Eclipse Control Maintenance Records

Release 8.6.5 (Eterm)

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Control Maintenance Overview

Use control maintenance records to customize how the system functions work for your company.

You must be assigned the SUPERUSER authorization key to edit control maintenance records. Additionally:

- The CONTROL.PARAMETER.AUTH authorization key enables you to restrict viewing and editing access to specific control maintenance records.
- The CONTROL.MAINT.VIEW and CONTROL.MAINT.EDIT authorization keys control your ability to view and edit restricted control maintenance records.
- For more information on these authorization keys, see Control Maintenance Authorization Keys.

  Note: The information contained in the control maintenance documentation is also in the respective documentation for each Eclipse program area, as well as in the Control Maintenance Record Upgrade Utility. For example, control maintenance records for accounts payable functionality are located here, in the Accounts Payable documentation, and in the documentation for the upgrade utility.

To view and edit control maintenance records:

1. From the **System > System Files** menu, select **Control Maintenance** to display the Control Maintenance screen.

   The screen contains input fields titled **Category**, **Area**, and **Keyword**. The system uses categories and areas to sort related control maintenance records to two levels. A category refers to a broad area of interest, while an area is a more focused area of interest within the category. Use keywords to search for specific records.

2. Enter parameters to find a record in one of the following ways:

To...	Do this...
Display all the records in a category	• In the **Category** field, press **F10** and select a category. • Press **Enter** three times.
Display all the records in an area within a category	• In the **Category** field press **F10** and select a category. • In the **Area** field, press **F10** and select an area within the selected category. • Press **Enter** twice.
Display a single record	• In the **Keyword** field, type words or character strings that are in the title of the record. The more words you type, the more focused will be the displayed list of records. • Press **Enter**.
Display an alphabetical list of all the records	Leave all three fields blank. Press **Enter**.

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The system displays a list of records that match the selection criteria.

3. Position the cursor on the record you want and press **Enter** to display the record.
4. To view the maintenance log entries for this record, use the **Log** hot key.
5. Edit the record as required and press **Esc** to save the changes.

   Note: For the changes to take effect, you must log off and back on again.

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ABC (Activity Based Costing) Control Maintenance Records

The following control maintenance records belong to the ABC (Activity Based Costing) category.

ABC Default Cost View

Select the default cost view to display in ABC. If left blank, the default is Calc.-12 Mo. Options include the following:

Option	Description
Calc - 12 Mo	Calculates from the last day of the prior month back 12 months.
Calc - 12 Mo (Last)	Calculates the same period of time as the 12-month option, but for the previous year.
Calc - YTD	Calculates activity costs for the current year-to-date.
Calc - YTD (Last)	Calculates activity costs for the same period of time as the YTD option, but for the previous year.
Estimated	Uses the estimated cost assigned to the activity.

Auto ABC Enabled

For each branch, indicate whether to enable the automatic logging of ABC codes.

- **Y** – Enables the logging.
- **N** – Disables the logging.

Log ABC Delivery Charge

Indicate when the ABC program logs a delivery charge for a customer when an invoice is printed or a manifest is closed. If you are using the Shipping Manifest program, select **Manifest Close**. If you leave this record blank, the default is **Invoice Print**.

- **Invoice Print** – The system logs one delivery activity for each combination of customer, branch, ship via, and ship date within each invoice print run.
- **Manifest Close** – Closing a manifest indicates that the delivery was made to the customer and the customer incurred the cost of delivery.

Log ABC On New Order Line Deletions

For each branch, indicate whether the system creates an ABC log entry whenever the salesperson deletes a line item from a new order. The default is **N**.

Set this record to **Y** if your salespeople are deleting items off of the order at the customer's request in most instances. For example, a salesperson adds an item to an order for the customer, advises that the item is not available or provides the price to the customer, and the customer decides they do not want the item. When the salesperson deletes the item from the order, the system logs the deletion to the ABC analysis for this customer.

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- **Y –** The system logs line item deletions for ABC analysis.
- **N –** The system does not log line item deletions for ABC analysis.

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ACCT (Accounting) Control Maintenance Records

The following control maintenance records belong to the ACCT (Accounting) category.

Activity Trigger Default Inherit

Select the default the system uses when the **Inherit** field on a customer or vendor Activity Trigger Maintenance screen is blank. If you leave this record blank, the default is **NO**.

- **Yes –** The entity inherits activity triggers from higher entities. For example, the system executes a ship-to entity's triggers, along with the triggers assigned to the corresponding bill-to entity, branch entity, and corporate customer, unless one of those entities is set to not inherit triggers.

  Note: The system sends only one e-mail per e-mail address, even if the entities have duplicate triggers.

- **No –** If the entity is a ship-to only customer that has e-mail triggers set, the system uses those triggers. If the system does not find e-mail triggers on the ship-to, the system checks the bill-to for triggers. The entity does not inherit triggers from branch or corporate customer entities.

Auto Prompt For G/L Account Detail Notes

Indicate whether the system prompts for G/L account detail notes.

- **Y –** Prompts for G/L account detail notes.
- **N –** Does not prompt for G/L account detail notes.

Branch That Controls Branch That Receives Credit For The Sale

Select which branch on a sales order the Branch That Receives Credit For Sale control maintenance record uses to determine which branch records the G/L postings for an order segment. Options are:

- Pricing
- Shipping
- Terminal
- UserHome

Respect Auth Br For A/R/A/P Inq/Ledger, Aging Rpts & Cash Receipts

Use this control maintenance record to limit the customer information a user can view in the following locations to the branches to which the user has access:

- A/P and A/R Inquiry
- A/P and A/R Ledger
- Cash Receipts
- A/R Collection Queue

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- A/R Aging Report
- A/P Aging Report
- Aged Unbilled Stock Receipts Report

Set the record as follows:

- **Y** – Displays the customer's balance only for those branches for which a user is authorized. For example, if the user is authorized for branches 1, 2, and 3, they are unable to view information for branch 4. This is the default.
- **N** – Displays the customer's total balance for all branches.

For example, your customer buys electrical parts from branch 1 and plumbing parts from branch 2. Set this record to **Y** if your accounts receivable clear in branch 1 should only use electrical branch 1 invoices when posting a cash receipt for the sale. Set this record to **N** if your accounts receivable clear in branch 1 should be able to post a cash receipt against all invoices in branch 1 and branch 2.

If you use central account, set this control record to **N**.

Terms Codes To Exclude From Anticipation Credit Eligibility

Enter the terms codes to exclude from anticipation credit eligibility. An invoice with a terms code specified here is not eligible for calculating an anticipation credit for the customer. This is true even though the anticipation credit function is enabled and the invoice was paid before the discount or final due date.

> **Note:** The system uses this record only if the anticipation credit function has been enabled by setting the Create Anticipation Credit Invoice From C/R control maintenance record to **Y**.

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ACCT AP Disbursements Control Maintenance Records

The following control maintenance records belong to the AP (Accounts Payable) area within the ACCT (Accounting) category and apply to checks and electronic funds transfers.

Auto Check Reconciliation Administrator User ID

Enter the user or group to message if the format ID specified in an automatic check reconciliation import file is not listed in the Auto Check Reconciliation Import Formats control maintenance record.

Auto Check Reconciliation Import Formats

On the Auto Check Reconciliation Import Formats screen, define the file format of check information to import for automatic check reconciliation purposes. If you import information from multiple banks, you may need to define multiple formats.

Minimum Check Disbursement Amount

Complete this record if your company out-sources accounts payable checks. Enter a minimum check amount and a maximum number of days since the last pay date for vendors receiving checks and for branches printing checks. If a check amount is less than a designated minimum it is not selected for printing. After the maximum number of days, a check below the minimum amount is selected for printing.

You can specify these parameters at the and branch and vendor levels:

- To specify branch-specific parameters, complete this control maintenance record for each branch in the company. Populate both of the following fields:
  - **Min Check Amt –** Enter the minimum amount for a check from this branch to be selected for printing.
  - **Max Days Since Pay Date –** Enter the number of days since the last payment was made to the vendor after which a check will be printed, even if it is below the minimum amount.

  Note: If you set this control maintenance record, also set the Valid ACH Formats and Valid Pull Codes control maintenance records.

- To specify vendor-specific parameters, complete the **Maximum Days Since Posted** and **Minimum Check Amount** fields in Vendor Maintenance. For more information, see Outsourcing A/P Checks.

  Note: Values entered in Vendor Maintenance override values entered in Control Maintenance.

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Use Prenumbered Checks

For each branch, indicate whether to use prenumbered checks.

- **Y –** Use prenumbered checks. The system prompts for a beginning check number whenever you print checks.
- **N –** Do not use prenumbered checks. The system numbers the checks.

Valid ACH Formats

Complete this record if your company transfers funds electronically by ACH (Automated Clearing House). Enter the clearing house formats required by the banks you do business with for electronic funds transfers. The format identifies the type of check being printed. For example, CCD indicates a corporate payment and PPD a payroll payment. Each format can be up to four characters.

The formats specified in this record display in the list of options for the **ACH Format** field on the Check Information screen in Vendor Maintenance.

> **Note:** If you set this control maintenance record, also set the Minimum Check Disbursement Amount and Valid Pull Codes control maintenance records.

Valid Pull Codes

Complete this record if your company out-sources accounts payable checks. Enter the pull codes for special handling of a check to a vendor. For example, you can use codes to indicate how to deliver a check or whether to send extra documents in the envelope along with the check. Each code can be up to four characters.

The pull codes defined in this record display in the list of options for the **Pull Code** field on the Check Information screen in Vendor Maintenance.

> **Note:** If you set this control maintenance record, also set the Minimum Check Disbursement Amount and Valid ACH Formats control maintenance records.

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ACCT AP Entry Control Maintenance Records

The following control maintenance records belong to the AP (Accounts Payable) area within the ACCT (Accounting) category and apply to A/P Entry.

A/P Entry Sort By

Select whether to display open purchase orders on the A/P Entry screen by P/O number or received date.

Allow Posting To Over/Short On Zero Dollar Payables

Indicate whether users can post to the over/short account for zero dollar payables in A/P Entry.

- **Y –** Users can post to the over/short account.
- **N –** Users cannot post to the over/short account.

Default To Quick Mode If # Of Unbilled Transactions Is Greater Than

Use this record to define the parameters for putting the A/P Entry screen in quick mode for payables. When in quick mode, the system does not display unbilled transactions for the vendor. Quick mode improves system performance.

- In the **Default to Quick Mode if # of Unbilled Transactions is Greater Than** field, enter one of the following for new payables:
    - ### – The maximum number of unbilled transactions a vendor can have before the A/P Entry screen defaults to quick mode.
    - **0 –** All vendors default to quick entry mode for a new payable.
    - **Blank –** The A/P Entry screen displays in normal mode, showing all unbilled transactions.

  If quick mode is in effect, the following views of A/P Entry no longer display unbilled transactions for this vendor:

    - P/O, Freight, & BOL
    - P/O & Terms
    - P/O & Order Id

  Enter each P/O to reconcile in the blank scrolling region. This feature uses all searching criteria in effect, including P/O number, receive date, and invoice amount.

- In the **Default to Quick Mode if Payable is Reconciled (Y/N)** field, indicate whether to put the A/P Entry screen in quick mode when displaying a reconciled payable. When in this mode, the screen only displays the transactions reconciled on the payable.
- In the **Default to Quick Mode if Payable is Paid or in View Only (Y/N)** field, indicate whether to put the A/P Entry screen in quick mode when displaying a paid payable or any view-only payable. When in this mode, the screen only displays the transactions reconciled on the payable.

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Disable A/P Auto-Reenter Feature

Indicate whether to disable the function that populates a new A/P Entry screen with the vendor name used on the previous entry. The default is **N**.

- **Y** – Disables the auto-reenter functionality.

  The system displays the new A/P Entry screen with no vendor name.

- **N** – The system populates the new A/P Entry screen with the previous vendor name.

Disable Reconciliation Of Duplicate BOL Numbers In A/P Entry

Indicate whether to prevent the system from reconciling duplicate bill of lading (BOL) numbers on the same payable.

- **Y** – The system reconciles only the selected BOL transaction on a payable.

  Select this option if your company uses the same BOL number on transactions that span multiple branches over multiple accounting periods and the transactions should not be combined on the same payable.

- **N** – When a user reconciles one BOL, the system reconciles all duplicate BOL numbers on the same payable.

  Select this option if one freight vendor invoice spans multiple shipments or purchase orders and these shipments all had the same BOL number.

Disable User Branch Authorization In A/P Entry

Indicate whether the system ignores user branch authorization when users view payables in A/P entry.

- **Y** – Users can view payables for any branch.
- **N** – Users can view payables only for branches for which they are authorized.

Disable Vendor Branch Authorization In A/P Entry

Indicate whether the system ignores vendor branch authorization in A/P entry.

- **Y** – Users can enter any branch and vendor combination.
- **N** – If the user enters an A/P branch for which the vendor is not authorized, the system displays the following message: Entity #XXXXX is not active in branch XXXX. Action : Do Not Activate.

Display P/O Internal Notes In A/P Entry

Indicate whether to display a purchase order's internal notes in a scrolling window when the cursor is positioned on the P/O # in A/P Entry. The default is **N**.

- **Y** – When internal notes exist, they display in a scrolling window.
- **N** – Internal notes do not display.

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Display Short Description For G/L Accounts In A/P Entry

Indicate whether to display the **Short Description** for a G/L account when a payment is applied on the A/P Entry screen. The default is **N**.

- **Y –** The **Short Description** of the account displays in the **G/L Account** field.
- **N –** The first 30 characters of the **Full Description** of the selected G/L account display in the **G/L Account** field.

Enable Auto Display Of A/P Expense Distribution

Use this record to enable the automatic display of expense distribution codes in A/P Entry.

- **Y –** Enables the automatic display.

  When a user enters an invoice amount in A/P Entry for a vendor for which expense distribution codes are defined, the system displays these codes in a selection list for the user.
- **N –** Disables the automatic display.

Force A/P Entry Branch To Match Reconciled P/O Branch

Indicate whether to force the A/P entry branch to match the P/O branch when a user reconciles a P/O from a branch that is different from the A/P entry branch.

- **Y –** Forces the A/P entry branch to match the P/O branch.
- **N –** Does not change the A/P entry branch.

Include Freight In Discount Calculation For Payables

Indicate whether to include freight in the calculation of the discount amount in A/P Entry.

- **Y –** Does not subtract the freight from the invoice amount before calculating the discount.

  Any time freight is added to the A/P Entry screen, the freight amount will be subtracted from the invoice amount when calculating the discount amount. The discount calculation is based upon the terms code assigned to the vendor or purchase order to which the payable is applied.
- **N –** Subtracts freight from the invoice amount before calculating the discount.

Limit P/O List In A/P Entry By A/P Branch

Indicate whether to limit the items listed in the payable to only open unbilled accounts payable items that are from the same branch as the A/P branch. The default is **N**.

- **Y –** Limits the items listed.

  The system displays only unbilled transactions for vendors that have the same branch as the A/P branch the user entered.

  Note: If the Disable Vendor Branch Authorization In A/P Entry control maintenance record is set to **N**, and the user enters an A/P branch for which

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the vendor is not authorized, the system does not display any transactions, even though the vendor has unbilled transactions in other branches.

- **N** – Does not limit the items listed.

  The system displays all unbilled transactions for all branches in which the vendor has activity. The system overwrites the A/P branch entered by the user with the branch of the first transaction the user reconciles.

Pass Along Freight To Direct Sales Orders

Indicate whether to pass along the amount entered in the **Freight Amt** field in the header of the A/P Entry screen for a payable to any direct sales orders that are reconciled to that payable.

- **Y** – Passes along the freight. If there are multiple directs reconciled to that payable, the system prorates the freight charge to the directs according to the amount in the **PO Total** field for each direct.

  If either of the following conditions is met, the system does not distribute freight to the direct sales orders:

  - If a direct is in a closed accounting period, the system displays a message to that effect.
  - If a direct already has had incoming freight applied to it, the system displays the following prompt: Freight Already Exists On at Least One of the Direct Orders. Do you Wish to Override that Freight? (Y/N).
    - **Y –** The system prorates the new freight amount from the **Freight Amt** field to the directs in place of the existing freight amount.
    - **N –** The system leaves the existing freight amount on the directs.

  Note: The system makes an entry in the change log for the payable when one of these situations occurs. If the customer on the direct sales order is freight exempt, the freight amount is expensed instead of billed. The system makes an entry in the change log for the sales order and the payable stating the account to which the freight was charged. If a sales order is unreconciled on a payable, the system does not back out the freight on the order that is unreconciled.

- **N** – Does not pass along the freight.

Prompt For Image In A/P Entry

For each branch, indicate whether the system prompts the user to enter an image of the invoice, if none currently exists, when escaping from a payable in A/P Entry.

- **N** – Never prompt.
- **A** – Always prompt.
- **O** – Only prompt on new.

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Require Batch ID In A/P Entry

Indicate whether to require a batch ID in A/P Entry.

- **Y –** A/P Entry requires a batch ID. Be sure to advise the department if you select this option.
- **N –** A/P Entry does not require a batch ID.

Set All New A/P Entries To Not Approved

For each branch, indicate whether to override automatic approvals and set all A/P entries to Not Approved. The default is **N**.

- **Y –** The system sets the **Approved** flag for all new A/P entries to **N**, even if the payment amount matches the invoice amount.
- **N –** If the payment amount is different from the invoice amount, the system sets the **Approved** flag to **N**. If the amounts are identical, it sets the flag to **Y**.

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ACCT AP General Control Maintenance Records

The following control maintenance records belong to the AP (Accounts Payable) area within the ACCT (Accounting) category.

A/P Distribution Freight Difference %

Enter the percentage of over/short difference the system allows during freight reconciliation, when the invoice amount for freight distribution charges differs from the bill of lading (BOL) freight amounts being reconciled, before prompting the user to redistribute the amount.

- If you leave this record blank, the program redistributes freight among all the BOLs being reconciled.
- If you enter a zero (0), the program prompts the user if the invoice amount is different from BOL freight amounts being reconciled.

A/P Over/Short Maximum Parameters

Enter the maximum percentage and dollar amount of difference to allow for vendor invoices that do not match a reconciled P/O when posting payables in A/P Entry. If the difference exceeds either the percentage or dollar amount, the system does not approve the invoice.

- In the **Max Over/Short Percentage Allowed** field, enter the maximum percentage of difference.
- In the **Max Over/Short Dollars Allowed** field, enter the maximum dollar amount of difference.

  Note: Values entered in the **Over/Short%** and **Over/Short$** fields in Vendor Maintenance override the values entered in this control maintenance record.

Allow Editing of Paid Payables In A/P Entry

Indicate whether users can edit the date, invoice number, invoice amount, discount amount or deduction amount fields of paid payables. The total amount of the payable after the changes must be at least what was already paid, and the transaction selection must be in the scrolling region. The default is **N**.

- **Y –** Users can edit paid payables.
- **N –** Users cannot edit paid payables.

Always Post A/P Discount To A/P Branch

Indicate whether to post the discount for a payable to the A/P branch, even if it is not the branch printing the check.

- **Y –** The discount posts to the A/P branch. If the check is written for multiple payables, then the system prorates the discount for each payable, and posts to each payable's A/P branch. The default is **Y**.
- **N –** The discount posts to the branch printing the check.

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Auto Approve Payable For P/O Receiver Within Over/Short Parameters

Indicate whether to use the A/P Over/Short Maximum Parameters to auto approve a P/O receiver. The default is **N**.

- **Y –** If the cost on the purchase order or direct sales order changes after the invoice has been reconciled and the new total falls within the limits on the over/short control parameters, the system approves the payable and posts the difference to the Over and Short Accounts Payable GL account. The system adds a message to the change log of the payable, referencing the transaction that allowed the automatic approval.

  Note: If the approval status of a payable has already been overridden with a No, the system does not change the approval status.

  If there are multiple payables posted to a single P/O receiver, the still does not change any GL posting on the existing payables. Any amount over/short is left as an open amount in A/P entry as available for reconciliation. The system does not refer to over/short parameters at all for multiple payables.

- **N –** The system does not use the over/short parameters.

Do Not Take Discount If Pay Date Is Past Discount Date

Indicate whether the A/P Preview Queue ignores a vendor discount if the Pay Date is past the Discount Date.

- **Y –** Does not take vendor discounts if the pay date is past the discount date. The system recalculates a discount if the pay date becomes less than or equal to the discount date and the discount can be taken.

  When checks are *printed*, the system does not take discounts if the *post date* is past the discount date.

  Exception: The system always takes manually overridden discounts, unless set to zero.

- **N –** Takes vendor discounts, even if the pay date is past the discount date.

Print Status On Direct When Payable Approved

Enter the print status to assign to the sales order generation of a direct order when the system approves a payable that has been applied to that order. If you leave this record blank, the system does not change the print status.

The options include the following:

- **P –** Detailed Invoice Preview Report
- **B –** Batch Print
- **Q –** Invoice Preview Queue
- **H –** Hold - No Batch Print

  Note: If the print status is **N**, the system will not change it.

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Require Direct Invoices Upon Reconciliation

Indicate whether to bill a customer when a direct P/O is reconciled in A/P entry.

- **Y –** Bills the customer.
- **N –** Prompts the user to specify when to bill the customer.

Valid Payable Invoice Statuses

Define payable invoice statuses to assign to payable invoices, in addition to the three system-defined statuses. You can select items for display in the A/P Preview Queue based on the statuses listed in this record.

The following system-defined statuses do not appear in this control maintenance record:

- **STK –** Stock
- **DIR –** Direct
- **EXP –** Expense

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ACCT AR Default Codes Control Maintenance Records

The following control maintenance records belong to the AR (Accounts Receivable) area within the ACCT (Accounting) category and apply to default codes.

Default Customer Activity Source In A/R Inquiry

Select a default activity source, such as COLLECT, to use as the selection criteria for Customer Activity Log Viewing when it is displayed from A/R Inquiry. When you leave this record blank, Activity Log Viewing displays all activity log entries.

Define valid activity sources in the Valid Activity Sources control maintenance record.

Default Customer Source In A/R Collection Queue

Select a default activity source, such as COLLECT, to use as the selection criteria for Customer Activity Log Viewing when it is displayed from the A/R Collection Queue. When you leave this record blank, Activity Log Viewing displays all activity log entries.

Define valid activity sources in the Valid Activity Sources control maintenance record.

Default Service Charge Percent

Enter the default service charge percent to print on the following forms:

- Consolidated invoice
- Ship ticket
- Pick ticket
- Yard ticket

If you leave this record blank, the default is 1.5%.

Default Service Charge Sales Source

Select a default G/L sales source to which the system posts service charges. If left blank, the sales source for service charges is the default setting of showroom sales, which is hard-coded in the system as SR.

> **Note:** Any sales report that lists sales by source might be misleading if service charges are tied to a source, because the service charges increase the sales for that source.

Default Ship Via For Service Charge Tax Code

For each branch, enter the default ship via for service charge invoices.

Service Charge Default Terms

Enter the default terms code to use on all service charge invoices.

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ACCT AR Display Parameters Control Maintenance Records

The following control maintenance records belong to the AR (Accounts Receivable) area within the ACCT (Accounting) category and apply to display parameters.

Cash Receipts Display Primary Ship-To's Invoices Only

Indicate whether the system displays only the transactions associated with the designated entity, when you enter cash receipts for a bill-to/ship-to customer.

- **Y** – Displays the transactions associated with the designated bill-to/ship-to customer.
- **N** – Displays the transactions associated with all the ship-to customers tied to the designated bill-to/ship-to customer.

The setting in this record determines the default value for the **Display** field on the Cash Receipts Options screen.

Display Aging Invoices From Balance Forward Perspective

Indicate whether to display aging invoices from a balance forward perspective in A/R Inquiry.

- **Y** – Aging buckets for bill-to or ship-to customers with their statement type set to **B** (balance forward) in Customer Maintenance show as balance forward lines. Current invoices and deposits show underneath these balance forward lines.
- **N** – Does not display aging invoices from a balance forward perspective.

Display Short Description For G/L Accounts In A/R Adjustment

Indicate whether to display the **Short Description** for a G/L account in the A/R Adjustments program. The default is **Y**.

- **Y** – The **Short Description** of the account displays.
- **N** – The first 30 characters of the **Full Description** of the selected G/L account display.

Display Zero Cash Entries In A/R Inquiry Last Pmt Amount Field

Indicate whether to display zero cash entries in the **Last Pmt** field in A/R Inquiry.

- **Y** – Displays zero cash entries.
- **N** – Does not display zero cash entries.

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ACCT AR General Control Maintenance Records

The following control maintenance records belong to the AR (Accounts Receivable) area within the ACCT (Accounting) category.

A/R Aging Bucket Names

Use this record to change the system default names for A/R aging buckets. The first column lists the system's six standard aging buckets. In the remaining columns, enter the names of columns as you would like them to appear in specific areas of the system:

- **Standard Names** – Lists the system's six standard aging buckets. (View Only)
- **6 Col Display** – Enter the column titles to use when the system displays all six columns. This column title appears in two places:
  - In the A/R Aging Report as aging bucket titles. For more information, see Running the A/R Aging Report.
  - On the A/R Inquiry screen, in the upper left corner. For more information, see Viewing Customer A/R Information.
- **5 Col Display** – Enter the column titles to use when the system displays only five columns. This column title appears on the A/R Summary screen, which is off of the A/R Inquiry screen. For more information, see Viewing A/R Balance Summaries.

  Note: Some programs, such as A/P Inquiry, A/R Inquiry, and Cash Receipts combine the last two buckets and only display five columns.

- **In Col** – Enter the three-character titles to use as the content when a screen displays an **Age** column. The **Age** column is located on the left side of the A/R Inquiry screen. For more information, see Viewing Customer A/R Information.

A/R Aging Method

Select the aging method to use to move A/R amounts from one aging bucket to the next. The default is 4-Due Date / Fiscal Month End.

Methods 1 through 4 are based on the due date calculated from the terms on the invoice. Methods 5 through 8 are based on the invoice date. For additional information, see A/R Aging Methods and Examples.

The options are:

- 1-Due Date/Days (one month invoice date)
- 2-Due Date/30 day Rolling (30 days from invoice date)
- 3-Due Date/Calendar Month End
- 4-Due Date/Fiscal Month End
- 5-Invoice Date/Days
- 6-Invoice Date/30 day Rolling

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- 7-Invoice Date/Calendar Month End
- 8-Invoice Date/Fiscal Month End
- 9-Due Date/30 day rolling Version 2 (Similar to method 2, but the date is shifted by one day so that on the day of an item's due date, the item is aged in the first bucket.)

A/R Collection Letter Types

Enter the different types of A/R collection letters, such as 30-Day, 60-Day, 90-Day, that your company sends.

Use these types on the A/R Collection Log Call screen to indicate that a collection letter has been sent and the type of letter that was sent.

A/R Collection Queue Error Report

Indicate whether the system generates an error report when printing or faxing from the A/R Collection Queue.

- **Y** – Generates error report.
- **N** – Does not generate error report.

Apply Batch Cash Exceeded Amount Against Invoice

Indicate whether the system applies excess cash against the invoice when entering batch cash receipts. The default is **N**.

