dialog boxes. You can also add notes using the Notes Everywhere Note Codes dialog box.

1 Go to the Customer window and select the customer for whom to create notes.

2 If the Customer Notes dialog box is not open, go to the Master Menu and click the Databases menu. Select Notes. Click Open Monitor. The Notes Everywhere Monitor dialog box opens.

Note: If you have campaigns set up for Campaign Manager, these display first in the Notes Monitor. Campaigns are displayed with a light blue background.

3 To add a note, click New. (You can also highlight a note, right-click and select New or type **Ctrl + N**.) The New Note Customer dialog box opens, shown in Figure 14. In this dialog box, you can cut and paste text as you normally would.

4 Click the down arrow in the Priority box and select the priority for this note. You can select a number between one and five with one being the highest priority.

5 Click the down arrow in the Code box and select the code to use for this note. (This is the note code you created in the Note Setup dialog box.)

Note: The Type and References boxes are for display only. The Type box displays the note type, Invoice, for example. The Reference box displays additional note type information. For example, if the type is set to Invoice, the Reference box displays the invoice number.

---

6 In the Loc box, enter the location.

Note: The Who box displays the name of the individual who created the order notes.

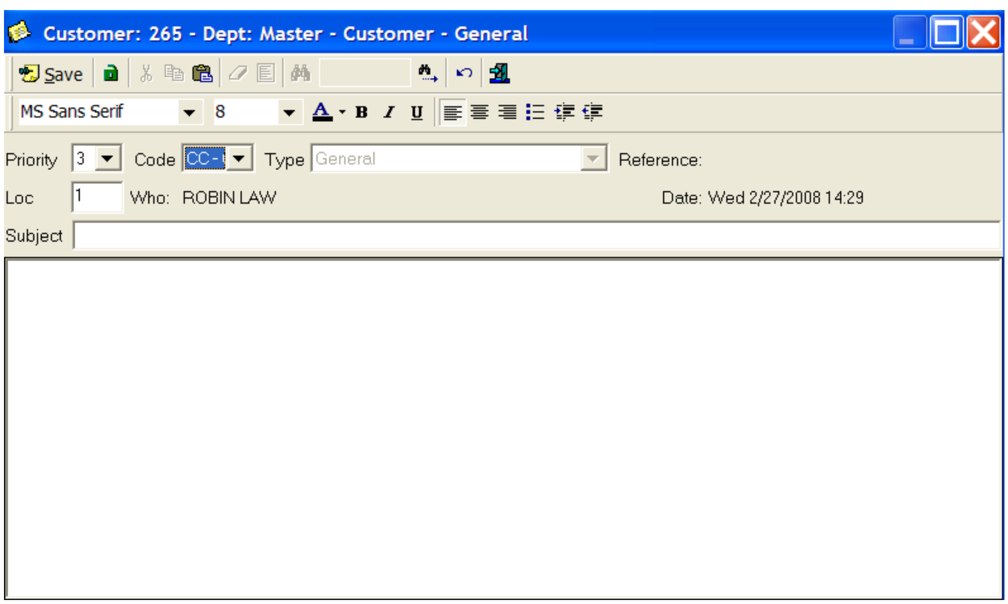
---

7 Click the Subject box and enter the note's subject.

8 Click the large Text box below the Subject box and enter the note's text.

Note: The toolbar at the top of the dialog box includes icons for cutting, pasting, and copying text. You can also click to select all text. You can also select font and font size and search for text by clicking .

Figure 14: The New Note Customer Dialog Box



9 Click to mark the note as private. If you entered a password in the Restricted Note Fields parameters text box, you are prompted to enter that password before marking this note as private. For information on viewing private notes, see **Viewing Private Notes**.

10 When finished, click Save.

Adding to Existing Notes

You can add to notes in several places. You can repeat the following steps in other windows to add to notes. For example, to add to vendor notes, open the Vendor window and add vendor notes. This example includes instructions for adding on to existing notes in the Customer window using the Notes Everywhere Monitor and Manager dialog boxes. You can also add on to notes using the Notes Everywhere Note Codes dialog box.

You cannot modify existing notes; only add to them. When adding to a note, you can perform all the same functions as when creating a new note. For example, you can mark the note as private or copy and paste text.

1 Go to the Customer window and select the customer for whom to add to existing notes.

2 If the Customer Notes dialog box is not open, click the Databases menu, select Notes, and click Open Monitor. The Notes Everywhere dialog box opens.

3 Highlight the note and click Add-On. (You can also highlight a note, right-click and select Add-On or type **Ctrl + A**.)

4 When the Add On Note Customer dialog box opens, you can add more text to the existing note. You can also change the note’s priority, code, location, and subject. You cannot change the type or reference.

5 Enter the new text in the lower part of the window.

6 When finished, click Save.

Deleting Notes

From the Notes Everywhere Monitor dialog box and the Notes Everywhere Manager dialog box, you can delete notes. You can also delete notes in the Notes Everywhere Note Codes dialog box.

1 Highlight the note to delete.

2 Click . Or you can highlight the note, right-click and select Delete or press the Delete key.

3 If you entered a password in the Delete Password box in the Notes Everywhere Parameters, the Enter Password to Delete Note Data prompt appears. Enter the password and click OK. The note is deleted.

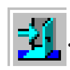
Viewing Private Notes

You can view private notes in the Notes Everywhere Monitor dialog box or the Notes Everywhere Manager dialog box.

1 Highlight the note to view and click .

2 If you entered a password in the View Private Notes Password box in the Notes Everywhere parameters, the Enter Password to View Private Notes prompt appears. Enter the password and click OK.

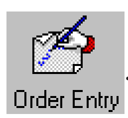
3 Double-click the note to view.

4 When finished, click .

Using the New Quote Release Features

You cannot change the customer in Furniture Order Entry.

When you release the quote to an order, you have the option to retain all of the order information including the number; customer; primary and secondary salespersons; general ledger and inventory locations; pay code; purchase order number, and so forth. This assures that all of the original information you specified when placing the quote is released to the order. There is no need to change this information. However, if necessary, you can select a different customer, purchase order number and so forth by clicking the appropriate boxes and entering the information.

1 Double-click 

.

2 Click the Action Code list box, and click Release. The Order Release dialog box opens, and the cursor moves to the Quote # box.

3 Retrieve the quote to release to an order.

4 After you retrieve the quote, the system displays the default information. See Figure 15.

5 You can check the Release Entire box to release the entire order without making any changes. To make changes, leave the Release Entire box blank.

6 Check the Delete Quote check box to delete the quote after the order is released. To keep the quote after it is released, leave the Delete Quote box blank.

7 Additional new boxes have been added including the Default the Following Data from the Quote check box. In this box, indicate whether to use the original information from the quote to the 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.

---

8 When finished, click Release.

9 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. You can change the ordered quantity or shipped quantity, or the item price. Enter the information and click OK.

10 The Item Detail tab opens. At this point, you can continue to change items on the order or add additional items to the order as you normally would.

