

## How The System Determines the Item Department

In DDMS Office Furniture Edition, you may add items to a new furniture order three ways:

- By importing a standard interchange format (SIF) file from a specification program.
- By adding uncataloged items.
- By selecting items from the database.

An item's Department ID represents the general ledger code for the item in order entry history and purchase order history. Each item's Department ID may be determined by one of several settings. The system assigns the first Department ID that it finds as it checks the following settings in this order:

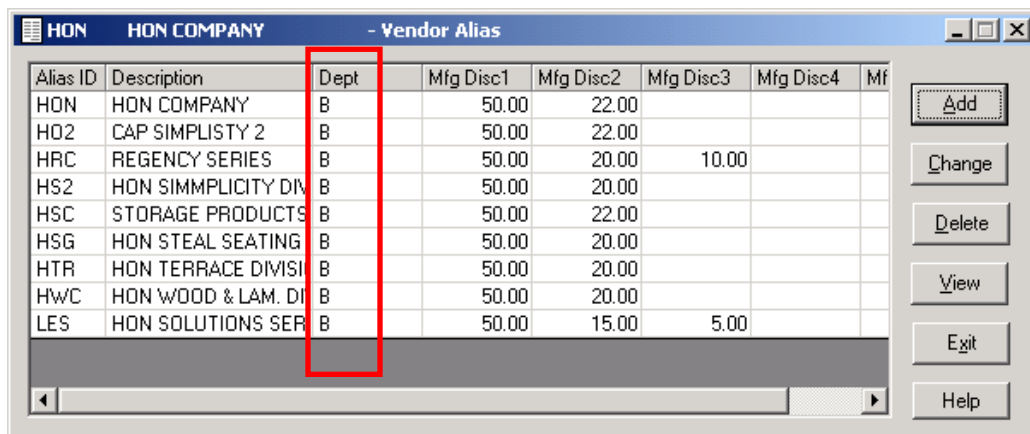
1. Vendor Alias.
2. Default Item Department in the Furniture Profile Settings.
3. Default Furniture Order Department specified in the (LGC) Furniture Order Entry Parameters screen.
4. Uncatalog default department in the (LGØ) Order Entry Parameters screen.

Identifying the source of the department ID on tickets and P/Os can be useful if you plan to report on individual vendors.

### Vendor Alias

The most common method of setting the department on furniture orders is through the Vendor Alias. (This feature is available in Version 6 and higher.) Vendor aliases are additional IDs in your database that vendors may use to identify their items.

For example, a vendor like HON may have several divisions within its company. You may enter HS2 for HON's Simplicity Division or HRC for HON's Regency Series Division. When you set up the divisions as vendor aliases, the system links the original vendor to all its aliases.



You can use the Vendor Alias dialog box to specify the vendor alias number, description, address, any discount percentages the manufacturer may allow, and item department. You can specify a different department for each vendor alias you create.

## Setting Item Department with Vendor Alias

To set a default item department for a Vendor Alias, follow these steps:

1. From the Master Menu, double click on the **Vendor Database** icon. The Vendor window opens, displaying the information for the last vendor selected.
2. Select the vendor for which you want to add an alias.
3. Click **View** on the menu bar and select **Vendor Alias**. The Vendor Alias dialog box opens displaying basic information about each alias for the vendor.

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**Note:** You can view the alias information by scrolling through the Vendor Alias dialog box.

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4. To add a vendor alias, click **Add**. The Add Alias vendor dialog box opens, and the cursor moves to the Vendor ID box.
5. Click each box and enter the appropriate information:
  - **Alias ID:** This box displays the vendor alias assigned to this vendor. In most cases, you want to use the 3-character library code from your specification system. However, you can also create your own code.

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**Note:** DDMS recommends creating a vendor alias identical to the Vendor # on the Vendor Master tab so that you can assign a department to the parent company.