- **Y –** Applies excess cash against the invoice.
- **N –** Leaves excess cash unapplied against the cash receipt.

Auto C/R Maximum Open Invoices

Enter the maximum number of open invoices a customer can have when the system is auto-posting cash receipts to that account. If the number of open invoices for a customer exceeds this maximum, then the system posts the cash receipt as an unapplied payment against that customer's account.

- If you leave this field blank, there is no maximum.
- If you enter **0** in this field, the system auto-posts all cash receipts as unapplied payments.

Automatic Cash Receipts Options

Set this control maintenance record to define the matching rules hierarchy for each bank and branch when creating automatic cash receipts. For example, a customer's bank sends you electronic funds information in a file. When you upload and process the file, the system uses the settings in this record to determine how to apply payments sent in the file to the correct open A/R balances.

Set the following fields for each bank and branch combination for which you create automatic cash receipts.

- **Bank –** Enter the bank for which you are setting matching rules. Set matching rules for each bank separately.

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- **Br –** Enter the accounting branch to which the matching rules apply. Press **F10** and select Multiple Branches to define the same matching rules for more than one branch.
- **Default –** Enter **N** to use the bank set in this control maintenance record. Set this field to **Y** to use the bank as defined in the Spooler Cash Receipts screen when processing the file.

In the table, set one or more matching rules using the following fields:

Field	Description
Matching Rules	Select the A/R balance to use when creating an automatic cash receipt. The setting in this field determines which invoices the system applies EFT amounts to first. • **Single Invoice Amt** – The system looks for an invoice amount that exactly matches the amount in the EFT file. If it finds an invoice that matches, it creates a cash receipt to pay the entire invoice. • **Current** – The system applies the EFT amount to the balance that is less than 30 days old. • **31-60** – The system applies the EFT amount to A/R balances between 31 and 60 days old. • **61-90** – The system applies the EFT amount to A/R balances between 61 and 90 days old. • **91-120** – The system applies the EFT amount to A/R balances between 91 and 120 days old. • **Over 120** – The system applies the EFT amount to A/R balances over 120 days old. • **Last Statement Total** – The system applies the EFT amount to the balance owed on the last statement to the customer. • **Incoming File** – If the invoice number is listed in the EFT file, the system pays the amount according to the information in the incoming file. You can set more than one matching rule to establish a matching hierarchy. For example, set a rule for Incoming File, Single Invoice Amount, and Last Statement Total. The system looks first at the incoming file to determine if there is an invoice number to which to apply the cash receipt. If the system cannot find a matching invoice it then checks to determine if there is a single invoice total that matches the payment amount in the EFT file. If the system does not find an exact match for a single invoice, it creates a cash receipt and applies it to the last statement total sent to the customer.
Comparison Amount	Select which invoice amounts to use for the comparison. For example, if you want the system to look at the gross amount of an invoice, prior to any discounts, select **Gross**. The arrow in some options indicates the order the system uses when comparing multiple values. For example, if you are using single invoice amounts with **Gross > Net** selected in this field, the system looks through all open invoices for the customer and compares the invoice total, net the discount, and the full invoice to the check amount. To use a variance tolerance when matching, select an option with variance. The system uses the variance as defined in the Cash Over/Short Maximum Parameters control maintenance record. For example, if you want to compare check amounts in the EFT file to the net invoice amounts within $5 above or below to the invoice amount, select Net w/variance, and set the **Cash Over/Short Maximum Parameters** control maintenance record to $5.

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Field	Description
Customer Level	Select the customer to search: Bill-To or Ship-To. The customer levels are used when calculating the aging buckets and last statement totals.

Cash Over/Short Maximum Parameters

Enter a maximum percentage and dollar amount, which determine whether the system should process an automatic cash receipt that does not exactly match an invoice amount. If the difference between the cash receipt and invoice amount exceeds either criteria, the system does not auto-apply the cash receipt. If the difference is within *both* over/short parameters, the system posts the difference to the G/L Autoposting Item titled Over/Short Cash Receipts.

- In the **Max Over/Short Percentage Allowed** field, enter the acceptable percentage of difference.
- In the **Max Over/Short Dollars Allowed** field, enter the acceptable dollar amount of difference.

Count Last Cash Receipt As Last Payment In A/R

Indicate whether to display the last sales order payment in the **Last Pmt** field in A/R Inquiry. The default is **N**.

- **Y** – The **Last Pmt** field in A/R Inquiry is populated with the value of the most recent payment of any kind, which can be a cash receipt or a payment generation on an order.
- **N** – The **Last Pmt** field in A/R Inquiry is populated with the value of the most recent payment generation on an order.

Exclude Postings To These G/L Accts From Commissions Report

Enter G/L accounts whose postings to exclude when running the Commissions Report for paid invoices. Enter G/L accounts to exclude from the calculation of paid amounts on the Commissions Report.

For example, if the money applied to an invoice was posted to a Bad Debt account and you list Bad Debt as an account to exclude, then the report program will not include that invoice as a paid amount.

Include Credits In Service Charge Calculation

Select which credits the system includes when calculating service charges. When left blank, the system includes all credits.

- **Past Due Only** – Includes only past due credits.
- **All** – Includes all credits.
- **None** – Does not include any credits.

Include Current On-Acct Payments/Deposits In Service Charge Calc

Indicate whether the system should include on-account payments and deposits made by a customer in the current accounting period in the overdue accounts receivable balance on which the system calculates a service charge. The default is **N**.

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On-account payments are payments entered in Cash Receipts but not applied to a particular sales order. Deposits are payments entered on the SOE Totals screen that are not applied to an invoice because the order has not been shipped.

For example, a customer has an overdue balance of $1000.00 and is on hold. The customer sends a check for $200.00, which is posted to an individual order as a deposit towards that order. Do you want to base your customer service charge on the $1000.00 or the $800.00 balance?

- **Y** – Includes on-account payments and deposits. In the example shown above, the service charge would be applied to the $800.00 balance.
- **N** – Does not include on-account payments and deposits.

Include Service Charges In Service Charge Calculation

Indicate whether to include previously assessed past due unpaid service charges in the current service charge calculation when posting service charges. The default is **N**.

- **Y** – Includes previously assessed past due unpaid service charges.
- **N –** Does not include previously assessed unpaid service charges.

  Note: You can override a setting on an individual customer basis by specifying **Y** or **N** in the **Include S/C Inv in S/C Calc** field on the Additional Customer Credit Data screen.

Include Tax In Discount Calculation

Indicate whether to include sales tax in the amount on which the system calculates a discount.

- **N** – The system does not include sales tax.
- **Y** – The system includes sales tax.

  Note: If the terms code discount percentage has a **P** prefix, the system uses the product or price line pass-along discount and does not include sales tax in the calculation. This control maintenance record has no effect on the calculation of a pass-along discount set up for a product in Product Maintenance or Price Line Maintenance.

Maximum Collection Days Date

Indicate whether to use the **Invoice** date or **Due** date to determine if an invoice was paid after the maximum collection days. Designate maximum collection days in the **Maximum Collection Days** field of Additional Customer Credit Data screen or the **Max Collection Days** field on the Additional Header Data screen. The number on the Additional Header Data screen overrides the number on the Additional Customer Credit Data screen. This system uses this information when it calculates commissions.

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Post Unapplied Cash Amounts To The Customer's Home Br

Indicate how the system handles a customer's unapplied payment in the Cash Receipts program. For each branch, indicate whether to post unapplied cash amounts to the customer's home branch.

If there is an unapplied payment, when the user exits the Cash Receipts screen to save the record:

- **Yes –** Posts the unapplied payment to the customer's home branch.
- **No** or left blank – Posts the unapplied payment to the branch where the cash receipt is recorded.
- **Prompt –** Displays the following prompt: Post Unapplied Cash To Customer's Home Branch [xx] (Y/N)?

Respect Auth Br In A/R, A/P, Inq/Ledger, Aging Rpts & Cash Receipts

Indicate whether the system ignores branch authorization in accounts receivable, accounts payable, inquiries, ledgers, aging reports, and cash receipts.

- **Yes –** Users can enter any branch and customer combination for any of the indicated areas.
- **No –** If the user enters a branch for which the customer is not authorized, the system prompts the user to activate the branch, activate the branch for one-time use, or cancel and return to the cash receipt.

Set this record to **No** if you typically post cash receipts in the same branch or territory as the invoices. Set this record to **Yes** if you use a CORP or central accounting branch, which you do not use to enter sales orders.

If you use central accounting, set this record to **Y**.

Taxable Service Charge States

On the Taxable Service Charge States window, enter the states for which service charges are taxable.

The Post Service Charges program checks this record for the state of the ship-to customer. If the state is listed, the program charges tax on the service charge.

Use Current Balance In Service Charge Calculation

Indicate whether to use the current balance in the service charge calculation. The default is **N**.

- **Y –** The system uses the overdue balance as of the actual day the Post Service Charges program is run.
- **N –** The system calculates a customer's service charge using the overdue balance as of the posting date, regardless of when the Post Service Charges program is run.

Valid Cash Sources

Enter valid cash sources for automatic cash receipts. Valid sources can be up to 10 characters.

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Valid Customer Statement Cycles

Enter cycles, such as EOM (end of month), BOM (beginning of month), or 25th, for sending statements to customers. Each code can be up to four characters.

For each customer, you can specify their statement cycle on the Customer Pricing/Printing screen. Then you can use the statement cycle as selection criteria in the Print Statements and Post Service Charges programs. For example, you can select and print statements for all customers assigned to a designated statement cycle.

Valid RapidPay Adjustment Codes

Complete this record if your company downloads time clock data for the RapidPay system.

- In the **Adj Codes** field, enter the adjustment codes required by the program.
- In the **D/E** field, enter the D/E code.
- In the **Earn** field, enter the earnings code.

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ACCT CC Authorization Control Maintenance Records

The following control maintenance records belong to the CC (Credit Card) area within the ACCT (Accounting) category and apply to credit card authorization.

Automatic Credit Card Authorization During Invoicing

Indicate whether to enable automatic credit card authorization when orders are invoiced.

- **Y –** Enabled. For sales orders, the system automatically charges the credit card, if the authorization method associated with the card is "Pre-Authorize Before Shipment" or "Authorize Before Shipment." When return orders are invoiced, the system prompts you to apply the credit to the credit card.
- **N –** Not enabled. When a sales order is invoiced, the system does not automatically charge the credit card. When a return order is invoiced, the system does not prompt you to apply the credit to the credit card.

Credit Card: Days Pre-Authorization Is Valid

Enter the number of days, 0-9, that a pre-authorization should be valid. We recommend entering seven days. After the specified number of days, the pre-authorization is no longer valid.

Credit Card: WOE Authorization Method

Complete this record to enable real-time credit card authorization for web commerce. Use this feature to authorize sales at the time orders are placed, or later.

Select the authorization method to use with credit card transactions initiated through Web Order Entry, not Sales Order Entry.

Note: If you leave this record blank, the system uses the method designated in the Default Auth Method For New Credit Cards control maintenance record.

- **Pre-Authorize Before Shipment** – Pre-authorize the sale. The Order Print Phantom attempts to pre-authorize the full order amount plus any credit card upcharges specified at the ship via level.
- **Authorize Before Shipment –** Delay authorization until the order is ready to ship. The Order Print Phantom attempts to authorize the full order amount.
- **Reference Only –** The system only uses the credit card information for reference.
- **Authorize After Review –** Only authorize sales after they are reviewed in the Invoice Preview Queue.

Default Auth Method For New Credit Cards

Select the authorization method to use with credit card transactions initiated through Sales Order Entry, not Web Order Entry.

Note: If you leave this record blank, the system uses the **Reference Only** method.

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- **Pre-Authorize Before Shipment** – The Order Print Phantom attempts to pre-authorize the full order amount plus any credit card upcharges specified at the ship via level.
- **Authorize Before Shipment –** The Order Print Phantom attempts to authorize the full order amount.
- **Reference Only –** The system only uses the credit card information for reference.
- **Authorize After Review –** Only authorize sales after they are reviewed in the Invoice Preview Queue.

Force Reference Only When No Default Credit Card Assigned To Order

Indicate whether the system forces the credit card authorization method to be Reference Only when authorizing a credit card from the Totals screen and a default credit card number is not associated with the order. If you leave this record blank, the default is **N**.

The system determines whether a default credit card number is associated with the order. If so, the system uses the authorization method assigned to the credit card. If not, the system refers to the setting in this record.

- **Y –** The system sets the authorization method to Reference Only.

  Note: To enable automatic credit card authorization in the print phantoms when the authorization method has been forced to Reference Only, the user will be able to go into the CC Info screen (Alt-I off of the Totals screen) and change the authorization method from Reference Only to the desired setting Authorize Before Shipment, Pre-Authorize Before Shipment, or Authorize After Review)

- **N –** The system uses the authorization method designated in the Default Auth Method For New Credit Cards control maintenance record.

Notification Method When Credit Card Auth Fails

Select how the system sends notification when a credit card authorization fails. If you leave this record blank, the default is **Job Queue and Message**.

- **Job Queue and Message** – Sends a tracker and message.
- **Job Queue Only –** Sends only a tracker.
- **Message Only –** Sends only a message.

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ACCT CC General Control Maintenance Records

The following control maintenance records belong to the CC (Credit Card) area within the ACCT (Accounting) category.

Credit Card Administrator

For each branch, enter the user or message group to message when a problem with a credit card transaction occurs.

Credit Card Collection Approval Mode

Complete this record if you use the automatic credit card processing system. For each branch specify when to do credit card authorization. If you leave this record blank, the default is **Credit Card Authorization Phantom**.

- **Freight Posting –** The system attempts to collect a pre-authorization during freight posting (StarShip/Clippership).
- **Credit Card Authorization Phantom –** The Credit Card Authorization Phantom attempts to collect a pre-authorization.

Credit Card Level III Summary Line Item

Use this record to determine how the system sends the items associated with a credit card purchase to your company's credit card processor. Enter a product description or leave this record blank.

- If you enter a product description in this control maintenance record, when your company sends a credit card purchase to your credit card processor, it lists only this item for the purchase, assigns a quantity of one, and sets the price of the item to the total charge for the order.
- If you leave this record blank, the system sends every line item associated with a credit card purchase to your credit card processor.

  Note: With Credit Card Level III Processing, there is a processing fee of $.10 for every line item.

Credit Card: Default Reference Number

Select which number the system should use as the default reference number for credit card transactions when one is not set in the **Default Ref No** field on the Default Credit Card Information screen in Customer Maintenance. If you leave this record blank, the default is **Customer P/O**. The options are:

- Release Number
- Customer P/O
- Invoice Number

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Note: The system populates the **Reference No** field on the Credit Card Authorization screen with the customer or control record default. Users can edit this field.

Credit Card: Required Information

Complete this record if your company does not use the Credit Card Authorization companion product. List the information your system requires when a user enters a credit card payment. Press **F10** and select items from the list.

Default Credit Card Terms Code

Enter a terms code that will override the customer terms code for any credit card order unless a terms code has already been attached to the credit card being used. When the system uses this default terms code, an asterisk (*) displays to the right of the code on the Credit Card Authorization and Credit Card Default Billing Information screens.

The system also assigns this terms code to new credit cards entered during order entry.

Override Print Status On Credit Card Denial

For each branch, select the override print status to assign to an order upon credit card denial.

Sales Order Entry Terms Code Override

Enter values in this control maintenance record to have the system automatically override customer terms settings at the time of sale based on the method of payment.

The override terms you set for cash payment methods also applies to gift cards and gift certificates.

User To Be Messaged With Credit Card Communication Errors

Enter the user ID to whom the system should send a message when credit card communication errors occur.

Valid Credit Card Types

Enter the credit cards your company accepts. For each credit card, enter a two-character user-defined abbreviation followed by a hyphen and a description, as shown in the examples below:

- **VI** – Visa
- **MC** – Master Card
- **DS** – Discover
- **AX** – American Express
- **DC** – Diners Club

Use credit card types when assigning credit card information on the Default Credit Card Information screen in Customer Maintenance and the Credit Card Authorization screen in Order Entry and Web Order Entry. For more information, see Defining Default Credit Card Information and Authorizing Credit Card Sales.

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ACCT COST General Control Maintenance Records

The following control maintenance records belong to the COST area within the ACCT (Accounting) category.

Central Warehousing Average Costing Enabled

Indicate whether the system calculates average cost, last cost, landed average cost, and landed cost, based on the inventory in all the branches included in the central warehouse and central purchasing environments.

- **Y - Central Warehousing and Central Purchasing –** Computes the costs using cost information from the inventory in the parent and child branches in central warehousing and central purchasing environments.
- **W - Central Warehousing Only –** Computes the costs using cost information from the inventory in the parent and child branches only in a central warehousing environment.
- **P - Central Purchasing Only –** Computes the costs using cost information from the inventory in the parent and child branches only in a central purchasing environment.
- **N - Not Enabled –** Computes the costs using cost information only from inventory in the parent branch.

Cost Of Goods Sold Basis Name

Enter a basis name, commonly REP-COST, with which to populate the **Basis** field that corresponds to the COGS-COST global name in Price Line Maintenance. This ensures that the basis name assigned to the COGS-COST global name is the same for all price lines. You must then enter this name in the designated position in the **Basis Names** column in the Price Line Maintenance. Do not change this name after you have defined it.

If you use AVG-COST as your COGS, be aware that the system does not recalculate AVG-COST based on either:

- Issuing a credit for a product that was returned using a different cost than the original AVG-COST.
- Canceling a purchase order that had incorrect product pricing.

  In the latter case, you can force the average cost to be recalculated by opening the purchase order, correcting the cost, and canceling and reissuing any open generations/backorders.

  Note: You must correct any sales orders issued between the time the purchase order was received at the incorrect cost and the time the purchase order was corrected.

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Global Buy/Sell Basis Names

On the Global Buy/Sell Basis Names screen, enter each global cost or price basis name the system can use, a corresponding view level 1-9, and a corresponding nonstock indicator.

- In the **Global Basis** column, enter a global cost or price basis name for each prompt in the left-hand column that your system uses. A global basis name refers to a cost or price that has a consistent meaning to all parts of the system. The list can contain up to 20 names. These names display in the **Global** column on the Price Line Maintenance screen.

  Do not change the first eight names assigned during implementation:

  - DFLT-LIST
  - DFLT-COST
  - COGS-COST
  - COMM-COST (or GENR-COST)
  - REBAT-COST
  - SELL-BREAK
  - PURC-BREAK
  - DISP-COST

  Use and modify the user-defined prompts as needed. You can enter them in upper, lower, or mixed case.

- In the **VLvl** column, enter a view level, 1-9, for each global basis name. The view level assigned to each global basis name works with the view level assigned to the following authorization keys for making price changes in sales order entry or transfer order entry:

  - COGS.EDIT
  - SOE.COST.EDIT
  - TOE.COST.EDIT

  When changing the cost for a group of products, the **F10** list of choices contains the costs the user is authorized to change.

- In the **Incl NS** column, for each global basis name, indicate whether users can assign a value to this basis name on the Nonstock Entry screen in sales order entry as follows:

  - **D –** Display. The global basis name displays in Nonstock Entry. The system updates the price sheet for the designated basis name with the value the user enters on the Nonstock Entry screen.
  - **U –** Update Only. The global basis name does not display in Nonstock Entry. The system updates the price sheet for the designated basis name with the value entered for the DFLT-LIST or DFLT-COST field, depending on whether the basis name is a price or cost basis.

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- **N –** Not Used. The global basis name does not display in Nonstock Entry. The system does not update the price sheet for the designated basis name.

Dflt List Prompt and **Dflt Cost Prompt** are set to **D** and cannot be changed. If the price line for a nonstock product has the same local basis name assigned to more than one global basis name, and those global basis names have a **D** indicator, only the topmost global name from the Price Line Maintenance screen displays in the Vscroll region on the Nonstock Entry screen.

The global basis names with a **D** indicator display on the Nonstock Entry screen, along with the local basis name assigned to the global basis name.

Include Item With Zero Average Cost In Average Cost Calculation

Indicate whether the system includes on-hand items with $0.00 average cost in the average cost calculation when additional inventory is received. The default is **N**.

- **Y –** Includes on-hand items with $0.00 average cost in the average cost calculation. This allows for the current on-hand quantity to offset the new average cost calculated.

  Example:

  On-hand qty = 9 with current average cost = $0.00

  Receive 1 with $10.00 cost

  New average cost = $1.00 ($0.00*9 + $10.00*1) / (9 + 1)

- **N –** Does not include on-hand quantities with $0.00 average cost in the average cost calculation.

  Example:

  On-hand qty = 1 with current average cost = $0.00

  Receive 1 with $10.00 cost

  New average cost = $10.00 (system did not include $0.00 average cost on-hand item)

  Note: This control record affects both average cost and landed average cost.

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ACCT COST Update Parameters Control Maintenance Records

The following control maintenance records belong to the COST area within the ACCT (Accounting) category and are related to update parameters.

Should Credit Sales Order Update Avg/Last Cost

For each branch, indicate whether the system uses the cost of incoming material on a credit sales order to adjust the average cost of the item.

For a credit order to act like a purchase order with regard to calculating the average cost, set the branch flag to **Y**.

- **Y –** Credit sales adjust the average cost for the item.
- **N –** Credit sales do not adjust the average cost for the item.

Should Inventory Adjustment Update Avg/Last Cost

For each branch, indicate whether an Inventory Adjustment entry causes the system to recalculate the LAST-COST and AVG-COST at the time purchase orders and transfers are received. The default is **N**.

We recommend setting each branch to **N**, because errors affecting these costs should be corrected by revising the original transaction.

- **Y –** The system recalculates the costs.
- **N –** The system does not recalculate the costs.

Update Landed Avg Cost Using Landed Cost

For each branch, indicate whether to update the landed average cost using the landed cost.

- **Y –** Sets the default capitalization method to Freight Factor.
- **N –** Sets the default capitalization method to none.

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ACCT CR (Cash Receipts) Control Maintenance Records

The following control maintenance records belong to the CR (Cash Receipts) area within the ACCT (Accounting) category.

Anticipation Credit Percentage

Enter a percentage, in decimal format, to apply to each invoice when issuing an anticipation credit at the time of cash receipts. The system issues anticipation credits to customers who pay before the discount and/or final due date of the invoice.

> **Note:** The system uses this percentage only if the Create Anticipation Credit Invoice From C/R control maintenance record is set to **Y**.

Auto C/R Default Customer If Not Found

Use this record if your company has customers who send payments to a lock box at a bank. The bank then uploads the payments into Cash Receipts. Enter the default customer to which the system should post a cash receipts payment if the system does not recognize a customer during the upload.

C/R Anticipation Credit Invoice Product

Enter the miscellaneous charge product to use when the system creates an anticipation credit.

Create Anticipation Credit Invoice From C/R

For each customer home branch, indicate whether the system prompts the user to do an anticipation credit check from Cash Receipts when the user enters a customer payment before the due date.

- **Y –** The system prompts the user.
- **N –** The system does not prompt the user.

You can override the setting in this record for a customer by entering a **Y** or **N** in the **Anticipation Credit Invoice** field on the Customer Maintenance > Credit Control Parameters > Additional Credit Information screen.

> **Note:** The system determines the customer's home branch by first looking at the Accessible Branches screen for the customer in Customer Maintenance. If a home branch is not specified there, the system looks at the branch entered on the cash receipt.

Do Not Apply Discounts To Cash Receipts

Indicate whether to disable the automatic application of discounts in Cash Receipts. The default is **N**. You can override the default setting in Cash Receipts.

- **Y –** The **No Discount** hot key on the Cash Receipts screen is highlighted. The system does not automatically apply any available discount for a customer upon entry of a cash receipt for that customer. The discount appears with a question mark.

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- **N –** The **No Discount** hot key on the Cash Receipts screen is not highlighted. The system applies any available discount for a customer upon entry of a cash receipt for that customer.

Use Terms Grace Period In Cash Receipts

Indicate whether the Cash Receipts program uses the terms grace period for late payments to still receive a discount.

- **Y –** Uses the cash discount grace period. Discounts are available in cash receipts for the number of grace days past the discount date.

  For example, a discount available through the 10th of the month with a grace period of five days displays on the screen until the 15th.

- **N –** Does not use the cash discount grace period, even if a grace period is assigned to the terms code.

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ACCT EXCHG (Exchange) Control Maintenance Records

The following control maintenance records belong to the EXCHG (Exchange) area within the ACCT (Accounting) category.

Base Currency For Exchange Rates

Specify the base currency to use in foreign exchange calculations.

Valid Foreign Currencies

Specify the currencies to use in foreign exchange transactions. Specify currencies in forms such as US$, Can$ and Pesos, using up to 6-character names.

Once valid currencies are defined, you can establish a base currency for your company using the Base Currency For Exchange Rates control maintenance record, and then create a table of exchange rates for each foreign currency in Exchange Rate Maintenance.

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ACCT GL (General Ledger) Control Maintenance Records

The following control maintenance records belong to the GL (General Ledger) area within the ACCT (Accounting) category.

Auto Payroll Balance Accounts

Use the Auto Payroll Balance Accounts screen to specify offset accounts for each branch for posting differences that occur when journal entries for automatic payroll don't balance.

To specify auto payroll balance accounts:

1. In the **G/L Account** field, specify the G/L account to use when creating payroll journal entries for the designated branch.
2. In the **Posting Br** field, specify the posting branch for the G/L account.
3. If multiple branches use the same account and posting branch, you can use the following hot keys:

Hot Key	Use to...
Set All	set the G/L account and posting branch for every branch to be the same as the line on which the cursor is positioned.
Copy	copy the G/L account and posting branch from the line the cursor is on to a specified branch, territory, or branches.

4. Use the **Rec Layout** hot key to display the User Defined Auto Journal Entry screen and define the record layout of the file being imported.
5. Use the **Msg User** hot key and specify the user or message group to notify whenever a journal entry is made to one of the G/L accounts listed on the screen as a result of importing the payroll file.
6. Use the **Find** hot key, as needed, to locate a branch based on the branch, G/L account, or posting branch.

Use the User Defined Auto Journal Entry screen to define the file format for importing a payroll file received from a third-party payroll system and creating journal entries for each branch.

To define the record layout of the file being imported:

1. On the Auto Payroll Balance Accounts screen, use the **Rec Layout** hot key to display the User Defined Auto Journal Entry screen.

   By default the system displays the format you viewed last. Press **Esc** to clear the screen.
2. In the **Work ID** field, enter an ID for this record layout. At the prompt, press **Enter** to confirm that it is a new ID.
3. In the **Desc** field, enter a description of the Work ID.

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4. Use the **File Format** hot key to display the Upload File Format screen and then define the file format.
   - In the **Record Type** field, press **F10** and select whether the record type is blocked (fixed-length) or variable-length.
   - In the **Record Length** field, if the record type is blocked, specify the record length. If records are terminated with a carriage return or line feed character, enter **0** as the record length.
   - In the **Delimiter Char** field, press **F10** and select whether data fields within records are separated by a comma or tab character.
   - In the **Delete Chars** field, enter any characters in the import file that are not related to the data and can be deleted, such as quotes.
5. Press **Esc** to save the file format information and return to the Auto Payroll Balance Accounts screen.
6. In the **Heading** field, enter the description to display in the journal entry.