11 When you finish adding items, click the Order Totals tab.

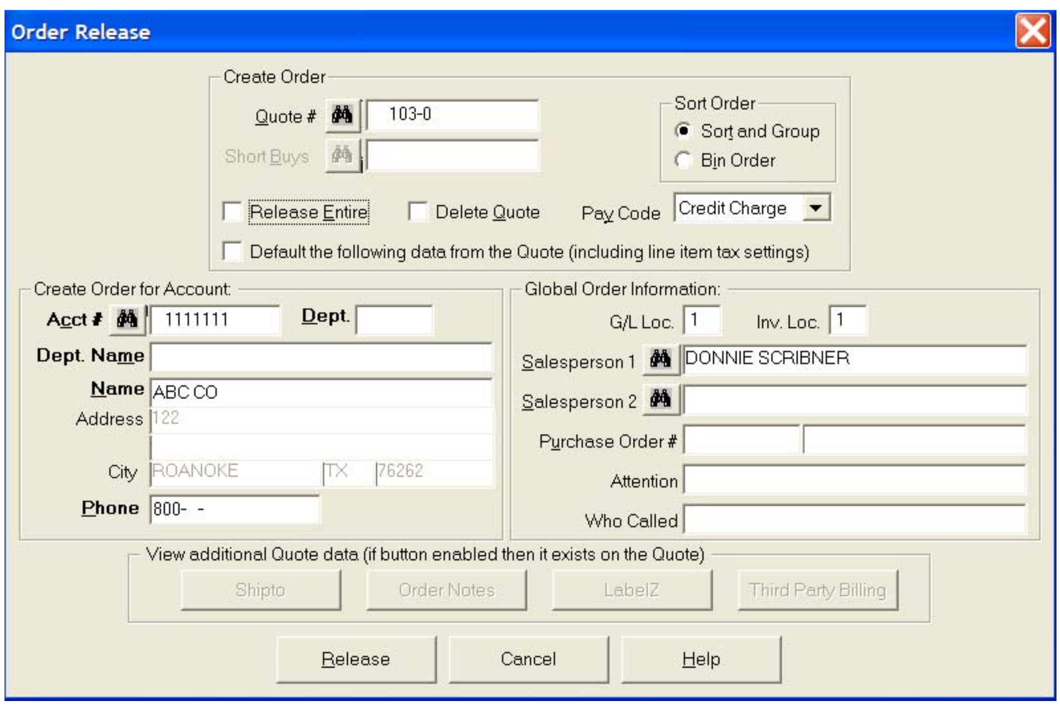


Figure 15: The New Boxes in the Order Release Dialog Box

Note: If you enter Ø in the Order Qty box, that item is not included on the order.

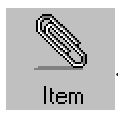
12 The cursor moves to the Ticket Printer box. Click Accept Order.

Setting Up and Using Item Remarks

The Item Remarks tab is designed to let you attach remarks to an item. These remarks can display in Order Entry each time the item is retrieved. You can use this feature to inform your order entry personnel of any item changes. Item remarks are stored in the file I-REMARKS.

Note: To display item remarks in Order Entry, you must set one parameter in the (LG3) screen. For details, see the heading **Setting Up the Item Remarks Parameter**.

Adding Item Remarks

1 Double-click 

. The Item window opens, displaying the information for the last item selected.

Tip: Click the Location box and enter the location for the item, if it is not already displayed. If the Location box is not displayed in the toolbar, right-click the toolbar and select Location.

2 Select the item for which to add remarks.

3 Click the Remarks tab.

4 Click Add to add a remark at the end of the current remarks. A new remark appears, highlighted in the Remark box.

Tip: To add a new remark before the currently highlighted remark, click Insert. The highlighted remark and any remarks after it are moved down to accommodate the new remark.

5 Type the remark. Each remark you add can contain up to 70 alphanumeric characters. See Figure 16.

6 Click outside the remark or press Enter to end the remark.

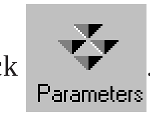
7 Before you leave the Remark box, click  to save your changes.

Setting Up the Item Remarks Parameter

To display item remarks in the Item Remarks tab in O/E, you must set up one parameter in the (LG3) Order Entry Pricing Parameters screen.

1 Double-click 

.

2 From the Keyop Menu, double-click 

.

3 In the Parameter Editor window, double-click Text Base Parameters.

4 The (L) Parameters screen opens. Select the [G] Order Entry action code.

5 In the (LG) screen, select the [3] Pricing action code.

6 In the (LG3) screen, select the [C] Change action code.

7 In the G/L Location field, enter the location for which to set or change parameters. (This field defaults to the location entered for your terminal in the (L1) Terminal and Tickets Parameters screen.) You can enter a new location or accept the default location.

   To accept the default location, press Tab.

   To set parameters for a different location, enter the number. If you enter fewer than two characters, press Tab.

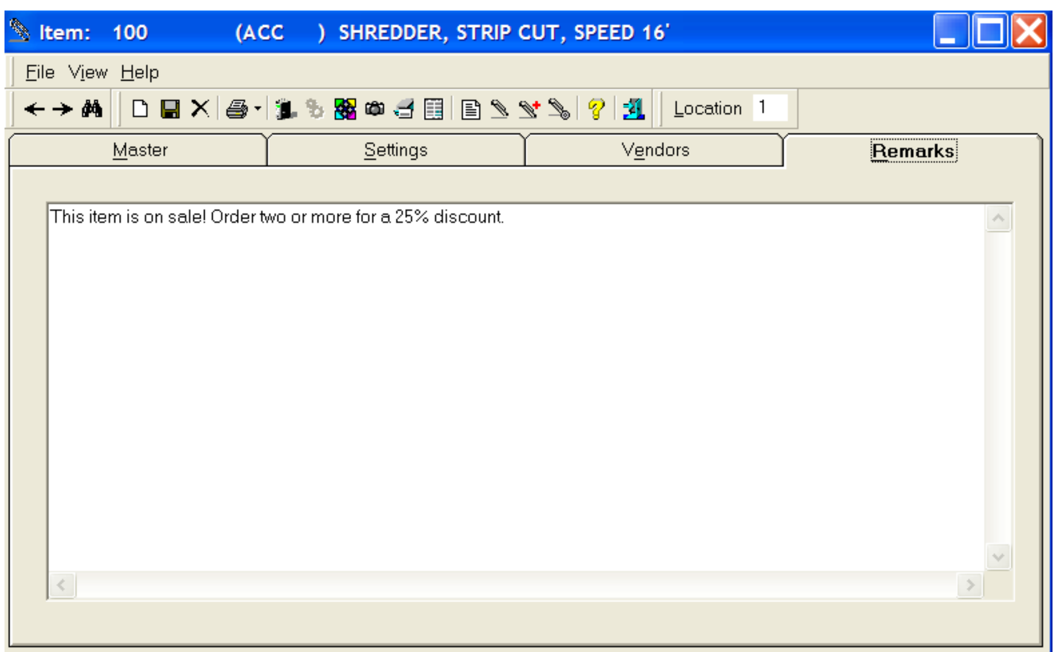


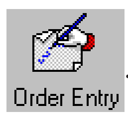
Figure 16: Setting Up Item Remarks in the Item Window

8 When the cursor moves to the Default Order Taker field, press Tab until the cursor moves to the Display Item Remarks in O/E field.