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- **Description:** This box displays the description of this vendor alias.
- **Name:** Click this box to enter a name for the vendor alias you are adding. You can enter up to 30 alphanumeric characters.
- **Address/City/St/Zip/Phone Number/Fax Number:** In these boxes, enter the contact information for this vendor alias.
- **Contact:** Click this box to enter the name of the contact you have for this vendor alias. For example, you might enter the sales representative.
- **Mfg Discounts:** Click these boxes to enter the manufacturer's discount for this vendor alias. Based on the list price for an item, the manufacturer's discount determines your cost. You can specify up to five different discounts for each vendor alias. In order to use manufacturer's discounts, you must enter a percentage in the first Mfg Discounts box.

Suppose the manufacturer offers you a discount of 50 percent first, then 5 percent, and then 2 percent on a particular item. Enter the percentages in these Mfg Discounts boxes. First, the list price is discounted by 50 percent (the percentage in the first box). If the item's list price is \$90, the discount price is \$45. Second, the discount price from the first calculation (\$45) is discounted by 5 percent (the percentage in the second box). Using the same example, the discount price from the second calculation is \$42.75. Finally, the discount price from the second calculation (\$42.75) is discounted by 2 percent (the percentage in the third box). Your cost for this item is \$42.32.

- **Department:** This box allows you to enter a default department for items you receive using this vendor's alias. When you build the purchase order in Furniture Order Entry, the system uses the department you specify in this box as the default for the items on the P/O. You can have a different department specified for each vendor alias you create. This feature allows the system to assign the G/L department code to items that you import using a SIF file, uncataloged items you add manually, or items you select from the database.

6. Click **Exit** to close the Vendor Alias dialog box.

### *Default Item Department in the Furniture Profile Settings*

What if the item has no Vendor Alias or if no department is specified in the Vendor Alias dialog box? The system looks next at the Default Item Department in the Furniture Profile Settings.

Individual users can have their own Default Item Department that applies to items that they import from a SIF file, uncataloged items they add manually, or items they select from the database. For example:

- User 101 logs in to the system with his user ID and password. In Furniture Profile Settings, he enters a default item department of A and clicks the Save button. Each time user 101 goes into the Furniture Profile Settings, his default item department will be A. Any time user 101 logs in, the system will apply Department A to all items he imports, adds manually, or selects from the database when he creates a new furniture order — as long as the Vendor Alias has not already established the department for that item.
- Then user 102 logs in. In Furniture Profile Settings, she sets the default item department to F and clicks the Save button. Whenever user 102 logs in, the default item department will be F for items that she imports, adds manually, or selects from the database when she creates a new furniture order — again, as long as the Vendor Alias has not already established the department for that item.

### *Setting Default Item Department in the Furniture Profile Settings*

To use Furniture Profile Settings to determine the department when an item has no Vendor Alias, or when no department is specified in the Vendor Alias dialog box, follow these steps:

7. From the Master Menu, double click the **Order Entry** icon.

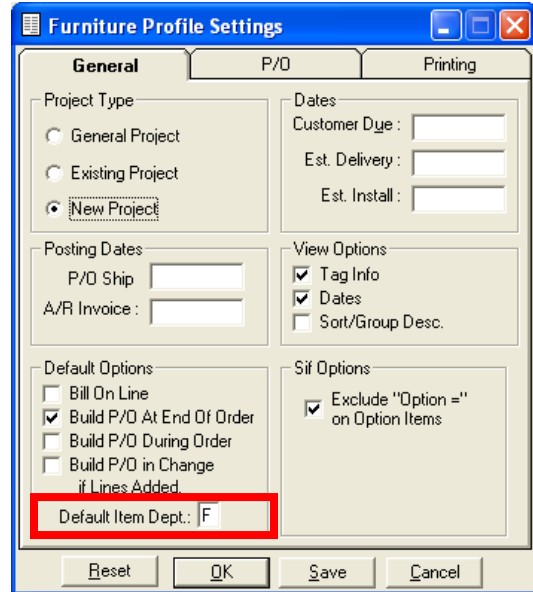
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**Note:** If your terminal does not default to Furniture Order Entry, click on the Order Style drop down box and choose Furniture.