   Note: The **Branch** and **Jrl Date** fields are not used.
7. In the **Data Format** section, define where the required information is located in each input file record. This includes identifying the G/L account, amount, and branch.
   - For blocked records, in the **Start** and **Lngth** columns, specify the starting position and length of each data item listed in the **Data Format** column.
   - For variable records, in the **Elmt#** column, specify the relative position in the import record of each data item listed in the **Data Format** column.
   - If a decimal point is not a part of the **Amount** data item, enter the number of decimal positions in the **Dec#** field.

   To post a journal entry to an Eclipse G/L account, import records must specify one of the following:
   - In the **Eclipse G/L ID #** field, specify an Eclipse G/L account ID. Optionally, you can also specify a subledger of the account in the **G/L SubLedger** field.
   - In the **G/L Account Ref #** field, specify another system's G/L account number, which has been cross-referenced to an Eclipse G/L account ID in the **Key Words** field on the G/L Account Maintenance screen.

   If records identify both accounts, the system processes them using the Eclipse account ID.
8. Press **Esc** to save the journal entry format.

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Branch That Receives Credit For The Sale

For each branch, select the accounting postings to make for orders generated when the pricing branch and shipping branch are not the same. Select from the following options:

- Pricing
- Shipping
- Terminal
- UserHome

This record works with the Branch That Controls Branch That Receives Credit For The Sale control maintenance record.

Example:

1. The Branch That Controls Branch That Receives Credit For The Sale control maintenance record is set to Pricing.
2. The system determines the pricing branch for the order. Assume the pricing branch is Branch 3.
3. The system checks the Branch That Receives Credit For Sale control maintenance record to see which branch is assigned to Branch 3.

If Branch 3 is set to...	Then all G/L postings for an order segment go to the...
Pricing	pricing branch, except for Inventory, which is posted to the shipping branch with balancing entries made to the Branch Exchange Account.
Shipping	shipping branch.
Terminal	pricing branch defined in Terminal Setup for each individual port or user.
UserHome	home branch of the writer of the sales order.

When the pricing branch on an open sales order changes to a different branch, the system checks this control maintenance record for the new pricing branch and updates the G/L postings for the order segment. For example, if you change the pricing branch on the order to Branch 4, the system checks this control maintenance record for Branch 4. If it is set to UserHome, the system records all G/L postings for the order segment to the writer's home branch.

Note: Once an order is invoiced, if a user makes a change that affects the G/L posting, such as changing the pricing branch, the user must manually change the G/L branch. The system does not re-post to a different G/L branch after an order is invoiced. When copying one order to another, the logic for selecting the G/L branch for the target order is the same at that for the original order.

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Budget Sales By Fiscal Year (Y/N)

Indicate whether the Sales Budgeting program creates budgets for the company's fiscal year, rather than the calendar year. The default is **N**.

- **Y** – Budgets for the fiscal year.
- **N** – Budgets for the calendar year.

Hide Zero Amount Accounts In Business Summary Sales Detail Screen

Indicate whether to set the default view of the Business Summary Sales Detail screen to hide accounts that have a zero balance. If you leave this record blank, the default is **N**.

- **Y** – Only accounts with non-zero balances display. Use the **Show Zero Amounts** hot key on the Business Sales Detail screen to view accounts with zero balances.
- **N** – All accounts display.

Limit Bank Selection By Branch

Use this control maintenance record to assign different bank accounts to each branch. When receiving and disbursing cash, the system prompts users to select a bank assigned to their branch. If no bank account is specified for a branch, users in that branch can select from all bank accounts.

For each branch, specify the bank account its users can select. Use the **Multi** hot key to specify multiple bank accounts for a branch. Use the **Copy** hot key to copy one branch's bank accounts to another branch, territory, or all branches.

Manually Reported Total Sales Posting Accounts

Specify the credit and debit G/L accounts to which to post a journal entry for manually reported sales.

Print Statuses To Define Sales In Process For Business Summary

Specify the print statuses to be considered as in-process sales by the Business Summary sales-in-process calculation. Separate multiple statuses by commas with no spaces. If you leave this record blank, the **Sales In Process** hot key on the Business Summary screen is not active.

The valid options are:

- **Q** – Invoice Preview Queue
- **P** – Detailed Invoice Preview Report
- **M** – Flag to be Placed on Manifest
- **H** – Hold-No Batch Print
- **B** – Batch Print

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Show All G/L Type Detail In The G/L Acct Business Summary

Indicate whether to show all G/L Type detail in the G/L Account Business Summary.

- **Y –** Shows all G/L Type detail.
- **N –** Does not show G/L Type detail.

Use G/L Account Type Flags For Trial Balance

Indicate whether the G/L Report Generator respects G/L account type flags when displaying actual data for a trial balance type of report. The default is **N**.

- **Y –** The **Actual** column on the report shows negatives for all accounts that are carrying a credit balance.
- **N –** The **Actual** column on the report only shows a negative amount when the account is carrying a balance opposite of its "natural" balance.

Valid Cost Center Types

Enter cost center types to assign to G/L accounts for reporting purposes in G/L Template Maintenance.

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ACCT LIFO (Last In First Out) Control Maintenance Records

The following control maintenance records belong to the LIFO (Last In First Out) area within the ACCT (Accounting) category.

Use Default Cost Basis For LIFO Cost Update

Indicate whether the system uses the default cost basis when calculating the current year's LIFO cost for items that were not purchased or transferred within the current year. The default is **N**.

- **Y –** The system uses the local cost basis mapped to the global basis specified in the **Default Basis** field on the LIFO Updating screen.
- **N –** The system uses last year's LIFO cost, if the item was not purchased or transferred within the current LIFO year.

Valid LIFO Product Pools

Specify product pool codes, up to two characters, that categorize products for use with LIFO reporting, which values inventory for tax reporting purposes. You can assign LIFO product pools defined in this record to the **Pool** field on either the LIFO Maintenance screen or the LIFO Inventory Valuation screen.

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ACCT PRINT Control Maintenance Records

The following control maintenance records belong to the PRINT (Print) area within the ACCT (Accounting) category.

Consolidated Invoice Reports Remit To

Enter the customer whose address to use as the remit-to address on the statements printed by the Consolidated Invoices Report and the Product Consolidated Invoices Report. If you leave this record blank, the system displays a warning message and gives the user the option of printing statements without a remit-to address.

Consolidated Invoicing Product

Enter the product to use with invoices printed by the Print Consolidated Invoices program. Select a miscellaneous charge product with a generic description, such as "Consolidated Invoice Product." For more information, see Setup Requirements for Printing Consolidated Invoices.

Default Invoice/Statement Sort

Enter the following sort option defaults for invoices and statements:

- In the **Default Invoice Sort** field, select the entry to display in the **Sort by** field on the Print Invoices and Print Consolidated Invoices screens. The options are:
  - **Zip** – Sorts by zip code first, then by the Customer Maintenance **Sort By** field entry. Select this option if your company takes advantage of reduced postal rates by sending invoices as pre-sorted first class mail.
  - **Customer Name** – Sorts by the Customer Maintenance **Name** field entry.
  - **Customer Sort By** – Sorts by the Customer Maintenance **Sort By** field entry. This is the default.
- In the **Default Statement Sort** field, select the default entry to display in the **Sort by** field on the Print Statements screen. The options are:
  - **Zip** – Sorts by zip code first, then by the Customer Maintenance **Sort By** field entry. Select this option if your company takes advantage of reduced postal rates by sending statements as pre-sorted first class mail.
  - **Customer Name – Sorts by the Customer Maintenance Name field entry.**
  - **Customer Sort By** – Sorts by the Customer Maintenance **Sort By** field entry. This is the default.

Default Settings For Batch Invoices And Statements

Complete the following default batch actions for printing batch invoices and statements:

Field	Description
Print Invoice Copies	Enter the number of copies of each invoice to print. The system uses this default when the **Invoice Print Copies** field on the Customer Pricing/Printing screen is blank.

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Field	Description
Fax Invoice Copies	Enter the number of copies of each invoice to fax. The system uses this default when the **Invoice Fax Copies** field on the Customer Pricing/Printing screen for a bill-to customer is blank.
Statement Mode	Press **F10** and select **0**, **1**, or **2** to indicate the number of copies of a customer's month-end statement to print or select **Fax** to fax the statement. The system uses this default when the **Batch Statement** field on the Customer Pricing/Printing screen for a bill-to customer is blank. **Note:** The system prints statements for customers selected using the **Customer** hot key on the Print Statements screen regardless of the settings in this control maintenance record or the customer maintenance record.
Include Paid Invoices on Statements	Set this field to **Y** to include paid invoices on statements. The default is **N**.

Complete the following fields for 3rd party billing:

Field	Description
Test Invoices	Set this field to **Y** when you are *testing* the transmission of outsourced batch invoices. When you batch print invoices in test mode, the system does not change print flags or make log entries. The system does not print, fax, or e-mail the generated invoices. The default is **N**.
Test Statements	Set this field to **Y** when you are *testing* the transmission of outsourced batch statements. When you batch print statements in test mode, the system does not change print flags or make log entries. The system does not print, fax, or e-mail the generated statements. The default is **N**.
FTP Actions	If your system is set up for FTP transmissions, press **F10** and select the batch action to replace with an FTP transmission. To select multiple actions, use the **Multi** hot key.
Send Invoices via FTP	If your system is set up for FTP transmissions, Indicate whether the system default for sending statements via FTP is **Y** or **N**. The default displays in the **Send via FTP** field on the Print Invoices screen.
Send Statements via FTP	If your system is set up for FTP transmissions, indicate whether the system default for sending statements via FTP is **Y** or **N**. The default displays in the **Send via FTP (Y/N)** field on the Print Statements screen.

Do Not Apply Terms Discount To MiscChrg Products

Indicate whether to include miscellaneous charge products in the value on which the system calculates a terms discount for timely payment.

- **Y –** Does not include the value of MiscChrg products.
- **N –** Includes the value of MiscChrg products.

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Only Consolidate Multiple Invoices

Indicate whether the system creates a consolidated invoice only if there are multiple invoices to consolidate. The default is **N**.

> **Note:** This record applies only to customers flagged for consolidated invoicing.

- **Y** – Creates a consolidated invoice only if there is more than one invoice to consolidate. If there is only one invoice, the system prints a regular invoice.
- **N** – Creates a consolidated invoice, even if there is only one invoice to consolidate.

Print Paid-In-Full Invoices

For each branch, indicate whether the Print Invoices program includes fully paid invoices when it selects invoices to print.

- **Y** – Includes fully paid invoices.

  Note: Select this option if your company sends EDI outbound 810 zero-balance invoices, which is indicated in the **Send Credit/Zero Bal Invoices** field on the EDI Add'l Doc Info screen.

- **N** – Does not include fully paid invoices. The system logs paid-in-full invoices as having been printed, regardless of whether they have been physically printed. A user assigned the SOE.CLOSED.ORDER.EDIT authorization key at level 1 can only view those invoices.

Show Detail On Service Charge Invoice

Indicate whether to itemize each overdue transaction and its corresponding service charge on a customer's service charge invoice. The default is **N**.

- **Y** – The service charge invoice lists each transaction with an overdue balance and its corresponding service charge.

  For example: S130XXXX.001 Serv Chrg $3.75

- **N** – The service charge invoice does not identify the individual transactions with overdue balances.

Valid Invoice Select Codes

Enter invoice select codes, which identify how often a customer receives invoices. Codes can be up to five characters long. Typical codes are Day, Week, and Month. You can assign an invoice select code to a customer on the Customer Pricing/Printing screen.

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ACCT SALES Control Maintenance Records

The following control maintenance record belongs to the SALES area within the ACCT (Accounting) category.

Hit Individual Components' G/L Account For Kits

Indicate how the sale of a kit affects G/L account postings.

- **Y –** When a kit is sold, the system posts to the G/L account for each component of the kit, as if the items were placed on the order individually. Miscellaneous charge products included in the kit do not have a cost associated with them.
- **N –** When a kit is sold, the system posts to only the G/L account of the kit.

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ACCT TAX Control Maintenance Records

The following control maintenance records belong to the TAX area within the ACCT (Accounting) category.

Calculate Tax On Freight/Handling In/Out Separately

Indicate whether to tax freight and handling in and freight and handling out charges separately.

- **Y** – The system taxes freight and handling in and freight and handling out charges separately. For this to work properly, enter the G/L account for freight and handling charges in the **Taxable Misc G/L ID** field on the Tax Jurisdiction Code Maintenance screen and assign the corresponding tax rate in the **FrtHndl** field.
- **N** – The system taxes the combined freight and handling charges.

Default Geocode Method For National Sales Tax

Select whether the system uses the entity record of the shipping branch (**S**), pricing branch (**P**), or ship-to customer (**H**) to determine an order's geocode when no ship via is assigned to the order. If you leave this record blank, the system uses the shipping branch.

If the entity has no geocode override, then the system uses the **Dflt Geocode** assigned to the entity record's zip code in Zip Code Maintenance.

Default Tax Jurisdiction

For each branch, enter the default tax jurisdiction.

When the system doesn't find a tax jurisdiction for a transaction, it refers to this record.

Default Tax Jurisdiction Method

Indicate which entity record the system uses for determining an order's tax jurisdiction when no ship via is assigned to the order.

- **S** – Shipping branch.
- **P** – Pricing branch.
- **H** – Ship-to customer.

Enable GST/PST Hot Key In Tax Jurisdiction Code Maintenance

Indicate whether to enable the **GST/PST** hot key in Tax Jurisdiction Code Maintenance.

Canadian distributors who have line item taxability enabled use this hot key to flag each G/L tax account associated with the displayed tax code as being a Goods and Services Tax (GST) or Provincial Sales Tax (PST) account.

> **Note:** If you charge GST or PST, enable line item taxability for those customers.

- **Y –** Enables the **GST/PST** hot key on the Tax Jurisdiction Code Maintenance screen.
  - If line item taxability for the customer is enabled, the system prompts you to specify line item taxability (Y/N/R = Yes/No/Reduced) in sales order entry. If you respond

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with **Y** or **R**, the system prompts you to specify the appropriate tax code for the line item.

- If line item taxability for the customer is not enabled:
  - The system uses the tax code that was previously used when the customer purchased the product.
  - For a product not previously purchased by the customer, the system prompts for the tax code and displays the code from the **Tax Jurisdiction Override** field on the Customer Maintenance / Sales Tax screen as the default.
- **N –** Does not enable the **GST/PST** hot key on the Tax Jurisdiction Code Maintenance screen.

National Sales Tax G/L Account

Enter the general ledger account for sales tax. The National Sales Tax program posts all taxes to this one general ledger account.

Non NY State Tax Codes

This record applies to distributors who pay New York state sales tax.

Enter each tax code defined in Tax Jurisdiction Code Maintenance that is *not* for the state of New York. The New York Sales Tax Report runs for all the tax codes defined for your company, except the ones listed in this record.

NY State Tax Codes

This record is for Eclipse internal use only.

Use Price/Ship Br For Ship Via Tax Jurisdiction Overrides

Indicate which branch to use to determine if an order has a branch-level tax jurisdiction method override. The system checks the Ship Via Branch Overrides/Auto Scheduling screen in Branch Maintenance to determine whether the branch is assigned a tax jurisdiction method that overrides the default tax jurisdiction method assigned to the order's ship via.

- **P-Price –** Pricing branch.
- **S-Ship –** Shipping branch.

See How Eclipse Determines the Tax Jurisdiction for a Sales Order.

Use Tax Rate From Original Sale Order For Returns

Indicate whether the system uses the tax rate from the original sale order for a return. The default is **N**.

- **Y –** Uses tax rate from the original sales order.
- **N –** Uses the current tax rate.

Note: To be able to put returns and sales items on the same order, you must set this record to **N**.

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User To Be Messaged On National Sales Tax Database Update

Complete this record if your company uses the national sales tax database. Enter the user to notify when Eclipse updates the geocode tax information in the database each month. The system sends a report to the Hold file of this user with a summary of the changes made.

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AOE (Inventory Adjustments) Control Maintenance Records

The following control maintenance record belongs to the AOE (Inventory Adjustments) category.

Disable Inventory Adjustment For Location Maintenance

For each branch, indicate whether to disable the inventory adjustment entry in the history ledger when an inventory adjustment is made through regular or RF location maintenance. The default is **N**.

- **Y –** Does not enter location maintenance inventory adjustments in the history ledger.
- **N –** Enters location maintenance inventory adjustments in the history ledger.

  Note: The only time you should set this record to **Y** for a branch is after the initial installation of the system and, then only if initial on-hand amounts must be corrected. After all on-hand amounts are corrected, set the record to **N**.

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AOE CMNT (Comments) Control Maintenance Records

The following control maintenance records belong to the CMNT (Comments) area within the AOE (Inventory Adjustments) category.

Allow Zero Average Cost in Inventory Adjustments

Indicate whether the system allows zero average costs to be the cost of goods sold in inventory adjustments, when the system uses an average cost basis as the global COGS basis. The default is **N**.

- **Y –** Uses the average cost as the cost of goods sold, even if it is zero. Note: Authorized users can override the cost on the adjustment.
- **N –** Uses the replacement cost as the cost of goods sold.

Inventory Adjustment Default View

Select the view to display when users enter the Inventory Adjustment Entry screen. If you leave this field blank, the default is **Standard**.

- **Standard –** The screen does not display an extended cost column.
- **Extended Cost –** The screen displays an additional column, which shows the extended cost of line items in whole dollars.

Prompt For Reason For Change In Product Location Maintenance

Indicate whether the system prompts for a comment when a user changes a product's quantity in Product Location Maintenance. For each branch, enter:

- **Y –** The system displays the Reason For Change prompt. Comments are displayed on the Inventory Adjustment Entry screen in the **Product Description** field under the description of the product whose quantity was changed.
- **N –** The system does not display the Reason For Change prompt.

  Note: This record does not apply to RF Location Maintenance.

Require Change Log Comment On Inventory Adjustment

Select whether the system requires users to enter change log comments for inventory adjustment edits and, if so, how the system uses them.

- **Yes –** Prompts users to enter a comment in the change log.
- **No –** Does not prompt users to enter a comment in the change log.
- **Display on Adjustment –** Prompts users to enter a comment in the change log and then adds their comments to the inventory adjustment as a general comment.

Valid Inventory Adjustment Comments

On the Default G/L Accounts for Inventory Adjustments screen, enter inventory adjustment comments that are acceptable entries in the **Header Comment** field on the Adjustment Order Entry screen. Also enter the default G/L accounts to which the adjustments post.

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- The left side of the screen displays valid comments. At the top are **System Defined Comments**. In the **User Defined Comments** column, enter additional comments, up to 40 characters long, as needed.
- In the **Offset Account** column, for each comment press **F10** and select the default G/L account to which this type of adjustment should be posted. If left blank, the system posts the adjustment to the Inventory Adjustment Charges account.

If header comments are defined in this record and the Validate Inventory Adjustment Header Comments control maintenance record is set to **Y**, the system validates comments entered in the **Header Comment** field of Adjustment Order Entry against the comments defined here. If this record is left blank, the **Header Comment** field on the Adjustment Order Entry screen allows free-form (not validated) entries.

When running the Print Inventory Adjustment Register report, you can limit the report to adjustments associated with one of the inventory adjustment comments defined in this record if the Validate Inventory Adjustment Header Comments control maintenance record is set to **Y**.

The maintenance log records separate entries for each field. To view maintenance log entries, position the cursor on a field and use the **Log** hot key.

For additional information, see Making Inventory Adjustments and Adjusting Inventory for Store Use Items.

Validate Inventory Adjustment Header Comments

Indicate whether the system validates the comments entered in the **Header Comment** field on the Inventory Adjustment screen.

- **Y –** The system validates comments in the **Header Comment** field on the Inventory Adjustment screen against the comments defined in the Valid Inventory Adjustment Comments control maintenance record.
- **N –** The system allows free-form entries in the **Header Comment** field.

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B2B Control Maintenance Records

The following control maintenance records belong to the B2B (Business-to-Business) category.

Assign IDMS-XML Invoices To A/P Branch

For each branch, enter the A/P branch to which to assign invoices received through IDMS-XML.

B2B Punchout Product Info Setup

Enter the following information for punchout edit requests from a buyer network, such as Ariba:

- In the **Locate UNSPSC In Product User Defined Field #** field, enter the user-defined field number on the product's Price Updating ID Maint screen where your company stores the UNSPSC product identification number.
- In the **Locate Manufacturer Name In Product User Defined Field #** field, the user-defined field number on the product's Price Updating ID Maint screen where your company stores the manufacturer name.

  Note: To display the Price Updating ID Maint screen, from Product Maintenance use the **UPCs** hot key and then the **UD Maint** hot key.

BCS - Default Item Comment Type

Enter the default line item comment type for e-commerce orders.

Default B2B Customer Templates

Enter the customer record to use as a template that defines your company to each of the following buyer network interfaces:

- Ariba
- OBI – Open Buying on the Internet
- OCI – Open Catalog Interface

Default IDMS-XML A/P Batch

Enter the default batch ID to display in the **Batch ID** field of the accounts payable record the system creates when it receives an invoice through IDMS-XML.

Default XML A/P Batch

Enter the default batch ID to display in the **Batch ID** field of the accounts payable record the system creates when it receives an invoice through XML.

Disable Checking Part #'s, UOM's, And Qty's On IDMS-XML Invoices

Indicate whether to disable the checking of part numbers, units of measure, and quantities on IDMS-XML invoices when the system auto-reconciles invoices. The default is **N**.

- **Y** – The system checks invoice amounts and the number of line items, but does not check part #'s, UOM's, and quantities.

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- **N –** The system checks invoice amounts, the number of line items, part #'s, UOM's, and quantities.

HTTP.TRANSFER Uses Curl

Indicate whether the system uses curl for B2B communications.

- **Y** – Uses curl.
- **N** – Uses socket communications.

IDMS-XML Admin Message User/Group

Enter the name of the user or message group the system notifies about IDMS-XML errors.

IDMS-XML Default Branch Availability Display

Select which quantity to display for IDMS-XML product availability inquiries:

- **Ship Branch –** Displays availability for the ship branch.
- **Home Territory –** Displays availability for the user's home territory.
- **Auth Branches –** Displays availability for the user's authorized branches.
- **All Branches –** Displays availability for all branches.

If you leave this field blank, the system displays the availability for the ship branch.

This control maintenance record is only active if the **Show Product Availability (Y/N)** field on the customer's Remote Order Entry Parameters screen is set to **Y**.

You can override this record at the customer level in the **Show Availability for Branches** field on the Remote Order Entry Parameters screen in Customer Maintenance.

IDMS-XML Default Part # Used For Creating A Nonstock Item

Enter the default product number the system assigns when creating a nonstock item in an IDMS-XML session.

IDMS-XML Default Sales Order Writer

Enter the writer the system assigns to IDMS-XML sales orders.

IDMS-XML Inbound Sales Orders Always Use Partner Pricing

Indicate whether the system uses the trading partner's pricing on incoming sales orders.

- **Y –** Uses trading partner pricing.
- **N –** Uses Eclipse pricing.

IDMS-XML Processing Routines

On the IDMS-XML Processors screen, enter the processing routines for each type of incoming request your system handles.

- In the **Request Tag** field, select the tag that identifies an incoming request.
- In the **Processor** field, select the IDMS-XML routine that processes the selected request.
- In the **Response Tag** field, select the tag that identifies your system's outgoing response.

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- In the **Insecure (Y/N)** field, indicate whether the incoming request must contain a security tag with a login and password.

IDMS-XML Session Lifetime In Minutes

Enter the number of minutes after which an IDMS-XML session with no activity expires.

IDMS-XML Site-Level Login and Password

Enter the login and password required for an IDMS-XML inquiry to access your system.

If your system does not require a login and password, leave this field blank.

IDMS-XML URL To Local xPost Servlet

Enter the URL that identifies the location of the xPost servlet.

For example, enter **http://yourserver/xServ/xPost**.

J2EE Application Server Settings

If your company uses products, such as BCXML, BCODBC, or Forms Generator, that use an application server, use this control record to define how to communicate with the J2EE application server currently being used with this account, as follows:

- In the **J2EE Server Name / IP** field, enter the machine name or IP address of the computer on which the application server is installed. This can be either the name of the computer, such as server.intui.com or bob, or it can be the physical IP address, such as 192.168.168.45.
- In the **HTTP Port** field, define the port this application server uses for its web server for the HTTP protocol communications.

The combination of the server name and port define the address that the Eclipse system must use to communicate with the application server.

New IDMS-XML Contact Template

Enter the generic contact record whose default settings your system uses when it creates a new contact record based on data from an IDMS-XML transaction. The system populates the fields in the new record with data from the template record.

New IDMS-XML Customer Template

Enter the generic customer record whose default settings your system uses when it creates a new customer record based on data from an IDMS-XML transaction. The system populates the fields in the new record with data from the template record.

Order Statuses Displayed in IDMS-XML

On the Order Statuses Displayed in IDMS-XML screen, enter the status to display in a response to an IDMS-XML order inquiry for each order type.

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The following table shows the default statuses:

Order Type	Default Status
Open Bid	Submitted
Open Order	In-Process
Invoiced	Open Balance
Paid	Completed

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B2B GENRL (General) Control Maintenance Records

The following control maintenance record belongs to the GENRL (General) area in the B2B (Business-to-Business) category.

Default IDMS-XML Sales Source

Select the default G/L sales source for orders generated from IDMS-XML transactions.

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B2B IDMS Control Maintenance Records

The following control maintenance record belongs to the IDMS area in the B2B (Business-to-Business) category.

Archive IDMS-XML Transactions

Indicate whether the system archives IDMS-XML transactions.

- **Y** – Archives.
- **N –** Does not archive.

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DLOT Codes Control Maintenance Records

The following control maintenance records belong to the DLOT (Detail Lot Tracking) category.

Default Detail Lot Country Code

Enter the default detail lot country code to display in the **Country** field on the Detail Lot Maintenance screen.

Valid Detail Lot Certification Codes

On the Valid Detail Lot Certification Codes screen, enter codes and descriptions to be used for tracking certification claims of a special quality or enhancement of the product for a detail lot. Codes can be up to 10 characters long and descriptions up to 20 characters long.

Users can assign codes defined in this record to the appropriate lot in the **Code** field on the Detail Lot Certification screen.

Valid Detail Lot Cost Adder Codes

Enter cost adder codes and descriptions, which refer to improvements that have been made to a product to enhance its quality and/or value. Codes can be up to five characters long and descriptions up to 20 characters long. For example, Rust (Rustproofing) or Case (Case Hardened). Cost adder codes have an associated cost that is assigned to a detail lot on the Detail Lot Maintenance screen.

You can assign these codes in various combinations to indicate that the product varies in quality according to the improvements that have been made to it. Assign these codes to a product using the Detail Lot Maintenance screen.

Cost adder codes might affect Q/C Inspection Levels. That is, the more improvements made to a product, the higher the quality.

Valid Detail Lot Country Codes

Enter detail lot country codes to identify the countries of origin of detail lot products. Codes can be up to 20 characters long. Enter each country from which your company obtains detail lot products. You can assign a detail lot country code to a detail lot in the **Country** field on the Detail Lot Maintenance screen.

Use the Default Detail Lot Country Code control maintenance record to enter the default country code that displays in that field.