9 In this field, enter your response according to the following:

Y	The system automatically displays the item remarks. Each time an item that is set up with item remarks is retrieved in order entry, the first eight lines of item remarks automatically display.
X	The system only displays the item remarks when R is specified in the Order box in the Order Entry application. To display the item remarks, type **R** when the cursor moves to the Order box. The system displays the first eight remark lines from the Item Remarks tab. To view the next eight lines, if any, type **R** in the Order box again.
N (default)	The system does not display the item remarks.

Viewing Item Remarks in O/E

1 Double-click 

.

2 In the Global tab, retrieve the customer.

3 Click the Item Detail tab and retrieve the item containing the item remarks you set up in the Item window.

4 The Item Remarks automatically display in a separate dialog box, as shown in Figure 17.

5 When finished viewing the remarks, close the dialog box to return to the Item Detail tab.

Customer Specific Item Substitutions

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

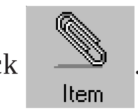
Item substitution lists let you set up a list of items to substitute with another item for specific customers. Each list you create can be assigned to individual customers or a group of customers, rather than for the entire customer database.

Item substitution lists also let you meet JWOD requirements. For Federal government customers, you can substitute a blue pen made by National Institute for the Blind (NIB) or National Institute for the Severely Handicapped (NISH) for company A's blue pen. The rest of your non-Federal customers receive company A's pen.

Item substitution lists can also be assigned to customers by shipping routes. This is helpful if, for example, all your Federal customers are assigned the same Route code. This is not commonly the case. Make sure it is right for you before putting it into practice.

You set up item substitutions in the graphical Item database. Once you've set it up, you can use it in both graphical Order Entry and the text-based (G) Order Entry screen.

Setting Up an Item Substitution List

1 From the Ensite Pro Master Menu, double-click 

.

2 From the View menu, select Substitute List or **Ctrl + L**. The Substitute List dialog box opens. See Figure 18.

3 You can now set up lists that indicate which items to substitute with new items. Complete the boxes according to the information below.

- **List:** Enter a unique list ID. You can enter up to ten alphanumeric characters.

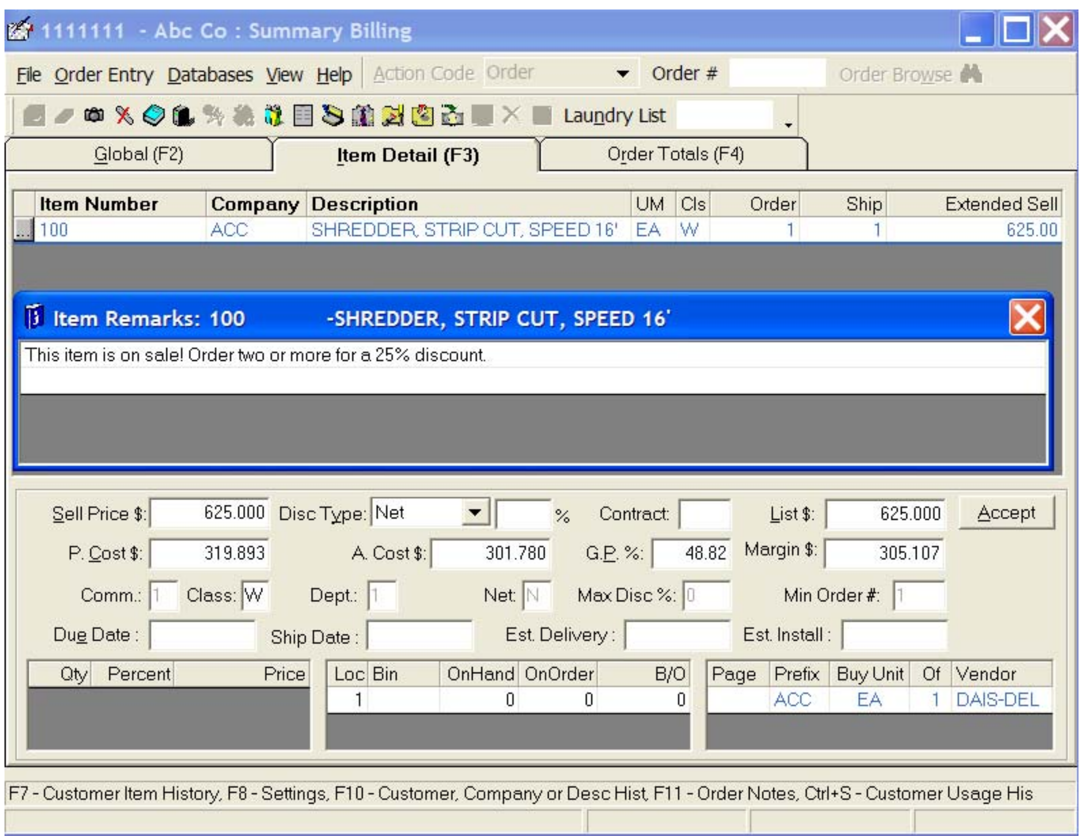


Figure 17: Viewing the Item Remarks You Set Up in Order Entry

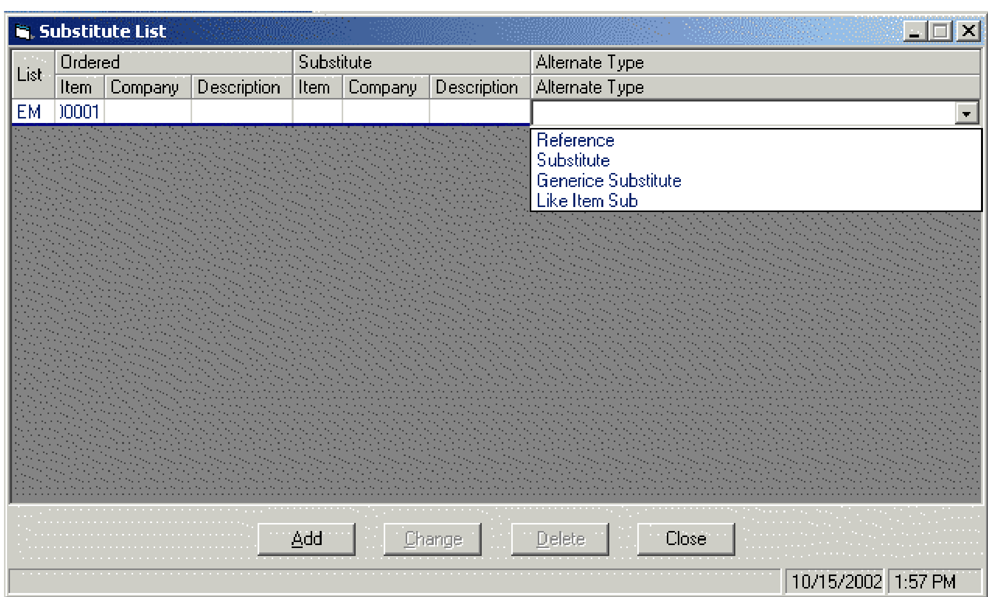
- **Ordered Item:** Enter all or part of the item number to replace with a substitute item. If you enter part of the number, press Enter. The item drop down list box opens. Select the item from the list. If you already know the item number, enter the number and press Tab. This is the item number entered when placing the order.