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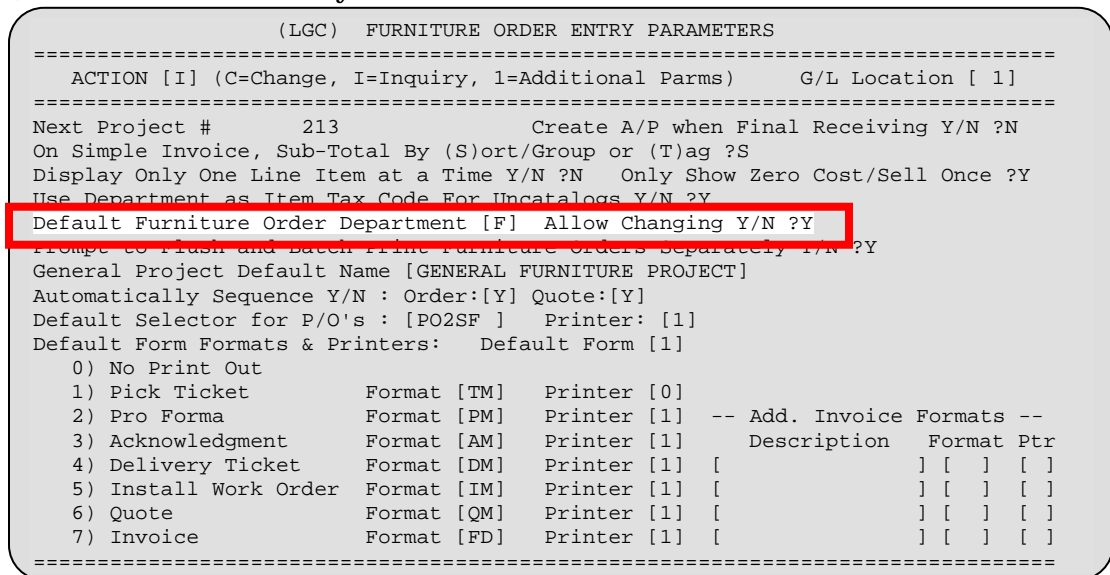
8. At the bottom of the Order Entry Global tab, click the **Furniture Profile Settings** box. The Furniture Profile Settings dialog box opens, displaying the information on the General tab.

9. At the bottom of the General tab, in the **Default Item Dept.** box, enter the department you want the systems to assign to items if the item has no Vendor Alias or if no department is specified in the Vendor Alias dialog box.
10. Click **Save** to make your change permanent.



### Default Furniture Order Department in the (LGC) Parameter

What if neither the Vendor Alias Department ID nor Default Item Department in the Furniture Profile Settings exists? The third place the system looks when determining the item department on a furniture order is the Default Furniture Order Department in the (LGC) Furniture Order Entry Parameters screen, shown below.



The system uses this Default Furniture Order Department setting in the (LGC) Furniture Order Entry Parameters screen to assign the department to items you import from a SIF file or uncatalogued items you add manually to create a new order. For items you select from the database, the system uses the G/L department from the item database.

### Setting Default Furniture Order Department in (LGC) Furniture O/E Parameters

When an item has no department set by Vendor Alias or Furniture Profile Settings, follow these steps to use (LGC) Furniture O/E Parameters to determine the department:

1. Double click the **Keyop Menu** icon and then double click the **Parameters** icon. When the text-based (L) screen opens, type G and then C to access the (LGC) Furniture Order Entry Parameters screen.

2. At the Action code prompt, type **C**
3. In the G/L Location field, type the number of the location for which you want to set the parameter. If location 1 is correct, press Tab.
4. Press the Tab key until your cursor reaches the Default Furniture Order Department field.
5. Type the letter or number of the default item department you wish to use for furniture orders.
6. Your cursor automatically moves to the Allow Changing field. If this field is blank or set to N, type Y
7. Press Enter to save your changes.