Valid Detail Lot Hold Codes

Enter detail lot hold codes used in Detail Lot Maintenance to indicate that the product is on hold and cannot be sold or used for a specific reason. Codes can be up to 20 characters long. This code displays on the Detail Lot Selection screen when attempting to place this product on an order.

Valid Detail Lot Special Feature Codes

Enter detail lot special feature codes used to describe something about a detail lot product. Codes can be up to 20 characters long. Special feature codes do not have an associated cost.

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DLOT General Control Maintenance Records

The following control maintenance records belong to the DLOT (Detail Lot Tracking) category.

Display Detail Lot Selection Screen

Indicate whether the Detail Lot Selection screen displays in Sales Order Entry and Work Order Processing when entering a product with a location maintenance control type of Detail Lot.

- **Y –** The Detail Lot Selection screen displays.
- **N –** The Detail Lot Selection screen does not display.

Exclude Detail Lot Items From Available On-Hand Calculation

The system can exclude detail lot items from the availability calculation if they are on hold or the quality control inspection level has not been met.

Indicate whether the system excludes detail lot items from the availability calculation if they are on hold or the quality control inspection level has not been met.

In the **Exclude Items If On Hold** field, indicate whether the system should check the Detail Lot Maintenance screen to see if the item is on hold when checking availability for a detail lot item in SOE.

- **Y –** Checks. If an item is on hold, the system excludes the on-hand amount for the item from the availability calculation.
- **N –** Does not check. The system includes the on-hand amount for the item in the availability calculation.

  Note: Define hold codes in the Valid Detail Lot Hold Codes control maintenance record.

In the **Exclude Items If Inspection Level/Quality Rank Not Met** field, indicate whether the system checks the Detail Lot Maintenance screen to see if the item meets the product's inspection level and quality rank and also check the Detail Lot Track screen to see if the item meets the customer's acceptable Q/C inspection level and product quality rank, when checking availability for a detail lot item in SOE.

- **Y –** Checks. If the lot item does not meet the inspection level or quality rank defined for the product or customer, the system excludes the on-hand amount for the item from the availability calculation.
- **N –** Does not check. The system includes the on-hand amount for the item in the availability calculation.

  Note: Define quality ranks in the Valid Detail Lot Product Quality Ranks control maintenance record. Define quality control inspection levels in the Valid Detail Lot Q/C Inspection Levels control maintenance record.

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Prompt For Detail Lot ID On Process Of Work Order

For each branch, indicate whether the system prompts for a detail lot ID when a detail lot item on a work order is processed.

- **Y –** When a detail lot item on a work order is processed, the Split Locations screen displays. You can assign the received quantity to an existing location/lot ID, split the quantity among any number of existing locations/lot IDs, or not assign the quantity to any location/lot ID. If you do not assign the quantity to a location/lot ID, the system assigns the quantity to the next lot ID number.
- **N –** The system assigns the quantity to the next lot ID number without prompting you with the Split Location screen.

Valid Detail Lot Product Quality Ranks

Enter detail lot product quality ranks, up to three characters long, used by quality control inspection personnel to indicate the surety that a detail lot is of a given quality rank. Detail lot product quality ranks refer to a rank that customers can demand of a detail lot before accepting the finished items.

For example, you might use a ranking system from 1 to 10, with 1 representing the highest possible quality, and 10 the lowest. You can assign a product quality rank to a detail lot product on the Detail Lot Maintenance screen.

> **Note:** You can also assign an acceptable product quality rank to a customer.

Valid Detail Lot Q/C Inspection Levels

Enter detail lot quality control inspection levels, up to three characters long, used by quality control inspection personnel to indicate the surety that a detail lot has been inspected to the required level.

A Q/C inspection level is relative to a product quality rank. For example, a low product quality rank with a high inspection level indicates that the detail lot is of low quality and the inspection personnel have ample evidence to prove it. You can assign a Q/C inspection level to a detail lot product on the Detail Lot Maintenance screen.

Detail Lot Cost Adders might have an effect on a product's quality rank. See the Valid Detail Lot Cost Adder Codes control maintenance record.

> **Note:** You can also assign an acceptable Q/C inspection level to a customer.

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EDI AP (Accounts Payable) Control Maintenance Records

The following control maintenance records belong to the AP (Accounts Payable) area within the EDI (Electronic Data Interchange) category.

Assign EDI Invoices To A/P Branch

For each branch, enter the branch where the system creates a payable record when the branch receives an EDI 810 invoice.

Default EDI A/P Batch

Enter the default batch ID to enter in the **Batch ID** field of the accounts payable record created when the system receives an 810 via EDI.

Do Not Display Payables Entered Via EDI In The AP Preview Queue

Indicate whether to not display payables entered by EDI in the A/P Preview Queue.

- **Y** – Does not display EDI payables.
- **N** – Displays EDI payables.

Override Print Status For Reconciled Direct EDI Invoices

Indicate whether to change the print status of a reconciled direct EDI invoices from **Q** to **P**.

- **Y** – The print status changes from **Q** to **P**.
- **N** – The print status does not change.

Pass All Freight Charges For EDI Directs On To Customer

Indicate whether to override the flag set in a direct order's **Freight Out Exempt** field, which defaults from the setting in the customer file. If either the control maintenance record or the order level flag indicate that the customer should be charged for the direct's freight, freight is added to the order.

- **Y** – Overrides a freight out exempt setting in the order and passes freight charges for EDI directs on to the customer.
- **N** – Does not override a freight out exempt setting in the order.

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EDI ARCH (Archive) Control Maintenance Records

The following control maintenance records belong to the ARCH (Archive) area within the EDI (Electronic Data Interchange) category.

Archive EDI Inbound Documents After (Days)

Enter the number of days, 0-999, before an EDI document moves from the active Inbound Document Archive to the Inactive Inbound Document Archive. The Inactive Inbound Document Archive contains directories created by EDI Support for each month of a year. Records in the monthly directories are accessible from the corresponding Inactive Archive by pressing **F10** and selecting the directory.

Archive EDI Inbound Envelopes After (Days)

Enter the number of days, 0-999, before an EDI inbound envelope moves from the active Inbound Envelope Archive to the Inactive Inbound Envelope Archive. The Inactive Inbound Envelope Archive contains directories created by EDI Support for each month of a year. Records in the monthly directories are accessible from the corresponding Inactive Archive by pressing **F10** and selecting the directory.

Archive EDI Outbound Envelopes After (Days)

Enter the number of days, 0-999, before an EDI outbound envelope moves from the active Outbound Envelope Archive to the Inactive Outbound Envelope Archive. The Inactive Outbound Envelope Archive contains directories created by EDI Support for each month of a year. Records in the monthly directories are accessible from the corresponding Inactive Archive by pressing **F10** and selecting the directory.

Archive EDI Review Queue Documents After (Days)

Enter the number of days, 0-999, before records move from the 810 Invoice (Inbound), 855 P/O Acknowledgment (Inbound), and 856 Advance Ship Notice (Inbound) Review Queues to the Review Queue Archive.

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EDI DFLT (Defaults) Control Maintenance Records

The following control maintenance record belongs to the DFLT (Defaults) area in the EDI (Electronic Data Interchange) category.

EDI Pricing UOM Conversion Table

This table displays pricing units of measure to be used in EDI documents and the corresponding Eclipse units of measure from which the system converts them. Add, delete, or change UOM conversions used by EDI, as needed.

- In the **EDI UOM** column, enter the unit of measure to be sent in the EDI document.
- In the **Eclipse UOM** column, enter the corresponding Eclipse unit of measure.

EIPP Inbound Filename Criteria

Complete this record if your company sends EDI transmissions using EIPP FTP network calls. Enter the following filename criteria:

- In the **Filename Begins With** field, enter the code that marks the beginning of the file you want to transmit.
- In the **Filename Ends With** field, enter the code that marks the end of the file you want to transmit.

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EDI ID (Identification) Control Maintenance Records

The following control maintenance record belongs to the ID (Identification) area within the EDI (Electronic Data Interchange) category.

EDI Outgoing ID

For each branch, enter the EDI outgoing interchange ID number. Though different interchange group or GS numbers can be assigned to each branch this is normally done elsewhere in the EDI system by EDI support personnel.

Example
Qualifier - Duns# - Duns#
01-123456789-123456789

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EDI OE (Order Entry) Control Maintenance Records

The following control maintenance records belong to the OE (Order Entry) area within the EDI (Electronic Data Interchange) category.

Allow Writer Field To Be Blank On EDI 840, 850, And 855 VMI Orders

Indicate whether the system leaves the **Written by** field on the Header screen of an EDI 840, 850, or 855 VMI order blank when the incoming document does not include a writer. The default is **N**.

- **Y –** The system leaves the **Written by** field blank. The next time the order is opened, usually from the review queue, the system prompts the user to populate this field.

  Note: If you set this record to **Y**, you must also leave the **Grp/User to Review Received Document** field on the document's EDI Add'l Doc Info screen blank.

- **N –** The system populates the **Written by** field with the data from the **Grp/User to Review Received Document** field on the document's EDI Add'l Doc Info screen. If that field is blank, the system populates the **Written by** field with EDI.ADM.

Create A Report For Zero Quantity Or Confirming EDI Orders

Indicate whether the generic inbound 850 mapper creates a report rather than a sales order when EDI receives zero quantity orders or confirming orders. The default is **N**.

- **Y –** Creates a report and sends it to the Hold file of the user or group specified in the **Grp/User To Review Received Document** field on the Add'l Doc Info screen for the incoming document.
- **N –** Creates a sales order.

Default EDI Sales Source

Enter the default sales source to assign to an incoming EDI purchase order from a customer.

Default Print Status To "E" For All EDI Vendors

Indicate whether the system sets the default print status for purchase orders to EDI vendors to **E** for EDI. If you leave this record blank, the default is **N**.

- **Y –** The default print status is **E**. This setting overrides the default print status set for purchase orders in the Order Status Print Status Defaults control maintenance record.
- **N –** The Order Status Print Status Defaults control maintenance record determines the default print status.

The system uses the setting in this record only if the **Print Status Override** field on the vendor's Miscellaneous Vendor Information I screen is blank.

> **Note:** If the system sent an 850 for the original order generation, the system will not populate any new generations created for that order during receiving

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with **E**, even if the **Print Status Override** field and/or this control maintenance record are set to **Y**.

Disable Checking Part #'s, UOM's, And Quantities On EDI Invoices

Indicate whether to disable the checking of part numbers, units of measure, and quantities on EDI invoices when the system auto-reconciles invoices in the EDI 810 Review Queue. The default is **N**.

- **Y –** The system checks invoice amounts and the number of line items, but does not check part #'s, UOM's, and quantities.
- **N –** The system checks invoice amounts, the number of line items, part #'s, UOM's, and quantities.

EDI Default Product If Not Found

Complete this record if your company uses EDI. Create a product record named ***EDI PRODUCT NOT FOUND*** in upper case and with the asterisks, which the EDI program can assign to an EDI order in the event that an incoming product cannot be located in your product file. Once created, assign the product to this control maintenance record.

Include Default Shipping Instructions On EDI Orders

Indicate whether to include customer default shipping instructions on EDI orders.

- **Y –** The **Shipping Instructions** field on the Header screen of a sales order displays the default shipping instructions set in the customer record using the **OE Instr** hot key and any additional instructions sent in the incoming EDI order.
- **N –** Only the shipping instructions sent on the incoming EDI order display in the **Shipping Instructions** field on the Header screen of a sales order.

Incoming EDI 846 Status

Select the print status the system assigns to incoming EDI 846 Inventory Advice documents. If you leave this record blank, the default is **B**.

- **B –** Batch
- **P –** Preview

Log Remote Pricing Variance

Select whether to measure pricing variances on remote orders by dollar amount or percentage, and then enter the dollar amount or percentage by which the remote order price can vary from the LIST price without the system logging the order with pricing error.

Note: To override this control maintenance record setting at the customer level, use the **Allowed Pricing Variance %** field on the customer's Remote Order Entry Parameters screen.

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Store EDI Order Confirmation Message In

Specify in which field on an order Header screen the system stores the EDI Order Confirmation message for EDI confirmation orders in which the BEG01 field of the incoming EDI 850 contains 06.

Select one of the following options:

- Internal Notes
- Shipping Instructions

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EFAX (Eclipse Fax) Control Maintenance Records

The following control maintenance record belongs to the EFAX (Eclipse Fax) category.

Default Fax Start Time

Do one of the following to determine when the system sends faxes, unless the sender designates a different time on the Fax Memo screen.

- Enter a time, including the am or pm designation The system sends faxes based on this time, and the **Fax Time** field on the Fax Memo screen reflects this time.
- Leave this record blank The system sends faxes as soon as possible. This is the default.

  Note: The time that you enter in this control maintenance record reflects the time zone as set in the Set System Time Zone control maintenance record.

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EMAIL Defaults Control Maintenance Records

The following control maintenance records belong to the EMAIL (E-mail) category and apply to defaults.

Default E-mail From Name

Enter the default name with which to populate the **From** field any time an e-mail is created. For example, webmaster@mycompany.com. This can be removed and replaced at the e-mail level.

Default E-mail Print Styles

Enter the default e-mail print style for the following transactions:

- Invoices
- Bids
- Ship tickets
- Acknowledgements
- Purchase orders
- Direct purchase orders

The forms program first checks the order for a print style override in the Header of the order. If one is not set, the system uses this control maintenance record for a print style. If you leave this record blank, the system uses one of the following default print styles:

- MBX.INV – The default print style for invoices.
- MBX.SDOCS – The default print style for bids and ship tickets.

MBX Default Customer If Not Found

Create a customer record named ***MBX CUSTOMER NOT FOUND*** in upper case and with the asterisks, which the E-mail Order Entry program can assign to an e-mail order in the event that an incoming customer number cannot be located in your customer file. Once created, assign the customer to this control maintenance record.

MBX Default Product If Not Found

Create a product record named ***MBX PRODUCT NOT FOUND*** in upper case and with the asterisks, which the E-mail Order Entry program can assign to an e-mail order in the event that an incoming product cannot be located in your product file. Once created, assign the product to this control maintenance record.

MBX Default Sales Source

Specify a default sales source to assign to orders created using MBX E-mail.

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EMAIL General Control Maintenance Records

The following control maintenance records belong to the EMAIL (E-mail) category.

Branch-Specific E-mail HTML Logos

On the Branch-Specific E-mail HTML Logos screen, for each pricing branch, when applicable, enter the complete URL of the logo image the system uses on e-mailed invoices, purchase orders, and regular html e-mails sent from that branch. Branches that are left blank use the image specified in the E-mail HTML Logo control maintenance record.

- In the **Br/Tr/All** field, enter the branch or territory for which to specify an e-mail logo. Enter **ALL** to specify logos for all branches and territories.
- In the **Image URL** field, specify the complete URL of the logo image, including your domain address and the path to the image. For example, enter **http://www.eclipseinc.com/emailimages/br3-logo.gif**.
- In the **Doc Color** field, press **F10** and select the background color to be used for the logo.

Corporate Customer

Enter a default entity record for which activity triggers are defined. This record provides a safety net to catch activity triggers that were not set up for a customer, vendor, or branch that should cause a corresponding activity to occur.

This record only works with respect to activity triggers. An activity trigger is an event that causes something else to happen. Activity triggers can be specified for customers or vendors. When an activity trigger occurs, the program looks for a defined activity first in the ship-to (pay-to) record, then the bill-to (ship-from) record, then the branch entity record, and then the entity specified in this control maintenance record.

E-mail Body For Orders Sent As Tiff Attachments

Enter the message you want the system to send in e-mails to which orders are attached as .tiff files. For example, your message might be, "Please click on the attachment to view your document."

E-mail Attachment Settings

> **Note:** If you are running Eclipse Forms, this control maintenance record does not apply.

Select which format you want to use for system-generated sales order and purchase order documents, and statments, that are sent using e-mail. You can override these settings at the customer and vendor level.

- **Tiff of Print Form –** Creates a .tiff image file using the Print form.
- **Tiff of Fax Form –** Creates a .tiff image file using the Fax form.
- **PDF of Print Form –** Creates a .pdf file using the Print Form.
- **PDF of Fax Form –** Creates a .pdf file using the Fax form.

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E-mail Body For Statements Sent As Tiff Attachments

Enter the message you want the system to send in e-mails to which statements are attached as .tiff files. For example, your message might be, "Please click on the attachment to view your document."

E-mail Footer Text

If the Use E-mail Footer control maintenance record is set to **Y**, specify the text of a footer, such as a privacy statement, for the system to attach to every outbound e-mail. For example, all e-mailed acknowledgments, bids, statements, and invoices will display the same standard statement in the footer.

The footer text can contain the string &SENT.TO.ADDR&, which the system replaces with the e-mail address in the **To Address** field.

E-mail HTML Logo

On the E-mail HTML Logo screen, enter the domain address, path to the graphic, and the background color to use for the logo on e-mail documents sent by the system.

- In the **Domain Address** field, specify your domain address. For example, enter **http://www.eclipseinc.com**.
- In the **Image Path** field, specify the path within the domain to the graphic for the logo. For example, enter **/emailimages/ie-logo-notag.gif**.
- In the **HTML Doc Color** field, press **F10** and select the background color to be used for the logo.

E-mail Message On Bids

Enter the message you want the system to append to the end of e-mailed bids.

E-mail Request - Subject Of Response For WOE Login/Password

Enter the text to display in the **Subject** line of the e-mail message sent by the system to a WOE customer or contact who forgets their login or password and clicks the link requesting help.

For example, enter **Eclipse WOE - Password Recovery Request Response**.

If the customer or contact forgets their login name or password and clicks the link to request that information, they are prompted to enter their e-mail address. The system searches for the customer or contact associated with that e-mail address and responds with a message containing the login name and password assigned to that name.

E-mail Request - Text Of Response For WOE Login/Password

Enter the text to display in the **Text** line of the e-mail message sent by the system to a WOE customer or contact who forgets their login or password and clicks the link requesting help.

For example, enter the following:

> This is an e-mail from http://www.eclipseinc.com - We received a request that your login and password be e-mailed to you. Following is the requested information:
>
> Login ID : &LOGIN.ID&

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Password : &PASSWORD&

Thank you for using the Eclipse Web.

Have a nice day.

If the customer or contact forgets their login name or password and clicks the link to request that information, they are prompted to enter their e-mail address. The system searches for their record and responds with the message entered in this control record. &LOGIN.ID& is replaced with the login name and &PASSWORD& is replaced with the password assigned to that name.

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Outbound E-mail Logging BCC

Use this record to send a blind carbon copy of all e-mails to an e-mail address used for logging purposes. The system appends this address to all e-mail BCC lists, but does not display the address in the **BCC** field.

- In the **E-mail Address** field, enter the logging e-mail address.
- In the **Subject Prefix** field, enter the prefix to display in the subject line of the copy sent to the logging e-mail address.

  Note: Users must be assigned the EMAIL.LOG.BCC authorization key to set this control maintenance record.

Show Customer Part # On E-mail P/O For Directs

For direct purchase orders the system sends by e-mail, indicate whether the system adds customer part numbers, when they exist, to the line item comments. The default is **N**.

- **Y** – Shows customer part numbers.
- **N** – Does not show customer part numbers.

Show Page Breaks on Text E-mails

Indicate whether the system shows page breaks on text e-mail orders. The default is **N**.

- **Y** – Shows page breaks.
- **N** – Does not show page breaks.

Adding control file for showing page breaks on text email orders.

Use E-mail Footer

Indicate whether you want the system to append footer text, such as a privacy statement, to all outbound e-mails.

- **Y** – Footer text is appended to every outbound e-mail.

  Note: You need to specify the content of the message in the E-mail Footer Text control maintenance record. The footer text can contain the string &SENT.TO.ADDR&, which the system replaces with the e-mail address in the **To Address** field.

- **N** – Footer text is not appended to outbound e-mails.

Valid E-mail Preference

Enter e-mail preferences to assign to an e-mail in the **Pref** field on the Internet Information Maintenance screen. Preferences can be up to five characters long.

E-mail preferences can be names such as Plain, XML, and HTML. You can use Report Writer to select on e-mail types and preferences specified on the Internet Information Maintenance screen for doing mass mailings.

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Valid E-mail Types

Enter e-mail types to assign to an e-mail in the **Type** field on the Internet Information Maintenance screen. Types can be up to 10 characters long.

Typical e-mail types are Business, Technical, and Personal. You can use Report Writer to select on e-mail types and preferences specified on the Internet Information Maintenance screen for doing mass mailings. If you are going to use the StarShip automatic e-mail function, you must define a valid e-mail type of AUTO-EMAIL.

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EMSG (Eclipse Messaging) Control Maintenance Records

The following control maintenance record belongs to the EMSG (Eclipse Messaging) category.

F9-Help Documentation Admin User

Enter the user ID to whom to send a message after the HELP.INFO.MSG.SERVER program uploads F9 files.

User To Get Tracker When A Tag Is Broken

For each branch, enter the user to notify through the Call Tracking System when a tag on a particular sales order has been broken. The tracker requires followup by the assigned user. For each branch, select one of the following:

- **WRITER** – The order writer.
- **INSIDE** – The inside salesperson assigned to the order.
- **OUTSIDE –** The outside salesperson assigned to the order.
- Any user or message group ID.

User To Get Tracker When MSDS Is Not Printed For Product

Use this record to specify the user or message group to receive a tracker when a product that requires an MSDS does not have one printed for it during the printing of invoices. The tracker will contain the bill-to customer name, order number, product number, and MSDS ID number, so the user can pull the MSDS from a file cabinet and include it with the invoice.

> **Note:** This control maintenance record is only active if the Enable MSDS Print With Invoice control maintenance record is set to **Y**.

Valid Message Group Types

Enter message group types for your company. Types can be up to 10 characters. For example, you might define three types called GLOBAL, GROUP, and PERSONAL. You can then authorize users to view or edit only assigned message group types by assigning the MESSAGE.GROUP.TYPES authorization key.

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EMSG BACK (System Backup) Control Maintenance Records

The following control maintenance record belongs to the BACK (System Backup) area within the EMSG (Eclipse Messaging) category.

System Backup Administrator

Enter the name of the user or message group, such as BACKUP, to receive the backup messages each morning.

> **Note:** The System Backup must be set up to run in the Phantom Scheduler and the backup administrator must be assigned for the system backup to work.

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EMSG CBT (Computer Based Training) Control Maintenance Records

The following control maintenance record belongs to the CBT (Computer Based Training) area within the EMSG (Eclipse Messaging) category.

CBT Administrator

For each branch, enter the user or message group to receive a tracker with quiz score information when an employee completes CBT training.

> **Note:** For the system to notify this user or message group, your system administrator must specify the correct system reporting path during CBT installation.

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EMSG CR (Credit) Control Maintenance Records

The following control maintenance records belong to the CR (Credit) area within the EMSG (Eclipse Messaging) category.

User To Be Messaged With Auto Credit Approvals

For each branch, enter the user or message group to notify through the Message System of an approval or denial when the Phantom performs an automatic credit card authorization check.

The system also notifies this user or message group with the new account number and name when a new customer account is created using WOE.

Use the Notify Credit Manager Of All Live Credit Releases control maintenance record for live credit releases.

User To Get Tracker When Order Is On Via Review Hold

For each branch, enter the user or message group ID to notify through the Call Tracking System when a designated ship via places an order on the Open Order Status Review Queue. The tracker requires followup by the assigned user. For each branch, do one of the following:

- Enter the user or message group ID.
- Press **F10** and select from a list of users and message group IDs.

User To Get Tracker When Order On Credit Hold

For each branch, enter the user or message group ID to notify through the Call Tracking System when a sales order has been placed on credit hold. The tracker requires followup by the assigned user. Do one of the following:

- Enter the user or message group ID.
- Press **F10** and select from a list of users and message group IDs.

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EMSG EPAD (EPad Signature Capture) Control Maintenance Records

The following control maintenance records belong to the EPAD (EPad Signature Capture) area within the EMSG (Eclipse Messaging) category.

User To Be Messaged With POS Comments

For each branch, enter the user or message group to notify through the Message System when a comment is attached to a POS (Point of Sale) signature (a signature captured at the counter).

For each branch that does not have a specified user or message group, the system notifies the first user or message group found, providing that a user or message group has been specified in at least one other branch. If a user or message group has not been specified in any of the branches, nobody is notified.

User To Get Tracker With POS Cross Reference Errors

For each branch, enter the user or message group to notify through the Call Tracking System when the system cannot find the invoice to which a POS (Point of Sale) signature (a signature captured at the counter) should be attached.

For each branch that does not have a specified user or message group, the system notifies the first user or message group found, providing that a user or message group has been specified in at least one other branch. If a user or message group has not been specified in any of the branches, nobody is notified.

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EMSG EPDW Control Maintenance Records

The following control maintenance record belongs to the Eclipse PDW area within the EMSG (Eclipse Messaging) category.

PDW Administrator User ID

This record has been replaced by the PDW Administrator control maintenance record.

EMSG PALM Control Maintenance Records

The following control maintenance record belongs to the PALM area within the EMSG (Eclipse Messaging) category.

Palm Pocket Order Entry Administrator

If your company uses Palm Pocket Order Entry, complete the following fields:

- In the **Palm Pocket Order Entry Administrator User ID** field, enter the ID of the user authorized to monitor Pocket Order Entry usage. This person receives any error messages generated from uploading data from Pocket OE. This is also the person authorized to review orders uploaded from Pocket OE to the Remote Review Queue.
- In the **Message Writer On Order Errors (Y/N)** field, indicate whether the system also messages the writer of the order whenever there is an error uploading data from Pocket OE.

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EMSG SAMBA Control Maintenance Records

The following control maintenance record belongs to the SAMBA area within the EMSG (Eclipse Messaging) category.

User To Be Messaged With SAMBA Errors

Enter the user or message group to notify when SAMBA fails to move any files from your messaging directories to their final storage location.

Two typical errors are:

- ** Error during Samba PUT** smbclient...file filename.ext does not exist.
  (Samba expected to find a file that it did not find.)
- SMBtconX failed. ERRSRV- ERRbadpw (Bad password - name/password pair in a Tree Connect or Session Setup are invalid.)

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EPDW General Control Maintenance Records

The following control maintenance records belong to the EPDW (Eclipse Product Data Warehouse) category.

Active PDW Version

Indicate which version (1 or 2) of PDW to use for creating nonstocks.

Allow PDW Automatic Updates

Indicate whether the system updates system prices when prices are imported into the PDW. The default is **N**.

- **Y** – Updates system prices when prices are imported into the PDW.

  Note: Do *not* enter **Y** without consulting with Support.

- **N** – Does not update system prices when prices are imported into the PDW.

Allow Price Line Change To PDW Items In Excluded Lines In SOE

Indicate whether, for a nonstock imported from the PDW into a price line that excludes manual creation of nonstocks, to allow the user to change the price line assigned to that product.

This record is active only when the manual creation of nonstocks is excluded from a price line by using the **Excl Nonstock** hot key on the Price Line Maintenance screen.

- **Y** – Users can change the price line.
- **N** – Users cannot change the price line.

Domain Name For The PDW

Enter the domain name of the web site where PDW images are stored.

Example
http://www.eclipseinc.com

Ignore Products In PDW Sync With Status

Enter the product statuses in your primary product file to be ignored when syncing the PDW. Enter the Delete and Purge statuses.