Notes: To use the drop down list box, you must set a parameter in the (LG5) Additional Order Entry Parameters screen. Set the Auto Query When There is No Exact Match on Y/N Item field to Y. If you do not set this parameter, the item most closely matching the information you entered is selected.

If you select the number using the drop down list box, the Description and Company boxes are automatically completed.

- **Ordered Company:** If not already completed, enter the manufacturer. You can also enter part of the name and press Enter. Then select the item from the drop down list box.
- **Ordered Description:** If not already completed, enter the item description. You can also enter part of the description and press Enter. Then select the item from the drop down list box.
- **Substitute Item:** Enter all or part of the item number to use as the substitute for the ordered item. If you enter part of the number and press Enter, the item drop down list box opens. Select the item from the list. If you already know the item number, enter it and press Tab.

Figure 18: Setting Up an Item Substitution List in the Item Database



Note: If you select the number using the drop down list box, the Description and Company boxes are automatically completed.

- **Substitute Company:** If not already completed, enter the manufacturer. You can also enter part of the name and press Enter. Then select the item from the drop down list box.
- **Substitute Description:** If not already completed, enter the description. You can also enter part of the description and press Enter. Then select the item from the drop down list box.

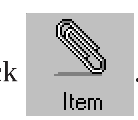
4 Select an alternate type from the Alternate Types drop down list box. Each type is described below.

- **Reference** automatically places the substitute item on the customer's order.
- **Substitute** allows the order-taker to select either the original item or the substitute item.
- **Generic Substitute** fills the order with the alternate (substitute) item but uses the price of the original item. If a customer accepts the alternate, the system uses the price from the original record but uses the cost of, and updates the item quantities for, the alternate.
- **Like Item Sub** automatically displays a list of all the substitutions when an item is set up with one or more substitutions. It shows the selling price, gross profit percentage and on-hand quantities for each. For comparison purposes, this information displays for the original item also.

Note: For more information about substitute types, see your online documentation.

5 When you complete the boxes, click Add. The substitute item is added.

Changing an Existing Item Substitution List

1 From the Ensite Pro Master Menu, double-click 

.

2 From the View menu, select Substitute List or **Ctrl + L**.

3 The Substitute List dialog box opens.

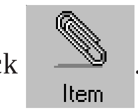
4 Click the item you want to change to highlight it. Click the Change button or right-click on the item and select Change.

5 The item you selected moves to the top line. You can now make the appropriate changes.

6 When you are finished making changes, click Accept.

Deleting an Item Substitution List

You can delete a substitution list at any time.

1 From the Ensite Pro Master Menu, double-click 

.

2 From the View menu, select Substitute List or **Ctrl + L**.

3 The Substitute List dialog box opens.

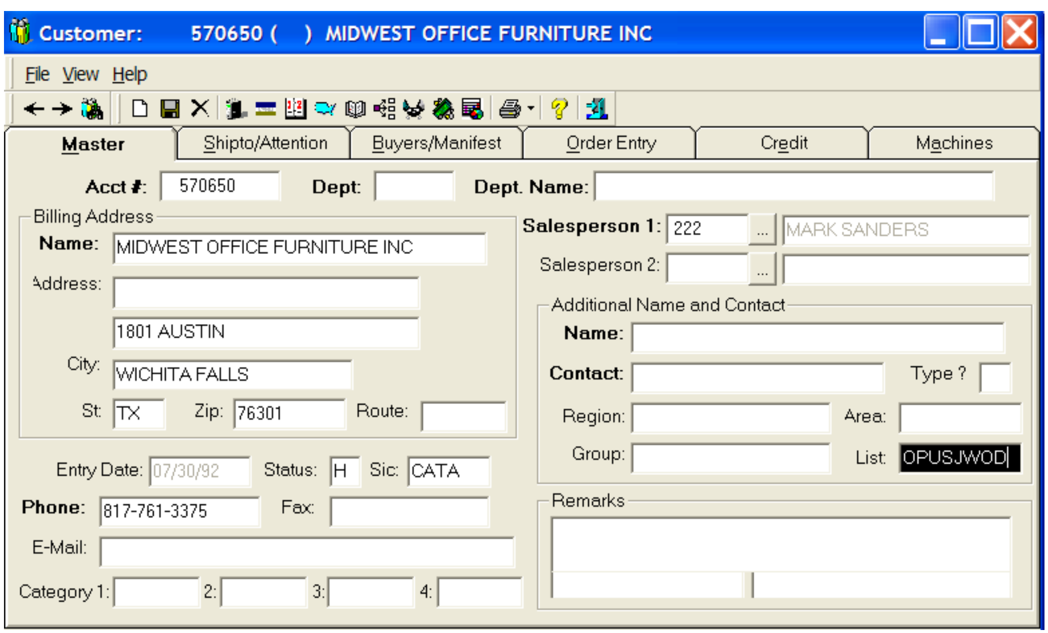
4 Click the item to delete to highlight it. Click Delete or right-click the item and select Delete.

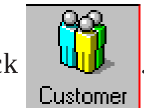
5 The item is automatically deleted.

Assigning an Item Substitution List to a Customer

Note: When you assign a list to a customer, it only applies to that specific customer. You must individually set up customers with substitution lists.

Figure 19: Assigning a Customer a Substitute Item List ID



1 From the Ensite Pro Master Menu, double-click 

.

2 Select the customer to assign a substitution list.

3 In the List box, enter the list ID for the substitution list to assign the customer. This is the first number you entered when creating a substitution list. See Figure 19.

4 Click  to save the changes made to this customer.

Assigning an Item Substitution List to a Shipping Route

Unless the group of customers you're assigning to an item substitution list is under a single route code, you should not assign the list by shipping route. Assign the list by customer instead. Refer back to **Assigning an Item Substitution List to a Customer**.

1 In the (L8R) Route Parameters Screen, select the [C] Change action code. See Figure 20.

2 Tab to the Route field. Enter the route to assign to a substitution list.

3 Tab to the Substitute List ID field. Enter the substitution list ID to assign to the shipping route.

4 Press Enter to return to the action field.

Figure 20: Assigning an Item Substitution List to a Shipping Route

```
13:50:30                    (L8R)  Route Parameters                    10/17/02
================================================================================
 Action [C] (C=Change, I=Inquiry)   G/L Location [ 2] Route [____]
================================================================================
Route Desc [______________________________]
Driver     [______________________________]

Delivery Days [______]
Maximum Number of Stops [___]

Last Manifest #__________
When Releasing Manifest, Build Third Party External Source Table Y/N ?_

          Format  Printer
Label    [______]   [_]
Loading  [______]   [_]
Delivery [______]   [_]

Substitute List ID [__________]



=================================================================================
```

Overriding Standard Item Substitutions

You can override standard item substitutions with customer specific substitutions. You can limit which customers the override affects by:

- Customer status
- SIC code
- Category.

1 Go to the (LGF) Order Entry General Parameters screen and select the [C] Change action.

2 In the G/L Location field, enter the G/L location to use.

3 To limit by customer status, tab to the Cust Status field. Enter the beginning status in the Cust Status field. Enter the ending status in the To field.

4 To limit by SIC code, tab to the SIC field and enter the code.

5 To limit by category, tab to the Categories 1 field. Enter the first category by which to limit. You can enter up to four categories.