### Uncatalogs Default Department in the (LGØ) Order Entry Parameters Screen

If the first three methods do not specify a department, the final place the system looks when determining the item department on a furniture order is the Uncatalogs Default Department in the (LGØ) Parameter, shown below.

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(LGØ) ORDER ENTRY PARAMETERS
=====
ACTION [I] (C=Change, I=Inquiry)  G/L Location [ 1]
=====
Invoice # 40026          Cash Receipt #          Quote # 100
Serial # 1000          Serial Prob. # 1000
Pricing Info ?Y Shipto Info ?Y A/R Info ?Y Pay Code Msg ?Y Pastdue Days #30
Set Commission Code Y/N ?N Archive Specials Y/N ?Y Freight Default Dept ?N
Use Billto as Shipto Y/N ?Y No Partial Ships Y/N ? Only Print Assemblies ?
Have Page# & Vendor Display Match the Prefix & Carton Display Y/N ?
Allow Auto Verifying with Batch Printing ("TR-V") Y/N ? All Shipped Y/N ?
Keep All PICK Fields in JOUR-S Y/N ?Y Build Sales Journal Item Index Y/N ?Y
Allow Sequence on "Pick Nbr" Orders Y/N ? Build Debit Memo Data File Y/N ?
PASSWORDS: Drawer ?OPEN Delete ?DDMS Reindex ?DDMS
Pick Nbr ?DAVE Change Loc ?LOC Credits ?
UNCATALOGS : Not allowed on remotes Y/N ? Default Dept ?9 Add-on -UC Y/N ?Y
BACKORDER PRINT : (All Items or Flushed) Future Shipping Y/N/A ?N
Print Code ?A (A=Ven,B=Bin,N=Ven,O=Bin) No Print From ? To ? Status 8 ?
Split to a Separate Line Partial Backorders Y/N ? Specials B/S/X ?
Always Print Pick Tickets in Bin Order Y/N/Z ? (Z=Invoices and Tickets)
TRANSFERS : A/R Master Y/N ?N A/R Batch Y/N ?Y Sales Journal Y/N ?Y
A/R Location same as Transfer From Location Y/N ?
SHIPPING LABELS : Print Company Logo Y/N ?Y Customer Logo Y/N ?N
  
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The system uses this Default Dept setting in the (LGØ) Order Entry Parameters screen to assign the department to items you import from a SIF file, uncataloged items you add manually, or items you select from the database to create a new furniture order.

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**Note:** The Default Dept setting in the (LGØ) Order Entry Parameters screen affects uncataloged items added in *commercial order entry* as well furniture order entry.

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### Setting Uncatalogs Default Department in (LGØ) Order Entry Parameters

To use (LGØ) Order Entry Parameters to determine the department when an item has no department set by Vendor Alias, Furniture Profile Settings, or (LGC) Furniture O/E Parameters, follow these steps:

1. Double-click the **Keyop Menu** icon and then double-click the **Parameters** icon. When the text-based (L) screen opens, type G and then Ø (zero) to access the (LGØ) Order Entry Parameters screen.
2. At the Action code prompt, type C.
3. In the G/L Location field, type the number of the location for which you want to set the parameter. If location 1 is correct, press Tab.
4. Press the Tab key until your cursor reaches the Default Dept. field on the UNCATALOGS line.
5. Type the letter or number of the default item department you wish to use for **all** uncataloged items.

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**Note:** This parameter affects all uncataloged items in commercial, retail, and furniture order entry.

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6. Press Enter to save your changes.