Keep Duplicate Records When Receiving Updates From The IDW

Indicate whether the system saves records received from the IDW for products that have not changed ,hen doing a full refresh of your PDW product catalog. The default is **N**.

- **Y** – Saves records received from the IDW for products that have not changed.
- **N** – Does not save records received from the IDW for products that have not changed.

Local Path For PDW FTP Files

Indicate the directory path where the system will download the FTP file. For more information, see Using FTP Requests to Update PDW.

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PDW Administrator

Enter the user or message group to notify of PDW updates and errors.

PDW Default Product If Not Found

If you are using PDW, enter the product record named ***PDW PRODUCT NOT FOUND*** in upper case and with the asterisks, which the system can assign to an order in the event that a product number in an update from the PDW cannot be located in your product file.

PDW Reserved Source Names

Enter the names of any source-specific data load routines, which can't be used as import map names.

For example, I2, IDW, or PM are reserved source names.

Use Separate PDW Maps For Batch Updates And Product Imports

Indicate whether to allow separate PDW maps for batch updates and product imports to be used when importing PDW product catalog records into your product file and updating your product file from PDW data. The default is **N**.

- **Y** – Allows separate maps to be used.
- **N** – Uses the same map for importing and updating records.

Valid PDW Data Types

This record lists valid meta item data types. The record should be maintained by Eclipse personnel only.

Valid PDW Views

This record lists the views that can be used in organizing data in the Data Viewer. This record is populated as import maps are created.

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EPDW IDW Parameters Control Maintenance Records

The following control maintenance records belong to the EPDW (Eclipse Product Data Warehouse) category and apply to the IDW.

EDI IDW Interchange ID

Enter the EDI interchange ID for the IDW (Industry Data Warehouse). The maximum length of the ID is 34 characters. This record is for Eclipse internal use only.

EDI IDW Member Number

Enter the member number assigned to your company by the IDW (Industry Data Warehouse). The member number can be up to nine digits long. This record is for Eclipse internal use only.

IDW FTP Site Login Name

Enter the login ID used by the PDW program when you submit an FTP update request to the IDW.

IDW FTP Site Login Password

Enter the password assigned to you by the IDW to be used by the PDW program whenever you submit an FTP update request to the IDW.

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EPDW Image Settings Control Maintenance Records

The following control maintenance records belong to the EPDW (Eclipse Product Data Warehouse) category and apply to image settings.

PDW Full Size Image Directory

Enter the path from the PDW Images Root Directory to the directory where full size images are stored. For example, enter **/fullsize**.

WOE uses this path, along with the Meta ID identified in the **PDW Meta ID For Full Size Image Path** control maintenance record, to locate a product image for display.

PDW Image Path

This record has been replaced by the PDW Images Root Directory record.

PDW Images Root Directory

Enter the root directory in which PDW images are stored.

For example, enter **/pdwimages**.

PDW Meta ID For Full Size Image Path

Enter the PDW Meta ID used to identify full size product images.

WOE uses this Meta ID, along with the directory path identified in the PDW Full Size Image Directory control maintenance record, to locate a product's full size image for display.

PDW Meta ID For Thumbnail Size Image Path

Enter the PDW Meta ID used to identify thumbnail size product images.

WOE uses this Meta ID, along with the directory path identified in the PDW Thumbnail Size Image Directory control maintenance record, to locate a product's thumbnail size image for display.

PDW Thumbnail Size Image Directory

Enter the path from the PDW Images Root Directory to the directory where thumbnail size images are stored. For example, enter **/thumbnails**.

WOE uses this path, along with the Meta ID identified in the PDW Meta ID For Thumbnail Size Image Path control maintenance record, to locate a product image for display.

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EPDW PROD (Product) Control Maintenance Records

The following control maintenance record belongs to the PROD (Product) area within the EPDW (Eclipse Product Data Warehouse) category.

Allow Price Sheet Per Qty And UOM To Change On PDW Price Update

Indicate whether, when doing a batch price update, the system changes the price per unit of measure and price per unit of measure quantity on the product price sheet in the Product file to match the UOM data in the PDW. The default is **N**.

For example, in Eclipse you have a product's price per unit of measure set to **ea** and the price per unit of measure quantity set to **1**, but in the PDW the product's price per unit of measure is set to **C** and the price per unit of measure quantity is **100**.

- **Y –** The system changes the price per unit of measure and the price per unit of measure quantity on the Eclipse product price sheet to match the UOM data in the PDW.

  Note: For any Eclipse products that the system updates because this record is set to **Y**, you will need to manually adjust the average cost unit of measure for the branch on the Branch Costs screen and any UOM-specific sell matrix cells.

- **N –** The pricing unit of measure on the Eclipse price sheet does not change when the corresponding PDW information changes. When running the batch price update, the system divides the PDW price/cost by the price per unit of measure quantity and then uses that amount to update the price/cost on the Eclipse product price sheet.

  Note: Select this option to retain Release 7 functionality.

Disable Branch Specific Product Authorization In PDW Catalog Search

Enter one of the following to determine whether to override the settings in the Enable Branch Specific Products For control maintenance record:

- **Y –** Overrides the settings in the Enable Branch Specific Products For control maintenance record.

  Note: Entering **Y** in this control maintenance record increases the speed at which the system displays your search results.

- **N –**Does not override the settings in the Enable Branch Specific Products For control maintenance record.

PDW Product Template

Enter the product set up to use as a template whenever you export product data from the PDW Catalog to create a product in the Eclipse Product file.

When a PDW metadata item mapped to a field in the Eclipse product record does not contain a value, the system populates the field in the Eclipse product record with the corresponding value from the default template. If you leave this control maintenance record blank and a PDW

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metadata item does not contain a value, the system leaves the corresponding field in the product record blank.

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EQUIP (Equipment) Control Maintenance Records

The following control maintenance records belong to the EQUIP (Equipment) category.

Valid Distance Units Of Measure

Enter units of measure for distance to used in the **UM** part of the **Odometer/UM** column on the Equipment Maintenance screen for an odometer reading. These are two-character abbreviations, typically for miles and kilometers.

Valid Fuel Units Of Measure

Enter units of measure for fuel to use in the **UM** part of the **Fuel/UM** column on the Equipment Maintenance screen for an amount of fuel. These are two-character abbreviations, typically for gallon and liter.

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GENRL (General) Control Maintenance Records

The following control maintenance records belong to the GENRL (General) category.

Branch Common Settings

For internal Eclipse use only. Use this record to reduce input/output time when processing records for which each branch has its own settings. The system stores the records it reads in the common area for the designated length of time, so multi-layered programs will not have to re-read records.

- In the **Maximum Branches for common** field, enter the maximum number of branches any of your users can access.
- In the **Number of Seconds before Clearing Common** field, enter the number of seconds after which the system clears the common area.

Branch Fax Cover Sheet

For internal Eclipse use only. For each branch, enter the name of the subroutine that prints a branch-specific cover sheet for faxes. If you leave a field blank, the system uses the default fax cover sheet.

The system requires you enter UNIX slashes (/), however it converts those slashes to a windows slash (\) when the program runs. In addition, the image you want to use for a fax cover sheet must live on your forms server.

> **Note:** Contact your system administrator for assistance in creating fax cover sheets and assigning them in this control maintenance record.

Countries That Require State For Zip Code

Enter the two-letter abbreviation of any country that requires the entry of a state abbreviation in addition to the country code in order to save the zip code record. You can determine a country's abbreviation by pressing **F10** in the **Country** field in Zip Code Maintenance.

> **Note:** Include the abbreviation for Canada (CA) in this record. In Zip Code Maintenance, enter the abbreviations for Canadian provinces in the **State** field.

Label Print Quantity Control

In the **Max Label Qty Before (Y/N) Warning** field, enter the maximum number of labels, 0-99999, the system will print before warning that the print job is over the limit. When a print job is over the limit, the Yes/No warning displays. If you do not enter a quantity here, there is no warning regardless of the size of the print job.

In the **Max Label Qty Before 'CONTINUE' Prompt** field, enter the number of labels, 0-99999, the system will print before displaying a message asking you to confirm that you want to continue with the print job. If you do not enter a quantity here, there is no break in printing or prompt to continue regardless of the size of the print job.

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Max Days In Future/Past Before Warning In Date Entry

In the **Max Days In Future Before Warning In Date Entry** field, enter the maximum number of days, 0-99999999, in the future before the system displays a warning when you enter a date in any date field.

In the **Max Days In Past Before Warning In Date Entry** field, enter the maximum number of days, 0-99999999, in the past before the system displays a warning when you enter a date in any date field.

Next Sales Order, P/O, Journal Entry Numbers

For sales orders, purchase orders, and journal entries, this record displays the next transaction number the system will assign.

> **Note:** If a user aborts a transaction before saving it, the system will reuse the aborted transaction number before using the next transaction number displayed in this record.

Do not change the values in this record, unless directed to do so by Eclipse personnel.

Typically, you use this record only if your site has had some sort of system crash. For example, if you are restoring the system from a backup tape following a hardware malfunction which caused your site to lose all the data entered that day, you might want to reset these numbers to account for the number of orders you probably created that day.

Number Of Passwords To Be Saved Before They Can Be Reused

Enter the number, 1-99999, of old passwords to save for a user before they can be reused. When users change their passwords, the system saves the old passwords in an encrypted file.

Number Of Years Sales In PSUB File

Enter the number of years, 0-99, of sales history the system should use in the PSUB file. The ledger purge program determines the total amount of maintained sales history.

- If you decrease this number, the overnight CHECK.PSUB removes excess history.
- If you increase this number, the overnight CHECK.LED2 rebuilds the necessary history.

If you change the number of years to a number that takes you past the system's G/L Audit Date, the overnight CHECK.LED2 does not add back the records older than the G/L Audit Date. To add records older then the G/L Audit Date, do one of the following:

- Have Support change the Audit Date and then run CHECK.LED2.
  We do *not* recommend this option.
- Have Support rebuild the PSUB file.

Number Of Years To Be Included In Customer Demand Index

Enter the number of years, 1 or 2, of product data to include when you run the Customer Product by Demand Index Build program. This program updates the Reorder Pad.

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Recalculate Delivery Times On Shipping Manifest For Manual Changes

Indicate whether the system recalculates shipping manifest delivery times, upon **Esc** from the Shipping Manifest Queue, if a user has manually changed a delivery time. The default is **Y**.

- **Y –** Recalculates delivery times for subsequent stops and then resorts the queue by delivery time.
- **N –** Resorts the queue by delivery time, but does not recalculate delivery times for subsequent stops.

Set System Time Zone

Enter the time zone where your server is located.

> **Note:** Use the User Maintenance Default Time Zone control maintenance record to specify a time zone to be assigned to all new user records.

Set This Account Up As A National Account

Indicate whether to set up your Eclipse system account as a national account.

> **Note:** Do not flag your account as a national account, unless instructed to do so by Eclipse personnel.

UNIX Backup Device Path Name

For internal Eclipse use only.

Unit For Load Factor Measurement

Enter the unit of measurement for a product load factor to use with the Afflink interface.

> **Note:** The load factor for products on purchase orders transmitted to Afflink must be specified using this unit of measurement.

Unit For Weight Measurement

Enter the unit of measurement for a product weight to use with the Afflink interface.

> **Note:** The weight for products on purchase orders transmitted to Afflink must be specified using this unit of measurement.

Valid Customer Price Classes

On the Valid Customer Price Classes screen, enter customer price classes used to group customers with a similar type of business or similar level of buying power for pricing purposes, and assign a level, 0-999, to each one.

> **Note:** The system creates a default price class ALL, which is not visible on the Valid Customer Price Classes screen. In the hierarchy of price classes, ALL is at the same level as your highest defined price class. To allow a user to view price class information with a price class of ALL, assign the user the OE.PRICE.CLASS.LEVEL authorization key at a level equal to your highest defined price class. To ensure that a user can see all price class

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information, assign that user the OE.PRICE.CLASS.LEVEL authorization key at a level of 999.

Valid Files

Valid files are the Eclipse files you can use with the Report Writer and Mass Load programs. Eclipse personnel maintain the list for standard files. You can add user-defined files to the list.

Note: A file must be included in this list before you can set the **Prevent Mass Load** flag to **Y** in File Definition Maintenance.

Valid Imaging Auth Keys

Enter the authorization keys to be available as choices throughout the Document Imaging companion product for assignment to document imaging profiles or images. You can add standard or user-defined authorization keys to this list.

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GENRL Ariba Defaults Control Maintenance Records

The following control maintenance records belong to the GENRL (General) category and apply to Ariba defaults.

Ariba Default Customer If Not Found

Complete this record if your company uses the Ariba Interface. Create a customer record named ***ARIBA CUSTOMER NOT FOUND*** in upper case and with the asterisks, which the system can assign to an Ariba order in the event that an incoming customer cannot be located in your customer file. Once created, assign the customer to this control maintenance record.

Ariba Default Product If Not Found

Complete this record if your company uses the Ariba Interface. Create a product record named ***ARIBA PRODUCT NOT FOUND*** in upper case and with the asterisks, which the system can assign to an Ariba order in the event that an incoming product cannot be located in your product file. Once created, assign the product to this control maintenance record.

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GENRL Buildpoint Parameters Control Maintenance Records

The following control maintenance records belong to the GENRL (General) category and apply to Buildpoint.com defaults and parameters. Complete these records if you use Buildpoint.com.

Buildpoint Ship Vias Cross Reference Table

On the Buildpoint Ship Via Xref screen, for each Buildpoint ship via enter its corresponding system ship via.

Buildpoint.com Default Customer If Not Found

Create a customer record named ***BUILDPOINT CUSTOMER NOT FOUND*** in upper case and with the asterisks, which the system can assign to a Buildpoint.com order in the event that an incoming customer cannot be located in your customer file. Once created, assign the customer to this control maintenance record.

Buildpoint.com Default Product If Not Found

Create a product record named ***BUILDPOINT PRODUCT NOT FOUND*** in upper case and with the asterisks, which the system can assign to a Buildpoint.com order in the event that an incoming product cannot be located in your product file. Once created, assign the product to this control maintenance record.

Default Buildpoint.com Sales Source

Enter the default sales source to assign to a Buildpoint order.

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GENRL Dataware Control Maintenance Records

The following control maintenance records belong to the GENRL (General) category and apply to Dataware parameters. Complete these records if your company sends and retrieves FTP files from Dataware.

Dataware Maintenance User

Enter the ID of the user to receive a tracker when errors occur in the Dataware interface.

Default Dataware Sales Source

Select the default G/L sales source for orders generated from Dataware transactions.

Default Dataware Tracker Customer

Enter the default customer to assign to trackers the system creates for Dataware transactions.

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GENRL Defaults Control Maintenance Records

The following control maintenance records belong to the GENRL (General) category and apply to general defaults.

Default Printer Location For Branch

For each branch, enter a default printer location where ship tickets for sales orders and transfer orders at that branch print.

For the Automatic Shipping Ticket Printing program or Batch Transfer program to print, specify a printer location for each branch either in this control maintenance record or in the **PickTicketPtrLoc** field on the Ship Via Branch Overrides/Auto Scheduling screen accessed from Branch Maintenance. The setting in the **PickTicketPtrLoc** field overrides the setting in this control maintenance record.

Default Product If Not Found

Enter the *** PRODUCT NOT FOUND *** product. This record is for internal use only.

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GENRL Logon Parameters Control Maintenance Records

The following control maintenance records belong to the GENRL (General) category and apply to the system logon parameters.

Enable User ID Prompt For Password Authentication (ENABLE.UID)

Indicate whether to prompt users for their user ID, in addition to their password, when they log onto the system.

- **Y** – The system displays the **Enter User ID** prompt in addition to the **Enter Password** prompt at the system login screen when a user logs onto the system. Multiple users can have the same login password.

  Note: If you set this to **Y** and start using the system, we recommend that you do not later change it to **N**. To make this change, please contact Eclipse Support.

- **N** – Only the **Enter Password** prompt displays at the user login screen. Multiple users cannot have the same login password.

Minutes Of Inactivity Before Disconnecting A User

Use this record for security purposes to automatically disconnect any inactive user from the Eclipse account. To use this record, enter the number of minutes a user can be inactive before the system logs the user off Eclipse. If you leave this record blank or enter a zero, the record is disabled.

Seconds Of Inactivity Before Requiring Relog

For terminals that have the **Re-Log** indicator in Terminal Setup set to **Y** (Yes) or L (Lock, for Solar only), which is typical for a counter terminal, designate the number of seconds, 0-9999999, that a terminal can be inactive at any of the program menus before the system logs the user off or locks the terminal. When you press any key after the designated number of seconds of inactivity, the login screen displays.

> **Note:** As long as the user is operating within a specific program, the time constraint is not in effect. It only works when a menu is displayed on the screen.

If a terminal has the **Re-Log** indicator set to **N** (No), this record has no effect on the terminal. Terminals away from the counter typically have the Re-Log indicator set to **No**.

Tune/Song To Play At Logon

Specify the musical tune to play whenever the login screen displays.

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GENRL LTL (Less Than Load) Control Maintenance Records

The following control maintenance records belong to the GENRL (General) category and apply to LTL (Less Than Load) defaults.

LTL Product Class/Rate

Enter classes and rates that are used on the LTL form.

LTL Product Descriptions

Enter product descriptions that are used on the LTL form. Each description can be up to 35 characters.

LTL Valid Carriers

Enter carriers that are used on the LTL form.

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GENRL Phone Parameters Control Maintenance Records

The following control maintenance records belong to the GENRL (General) category and apply to phone parameters.

Index Entity's Full Phone

Indicate whether to use all 10 digits of a new customer's phone number to see if it matches that of an existing customer. This record is used to prevent duplicate customer records from being created.

- **Y –** The system uses all 10 digits of a new customer's phone number.
- **N –** The system uses the last four digits of a new customer's phone number.

Phone Format

Specify the format in which phone numbers entered in Contact Maintenance display. The default format is ###-###-###-#### ext #####.

Use pound signs (#) to represent numbers. Use dashes, spaces, and text to indicate the formatting of the numbers when displayed.

The first set of pound signs represents the country code, the second set represents the area code, the third set represents the local exchange, and the fourth set represents the last four digits of the phone number. This is followed by the abbreviation for extension and pound signs that represent the extension number. When entering a phone number, the third and fourth sets of pound signs are required. The extension is optional.

You can change the number of pound signs in each group, the characters between or around the groups, and the abbreviation for extension. You must have four groups of numbers, not including the extension.

> **Note:** This record is only used during conversion from Release 6 to Release 7. Do not use this after your company converts to Release 7.

Valid Phone Codes

On the Valid Phone Codes screen, enter telephone codes, up to five characters long, and the corresponding descriptions, up to 36 characters long, for the telephone numbers assigned to customers, vendors, and contacts in the system.

Map Palm device phone codes to these phone codes in the Map Palm Phone Codes To Eclipse Phone Codes control maintenance record.

Use the Telemarketing Contact Phone Type control maintenance record to designate which code to use for telemarketing calls.

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GENRL Scheduler Parameters Control Maintenance Records

The following control maintenance records belong to the GENRL (General) category and apply to the scheduler.

Check Scheduler On Login

Use this record to remind users to keep the Daily Planner or Daily Schedule filled in for each day so other people know where they are. The default is **No Checking**.

Specify the checking to be done when a user logs in.

- **Daily Planner** – The system checks the Daily Planner. If there is no entry for that day, the following prompt displays: Enter Today's Schedule.
- **Daily Scheduler** – The system checks the user's Daily Schedule. If there is no entry for that day, the Daily Schedule screen displays. The user must schedule an event, preferably one that indicates the user's availability for the day, before they can exit the screen.
- **No Checking** – The system does not check to see if the user has an entry for that day in the Daily Planner or the Daily Schedule.

Daily Schedule Default Hours

This record works with the Daily Schedule screen and the settings for a user on the Scheduler Parameters screen in User Maintenance. The default is **N**.

- If set to **Y** and the **Auto Fill Daily Sched** field on the Scheduler Parameters screen for a user is set to **Y**, the system populates the Start column on the Daily Schedule screen with a time schedule as defined by the other entries on the Schedule Parameters screen.
  - If the Daily Start Time and **Daily Schedule Interval** fields are blank, the system displays a default hourly time schedule from 09:00am to 09:00pm.
  - If the **Daily Schedule Interval** field is set to Hourly and the **Daily Start Time** is not on a whole hour, the system rounds the first time in the **Start** column down to the nearest whole hour and then displays hourly intervals. If there is an event scheduled at a time that is not on the hour, it displays the actual time of the scheduled event.
  - If the **Auto Fill Daily Sched** field on the Scheduler Parameters screen for the user is set to **N**, the system does not fill in the Daily Schedule for the user.
- If set to **N**, the system does not populate the Daily Schedule for a user unless the **Auto Fill Daily Sched** field on the Scheduler Parameters screen for the user is set to **Y**.

Default Scheduler Alarm Time

Enter the default time the system displays when users set the scheduler alarm.

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Prompt For Scheduler Closing Notes

Indicate whether the system should prompt users to enter a closing note when a scheduled event is completed. The default is **N**.

- **Y** – Displays the Closing Notes screen.
- **N** – Does not display the Closing Notes screen.

The setting in the **Prompt for Closing Note** field in on the User Maintenance > Scheduler Parameters screen overrides the setting in this control maintenance record.

Scan For Scheduling Messages Every: (Seconds)

Enter how often, every 0-99999 minutes, the system should scan the daily schedules of all users and, if the alarm is enabled, send a message to those users the appropriate number of minutes before the event to alert them to the scheduled event.

Valid Scheduler Priorities

Enter a list of priorities, 1-999, to assign to scheduled events and tasks. Number 1 has the highest priority.

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GENRL Sort Parameters Control Maintenance Records

The following control maintenance records belong to the GENRL (General) category and apply to general sort parameters.

Contact Classification Sort List

Enter the dictionary items from the CONTACT.CLASS file to display on the User Defined Data screen in Contact Maintenance. Prompts for the dictionary items display on that screen in the order in which you enter them here. If you leave this record blank, the system displays all the dictionary items in the CONTACT.CLASS file on the User Defined Data screen in Contact Maintenance.

Customer Classification Sort List

Enter the dictionary items from the CUST.CLASS file to display on the User Defined Data screen in Customer Maintenance. Prompts for the dictionary items display on that screen in the order in which you enter them here. If you leave this record blank, the system displays all the dictionary items in the CUST.CLASS file on the User Defined Data screen in Customer Maintenance.

Product Classification Sort List

Enter the dictionary items from the PROD.CLASS file to display on the User Defined Data screen in Product Maintenance. Prompts for the dictionary items display on that screen in the order in which you enter them here. If you leave this record blank, the system displays all the dictionary items in the PROD.CLASS file on the User Defined Data screen in Product Maintenance.

Ship Vias For Which Vendor Delivery Is Not Requested

Enter the ship vias that require no delivery from the vendor. The buyer, such as Afflink, is responsible for delivery.

Vendor Classification Sort List

Enter the dictionary items from the VEND.CLASS file to display on the User Defined Data screen in Vendor Maintenance. Prompts for the dictionary items are listed on that screen in the order in which they are listed here. If you leave this record blank, the system displays all the dictionary items in the VEND.CLASS file on the User Defined Data screen in Vendor Maintenance.

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GENRL Tibersoft Control Maintenance Records

The following control maintenance records belong to the GENRL (General) category and apply to Tibersoft e-commerce software. Complete these records if your company exchanges product and price information with Tibersoft e-commerce software.

Morgan Scott Tibersoft Data

Complete the following fields with Tibersoft defaults.

Field	Description
Distribution ID	Your distribution ID, assigned by Tibersoft.
Warehouse ID	Your warehouse ID, assigned by Tibersoft.
Group ID	Your group ID, assigned by Tibersoft.
Catalog ID	Your catalog ID, assigned by Tibersoft.
TiberNet Order Status	The status to assign to incoming orders.

TiberSoft FTP Configuration

Complete the following file transfer protocol information for interfacing Tibersoft with Eclipse.

Field	Description
FTP Address	
FTP User Name	
FTP Password	
Customer Master Path	
Product Master Path	
Product Browse Tree Path	
Product Pricing Path	
Bid List Prices Path	
Order Guide Path	

Tibersoft Product ID And Description

Enter Tibersoft product IDs and the corresponding descriptions to use in Eclipse.

- In the **ID** field, enter the Tibersoft product ID.
- In the **Description** field, enter the corresponding description to use in Eclipse.

Tibersoft Review Users

Enter the users the system notifies with a message when it receives a sales order through Tibernet.

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GENRL UPS Parameters Control Maintenance Records

The following control maintenance records belong to the GENRL (General) category and apply to UPS parameters.

Client ID For UPS E-Logistics

Enter the ID assigned to your company by UPS for use with the eLogistics application.

UPS Freight Discount Definition

Enter the percentage of discount granted for using UPS 3-Day delivery.

UPS E-Logistics Information

If you use the UPS eLogistics product, enter the following information:

Field
IP Address
User ID
Password
Output Path
Input Path
Alt. Client ID
Alt. Client ID Trigger SKU
Alt. Client ID Trigger PN

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GENRL EFAX (Eclipse Fax) Control Maintenance Records

The following control maintenance record belongs to the EFAX (Eclipse Fax) area within the GENRL (General) category.

Department Fax Code Maintenance

For each department listed on the Department Fax Code Maint screen, enter a numeric fax access code to append to the end of a fax phone number for faxes sent from that department. A fax code can be 1-10 numeric characters and can have leading zeroes. The Valid Departments control maintenance record defines the departments for this record.

This record works with the fax access code assigned to users in User Maintenance. When a user sends a fax, the system appends the fax access code assigned to the user. If a fax access code is not assigned to the user, the system appends the fax access code defined in this control maintenance record for the department where the fax originated. Otherwise, the system does not append a fax access code to the end of the fax phone number.

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GENRL FORMS Control Maintenance Records

The following control maintenance records belong to the FORMS area within the GENRL (General) category.

Assign Printer Type To Form

For each branch and type of form on the Assign Printer Type to Form screen, select the type of printer on which that form should print. If you leave this record blank, the default is **None**.

- **Br/Tr/All –** Enter the branch to which the settings in this control maintenance record apply.
- **Dot Matrix –** The designated form must print on a dot matrix printer.
- **Laser –** The designated form must print on a laser printer.
- **None –** The designated form does not print in this branch.

Note: For the system to recognize the settings in this record, set the Enable Forms Assignment control maintenance record to **Y**.

Branch That Controls Eclipse Forms Logo

If you use the Eclipse Forms product, select whether the system uses the logo set for the pricing branch or the shipping branch when printing order documents. Set Eclipse Forms logos in the **Eclipse Forms Branch Logos** control maintenance record.

Eclipse Forms Footer Message For

If you use the Eclipse Forms product, for each document type that you use, enter the message you want to display in the footer (the bottom portion) of the form. You can enter a unique message for each branch for each document type. To enter the same message for all your branches, enter the message for one branch, and then use the **Set All** hot key. To enter a message that is longer than the space on the screen, use the **Expand** hot key, type your message, and then press **Esc**.