6 When you finish, press Enter to save your changes.

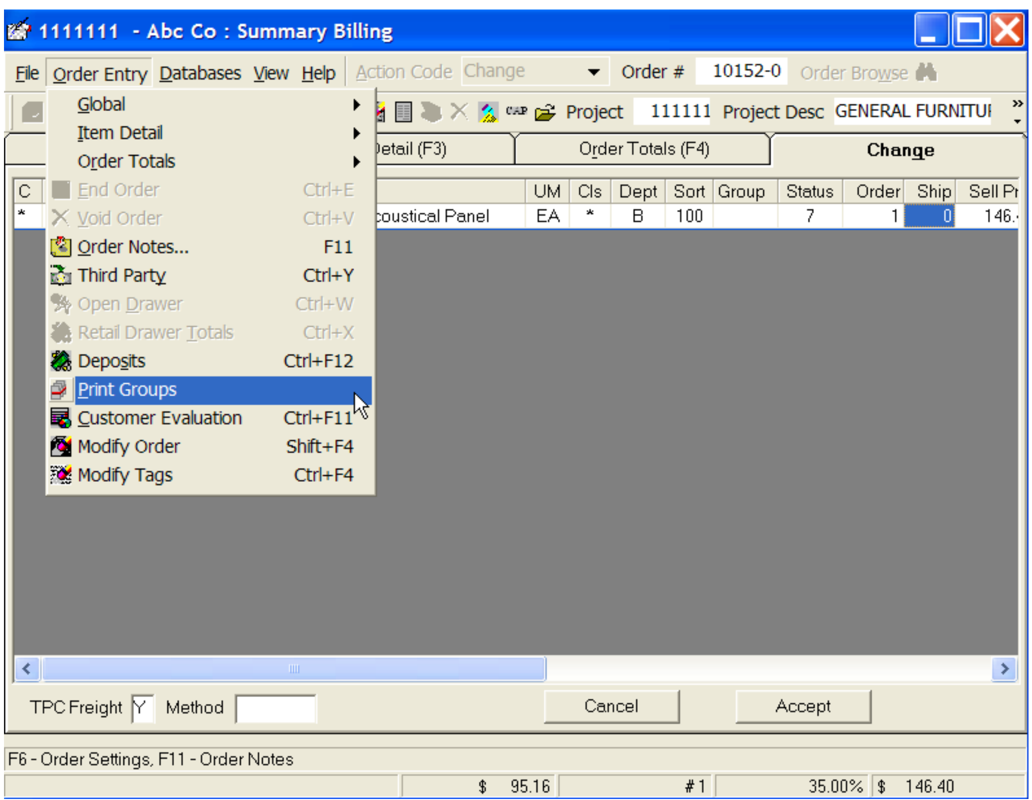


Figure 21: Selecting the Print Group Option from the Order Entry Menu

Using 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 to assign 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.

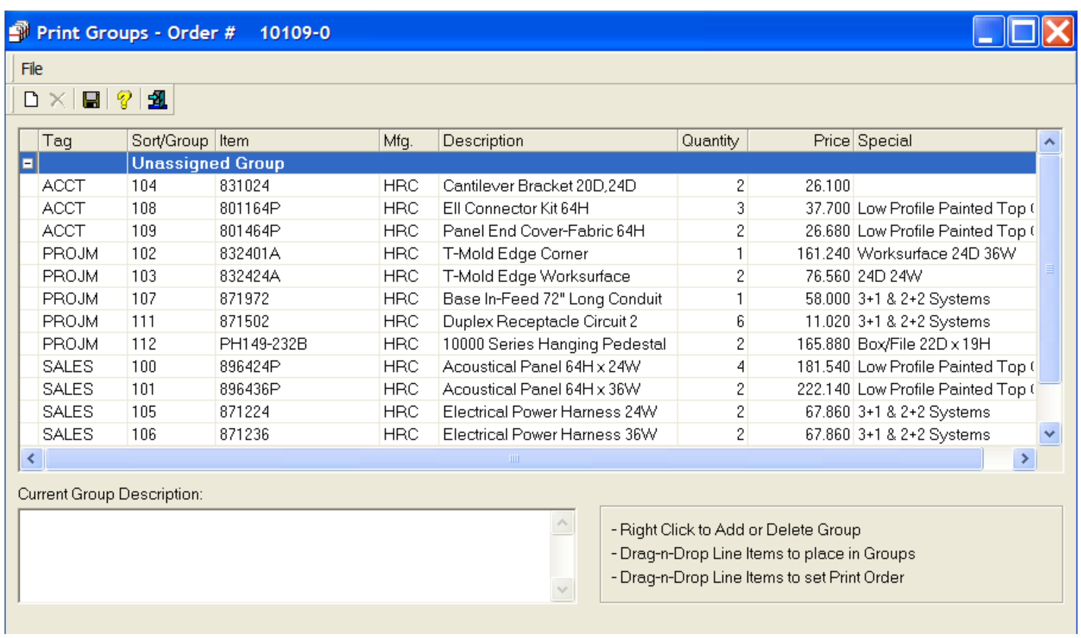
For example, you could create a print group named Accounting Department and group five items on the order under this heading. You could then create another print group named Training Department and group three items under this heading. You can create as many print groups and assign as many items to the 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, begin placing, changing, or verifying an order as you normally would.
2. Click the Order Entry menu and select Print Groups, as shown in Figure 21.

Figure 22: The Print Groups Dialog Box



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. See Figure 22. If you have created a group, the items appear under the group heading you specified.

You cannot move the group name. Names appear in the order in which they are entered.

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

5 Click the Current Group Description box and enter the description to assign this print group, Accounting Department, for example.

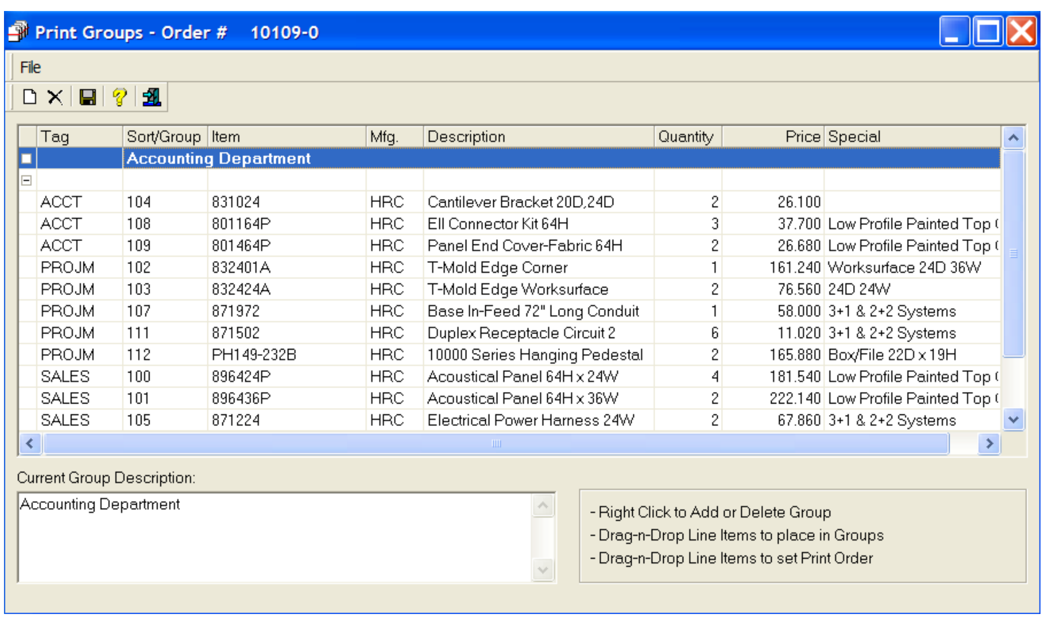
6 Click the Sort / Group column. The print group description you specified appears. See Figure 23.