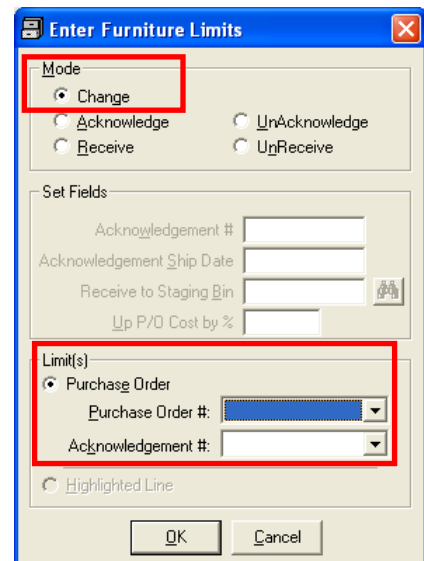
### Changing the Item Department

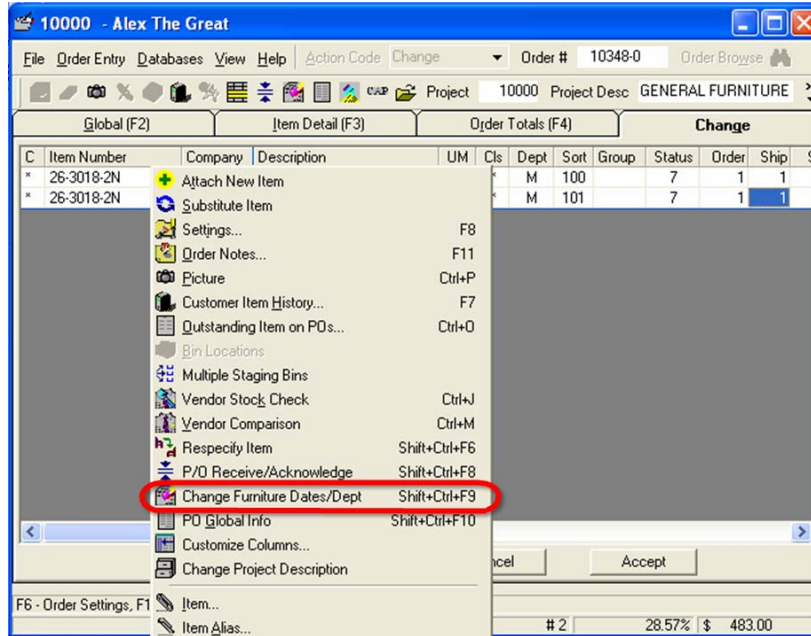
When changing orders, you can use the Change Furniture Dates/Dept. dialog box to change an item department for a single item or for all items on the order.

#### Changing the Item Department for One Item on the Order

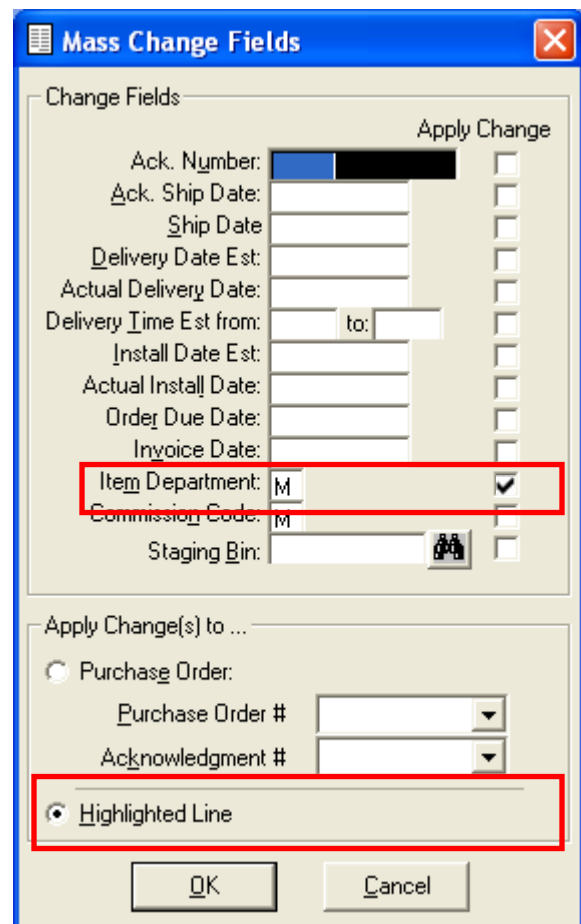
To change the department for one item on the order:

1. Go to Furniture Order Entry. In graphical software (assuming Furniture Order Entry is your default setting), double-click the **Order Entry** icon.
2. In the Action Code box, select **Change**.
3. In the Order # box, type the order number you wish to change. If you do not know the order number, click the **Order Browse** button and select the order from the list.
4. In the **Enter Furniture Limits** window that appears, choose the appropriate action:
  - Under **Mode**, select **Change**. Under **Limits**, you can limit the items that appear by selecting the purchase order number or acknowledgment number from the proper drop-down box, and click **OK**.
  - If you do not wish to set limits, click the **Cancel** button.
5. On the Change tab, right click the item whose department you wish to change, and select **Change Furniture Dates/Dept.** from the pop-up menu.





6. The Mass Change Fields dialog box opens. In the **Item Department** box, type the new department you wish to assign to the selected item, and place a checkmark in the box under **Apply Change** on the corresponding line.
7. In the **Apply Changes To...** section, select **Highlighted Line** to limit by that item.
8. Click **OK**.
9. When you are finished making changes to the order, click **Accept** on the Change tab or click **Accept Order** on the Order Totals tab.



*To change the department for the entire order*

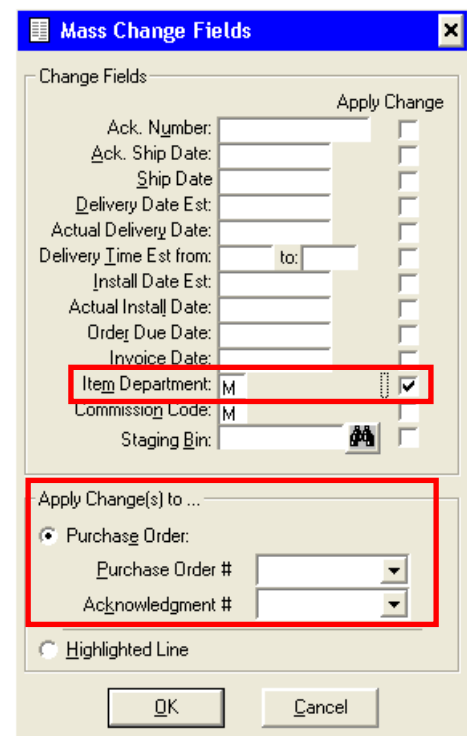
1. In the Action Code box of the Furniture Order Entry window, select **Change**.
2. In the Order # box, type the order number you wish to change. If you do not know the order number, click the **Order Browse** button and select the order from the list.
3. In the **Enter Furniture Limits** window that appears, choose the appropriate action:
  - Under **Mode**, select **Change**. Under **Limits**, you can limit the items that appear by selecting the purchase order number or acknowledgment number from the proper drop-down box, and click **OK**.
  - If you do not wish to set limits, click the **Cancel** button.

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**Note:** If you limit by P/O number or Acknowledgment number, only the items on that purchase order or with that acknowledgment number will be changed.

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4. On the Change tab, right click any of the items, and select **Change Furniture Dates/Dept.** from the pop-up menu.
5. The Mass Change Fields dialog box opens. In the **Item Department** box, type the new department you wish to assign to the selected item, and place a checkmark in the box under **Apply Change** on the corresponding line.
6. In the **Apply Changes To...** section, select the **Purchase Order** option.
  - If you wish to limit the items that appear, select the **Purchase Order #** or **Acknowledgment #** from the proper drop-down box.
  - If you do not wish to limit the items, leave the drop-down boxes blank.



7. Click **OK**.
8. When you are finished making changes to the order, click **Accept** on the Change tab or click **Accept Order** on the Order Totals tab.