Eclipse Forms Branch Logos

If you use the Eclipse Forms product, for each branch enter the path to the logo file you want to use at that branch. The system uses this path and the setting in the **Branch That Controls Eclipse Forms Logo** control maintenance record to determine which logo to print your documents. To enter the same path for all your branches, enter the path for one branch, and then use the **Set All** hot key. To enter a path that is longer than the space on the screen, use the **Expand** hot key, type the path, and then press **Esc**.

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Enable Forms Assignment

Indicate whether to enable the Assign Printer Type to Form control maintenance record.

- **Y** – The system respects the entries in the Assign Printer Type To Form record when determining the printer type associated with each form.
- **N** – The system assigns default printer types to each form, regardless of the settings in the Assign Printer Type To Form record.

Footer Message For Pick Tickets And Ship Tickets

Enter the message the system prints on the footer of pick tickets and ship tickets.

Generic Barcode Label Form

Enter the barcode form to use with the **Shift-F12** hidden hot key combination that allows the user to print barcode labels for a customer, vendor, user, part number, activity log, or order ID.

Hold Pick Ticket For Routing Interface SVIA

Indicate whether the system holds the printing of pick tickets for routed orders until after the system receives the routing data from the third party routing software.

- **Y** – The pick ticket prints after the third party software has routed the order and sent the routing data back to the Eclipse system.
- **N** – The pick ticket prints before the system sends the order data to the third party routing software.

Label Printing Default Print Selection

For each order type, SOE, POE, TOE, and RF, select the default label printing setting.

For example, the SOE setting is used as the **Print Selection** field default on the User Defined Document/Label Printing screen, which you can access using the **Label** hot key on an order's Body screen. The options are:

- **Current Item Only** – Prints only the selected item.
- **All Items** – Prints every item on the order.

Print Barcodes On Eclipse Forms

If you use the Eclipse Forms product, for each branch, select on which document types to print barcodes. Printing barcodes allows you to scan the barcode to pull up the order in the system.

- **None** – Does not print barcodes on any document type that prints at the branch.
- **Picking/Shipping** – Prints barcodes at the top of the ship ticket, pick ticket, and transfer shipping documents at the branch.
- **All forms** – Prints barcodes on all documents that print at the branch.

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Print Eclipse Part Number After Product Desc

If you use the Eclipse Forms product, for each document type, such as acknowledgments and credit memos, indicate whether you want to print the Eclipse part number for a product after the product description.

- **Y –** Prints the part number assigned in Eclipse directly after the product description.
- **N –** Prints the product description on the document without a reference to the Eclipse part number.

Print Products On Tickets By Location

For each branch, specify whether products on pick tickets and transfer shipper tickets should be printed according to the bin location for the product. Bin locations are sorted by number and then by letter. If you leave this field blank, the default is **Neither**.

> **Note:** Before you set this control maintenance record, you must set the Enable Picking Confirmation control maintenance record to **Yes** to enable the Warehouse Confirmation Queue. For more information, see Tracking Sales and Transfer Orders Through the Warehouse.

This record has the following four options:

- **Pick Tickets –** Only the products on pick tickets are printed according to bin location.

  The product is printed on the pick ticket once for each location from which the product should be pulled to meet the order quantity. The quantity in the **Ordered** column for each entry on the pick ticket is the quantity that should be pulled from that location.

  Products are printed on a Pick Ticket in order, according to the product's location. When a product on a pick ticket has multiple locations from which it will be picked, that product's order on the pick ticket is determined by the first location from which that product should be picked, regardless of the quantity in each location.

  Products on a transfer are printed on the transfer shipper ticket only one time according to the order in which they were entered on the transfer order. Beneath the product description, the system lists the location or locations from which the product should be picked.

- **Transfer Shipper Tickets –** Only the products on transfer shipper tickets are printed according to bin location.

  The product is printed on the Transfer Shipper ticket once for each location from which the product should be pulled to meet the order quantity. The quantity in the **Pick** column for each entry on the Transfer Shipper is the quantity that should be pulled from that location.

  Products are printed on a Transfer Shipper in order, according to the product's location. When a product on a Transfer Shipper ticket has multiple locations from which it will be picked, that product's order on the Transfer Shipper ticket is determined by the first location from which that product should be picked, regardless of the quantity in each location.

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Products on a sales order are printed on the Pick Ticket only one time according to the order in which they were entered on the sales order. Beneath the product description, the system lists the location or locations from which the product should be picked.

- **Both –** The products on both pick tickets and transfer shipper tickets are printed according to bin location, as described above.

  The products on both Pick Tickets and Transfer Shippers tickets are printed on the respective document once for each location from which the product should be pulled to meet the order quantity. The quantity in the **Ordered** column on the Pick Ticket or the **Pick** column on the Transfer Shipper ticket is the quantity that should be pulled from that location.

  Products are printed on either document in order according to the product's location. When a product has multiple locations from which it will be picked, that product's order on the respective document is determined by the first location from which that product should be picked, regardless of the quantity in each location.

- **Neither –** The products on pick tickets and transfer shipper tickets are not printed according to bin location.

  The products on a Pick Ticket or Transfer Shipper ticket are printed on the respective document only one time according to the order in which they were entered on the sales order or transfer order.

  - If a product is not tagged to an order, the system lists all the locations from which the product should be picked beneath the product description.
  - If a product is tagged to an order, the system lists only the location for the tagged product.

Use Current Location When Printing From Cross Dock

Before printing pick or work tickets for cross dock tasks, select one of the following to determine where the tickets print:

- **Y –** Pick or work tickets print at the user's currently assigned location.
- **N –** Pick or work tickets print at the location determined by the printer location selection hierarchy, which flows from the ship via location override to the ship ticket branch override, and finally to the current location.

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GENRL MSGS (Messages) Control Maintenance Records

The following control maintenance records belong to the MSGS (Messages) area within the GENRL (General) category.

Days Before Messages Purged

Enter the number of days, 0-9999, a message can stay in a user's message log before being purged. The default is 9999.

Maximum Number Of Messages

Enter the maximum number, 0-999, of messages retained by the system.

Notify When Tracker Is Closed

Indicate whether the system sends a message to all the users on the forward list when a user closes the tracker using the **Close** hot key. The default is **N**.

- **Y** – The system sends a message.
- **N** – The system does not send a message.

Number Of Days From Current Date To Display Messages

Enter the number of days before the current date from which to display received and sent messages. If you leave this record blank, the system displays all messages.

Use this record to limit the number of messages the system displays when users access these screens. Users can use the **Select** hot key on the messages screen to display older messages.

Valid Languages

For Eclipse internal use only.

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GENRL REP (Reports) Control Maintenance Records

The following control maintenance records belong to the REP (Reports) area within the GENRL (General) category.

Capture Login

Indicate whether the system captures login information for the User Logins Report, which shows for each branch the maximum, minimum, or total number of users logged into UniVerse each day.

- **Y –** Captures login information.
- **N –** Does not capture login information.

Default Days Before Today For Hold File Select Start Date

Specify the number of days, 0-9999, before today through which the system will search for Hold file entries. The default entry is 9999 days.

> **Note:** If a user specifies a different starting date for the select using the **Slct** hot key on the Spooler Control screen, the number of days before the current date indicated by that date becomes the default days before today for a Hold file select for that user.

Lower Threshold Clients

For internal Eclipse use only.

Enter customers that want the system to set the disk free space threshold value set to 85 percent rather than 95 percent when Eclipse runs the Client Display Free (DF) Report.

Minimum Days Before Report Purge

Specify the number of days, 0-99999, to retain a report in the Hold file before it is purged.

Phantom Log Exempt Programs

Enter the programs to exempt from being logged by the phantom process.

Phantom Log Purge

Enter the number of days to retain phantom log records before the system purges them.

Purge Login Info

If the **Capture Login** control maintenance record is set to **Y**, specify the number of days to save login information before the system purges it. The default is 30 days.

After the User Logins Report is run, a phantom process purges login data that is older than the specified number of days.

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GENRL TOOLS Control Maintenance Records

The following control maintenance records belong to the TOOLS area within the GENRL (General) category.

20/20 Interface Parameters

Complete this record if you use the 20/20 Interface. On the 20/20 Interface Parameters screen, complete the following parameters required by the 20/20 interface for processing the import files.

Field	Description
SKU UD#	Enter the user-defined field number from the Price Updating ID Maint screen in Product Maintenance, where you store product SKUs. The system matches against this field when importing items. If you leave this field blank, the system does not use SKUs from the import file when trying to identify line item part numbers.
Product Code UD#	Enter the user-defined field number from the Price Updating ID Maint screen in Product Maintenance, where you store product codes. The system matches against this field when importing items. If you leave this field blank, the system does not use product codes from the import file when trying to identify line item part numbers.
PDW Meta for SKU	Enter the PDW Meta ID to search on for the SKU. If you leave this field blank, the system does not search the PDW.
Default Product	Enter the product to use as a last resort, if the system cannot identify any other product.

Cost Factor Option	For products not identified by SKU, select one of the following options for determining the cost factor:
	• **Auto** – The system determines the cost factor automatically using the product level **Product Classification** field. If that field is empty, the system uses the value entered in the **System Default Cost Factor** field below. If that field is blank, then the factor defaults to "1," which will have no effect.
	• **Allow Order Ovrd** – At order import time the user selects one of the following options:
	  • The system determines the cost factor automatically, as described above.
	  • The user enters a global cost factor for the current order.
	• **Allow Order/Line Ovrd** – At order import time the user selects one of the following options:
	  • The system determines the cost factor automatically, as described above.
	  • The user enters a global cost factor for the current order.
	  • The user enters a cost factor for every line.

System Default Cost Factor	For products not identified by SKU, enter a global cost factor default for the system to use when on is not defined at the product level.

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Field	Description

Price Factor Option	For products not identified by SKU, select one of the following options for determining the price factor:
	• **Auto** – The system determines the price factor automatically using the product level **Product Classification** field. If that field is empty, the system uses the value entered in the **System Default Price Factor** field below. If that field is blank, then the factor defaults to "1," which will have no effect.
	• **Allow Order Ovrd** – At order import time the user selects one of the following options:
	  • The system determines the cost factor automatically, as described above.
	  • The user enters a global cost factor for the current order.
	• **Allow Order/Line Ovrd** – At order import time the user selects one of the following options:
	  • The system determines the cost factor automatically, as described above.
	  • The user enters a global cost factor for the current order.
	  • The user enters a cost factor for every line.

System Default Price Factor	For products not identified by SKU, enter a global price factor default for the system to use when on is not defined at the product level.

Account Sync Time Constraints

Specify the parameters that determine when the system allows an account sync to run. If you leave this record blank, a sync cannot run.

> **Note:** A sync that starts before a constrained time will not stop running if it runs into the constrained time. Once a sync starts, it will finish, regardless of the time constraints.

Complete the following fields:

- In the **Start Time** field, enter the time after which a sync can start.
- In the **End Time** field, enter the time after which a sync cannot start.
- Use the **Exceptions** area to enter exceptions to the start and end times for designated days, as follows:
  - In the **Date** column, enter any dates for which you want to change the start and end times.
  - In the **Start** column, enter the time when the sync can start for each designated date.
  - In the **End** column, enter the time when the sync cannot start for each designated date.

Use the **Log** hot key to view the log of changes made to this screen.

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Activity Trigger Subroutines Override

On the Activity Trigger Override Maintenance screen, assign subroutines at the system level that will override the standard subroutines called by activity triggers.

You can also assign an override subroutine to an activity trigger in Customer Maintenance, which overrides a subroutine defined in this record.

> **Note:** Make sure that an override subroutine conforms to the standard entity-trigger programming interface in terms of number of arguments, definition of arguments, and so forth. The system does not check requirements when the override subroutine is called.

- In the **Trigger Description** field, select the activity trigger to which to assign an override subroutine.
- In the **Activity Description** field, select the activity description to assign to the displayed trigger description.
- In the **Subroutine** field, enter the name of the override subroutine. To enter a name longer that the column width, use the **Expand** hot key. You can also display a selection list of all defined subroutines and select a subroutine.
- Use the **See Default** hot key as needed to view the default subroutine assigned to the activity indicated by the cursor.

Change OS Password When Eclipse Password Is Changed

Indicate whether the system changes users' operating system (OS) passwords when they change their Eclipse system passwords.

- **A - Always** – Changes the OS password to be the same as the Eclipse system password.

  If the OS password change fails, the system displays the following prompt: Please enter your case sensitive OS username and password.

  Note: Eclipse system passwords are not case sensitive, but OS passwords are case sensitive.

- **P - Prompt** – Displays the following prompt: Do you wish to change your operating system login password?

  If you choose to change the OS password and the change fails, the system displays the following prompt: Please enter your case sensitive OS username and password.

- **N - Never** – Does not change the operating system password or prompt you to change it.

Daily Available Hours

Enter the normal working hours for your company. For example, 8 am -5 pm.

Default Queue For Incoming Remote Trackers

Enter the user ID set up as a queue for incoming trackers submitted by remote users.

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Eclipse Remote Tracking Log Sender ID

For internal Eclipse use only.

Enter an ID that identifies your system to the Eclipse system for syncing your tracking log.

Setting this record enables the User Friendly Organization (UFO) web site to create and maintain trackers on the Eclipse system.

Intranet URL for Eclipse Help

For internal Eclipse use only.

Minutes of Inactivity Before Solar Checks Universe Connection

Enter the number of minutes the system waits when Solar Eclipse is idle before pinging UniVerse to keep the connection alive. If you leave this record blank, the default is seven minutes.

Scheduler Activity Notes

Enter notes that can be entered on the Detail Schedule screen.

Send Internal Appends When Syncing Remote Trackers

Indicate whether to send internal appends when syncing remote trackers.

- **Y –** Sends internal appends.
- **N –** Does not send internal appends.

System Admin Intervals

Define the following system administration intervals in hours, minutes, and seconds:

- System Admin Restart Interval
- Epid Cleanup Interval
- Phantom Status Cleanup Interval

System Backup Check Time

Enter the time when the system backup program confirms whether or not the backup was successful. The default check time is set to 07:00am, which should allow plenty of time for the backup to finish.

This check is done every day of the week and cannot be changed. If you do not run a backup on Saturday and Sunday, a message is sent to the System Backup Administrator that a backup has not been recorded since the previous Friday. A message is sent for each day of the weekend the backup does not run. If this time is not specified or if the backup is not successful, the Administrator receives an error message.

Time can be entered in several ways, including: **9a** for 9:00 a.m. or **9p** for 9:00 p.m. Military time does not require an **a** or a **p**. When including minutes with either normal or military time, type a colon between the hour and the minutes. For example, 04:30.

> **Note:** The System Backup must be set up to run in the Phantom Scheduler and the backup check time must be specified for the system backup to work.

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System Backup Variance %

Enter the allowable percent difference in the amount of backed up data between last night's backup and the previous night's backup without generating an error message. We recommend that the variance percent be set to **9** to allow for the normal generation of new data. If the percent difference between the two backups is greater than the specified number, the System Backup Administrator receives an error message.

> **Note:** The System Backup must be set up to run in the Phantom Scheduler and the backup variance percent must be specified for the system backup to work.

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INVM Automated Purchasing Parameters Control Maintenance Records

The following control maintenance records belong to the INVM (Inventory Management) category and apply to automated purchasing.

Commit From Invoiced Gen's Location If On-hand Available

For each branch, indicate whether the system commits increased quantities on invoiced generations from the original location, if on-hand quantity is available.

- **Y –** Commits inventory from the original product location.

  For example, if the system committed the original quantity from consignment inventory, it will also commit the additional quantity from consignment inventory.

- **N –** Commits inventory from the primary product location.

Days Before Ship Date To Reserve Product

Enter the number of days, 0-99, before their plenty date to commit items for automated purchasing.

The system subtracts this number of days from ship dates, so it will generate a suggested purchase order earlier than if no days were set. Setting this record helps the purchasing department obtain items for Ship When Specified and Call When Specified orders that cause items to fall below their order points.

> **Note:** The setting in this record does not affect the order entry availability calculation. The system only commits products on orders when they are within their lead time or plenty date, depending on the settings of the Suggested P/O Trigger for Non-Immediate Orders control maintenance record, although a suggested purchase order might be generated earlier.

Enable Automatic Suggested Transfers From Cross Dock Printing Queue

Indicate whether to display entries for suggested transfers to other branches that can occur as a result of a P/O receiving in the Cross Dock Printing Confirmation Queue.

The system checks items received on the P/O for suggested transfers. A suggested transfer displays in the Cross Dock Printing Confirmation Queue as a separate line in the queue with a description of "Transfer to Branch 'x'," and a user can flag the suggested transfer to print. When the user uses the **Print Tickets** hot key, the system generates a transfer for that branch.

- **Y –** Displays entries for suggested transfers to other branches.
- **N –** Does not display entries for suggested transfers to other branches.

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Enable Immediate Print/Process From Cross Dock Sug Transfer

Indicate whether to print and ship transfers created from the Cross Dock Suggested Transfer Queue.

- **Y –** The system prints and ships any transfer created from the Cross Dock Suggested Transfer Queue.

  You can use this control maintenance record alone or with the Enable Automatic Suggested Transfers From Cross Dock Printing Queue control maintenance record. If your company uses the **Xfer** hot key on the Cross Dock Printing Confirmation Queue screen to generate suggested transfers, the system can also print and process the transfers.

- **N –** The system does not print and ship transfers.

Message Buyer On Inventory Factor Override In SOE

This record works with the entry in Order To Inventory Factor For SOE control maintenance record, which assigns an order to inventory factor to all products. The order to inventory factor is a percentage of the amount of each product to maintain on hand. For example, if a user enters an order quantity for a product that is a percentage greater than the percentage specified at the product level or in the control maintenance record, a warning message displays. The user can continue or delete the item from the order.

- **Y –** If the user continues with the order, the system sends a tracker to the buyer for the product. The tracker identifies the user who has overridden the inventory factor, the product, and the sales order number.
- **N –** The system does not send a tracker.

Minimum Order Cycle Days For Suggested P/O

Specify the system-level minimum order cycle days, 0-9999, which limits how much the Suggested P/O program can contract a calculated order cycle. The system never contracts below the minimum order cycle defined at the buy line level or in this control maintenance record.

- If a minimum order cycle is defined at the buy line level and it is less than the calculated order cycle, the Suggested P/O program uses the buy line override, even when it is less than the minimum order cycle defined in this record.
- If a minimum order cycle is not defined at the buy line level and the calculated order cycle is less than the minimum order cycle defined in this record, the Suggested P/O program uses the order cycle defined in this record. The value in this record also displays in parentheses in the **Minimum Order Cycle** field on the Buy Line Maintenance screen.

Percentage of Mother Branch's OP Protected in Suggested Transfer

For each branch, enter the percentage, 0-99, of the branch's order point to protect during the suggested transfer process for a non-immediate-need situation. If you leave this record blank, the default is 100%. When you set the percentage to 0, the system does not protect any of the branch’s order point.

> **Note:** Percentages set at the product or buy line level override the percentage set in this record.

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Respect Item Min/Max For Suggested Transfers

Indicate whether the system should respect item min/max settings for suggested transfers.

- **Y –** The system calculates a suggested transfer quantity for an item in a child branch if the available quantity has gone below the minimum quantity, as specified for the branch on the User Inventory Controls screen. The suggested quantity brings the child branch back up to its maximum quantity.
- **N –** The system uses the standard transfer point calculation for branch replenishment.

Suggested P/O Trigger For Non-Immediate Orders

Select whether to use a product's **Lead Time** or **Plenty Date** to determine the trigger point for a suggested purchase order for Ship When Specified or Call When Specified orders whose ship-on or call-on dates are beyond the product's lead time window but within the product's plenty date. These orders cause a product's on-hand quantity to drop below its order point. The default is **Lead**.

- **Lead** – Ship When Specified or Call When Specified orders only trigger a suggested purchase order when the ship-on or call-on date falls within the product's lead time window.

  If this is not enough time for creating a suggested purchase order, consider using the Days Before Ship Date to Reserve Product control maintenance record.
- **Plenty –** Ship When Specified or Call When Specified orders trigger a suggested purchase order when the ship-on or call-on date falls within the product's plenty date window.

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INVM Consignments Control Maintenance Records

The following control maintenance records belong to the INVM (Inventory Management) category and apply to consignments.

Allow Customer Consignment From Multiple Branches

Indicate whether your company can ship consignment inventory from branches other than the customer's home branch. The default is **N**.

- **Y –** Branches other than a customer's home branch can ship consignment inventory to the customer.

  For example, your customer's home branch is Branch 1. If this control record is set to **Yes**, then you can ship a consignment transfer out of Branch 3, but store the consignment material in Branch 1 (the customer's home branch). The Location Maintenance screen for Branch 1 reflects the shipment of the consigned inventory to the customer. The system completes a behind the scenes automatic transfer in the to handle moving the physical material from Branch 3 to Branch 1. The G/L postings are stored on the automatic transfer generated behind the scenes, not the original customer consignment transfer. View the automatic transfers from the original order's change log. The customer's home branch then tracks the consignment and sends invoices to the customer.

  In the above scenario, the original customer consignment order and the associated automatic transfer are both view only after they are processed. If you need to change quantities on the transfer, you need to make adjustments using customer consignment transfers and additional branch transfers.

- **N –** There is no restriction on shipping consignment transfers from any branch. The inventory is reflected out of the shipping branch, rather than the customer's home branch.

  For example, your customer's home branch is Branch 1. If this control record is set to **No**, then you can ship a consignment transfer out of Branch 3, and the consignment material is also reflected in Branch 3, not the customer's home branch.

Allow Transfer Of Vendor Consigned Inventory

For each branch, indicate whether users can transfer inventory consigned from a vendor to another branch.

- **Y –** Can transfer vendor consigned inventory.
- **N –** Cannot transfer vendor consigned inventory.

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INVM Forecast Parameters Control Maintenance Records

The following control maintenance records belong to the INVM (Inventory Management) category and apply to forecasting.

Assign Demand Forecast To Price/Ship Branch Or By Zip Code

Select the branch to receive credit for a sale and all associated hits information when a product is sold at one branch, but ships from another. The default is **S-Ship Branch**.

- **S-Ship Branch –** The system credits the demand for the product to the shipping branch.
- **P-Price Branch –** The system credits the demand for the product to the pricing branch.
- **Z-Zip Code –** The system credits the demand for the product to the branch that is closest to the customer's zip code, rather than the pricing or shipping branch.

  To determine which branch receives credit for the demand, the system checks the zip code of the ship-to customer and compares it to the zip codes or ranges of zip codes assigned to each branch in Branch Zip Code Maintenance. For the zip code option to work correctly, assign a zip code or range of zip codes to each branch.

  If this record is set to zip code option but zip codes have not been assigned to branches in Branch Zip Code Maintenance, the system uses the ship branch option.

  Note: If you change the setting in this record from Ship or Price to Zip Code, or if the information in Branch Zip Code Maintenance changes, rebuild the PSUB file. Please contact Support for help.

Customer Product By Demand Sort File Size

By default, the size of the temporary sort file the system uses to calculate product demand is 517K. If your company needs to use a larger file, enter the following parameters for a new uniVerse file size:

- **Sort File Modulo –** Enter the number of groups in the file. This should be a prime number.
- **Sort File Separation –** Enter the group buffer size in 512-byte blocks.
- **Sort File Type –** Enter the uniVerse file type.

  Note: The time it takes for uniVerse to do a clearfile or a select on the sort file is dependent on the file size, not how many records are actually in it.

Demand Hit Definition

Select how the system calculates hits based on sales order entries and recalculate hits for credits and returns. Once set, the system does not further adjust the demand hit definition. Choose the most appropriate variable, depending on how your company runs its business.

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- **Order Level –** The system calculates hits on a per sales order basis, regardless of how or when the items are shipped, or how the material is separated on the order.
- **Generation Level –** The system calculates hits on a per sales order generation basis. Each scheduled shipment or generation produces a separate hit occurrence. Credits and returns apply to specific sales order generations.
- **Line Item Level –** The system calculates hits on a per line item basis. Each line item produces a separate hit occurrence.

  Note: The demand hit definition affects how the system calculates exceptional sales and usage for items split among multiple orders. More exceptional sales are possible when calculating hits on a per sales order basis, than when calculating hits on a generation or line item level.

Enable Exclusion of Matrix Cells From Demand Calculations

Complete this record if your company handles many contract jobs and uses product-specific and customer-specific matrix cells to handle pricing on those jobs.

In Release 7, you must rely on the salesperson to flag a large contract job order as an exceptional sales order so the items sold on that order are not included in the demand calculation. If the items sold are for a one-time job, why increase demand?

In Release 8, indicate whether users authorized for sell matrix maintenance can flag matrix cells for exclusion from the demand calculation. The setting in this control maintenance record determines how the system responds when an authorized user sets the **Exclude Items Using This Matrix Cell From Demand Calc (Y/N)** field on the Sell Matrix / Matrix Maint Additional screen to **Y.**

- **Y –** The system does not include items using this matrix cell in the demand calculation.
- **N –** The system displays the following prompt: Exclusion of Matrix Cells from Demand Calculations is not enabled! Enable it (Y/N)?
  - If the user enters **Y**, the system changes the control maintenance record setting to **Y**.
  - If the user enters **N**, the system changes the **Exclude Items Using This Matrix Cell From Demand Calc (Y/N)** field setting back to **N**.

Exclude Negative Quantities From Item Demand Calculation

Complete this record if your company allows stock returns from customers who purchased items for a large contract job.

In Release 7, if a sales order is marked as exceptional, the items sold are automatically excluded from the demand calculation. If the customer returns items, the return order is not marked as exceptional. This can potentially cause a negative demand.

In Release 8, you can set this record to exclude negative transaction quantities from the demand calculation, but you also need to consider other occurrences of returned stock items. By setting this record to **Y**, all returns are excluded. Consider an item that is sold and then returned the next day. The raw quantity used for the demand calculation includes the sale only and not the return. If you set the record to **N**, then the sale and the return cancel out each other.

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For each branch, indicate whether the system excludes negative transaction quantities from the demand calculation. The default is **N**.

- **Y –** Excludes negative transaction quantities from the demand calculation.
- **N –** Includes negative transaction quantities in the demand calculation.

Forecast Parameters For Demand Calculation

For each branch, on the Control Forecast Parameters Maintenance screen, enter default forecast parameters. The parameters set here apply to all products in your company, unless overridden at the buy line or the product level. See Entering Forecast Control Parameters.

Global Hits Definition

On the Hits Control Maintenance screen, enter the system-level hits-related inventory parameters for each branch. The Update Demand Forecast program and the branch replenishment calculation use this information when they can't find parameters defined at the product or buy line level.

> **Note:** Use the **Find** hot key as necessary to locate a branch that is in the list, but not in the viewable area. Use **Alt-Insert** to add a branch or territory to the list. The new branch or territory inherits the settings of the previous entry. Use **Alt-Delete** to remove a branch or territory from the list.

- Complete the **Central Whse Type** field only for multi-branch networks. Select the central warehouse type.
  - **Bottom-up –** The selling branches dictate branch replenishment and automatic stock/nonstock determination.