Note: To change the group description, click the group name under the Sort / Group column to highlight it. Enter the new description over the existing 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 print group name. You can click the (+) plus sign to display or hide the items assigned to the group.

Figure 23: Adding and Changing Print Groups



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

9 When finished, click to save your changes. The cursor returns to the Order Entry window.

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

11 When you're ready to end the order, click Accept. The system prints the ticket, displaying the items within the print groups you specified.

Deleting Print Groups

You can use the Print Groups option to group and arrange line items on an order. You can also delete print groups once they have been added. This function is available when using Order, Change, and Verify modes.

1 To access the Print Groups function, begin 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 existing print groups and line items on the order.

4 To delete an existing print group, click the group to delete and click .

You can also right-click a displayed print group and select Delete Group. You can also type **Ctrl + D**.

5 When you finish deleting print groups, click . The cursor returns to the Order Entry window.

6 In the Order Totals tab, if you have print groups to print, click the Format box and enter the format to use. You must create a custom format to use with print groups.

7 When you're ready to end the order, click Accept. The system prints the ticket, displaying the items within the print groups you specified.

Creating A Print Group Format

If you use your own custom Report Writer format to print the ticket or invoice, the Item Print Order on the first line of the format must be set to G for Print Groups. See Figures 24 and 25.

Also, the format must have a line 91 for the special text written in the print group headers.

Figure 24: Creating a Print Group Format

```
LINES FOR THIS FORMAT                     |REPORT NAME - [4I     ON SR??] [!USR]
=====================                     |              SEND TOF? [Y] LINES [42]
 1   83                                   |TITLE -       RPT [ ] WIDTH [  ]
 2   84                                   |[NORMAL BLUE INVOICE                ]
 3   85                                   |MASTER FILE >> 1 P-MASTER   <<
 4   86                                   |
 5   87                                   |PAGE BREAKS IN FILE Y/N ?
 6   89                                   |PRINTER SETUP FILE-[                ]
 7   90                                   |
 8   91                                   |
 9   92                                   |
10   93                                   |HEADINGS (1-20)   BREAKS    (21-25)
11   94                                   |DETAIL   (26-35)  SUBTOTALS (36-40)
12   95                                   |TOTALS   (41-55)  TRAILERS  (56-65)
26   96                                   |LINE  [1 ] BOILERPLATE [  ]
41   97                                   |FONTS [18] [  ] [  ] [  ] [  ] [  ]
42   99                                   |SKIPS BEFORE [  ] AFTER [ 1] LAST [55]
43                                        |FILE TO SELECT FROM [  ]  TYPE F/T [F]
                                                     ** ENTER 99 FOR TEXT ONLY **

--------------------------------------------------------------------------------
STORE NAME.............             111-222-3333         11/22/33 11111111-2

Item Print Order ? [G] N=Item Number, C=Item Company, I=Inv Loc, G=Print Groups
```

Figure 25: Creating a Print Group Format

```
FILES USED IN LINE 91                     |REPORT NAME - [4I     ON SR??] [!USR]
========================                  |              SEND TOF? [Y] LINES [42]
P-SPECIAL  AT COL  16 LENGTH  25          |TITLE -       RPT [ ] WIDTH [  ]
P-SPECIAL  AT COL  41 LENGTH  25          |[NORMAL BLUE INVOICE                ]
                                          |MASTER FILE >> 1 P-MASTER   <<
                                          |
                                          |PAGE BREAKS IN FILE Y/N ?
                                          |PRINTER SETUP FILE-[                ]
                                          |
                                          |
                                          |
                                          |HEADINGS (1-20)   BREAKS    (21-25)
                                          |DETAIL   (26-35)  SUBTOTALS (36-40)
                                          |TOTALS   (41-55)  TRAILERS  (56-65)
                                          |LINE  [91] BOILERPLATE [  ]
                                          |FONTS [18] [  ] [  ] [  ] [  ] [  ]
                                          |SKIPS BEFORE [  ] AFTER [ 1] LAST [30]
                                          |FILE TO SELECT FROM [  ]  TYPE F/T [F]
                                                     ** ENTER 99 FOR TEXT ONLY **

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

DISPLAY F=FILES OR T=TOTAL
```

Tabs and Dialog Boxes vs. Specials

Options were called Specials in the DDMS text-based system. These specials have now been made more accessible through tabs and dialog boxes. You can enter special information at any time. One example of this is the former Shipto special. Changing a shipping address is a common task when placing orders. Instead of using the SHIPTO special, you can simply click the Global tab and enter the shipping address in the Ship To boxes. You can do this at any time while placing the order.

Shortcut and Access Keys

In addition to the ability to more quickly access previous text-based specials, graphical software lets you use shortcut keys and access keys on your keyboard if you do not have a mouse or prefer to use the keyboard.

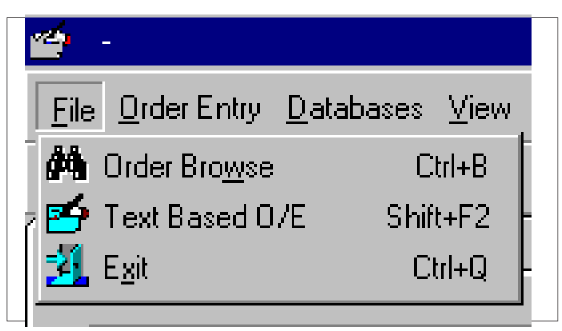
Shortcut keys are either function keys, like F9, or a combination of the Control key and a letter, like Ctrl + A. For example, to activate the Previous command in many Ensite Pro windows, press the F9 key. The most commonly used shortcut keys in Ensite Pro windows are displayed at the bottom of each window.

Access keys are keys corresponding to the underlined letter in a menu or tab name. To open a menu or move to a tab, hold down the Alt key and press the access key. For example, to open the File menu, as shown in Figure 26, type **Alt + F**. You can also use an access key to activate a command from an open menu. To activate the Order Brown command shown below, type **Ctrl + B** after opening the File menu.

For a list of tabs and dialog boxes, along with shortcut and access keys available in the Order Entry window, see the tables on the following pages.