    In a bottom-up central warehouse scheme, the needs of the child branches are analyzed and reported back to the parent branch (central warehouse) so stock can be purchased to bring the child branch back to the greater of its transfer point or its EOQ.
  - **Top-down –** The central warehouse dictates branch replenishment and automatic stock/nonstock determination.
- In the **Branch Hits** field, enter the minimum hits a product must have at the branch level to be considered a stock item.
- Complete the **Network Hits** field only for multi-branch networks. Enter the minimum hits a product must have throughout the network.
- The **Max Days** field displays the value entered in the Maximum Days Supply control maintenance record. This value is the system-level maximum number of days supply of a product, 0-99999, that can be stocked in the warehouse through adjustments, purchase order entry, sales order entry or transfer order entry. If you edit this field, the system copies the edit to the other record.

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Minimum Hits

Enter the minimum number of annual hits, 0-99999, that an item must have to be a stock-keeping item. This record only applies to those systems that have insufficient demand history to accurately forecast demand. It works with the MIN.FORECAST.AGE and CONVERSION.DATE variables defined by the installer during system installation.

When a product has been ordered enough times to reach the value of this record or has been a product in the system long enough to reach the minimum forecast age (MIN.FORECAST.AGE), the system can forecast its demand using hits-related inventory parameters.

You can define minimum hits at the product level, the buy line level, or in this control maintenance record. Minimum hits specified at the product level override the minimum hits at the buy line level, which override the value in this record.

Minimum Lead Samples

For each branch, enter the system-level minimum number, 0-99999, of lead samples required to determine the lead time for a product.

- If the **Mn LF** column on the Product Maintenance / Forecast Parameters Maintenance screen contains a number, that number defines the minimum lead samples for the product.
- If the **Mn LF** column on the Product Maintenance / Forecast Parameters Maintenance screen is blank, the system uses the number entered in this control maintenance record to determine the minimum lead samples for the product.
- If the product has not been received on the number of purchase orders indicated in this record, the system uses the number entered in the Default Lead Time Days If Product And Buy Line Have None control maintenance record to determine the lead time for the product.

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INVM General Parameters Control Maintenance Records

The following control maintenance records belong to the INVM (Inventory Management) category.

B2B Inventory Control Maintenance

On the B2B Inventory Control Maintenance screen, set global parameters for the system to use to control the amount of actual inventory to show when B2B trading partners perform an inquiry. For each product rank, select a basis and enter a multiplier for calculating the amount of actual inventory to show.

The basis options are:

- Available
- Order Point
- Line Point

You can assign parameters at the customer level that override the settings in this record.

Buy Line Maintenance Authorization Levels

Use this record to restrict editing access for each field on the Buy Line Maintenance screen.

On the Auth Levels Required to Edit Buy Line Maintenance screen, for each item listed in the **Field Description** column, assign a security level, 0-99, in the **Auth Level Req'd** column. The default is **0**.

The system uses the levels assigned in this record with the level assigned in a user's BUYLINE.MAINT.LEVEL authorization key to determine which fields the user can access for editing purposes.

- If the BUYLINE.MAINT.LEVEL authorization key is assigned, the user needs an authorization level *greater than or equal to* the security level of the field to use for editing purposes. For example, a user assigned an authorization level of 50 can edit a field assigned a security level of 50 or less but cannot edit a field assigned a security level greater than 50.
- If the BUYLINE.MAINT.LEVEL authorization key is not assigned to a user, the settings in this control maintenance record do not apply to that user. The user can access any field for editing purposes.

Customer/Vendor Display Option For Future And History Ledger

Indicate which customer name the system displays on the Future History Ledger and Inventory History Ledger screens.

- **I** (Index Name) – Displays the name from the **Index** field in Customer Maintenance.
- **N** (Entity Name) – Displays the name from the **Name** field in Customer Maintenance.

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Display Availability In Inventory Inquiry Product Index

When users search for a product in Inventory Inquiry, the system can display availability along with the product.

Indicate whether the system displays availability along with the product description in the Product Primary Index when searching for a product in Inventory Inquiry.

- **Y –** Displays the product description and availability.
- **N –** Displays the product description.

Include All Location Types In Product Sales History

Indicate whether to include all product location types when displaying **Sales Dollars** and **Sales Quantities** on the Product Sales History screen.

- **Y –** Includes all product location types.
- **N –** Includes only sales with the location type of Stock, Tagged, and Except.

Inventory Modeling Parameters

Define how you want the system to extract information to the Inventory Modeling program.

- **Demand Threshold Rounding –** In standard Eclipse calculations, demand is always rounded up. The Demand Threshold Rounding value on the Inventory Modeling spreadsheet provides a way to test if the rounding should be adjusted. The default is zero and is used to analyze commodity lines when you have high dollar items. One point change could affect your total inventory dollars.

  For example, if you change the Demand Threshold Rounding from zero to ten on the inventory model, the total inventory dollars change from $1360.46 to $984.00. Any product with daily demand less than ten does not round up. By doing this, you create your inventory budget without Eclipse rounding up. This setting allows you to adjust safety factors to get real inventory down or up to the model you are trying to reach.
- **Target Inventory Turns –** Indicate the turn cycle you want to use in modeling your inventory. Turns is a measurement of the costs associated with the cycle of purchasing an item, selling it, and replenishing it in a period.
- **Rank Number for S.F. Calc –** Enter the rank number you want the system to use when calculating the safety factor.

Maximum Days Supply

For each branch, enter the system-level maximum number of days supply of a product, 0-99999, that can be stocked in the warehouse through adjustments, purchase order entry, sales order entry or transfer order entry. A warning message displays if the days supply number is exceeded. Users assigned the corresponding PIL override authorization key, (AOE.PIL.DAYS.OVRD, POE.PIL.DAYS.OVRD, SOE.PIL.DAYS.OVRD or TOE.PIL.DAYS.OVRD) can override the warning. Otherwise, the system prompts users to enter a password.

You can also designate a maximum days supply at the product, branch, and buy line level. If a maximum is not set at the product, branch, or buy line level, the system uses the value entered in this control maintenance record. The value entered in this record also displays in the **Max Days**

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column of the Global Hits Definition control maintenance record. If you edit the field on that screen, the system copies the edit to this record.

> **Note:** The maximum days supply checking logic does not apply to MiscChrg or Comments product types. When a user adds an item to an order, the system checks the projected inventory level (PIL) at that point in time. When a user removes an item or deletes an order, the system compares the PIL at the time of the removal or deletion to the stored PIL. If the removal or deletion does not make the PIL higher then it was at the time of the addition, the system does not display a Maximum Days Supply warning.

Reprocure Backordered Tagged Transfer Quantities

Indicate whether the system sets up the remaining quantity for reprocurement when a tagged quantity on a transfer is changed to a lower amount or if the order is canceled.

- **Y –** Reprocures.
  - If the user cancels a tagged quantity, the system keeps the order status the same as it was initially and sets the product status to Stock.
  - If the user lowers a tagged quantity, the system keeps the order status the same as it was initially and sets the product status on the backordered items to Procure. The product status of quantities that are still tagged stays as Tagged.
- **N –** Does not reprocure.
  - If the user cancels or lowers a tagged quantity, the system keeps the order status the same as what it was initially and sets the product status on the backordered or canceled items to Stock.

Set Br/Tr "Suggest On All" Flag To "N" For Lines In Super Buy Line

Complete this record if your company has multiple branches and uses super buy lines.

In Release 7, when the system suggests a super buy line, only the super buy line displays in the Suggested P/O Queue for the purchasing agent to analyze. The buy lines pointing to the super buy line do not display, because the **Suggest On All** field is automatically set to **N**.

In Release 8, indicate whether the system sets the **Suggest On All** flags on the Buy Line Maintenance screen to **N** for the branches and territories to which the super buy line applies, when a user adds a buy line to a super buy line. The default is **N**.

- **Y –** Sets the **Suggest On All** field to **N** for all buy line branches and territories to which the super buy line applies. Prevents users from changing these **Suggest On All** settings.
- **N –** Sets the **Suggest On All** field to **N** for all buy line territories and to *blank* for all buy line branches, regardless of which ones are associated with the super buy line.

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INVM Inventory Counting Parameters Control Maintenance Records

The following control maintenance records belong to the INVM (Inventory Management) category and apply to counting inventory.

Cycle Count Queuing Enabled

For each branch, indicate whether to enable cycle count queuing. When cycle count queuing is enabled, the system logs negative quantities, over-commitments, and invoice quantity edits to the Count Queue file. You can then generate cycle count queue from information in this file.

- **Y** – Enables cycle count queuing.
- **N** – Does not enable cycle count queuing.

Disable Cycle Count Generation In SOE

Complete this record if you use the Cycle Count Queue.

In Release 7, the system automatically sends items to the Cycle Count Queue when an item is manually backordered order (when the ship quantity of a ticket is lowered after the ticket has already processed). In Release 8, the system can prompt the user to send the item to the Cycle Count Queue.

For each shipping branch, indicate whether to disable automatic cycle count generation in SOE when an item is short shipped. The default is **No**.

- **Yes** – The system does not generate a cycle count.
- **No** – The system generates a cycle count.
- **Prompt** – The system prompts the user to select whether to a cycle count is necessary.

Exclude Tagged Location Information On Physical Sheets

Indicate whether to exclude tagged quantities when printing physical count sheets.

- **Y** – The system excludes tagged quantities.
- **N** – The system includes tagged quantities.

Generate Cycle Count When Transfer Ship Quantities Change

Complete this record if your company uses the Cycle Count Queue.

The system sends an item to the Cycle Count Queue in one of three ways: negative on-hand in a bin location, over-commitment of inventory, and a manual backorder on a sales order (when the ship quantity of a ticket is lowered after the ticket has already processed). This control maintenance record applies to manual backorders for transfers.

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For each branch, indicate whether the system generates a cycle count when the quantity for a product changes on a shipped transfer generation. The default is **N**.

- **Y –** Updates the Cycle Count Queue for that product.
- **N –** Does not update the Cycle Count Queue for that product.

Location Types To Include In Physical Count

Enter the product location types to include in a physical count. If you leave this record blank, the default is **S**. This record also controls which product location types the system updates. The system does not update tagged on-hand locations.

Options include:

- **S –** Stock
- **L –** Display
- **F –** Defective
- **O –** Over Shipment
- **R –** Review

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INVM Inventory Management Control Maintenance Records

The following control maintenance records belong to the INVM (Inventory Management) category and apply to inventory management defaults.

Allow Blank Locations in Split Location

Indicate whether users can enter a blank location on the Split Location screen in order entry.

- **Y –** Users can tab past the **Location** field.
- **N –** Users must enter a value in the **Location** field before moving the cursor to the **Lot** or **Qty** fields.

Default For Excess Grace In Buy Line Maint

Enter the default transfer excess grace days of demand, 0-999, the system should use if no setting is entered at the buy line. The suggested automatic branch transfer system ignores any excess quantity that equals the demand for the excess grace days before recommending a return of excess stock from a dependent branch to a supplying branch. Use the excess grace feature to avoid overwhelming a supplying branch and the transfer delivery system with unusually excessive stock situations.

> **Note:** Setting this record to 999 *disables* the return from child branch to parent branch, even for emergencies. Use this setting for products or lines that should not be returned to the parent branch. Setting this record to 998 prevents most automated returns from child branch to parent branch, unless there is an emergency.

Default Lead Time Days If Product And Buy Line Have None

Enter the default number of lead time days, 0-999, the Suggested Purchase Order program uses when a product does not contain a lead time setting at either the product or buy line level.

> **Note:** If all lead time indicators on the Buy Line Maintenance screen for a product are blank and this record is set to zero (0) or is blank, the program uses 15 days as the product's lead time.

Default Lead Time Factor If Product And Buy Line Have None

Enter the default lead time factor, 0-99, to system uses to calculate the historic median lead time days when a product does not contain a lead time factor setting at either the product or buy line level. A lead time factor should be an odd number.

Default Product Location Maintenance View

Select the default view to use for the Product Location Maintenance screen, if one is not designated in User Maintenance for the logged-on user. If you leave this record blank, the default view is **Last Count / Location Pick Status**.

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Options include:

- Last Count / Location Pick Status
- Replenish Min/Max Qtys
- Home Location
- Pre-package Qtys
- Tote / Picker
- Last Count / Exp Date
- Last Count / Recv Date
- RF Put Away Date / Time
- Last Count / Review Type / Original Type

Display All Locations In Split Locations

Indicate whether the Split Locations screen displays all locations, even if they are empty. If you leave this record blank, the default is **N**.

- **Y** – Displays all locations.
- **N** – Only displays locations with a positive quantity.

Enable Location Parameter Maintenance

For each branch, indicate whether to enable a location database for defining warehouse locations. The default is **N**.

See Setting Up Warehouse Locations for more information.

- **Y** – The system stores product permanent locations in a location database.

  Use Location Parameters Maintenance to define warehouses at the location level.

- **N** – The system creates and deletes product locations as users add or remove products from locations.

  Use Zone Maintenance to define warehouses at the zone and pick group level.

  Note: Define all of your warehouses using the new logic before making use of the Warehouse Location Database.

Warehouse Status Queue Non-Manifest Picking Statistics

For each branch, indicate whether the system includes the audit function in the **PckCnt** and **%Cmplt** columns in the Warehouse In Process Status Queue. The default is **N**. If your company performs auditing on orders, set this record to **Y**.

- **Y** – Includes the audit function.

  For example, an order with one line item picked from one location has a **PckCnt** of 2. Once the item is picked, the order is 50% complete. Once the item is audited, the order is 100% complete.

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- **N –** Does not include the audit function.

  For example, an order with one line item picked from one location has a **PckCnt** of 1. Once the item is picked, the order is 100% complete.

Warehouse Status Queue Refresh Interval

Enter the number of seconds, 1-99, between each refresh of the Warehouse Status Queue. The default is every 60 seconds.

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INVM Pick Parameters Control Maintenance Records

The following control maintenance records belong to the INVM (Inventory Management) category and apply to picking inventory.

Pick By Location Based On Received Date

Indicate whether the system fills an order by picking the oldest products first rather than searching for a location that contains the full order quantity.

- **Y –** Picks the oldest products first. If there are multiple locations for the same item with the oldest receipt date, the system selects the location with the smallest quantity first. This helps eliminate floating locations.
- **N –** Picks products from a location that contains the full order quantity.

Use Location Expiration Dates

Indicate whether the system stores expiration dates by location rather than by branch.

- **Y –** Stores expiration dates at the location level.
- **N –** Stores expiration dates at the branch level.

XDock Location For Quantity To Pick

For each branch, enter the receiving dock location from which to pick cross dock material. If you leave the location blank, the picker will have to use the shipment number/container ID as the pick location.

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INVM ALLOC (Inventory Allocation) Control Maintenance Records

The following control maintenance record belongs to the INVM (Inventory Management) category and applies to allocation of inventory.

Inventory Allocation Method

For each branch and allocation type, use this record to override the system default and define your own inventory allocation logic for picking items.

This record applies to unit-of-measure locations, but does not apply to zone-allocated material or lot items.

- If an item is allocated from a zone, the system attempts to pull the quantity from the specified zone.
- For a lot item, the system looks for an exact match. If there is no exact match, the system looks for a quantity equal to or greater than the required quantity. If this method fails to allocate anything, then the system uses the user-defined allocation method.

To define an inventory allocation method:

1. On the Inventory Allocation Method screen, enter the branch and allocation type for which to define an inventory allocation method.
   - In the **Branch** field, enter the branch number.
   - In the **Type** field, select one of the following allocation types:
     - Sales Orders
     - Transfers
     - Replenishment

   The system populates the remainder of the screen with the defined parameters.

   The **Rd** column identifies each allocation method and the order in which the system uses it. If the first allocation method cannot fill the pick, then the system uses the next method, and so on until the pick is filled. There is no limit to the number of rounds that can be defined.
2. Define a new allocation method by defining the parameters for each round as follows:
   - In the **Pick Qty Typ** field, select the quantity match for fulfilling the pick.
     - **Exact Quantity –** Selects a location that has exactly what is being requested.
     - **Single Pick –** Selects a location that has at least the same amount or more than is being requested.
     - **Multiple Picks –** Selects from multiple locations to fulfill the product quantity requested. This selection is useful for depleting floating locations. The system

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directs you to the locations with the lowest quantities in order to deplete those locations until the pick is filled.

- If your warehouse is completely zone-defined, press **F10** in the **Zone** field and select whether to include or exclude defined zones from the picking allocation method. Then press **F10** again and select the zone to include or exclude. Use the **Multiple Zones** hot key to select multiple zones. If you leave this field blank, the system includes all zones.
- In the **Status** field, enter the product location statuses from which to pick. List the statuses in the order in which to check for product availability. Separate each status with a comma but no spaces. Select from the following:
  - **P –** Primary
  - **S –** Secondary
  - **R –** Remnant
  - **F –** Floating
  - **B –** Blank
- In the **Sortby1-5** fields, select how to sort the locations available for picking if the system must allocate the pick from multiple locations. Once you select a sort option, you cannot use it again in the same round. The sort options are:
  - **Qty Asc –** Quantity Ascending
  - **Qty Des –** Quantity Descending
  - **Exp Dt –** Expiration Date
  - **Rcvd Dt –** Received Date
  - **Status –** Sorts items in the status order displayed in the **Status** column.
  - **UoM –** Unit of Measure

  If the **Type** is Replenishment, UoM sorts by the lowest unit of measure to the largest unit of measure.

  If the **Type** is Sales Order or Transfer, UoM sorts by the unit of measure listed on the order first. It works its way down to the smallest unit of measure and then back up to the largest unit of measure.

3. To clear all the rows and replace them with default values, use the **Default** hot key.

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Following are the system default values:

<table>
<tr><th>If...</th><th>The default allocation method for transfers and sales orders is...</th></tr>
<tr><td>the Use Location Expiration Dates control maintenance record is set to Y</td><td>Round 1
Pick Qty Typ = Multiple Picks
Status = P,S,F,R,B
Sortby1 = Exp Dt
Sortby2 = Qty Des
Sortby3 = Status</td></tr>
<tr><td>the Pick by Location Based On Receive Date control maintenance record is set to Y</td><td>Round 1
Pick Qty Typ = Multiple Picks
Status = P,S,F,R,B
Sortby1 = Rcvd Dt
Sortby2 = Qty Asc
Sortby3 = Status</td></tr>
<tr><td>the Use Location Expiration Dates and Pick by Location Based On Receive Date control maintenance records are both set to N</td><td>Round 1
Pick Qty Typ = Single Pick
Status = P,S,F,R,B
Sortby1 = Status
Sortby2 = Qty Des
Round 2
Pick Qty Typ = Multiple Picks
Status = P,S,F,R,B
Sortby1 = Status
Sortby2 = Qty Des</td></tr>
</table>

4. To copy the inventory allocation method defined for one branch to another branch, use the **Copy to Branch(es)** hot key and then complete the following fields:
   - In the **Br/Tr/All** field, enter the branch or territory to which to copy the allocation method. Enter **All** to copy the allocation method to all branches and territories.
   - In the **Type** field, select the type of allocation to which to apply the copied method.
5. Press **Esc** to save the allocation information and exit the screen.

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INVM PHYSI (Physical Inventory) Control Maintenance Records

The following control maintenance record belongs to the INVM (Inventory Management) category and applies to physical inventory.

Check Shipping Branch Only When Determining Physical Last Activity

Indicate whether the system checks the shipping branch if the **Stock Items with Last Activity Days** or **Nonstock Items with Last Activity Days** are specified when determining last activity days for physical control file generation. The default is **N**.

- **Y –** The system checks the shipping branch.
- **N –** The system checks the pricing branch.

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INVM SHIPM (Inventory Shipment) Control Maintenance Records

The following control maintenance records belong to the INVM (Inventory Management) category and applies to the shipment of inventory.

Multi Vendor Shipments Allowed

For each receiving branch, indicate whether branches can receive shipments from multiple ship-from entities but the same freight carrier.

- **Y** – Can receive multi-vendor shipments from the same freight carrier.
- **N** – Cannot receive multi-vendor shipments from the same freight carrier.

Shipment Header Fields

For each branch, indicate whether the following fields on the Shipment Header screen are required. The default for each field is **N**.

- **Y** – The designated field is required.
- **N** – The designated field is not required.

Field	Description
ASN ID	Advance Ship Notice ID
Bill of Lading	Bill of Lading ID
Containers	Number of containers listed on the Vendor Ship Notification (VSN) or ASN.
Pieces	Total item quantity as listed on the packing list or ASN.
Ship Date	Date on which the shipment left the vendor's facility.
Receive Date	Expected receive date for the shipment.
Receive Time	Expected receive time for the shipment.
Weight	Shipment's weight listed on the VSN or ASN.
UD 1 – UD 5	User-defined fields. For each field you want to add to the Shipment Maintenance screen, enter a unique name, such as Vessel Name, Freight Forwarder, or Dock Supervisor.

Shipment Variance Notes Required

For each branch, indicate whether users are required to enter shipment variance notes when resolving quantity variances for shipment receiving. If you require users to enter shipment variance notes, the Shipment Item Notes screen automatically displays.

Press **F10** and select one of the following options:

- **Shipment –** Variance notes are required at the shipment level.
- **Item –** Variance notes are required at the item level.

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- **Shipment & Item –** Variance notes are required at both the shipment and item levels.
- **Not Required –** Variance notes are not required.

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INVM SRIAL (Serial Number) Control Maintenance Records

The following control maintenance record belongs to the SRIAL (Serial Number) area within the INVM (Inventory Management) category and applies to working with serial numbers.

Pick By Serial Number Based On Received Date

Complete this record if your company tracks serial numbers on products for Inbound and/or Outbound only.

Indicate whether to pick serialized items by serial number, using the oldest, first-received serial numbers first.

- **Y –** Picks oldest serial numbers first.

  Note: Each time you receive serialized items, your receivers must manually rotate the stock so that oldest items are easiest to reach and newer items are placed behind.

- **N –** Does not need to pick oldest serial numbers first.

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INVM WHSE (Warehousing) Control Maintenance Records

The following control maintenance record belongs to the WHSE (Warehousing) area within the INVM (Inventory Management) category and applies to order packing and carton loading.

Order Packing Pop-Up When Confirming To PACKED

Select how to use the Order Packing function with the Warehouse Confirmation Queue:

- **No Packing –** The system does not use Order Packing with the Warehouse Confirmation Queue.
- **Auto Pop-Up** – When an order's status updates to Packing on the Warehouse Confirmation Queue, the system automatically displays the Carton Packing screen.
- **Prompt –** When an order's status updates to Packing on the Warehouse Confirmation Queue, the system prompts you to display the Carton Packing screen.

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JSTON (Johnstone) Control Maintenance Records

The following control maintenance records belong to the JSTON (Johnstone) category and only apply to Johnstone companies.

Advanced Shipping Notices Branch Overrides

For each branch, enter the override branch to receive advance shipping notices, as needed.

Johnstone Ship-From Vendor

For each branch, enter the ship-from vendor to use for Johnstone purchase orders.

Sort Johnstone P/O On Transmission

Indicate whether to sort items on a Johnstone purchase order.

- **Y –** Sorts the items by Johnstone part number.
- **N –** Maintains the items in the order in which they were entered on the purchase order.

Valid Johnstone Trading Partners

Enter the trading partners with whom Johnstone exchanges EDI documents.

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JSTON SHIPP Control Maintenance Records

The following control maintenance record belongs to the JSTON (Johnstone) category and applies to shipping in Johnstone companies.

Johnstone Valid Shipping Warehouses

Enter the warehouses from which Johnstone ships product.

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MAINT (Maintenance) Control Maintenance Records

The following control maintenance records belong to the MAINT (Maintenance) category.

Copy Default Price Sheet To Blank Sheets In Product Maint

Indicate whether to prevent the creation of a price sheet for a product without any defined pricing information. The person who maintains price sheet information will review and, if necessary, modify the price sheet information after the copy.

If a blank price sheet is created during the course of maintaining a product record:

- **Y** &endash; The system copies all pricing information, including effective dates, prices, and pricing unit of measure, for the most recent effective date found in the product's default price sheet into the blank price sheet on the Product Price Sheet Maintenance screen.
- **N** &endash; The new price sheet does not contain any pricing information.

Default Best Price Check In Sell Matrix Maint To No

Indicate whether the system sets the **Best Price Check** field in Sell Matrix Maintenance or Quick Sell Matrix Maintenance to **N** when creating a new matrix cell. The default is **N**.

- **Y** &endash; The flag in the **Best Price Check** field defaults to **N**. The best price check function is disabled.
- **N** &endash; The flag in the **Best Price Check** field defaults to **Y**. The best price check function is enabled.

Default Cost View On Matrix Maint Cost Override To COMM-COST

Use this record to set the default view on the Matrix Cell Cost/COGS Override screen to COMM-COST.

- **Y** &endash; The default view is COMM-COST.
- **N** &endash; The default view is COGS.

Disable Home Branch Check In Vendor Maintenance

Use this record to disable the requirement that to view a vendor record, one of the user's accessible branches must be the vendor's home branch. The default is **N**.

- **Y** &endash; A user can view the Vendor Maintenance record as long as one of the user's accessible branches is one of the vendor's accessible branches.
- **N** &endash; A user can view the Vendor Maintenance record only if one of the user's accessible branches is the vendor's home branch.

File System For Eclipse Reports

Use to identify where the system should store your reports when using Eclipse Reports. The path you enter on this control maintenance record displays on the Administrative page within the application.

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To view the current path for the storage location, launch Eclipse Reports and click the **Admin** icon at the top of the Eclipse Reports application. The path is listed under the **System Stats** area labeled the Partition Location.

> **Note:** This path is identified at the time of installation or at upgrade. Please consult Eclipse Support before changing this path.

Number Of Days After Which Users Can Edit Old Prices

Enter the number of days after which users can edit prices and costs on the Product Price Sheet Maintenance screen.

> **Note:** To edit a price or cost on the Product Price Sheet Maintenance screen, users must be assigned the PRICE.SHEET.MAINT authorization key.

Product Location Quantity Movement

Indicate whether users who have been assigned the PRD.LOCATION.MAINT authorization key at level 2 can move quantities of a product from one location to another and have the system calculate the new quantity in the target location. This control maintenance record does not apply to level 3 users.

- **N** &endash; This record has no effect.
- **Y** &endash; Authorized users can move quantities. Quantity movement can be accomplished using the following methods:

  Example 1: Product *x* has on-hands of 12 in Location 1 and 0 in Location 2. To decrease the quantity in Location 1 to 8, position the cursor on the 12 and type an 8. The following message displays: Position cursor on quantity to increase by 4 and press <Enter>. When you move the cursor to Location 2 and press **Enter**, the 0 changes to 4.

  Example 2: Product *x* has on-hands of 12 in Location 1 and 0 in Location 2. To decrease the quantity in Location 1 to 8, position the cursor on the 12 and type -4. The following message displays: Position cursor on quantity to increase by 4 and press <Enter>. When you move the cursor to Location 2 and press **Enter**, the 0 changes to 4.

  Example 3: Reduce the on-hand quantity at one location. Reposition the cursor on the screen where you want to insert a new location. Press **Alt-Insert** to insert a blank line. Press **Enter** to insert the quantity being moved. Specify the quantity type and new location name.

Solar Additional Resource Types

For Eclipse internal use only.

Solar Release Classpath Maintenance

For Eclipse internal use only.

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System Search Results Display Setup

Populate the following fields to determine how the system displays search results. These settings apply to all system searches.