Figure 26: Viewing the File Menu in Order Entry

Access Keys



Shortcut Keys

Text-Based Specials	Graphical Specials
REVIEW	Item Detail Tab
HOLD	Order Totals Tab
DELETE	Item Detail Tab
CROUTE	Global Tab
LONGPO	Global Tab
DUE DATE	Order Settings (F6)
PRICING	Order Settings (F6)
CTAX	Order Settings (F6)
CONTRACTS	Order Settings (F6)
SALESMAN	Global Tab / Order Settings (F6)
CHECKERL	N / A
WHOCALLED	Order Settings (F6)
DROPSHIP	Order Settings (F6)
HISTORY	Item Detail (F10)
SHIPTO	Global Tab
LABELZ	Order Settings (F6)
SHIPUPS	N / A
ATTN	CTRL + A
REVIEWH	Item Detail Tab
CHANGE#	Item Detail Tab
DELETE#	Item Detail Tab
VOID	Order Totals Tab
SEQUENCE	Order Settings (F6)
INVOICE DATE	Order Settings (F6)
AUTOSB	Item Settings (F8)
NOBUD	Order Settings (F6)
NOSUM	Order Settings (F6)
SHORTPO	Global Tab
SPECIALSxx	Order Notes (F11)
RETURNS	N / A

Command	Shortcut Key
Attention	Ctrl + A
Change Line Item	Ctrl + I
Continue Hold Order	Ctrl + C
Create P/O for Item	Ctrl + R
Create P/O for Order	Ctrl + D
Customer Company History	F10
Customer Evaluation	Ctrl + F11
Customer Item History	F7
Customer Usage History	Ctrl + S
Delete Line Item	Del
Deposits	Ctrl + F12
Detailed Logging	Shift + Ctrl + F1
End Order	Ctrl + E
Global Tab	F2
Item Detail Tab	F3
Line Item Settings	F8
Machine Options	Ctrl + Z
Order Browse	Ctrl + B
Order History	F5
Order Notes	F11
Order Settings	F6
Order Totals Tab	F4
Outstanding Item on POs	Ctrl + O
Picture	Ctrl + P
Put Order on Hold	Ctrl + H
Release (Quote/Short Buy)	Ctrl + G
Shipping Info Changes	F9
Text-based O/E	Shift + F2
Third Party	Ctrl + Y
Uncatalog	Ctrl + U

Command	Shortcut Key
Vendor Comparison	Ctrl + M
Vendor Stock Checks	Ctrl + J
Void Order	Ctrl + V
Open Drawer	Ctrl + W
Retail Drawer Totals	Ctrl + X

O/E History

You have the ability to view line entries in the O/E History window. This includes entries that are stored in the current sales journal, JOUR-S, the active order entry file, P-MASTER, or renamed sales journals. You can view the customer's order history by invoice number, name, date, and so on. See Figure 27.

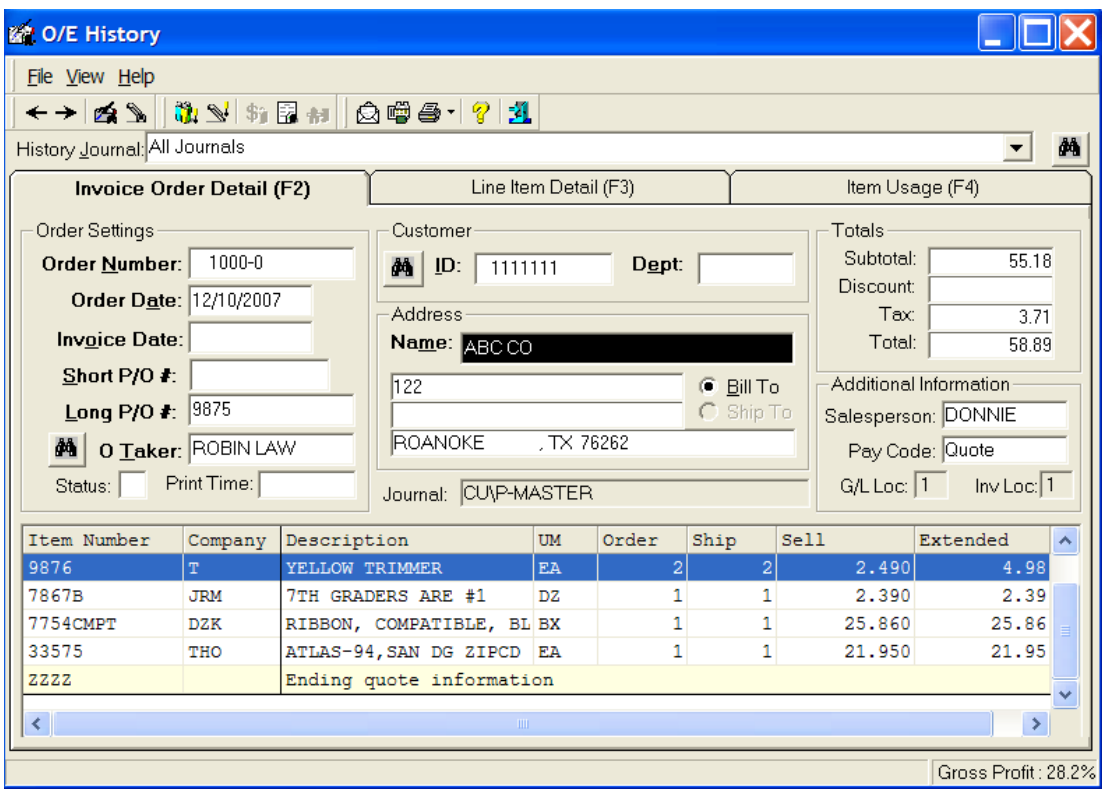


Figure 27: Viewing O/E History

There are three tabs in the O/E History window.

- **O/E History Invoice Order Detail Tab:** This tab lists detail concerning the order, including the order and invoice dates, the long purchase order number, the individual who placed the order, and the order's status. You can also view basic customer information, the totals for the order, including any discount amount and tax, and the pay code for the order. Toward the bottom of the tab, each item listed on the order appears, along with the item quantity and shipped status. This tab also shows the item's selling price and its extended price.
- **O/E History Line Item Detail Tab:** This tab shows item information in two sub tabs: the Primary boxes tab and the Secondary boxes tab. The Primary boxes tab supplies bin, general ledger department, class, and taxable information. It also shows the item's pricing and purchase order details, including the P/O number, order and due dates. This tab also includes the line item's status on the order and the quantities that were shipped and backordered. The Secondary boxes tab shows the individuals who are involved with the order, from the salesperson who receives credit for the order to the manifest order puller. This tab also includes the item's on-hand quantities and whether the item is part of a kit assembly. If the item is on a picking manifest or a summary invoice, the number appears. If you have credit orders, the Secondary boxes tab shows the original order number and order-taker who placed the order, as well as the reason the order was credited.
- **O/E History Item Usage Tab**: After you retrieve the order or item, information appears in the Item Usage tab. Like the Line Item Detail tab, this tab also lists detail concerning specific items on the order. It shows what items your customers are buying and how much of each item they have bought. You can also change the information you can view in the Item Usage tab. For example, you can clear the customer and item information or limit the information that displays. You can view all item information. You can also view totals for the displayed item and change the boxes to view.

Note: You must first build usage using Ensite Pro utilities to view item usage information in this tab. For details, see the topic **Building Item Usage**. In addition, the Item Usage tab displays default information. You can also view different columns of information by clicking the Fields button. For information about changing the display in the Item Usage tab, see the heading **Selecting Columns to Display in O/E History**.

Building Item Usage

The Item Usage tab lists detail concerning specific items on the order. It shows what items your customers are buying and how much of each item they have bought. To view this information, you must first build item usage (P-USAGE). We recommend that you build this file monthly. You do this using the Ensite Pro Utilities icon on your Ensite Pro server.

Note: This is a dedicated procedure. Be sure no one uses the Item database until the build item usage function is complete. This must be done on your Ensite Pro server.

1 Double-click 

.

2 When the Utilities menu opens, click Build Item Usage.

3 In the Build Customer Item Usage window, enter the location for which you are building item information. For example, to build item usage for location 2, type **2**.

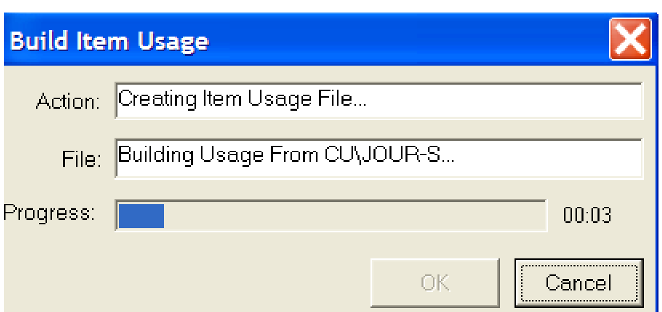
4 Click OK.

5 Leave the ASP ID box blank.

6 Click OK.

7 As the item usage is built, the system displays information in the action, file, and progress boxes. See Figure 28. When the procedure is complete, the Successfully Built Item Usage File message appears. Click OK.

Figure 28: Building Item Usage



Selecting Columns to Display in O/E History

1 Double-click 

.

2 Click the Item Usage tab, click the Fields button.

3 The Select Columns to Display dialog box opens. This dialog box contains the Customer through T Margin % boxes. The boxes that currently display are checked. To change the boxes, check the appropriate boxes.

4 Click OK.

Printing Orders in O/E History

1 In the O/E History window, retrieve the customer and order to print.

2 Click the down arrow beside .

3 The available O/E History reports appear, including Print Options. Click Print Options. The Print Order dialog box opens displaying the invoice number you specified to print in the Order Number box. See Figure 29.

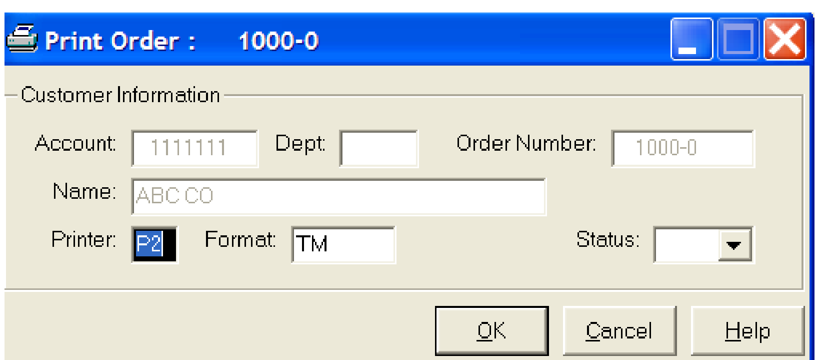
Note: If you are printing a furniture order, the system displays the furniture project options, including the Copies through Printer boxes. You can use these boxes to specify copy, format, and printer information. Click each box and enter the new information over the existing information.

---

4 The Account and Dept box display the customer's account number and department number.

5 The cursor moves to the Printer box. Enter the logical name of the printer where the invoice prints, P1 or P2, for example.

Figure 29: The Print Order Dialog Box



6 In the Format box, specify the format for the invoice, 4I or 6I, for example.

7 Click the down arrow in the Status list box and select the status of this order.

8 Click OK.

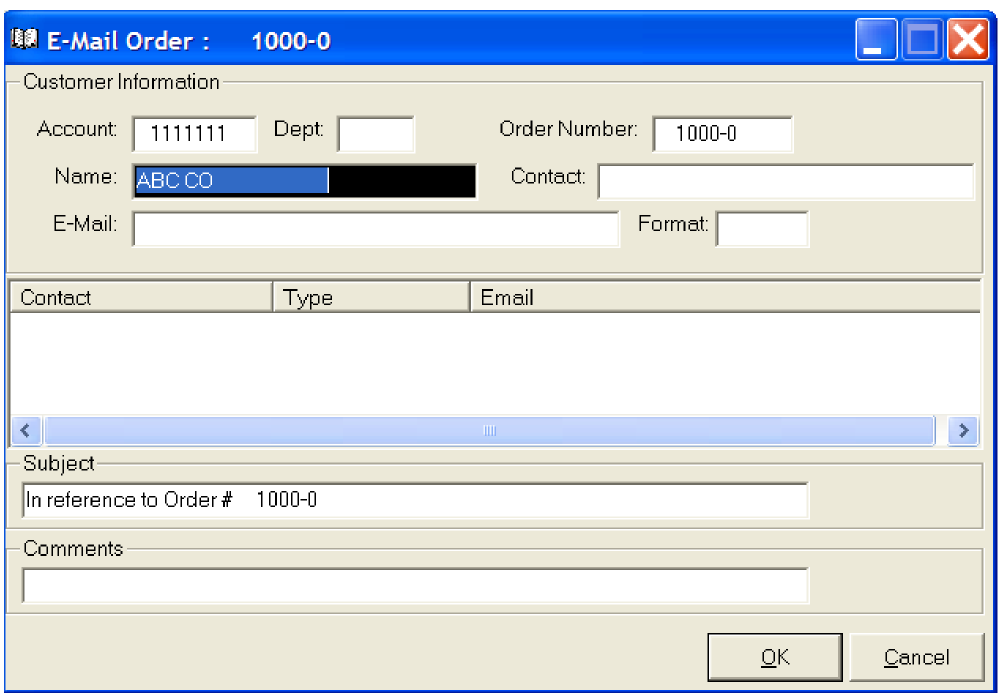
Note: If you are printing a furniture order and specify to print a purchase order, the system displays the purchase orders attached to this order in the Select P/Os to Print for Order dialog box. Use this dialog box to print a specific purchase order and/or a receiving report for that P/O. Click the P/O's and/or Receive Rpt box corresponding to each P/O and click OK. You can also click the Select All button to print a P/O and a receiving report for all the purchase orders attached to this order.

Emailing Orders in O/E History

1 In the O/E History window, click  to open the E-mail Order dialog box, as shown in Figure 30. The dialog box opens displaying customer information. The Order Number box displays the number of the order to be emailed. The cursor moves to the Name box.

Note: To use email, you must be authorized for AutoComm II and your system must be appropriately set up to use the feature.

Figure 30: The E-Mail Order Dialog Box



2 Click each box or press Tab to move from box to box and enter the information for this email.

3 When you are ready to email the order, click OK.

Faxing Orders in O/E History

1 In the O/E History window, click  to open the Fax Order dialog box.

The dialog box opens displaying customer information. The Order Number box displays the number of the order to be faxed. The cursor moves to the Name box.

Note: To fax, you must be authorized for AutoComm II and your system must be properly set up to use the feature.

---

2 Click each box or press Tab to move from box to box and enter the information for this fax.

3 When you are ready to fax the order, click OK.