- **Maximum # items before prompting –** Enter the maximum number of items you want the system to return before prompting users to confirm to continue. For example, if you enter 25, the system displays the first 25 results in any type of search, and prompts you to display the next 25.
- **Always sort result set** – Enter **Yes** to sort the returned results in alphabetical order. Set this field to **No** to not sort in alphabetical order. **No** is the default.

Telemarketing Sales History Inquiry Settings

Select how the system displays sales order history on the telemarketing Customer Sales History screen. Select from the following options:

- **Fiscal** &endash; Fiscal-year months.
- **Calendar** &endash; Calendar months.

Template Authorization Key Level Hierarchy

Select which authorization level the system applies when the same authorization key with different levels appears in multiple templates assigned to the same user. The default is **First**.

- **Best** &endash; Selects the level that gives the user the most authority.
- **Worst** &endash; Selects the level that gives the user the least authority.
- **First** &endash; Selects the level assigned in the first occurrence of the authorization key the system encounters.

  Note: An authorization key assigned in addition to templates overrides any occurrence of that authorization key in the templates. This control maintenance record has no bearing on authorization keys with detail assigned. The system uses the detail list from the first authorization key it finds.

URL or UNC Path to Eclipse Help

For each branch, enter the URL or UNC path to the location on your server that contains the Eclipse online help files.

URL or UNC Path to Solar Eclipse Web Help

For each branch, enter the URL or UNC path to the location on your server that contains the Solar Eclipse online help files.

User Maintenance Default Time Zone

Select the time zone to assign to all new user records on the Scheduler Parameters screen in User Maintenance.

Use the Set System Time Zone control maintenance record to specify the time zone where your server is located.

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Valid Telemarketing Statuses

Enter custom statuses to assign to entries in the Telemarketing Queue. Statuses can be up to eight characters long. Use the statuses in the queue as sort and selection criteria.

The system uses the custom statuses in addition to the following standard statuses, which do not display in this record:

Status	Description
NEWITEM	New customer added to the telemarketing queue.
CALLED*	Customer call initiated.
NOTE*	Note entered.
FOLLOWUP*	New followup date scheduled.
ORDER*	Sales or bid order created for the customer.
CANCEL*	Customer removed from the telemarketing queue or call list.
* The system only records and displays these statuses in the Call Log History status.	

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MAINT CONT (Contacts) Control Maintenance Records

The following control maintenance records belong to the CONT (Contacts) area within the MAINT (Maintenance) category.

Telemarketing Contact Classifications

Identify the contact classifications to use to identify a customer's main telemarketing contact. List the classifications in the order in which the system searches for the customer's main telemarketing contact.

For example, if this control maintenance record contains two entries, "Telemarketing" and "Main," the telemarketing program first seeks contacts who are set up with a classification of "Telemarketing." If the program doesn't find any, it then seeks contacts who are set up with a classification of "Main."

This control maintenance record is most useful when each telemarketing contact is assigned a classification in Contact Maintenance using the **Classification** field. The entry in the **Classification** field should match the first-position entry in the control maintenance record.

Telemarketing Contact Phone Type

Select the phone type code to use when making telemarketing calls to a contact.

When a contact has multiple type codes for phone numbers, the system displays the phone number associated with the type code identified in this record in the Telemarketing Queue. If the contact does not have a phone number associated with the phone type identified in this record, the system displays the first phone number set up in Contact Maintenance for the contact.

Telemarketing Initial Order Status

Select the default order status to assign to orders created from the Telemarketing Queue. If you leave this record blank, the default status is Bid.

Valid Salutations

Enter a list of salutations to associate with the names of contacts. Each salutation can be up to 10 characters long. The system uses this list in the **Sal** field on the Contact Maintenance screen and the **Salutation** field on the **Contacts** > **Main** tab in Sales Force Automation.

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MAINT CONV (Conversion) Control Maintenance Records

The following control maintenance records belong to the CONV (Conversion) area within the MAINT (Maintenance) category.

Account To Copy From For CONVERT.COPY.ACCOUNT

Only Eclipse data conversion personnel should use this record.

Conversion A/R Loading Product

Only Eclipse data conversion personnel should use this record.

Conversion Account Prefix

Only Eclipse data conversion personnel should use this record.

Conversion Default Product If Not Found

Only Eclipse data conversion personnel should use this record.

Conversion MiscChrg Product

Only Eclipse data conversion personnel should use this record.

Path To SHIMS Account For Conversions

Only Eclipse data conversion personnel should use this record.

Path To Copy From For CONVERT.COPY.FILE

Only Eclipse data conversion personnel should use this record.

Path To Old Eclipse Account For CONVERT.COPY.ECLIPSE

Only Eclipse data conversion personnel should use this record.

Path To Pick Files For CONVERT.COPY.PICK

Only Eclipse data conversion personnel should use this record.

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MAINT COST Control Maintenance Records

The following control maintenance record belongs to the COST area within the MAINT (Maintenance) category.

Prompt For Cost Code On Cost Override In Matrix Maintenance

Indicate whether the system prompts for a cost override code when a user assigns a cost override to a matrix cell using the **Cost Ovrd** hot key in Sell Matrix Maintenance or the **Cost Override** hot key in Quick Sell Matrix Maintenance.

- **Y –** The system prompts the user to enter a cost override code. If the matrix cell used for the product already has a cost override and corresponding cost override code assigned at the matrix cell level, the system does not prompt the user to enter a cost override code.

  Note: Define valid cost override codes in the Valid Cost Override Codes control maintenance record. If cost override codes are defined, an **F10** list is available at the prompt. If no cost override codes are defined, the user can enter an unvalidated free-form code.

- **N –** The system does not prompt the user to enter a cost override code.

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MAINT CUST Default Settings Control Maintenance Records

The following control maintenance records belong to the CUST (Customer) area within the MAINT (Maintenance) category and apply to default settings.

Default Customer Price Class

For each branch, enter the default price class to assign to a new customer, if a default New Customer Maintenance Template is not defined for the branch in question.

Default Customer Salesperson

For each branch, enter the default Out Salesperson to assign to a new customer, if a default New Customer Maintenance Template is not defined for the branch in question.

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MAINT CUST Codes and Types Control Maintenance Records

The following control maintenance records belong to the CUST (Customer) area within the MAINT (Maintenance) category and apply to customer codes and types.

Valid Customer Invoice Status Codes

On the Valid Customer Invoice Status Codes screen, enter user-defined status codes to use in Cash Receipts to identify an invoice as being on hold, disputed, or in some way questionable. You can also set up a code to exclude any invoice with the code from being used in determining the customer credit limit, service charge calculations, average weighted days to pay calculations, and the automatic posting function in cash receipts. The code can also force the aging of the invoice to a specific bucket and put a message on the customer statement.

To enter a customer invoice status code:

1. In the **Status Code** field, enter a code, up to four characters long. Press **F10** to display defined codes.
2. In the **Description** field, enter a description of the code, up to 35 characters long.
3. In the **Bucket to use for Aging** field, select whether an invoice with this status code should use the normal calculation to determine the aging bucket to which it is added, or select the aging bucket to which it should be added, regardless of the normal calculation.
4. In the **Cust Invoice Status Msg** field, enter the message to display on the customer's statement to explain the status of the invoice. This message prints below the associated invoice number for any invoice that is flagged with this invoice status code.
5. In the **Exclude Invoices with this Status Code from** field, place an asterisk next to each calculation from which to exclude invoices with this status code.

An asterisk in this field...	Prevents...
Customer’s Credit Limit Calculations	invoices with the displayed status code from being included in the customer’s credit limit calculations.
Service Charge Calculations	invoices with the displayed status code from accumulating service charges even when they are past due.
Avg Weighted Days to Pay Calculations	invoices with the displayed status code from being included in the calculation of Average Weighted Days to Pay.
Auto Posting Function in Cash Receipts	any payments this customer makes to their account from applying toward this invoice while it is in dispute.
Statement Printing	invoices with the displayed status code from being included on the customer’s statement.
Statement Totals	invoices with the displayed status code from being included in the statement totals.

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6. Press **Enter** to create the code.

   Note: Use the **Delete** hot key to delete an existing code.

Valid Customer Points Programs

On the Valid Customer Points Programs screen, define points programs to use to earn rewards, master points programs to use to earn the same reward, and an alternate description for each program to use on reports.

- In the **Points Program** field, enter points programs to assign to customers.
- In the **Master Program** field enter the master points program to which the designated points program belongs, if applicable.
- In the **Alternate Description** field, enter a description of the designated points program to use on reports.

Valid Customer Roll-Up Groups

Enter roll-up groups to assign to customers. The system uses these groups to produce a download report with customer invoice information.

Valid Customer Select Codes

Enter customer select codes that categorize customers by industry segment for tracking and reporting purposes. Codes are user-defined alphanumeric names, up to 20 characters long. You can assign a customer select code defined in this record to a customer in the **Customer Select Code** field on the Miscellaneous Customer Information screen.

Valid Customer Types

Enter customer types, such as PLUMBER, ELECTRICIAN, or CONTRACTOR, that describe your customers. Use customer types to create a sell matrix cell for a customer type and specified products. Customer types are user-defined alphanumeric names, up to 10 characters long.

The customer type is similar to the customer price class in that it also represents a column in the pricing matrix, but it is generally used for promotional pricing.

The customer type assigned to a customer is the same for all branches. When a program requests the entry of a customer type, the system validates the entry against the types defined in this record.

Valid Sale Categories

Enter categories to use to identify different types of sales for reporting purposes.

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MAINT CUST General Control Maintenance Records

The following control maintenance records belong to the CUST (Customer) area within the MAINT (Maintenance) category.

Customer Maintenance Authorization Levels

Use this record to restrict editing access for each field and hot key on the Customer Maintenance screen.

On the Auth Levels Req'd to Edit Customer Maintenance screen, assign a security level, 0-99, in the **Auth Level Req'd** column for each item listed in the **Field/Hot Key Description** column. The default is 0.

The system uses the levels assigned in this record with the level assigned in a user's CUSTOMER.MAINT.LEVEL authorization key to determine which fields and hot keys the user can access for editing purposes as follows:

- If the CUSTOMER.MAINT.LEVEL authorization key is assigned, the user must be assigned an authorization level *greater than or equal to* the security level of the field or hot key they want to use for editing purposes. For example, a user assigned an authorization level of 50 can edit a field assigned a security level of 50 or less but cannot edit a field assigned a security level greater than 50.
- If the CUSTOMER.MAINT.LEVEL authorization key is not assigned to a user, the settings in this control maintenance record do not apply to that user. The user can access any field or hot key for editing purposes.

Customer Maintenance Authorization Levels For New Customers BT/ST

Use this record to restrict editing access to the **Bill To** and **Job or Ship To** fields on the Customer Maintenance screen, when creating new customers. Enter a security level, 0-99. The default is 20.

The system uses the level assigned in this record with the level assigned in a user's CUSTOMER.MAINT.LEVEL authorization key to determine whether the user can edit these fields as follows:

- If the CUSTOMER.MAINT.LEVEL authorization key is assigned, the user must be assigned an authorization level *greater than or equal to* the security level entered in this record to edit the **Bill To** and **Job or Ship To** fields. For example, a user assigned an authorization level of 50 can edit these fields if this record is assigned a security level of 50 or less but cannot edit these fields if this record is assigned a security level greater than 50.
- If the CUSTOMER.MAINT.LEVEL authorization key is not assigned to a user, the settings in this control maintenance record do not apply to that user. The user can edit the **Bill To** and **Job or Ship To** fields when creating a new customer record.

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New Customer Maintenance Template

For each branch, enter the customer record to use as a template when a user (for whom the branch is the user's home branch or, if no home branch is assigned, first authorized branch) creates a customer. The system populates the fields in the new record with data from the template record. The template customer record is typically a generic record created for this purpose.

> **Note:** The system does not use the template customer record when a user creates a customer through the sales order entry program.

Prompt To Copy Tax Information From Bill-To To All Ship-Tos

Indicate whether to prompt to copy tax information from a bill-to account to all its ship-to accounts upon exiting the bill-to record.

- **Y** – Prompts to copy tax information.
- **N** – Does not prompt to copy tax information.

Rebate Detail Setup Information

Enter the following items associated with incoming EDI 849 transmissions:

- **Rebate Detail Administrator –** User or message group to notify through the Message System with messages related to incoming EDI 849 transmissions.
- **Rebate Detail Product –** Miscellaneous charge product, with a zero cost and zero price, to use when creating a negative purchase order for the total rebate amount.
- **Rebate Inventory Offset Account –** G/L account used to offset any monetary amount associated with an item, such as capitalized freight (Landed Cost), with a credit entry.

  This account offsets the Inventory G/L account. The system credits this account with the monetary amount associated with the item upon creation of the negative purchase order.
- **Rebate G/L Inventory Account –** G/L account used to offset any monetary amount associated with an item, such as capitalized freight (Landed Cost), with a debit entry.

  If your company uses landed average cost or average cost as your COGS (cost of goods sold) basis and you are capitalizing freight to inventory, the system creates a journal entry that reconciles the inventory valuation. If a journal entry is created, the system credits or debits this account.

When you run the Customer Sales Rebate Report and choose to book the letters of credit, the system creates a negative received purchase order to the rebate vendor. The quantity on the order is -1 and the product added to the purchase order is the product identified in this control maintenance record. The amount of the purchase order is the total rebate amount owed by the vendor.

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MAINT NOTES Control Maintenance Records

The following control maintenance records belong to the NOTES area within the MAINT (Maintenance) category.

User Defined Call Tracking Notes

Enter up to 20 note categories that users can access when entering notes in Call Tracking Entry. For example, Release Notes.

When you use the **Notes** hot key, the note categories defined in this record display. After you select a note category a screen displays, where you can enter a note using up to 999 lines of 68 characters each.

User Defined Customer Notes

Enter up to 20 note categories that users can access when entering user-defined notes in Customer Maintenance. For example, Freon Purchases.

When you use the **Notes** hot key, all the note categories defined in this record display. After you select a note category a screen displays, where you can enter a note using up to 999 lines of 68 characters each.

Note: You cannot assign note categories on a customer-by-customer basis.

User Defined Product Notes

Enter up to 20 note categories that users can access when entering user-defined notes in Product Maintenance. For example, Technical Specs.

When you use the **Notes** hot key, all the note categories defined in this record display. After you select a note category a screen displays, where you can enter a note using up to 999 lines of 68 characters each.

Note: You cannot assign note categories on a product-by-product basis.

User Defined Vendor Notes

Enter up to 20 note categories that users can access when entering user-defined notes in Vendor Maintenance. For example, Return Requirements.

When you use the **Notes** hot key, all the note categories defined in this record display. After you select a note category a screen displays, where you can enter a note using up to 999 lines of 68 characters each.

Note: You cannot assign note categories on a vendor-by-vendor basis.

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MAINT PRINT Control Maintenance Records

The following control maintenance records belong to the PRINT area within the MAINT (Maintenance) category.

Eclipse Server Setup

Use this record to enter the IP address or computer name and port number for the location where you have set up the server. The **IP Address / My Computer Name** field allows a free-form entry, because the entry can be an IP address entered as a sequence of numbers or it can be a network name.

Use the **Find** hot key to locate a server on the screen. Complete any of the **Location**, **IP Address**, or **Port** fields and then press **Esc** to position the cursor on the matching entry.

Use the **Copy** hot key to copy the IP address and port number for one location to another. At the prompt enter the location to which you want to copy the selected data.

Prompt For Confirmation When Pages To Be Printed Exceed

Enter the maximum number of pages, 0-9999999, a report in the Hold file can have without requiring approval to print. Before a report prints from the Hold File, the system checks the number in this control maintenance record.

- If the report has this number or fewer pages, the job prints without requiring approval.
- If the report has more than this number of pages, the system displays a message asking if you want to print the number of pages in the report.

  Note: Reports that print directly from a screen have no page restrictions, and the system does not display any confirmation prompt, regardless of the report size.

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MAINT PROD (Product) Control Maintenance Records

The following control maintenance records belong to the PROD (Products) area within the MAINT (Maintenance) category.

Allow Duplicates In Product Families

Indicate whether a product can be included and displayed multiple times in a product family in web order entry (WOE) and sales order entry (SOE).

- **Y** – Users can enter the same product multiple times when setting up a product family. WOE and SOE display all instances of the product.
- **N** – Users can enter a product only once when setting up a product family. If duplicates are already set up in a product family, only the first instance of the product displays in WOE and SOE.

  Note: After changing this control record, rebuild the product family cache.

Default Nonstock Product Template

Select the default product template for the system to use when creating a non-PDW nonstock product. The system follows the steps below for populating the Nonstock Entry screen and the associated Product Maintenance record for the new nonstock product:

1. If the nonstock is a new PDW product, the system uses the product template entered in the PDW Product Template control maintenance record.
2. If the nonstock is not a new PDW product, the system uses the default nonstock product defined at the buy line level.
3. If a default nonstock product template is not defined at the buy line level, the system uses the default nonstock product template defined in this control maintenance record.
4. If you leave this record blank, the system uses settings in the following control maintenance records to supply default information:
   - New Nonstock Buy Line Default – The system assigns the value entered in this record as the default buy line. If the buy line is not valid, the system uses NONSTOCK.
   - New Nonstock Price Line Default – The system assigns the value entered in this record as the default price line.
   - New Nonstock Procure Group Default – The system assigns the value entered in this record as the default procure group.

Delete Stock Location With Blank Status And Zero Quantity

For each branch, indicate whether the system deletes stock locations with a blank location status when the on-hand balance goes to zero.

- **Y** – Deletes.
- **N** – Does not delete.

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The system deletes all other location types when the on-hand balance goes to zero, regardless of the setting in this record.

Enable Laminate Products

Indicate whether to activate product laminate mode. The default is **N**.

- **Y –** Activates laminate product mode if attribute 10 in the PRODUCT.NOTES file contains a value.
- **N –** Laminate product mode is not activated.

Leave Delete Products In The Pricing Index

Indicate whether to leave products with the Delete status in the pricing index, even if they have a quantity of zero.

- **Y** – Keeps products with a Delete status.
- **N –** Removes products with a Delete status.

If you change the setting for this record, run the CHECK.PRODUCT process for the change to take effect.

> **Note:** When you run the Product Sales History Report, items in a delete status are excluded from the report when their on-hand quantity reaches zero if this control maintenance record is set to **N**.

Max Products Displayed When Sequencing A PriceLine/BuyLine

Enter the maximum number of products the system displays when resequencing price lines and buy lines. The default is 5000. Setting the value greater than 5000 will result in slower processing and navigation. The system resequences each time you move an item, so refreshing the screen takes longer when larger numbers of records are involved.

> **Note:** This control maintenance record does not apply to Solar Eclipse, because display speed is not an issue.

Product Maintenance Authorization Levels

Use this record to restrict editing access for each field and hot key on the Product Maintenance screen.

On the Auth Levels Req'd to Edit Product Maintenance screen, assign a security level, 0-99, in the **Auth Level Req'd** column for each item listed in the **Field/Hot Key Description** column. The default is **0**.

The system uses the levels assigned in this record with the level assigned in a user's PROD.MAINT.LEVEL authorization key to determine which fields and hot keys the user can access for editing purposes.

- If the PROD.MAINT.LEVEL authorization key is assigned, the user must be assigned an authorization level *greater than or equal to* the security level of the field or hot key they want to use for editing purposes. For example, a user assigned an authorization level of

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50 can edit a field assigned a security level of 50 or less but cannot edit a field assigned a security level greater than 50.

- If the PROD.MAINT.LEVEL authorization key is not assigned to a user, the settings in this control maintenance record do not apply to that user. The user can access any field or hot key for editing purposes.

We recommend setting the following security level defaults:

Level	People who use this level...	Fields and hot keys to which to assign this level...
99	PDS Group/Product Queue Associates	**Fields:** Description, Keywords, UM, Quant/S;P;T;A;I, Product Select Code, GL Code, Commodity Code, Price Line, Buy Line **Hot keys:** Delete, ADes, UPCs, Copy
70	Buyers/Purchasing Manager	**Hot key:** Prices
50	Purchasing Support Associates/Sales Support Literature Associate	**Fields:** Budget Group, Status, Index, Sort Code, Procure Group **Hot keys:** Tax, Kit, Inven, Add'l
25	Warehouse Managers	**Fields:** LBS, Load/bx **Hot key:** Location
20	Possibilities include temporary employees for purchasing or warehouse	**Hot keys:** Log, Hazard, Points, Cert, Xref, UET, Subs, Seq, Reminder

User To Log Automatic Inventory Adjustments Under

Enter the user ID to assign to automatic inventory adjustments.

Valid Product Activity Sources

Enter product activity sources, up to eight characters long, that users can assign to activity log entries (trackers). Activity sources describe how, where, or why the tracker originated. The system uses these categories as sort and selection criteria for viewing the Product Activity Log or printing reports from the log.

Valid Product Catalogs

Enter the vendor product catalogs to which you can point products in Product Maintenance or sales order entry for more information. A catalog ID can be up to seven characters long.

- You can point a product to a product catalog, along with a specific page and column from the Product Maintenance screen, using the **Add'l** hot key followed by the **Product Catalog Maint** hot key.
- You can point an order to a product catalog, but without a specific page and column from the SOE Header screen, using the **Add'l** hot key followed by the **Add'l Header Info** hot key, and then the **Product Catalog** field on the Additional Header Information screen.

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Product catalogs work with the Require Product Catalog In Sales Order Entry control maintenance record, which prompts for the entry of a product catalog at the SOE Header screen.

Valid Product Certification Codes

Enter certification codes, up to 11 characters long, that describe types of regulated products, such as CFC for Chlorinated Fluorocarbon. Users can then assign this code to the appropriate regulated product using the **Cert** hot key on the Product Maintenance screen.

Valid Product Commission Groups

Enter product commission groups, up to eight characters long, to which users can assign related products for commission purposes.

Assign products to commission groups on the Product Price Maintenance screen. Assign product commission groups to commission plans. Assign commission plans to salespeople. The system pays a calculated commission when a product assigned to one of the commission groups is sold by someone whose commission plan is based on products in that commission group.

At one extreme, you can create one commission group that includes all of your products. At the other extreme, you can create a commission group for each product in the product file.

If every commission plan is based on the order total instead of groups of products or individual products, do not create any product commission groups. If you select **Order** when setting up a commission plan, the system assigns the word Default to the **Product Commission Grp** field. When the product commission group is Default, every product on the order is subject to a commission.

Valid Product Commodity Codes

On the Valid Product Commodity Codes screen, enter commodity codes to assign to product records in the **Commodity Code** field on the Product Maintenance screen. The system uses commodity codes for reporting purposes.

- In the **Commodity Code** field, enter a code up to 20 characters long.
- In the **Short Code** field, enter an abbreviated version of the code up to 12 characters long.

Valid Product Select Codes

Enter product select codes to assign to product records in the **Product Select Code** field on the Product Maintenance screen. The system uses product select codes for reporting purposes.

Valid Product Sort Codes

Enter sort codes to assign to product records in the **Sort Code** field in Product Maintenance. Sort codes can be up to 11 characters long. If you leave this record blank, users can assign any sort code to a product.

Valid Product Zones

Complete this record if your company uses product zones. Enter the product zones. Defining zones enables users to restrict product selection by bill-to customer by zone.

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MAINT PURGE Control Maintenance Records

The following control maintenance records belong to the PURGE area within the MAINT (Maintenance) category.

Minimum Days Past Bid Pricing Expire Before Purge

Enter the default number of days, 0-99999, to display in the **Minimum Days Past Pricing Expire Before Purge** field on the Bid Purge screen.

Minimum Days Past Bid Ship Date Before Purge

Enter the default number of days, 0-99999, to display in the **Minimum Days Past Ship Date Before Purge** field on the Bid Purge screen.

Months Before Purge Of EDI Archives

Enter the system defaults for the Purge Archive Documents program. For each archive, enter the number of months of archive data the system keeps whenever it runs the purge program. You can override the defaults when you run the program.

- Months Before Purge Of EDI Inbound Documents Archive
- Months Before Purge Of EDI Inbound Envelope Archive
- Months Before Purge Of EDI Outbound Envelope Archive
- Months Before Purge Of EDI Review Queue Archive
- Months Before Purge Of EDI Additional Data Archive

For example, if you enter 12 in a field, the system preserves the most recent 12 months of archived data and deletes everything that has been in the archive longer than 12 months. If you leave a field blank, the system does not delete records from that archive. If you enter zero (0), the system deletes all the records in the archive.

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MAINT SOE (Sales Order Entry) Control Maintenance Records

The following control maintenance records belong to the SOE (Sales Order Entry) area within the MAINT (Maintenance) category.

Calling Queue Use Vendor Ship Notice To Determine Orders In Trouble

For each branch, indicate whether the Customer Calling Queue considers vendor shipment notifications as a valid part of the earliest available date calculation when determining whether to list an order as being in a trouble condition.

- **Y –** Checks vendor shipment notifications.

  The system performs this check in addition to the current logic that determines if an order is in trouble. If the earliest available ship date is the plenty date, the system checks for any vendor shipment notifications where the item in question might exist. If a vendor shipment notification exists with a ship date that is later than the plenty date, the system uses the vendor shipment notification ship date to determine if the order is in a trouble condition.

- **N –** Does not check vendor shipment notifications.

Order Return To Bid Parameter

For each of the following parameters, which control returning an order to a bid, enter the number of days, 0-99999, that defines when an open order displays in the Customer Calling Queue:

- **Minimum Days Past Ship Date Before Any Action –** Number of days that must pass before the order displays in the Customer Calling Queue.
- **Minimum Days Past Complete Date Before Warning –** Number of days before a warning displays in the Customer Calling Queue.
- **Minimum Days After Warning Before Returning To Bid –** Number of days before an open order returns to a bid.

  Note: Run the Check Availability program to trigger these dates. This process is a good way to catch dead orders, which commit stock that could otherwise be available for sale.

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MAINT STATE Control Maintenance Records

The following control maintenance record belongs to the STATE area within the MAINT (Maintenance) category.

Valid State Codes

Enter an abbreviation for each state in the United States. Use the standard two-character abbreviations used by the United States Postal Service. Enter **DC** for Washington, DC.

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MAINT TAX Control Maintenance Records

The following control maintenance records belong to the TAX area within the MAINT (Maintenance) category.

Automatically Update Zip/Zip+4 Files

On the Automatically Update Zip/Zip+4 Files screen, indicate whether Eclipse updates the zip codes in your system once every quarter.

- Complete the **Automatically Update Zip+4 File** field if your system uses nine-digit zip codes. Indicate whether to update the Zip+4 database. The default is **N**.
- Complete the **Automatically Update Zip File** field if your system uses the standard five-digit zip codes. Indicate whether to update the zip code database. The default is **N**.
- In the **User to Notify when Update Completes** field, enter the user ID to whom the system sends a message when the program completes.

Valid Tax Exempt Types

Enter tax exempt types that describe the reason for a tax jurisdiction override for customers who should not be charged sales tax on purchases. Tax exempt types can be up to 10 characters long. You can assign a tax exempt number and a tax exempt type to a tax jurisdiction override on the Sales Tax screen for a customer. Typical tax exempt types are Gov't, Non-Profit, Church, and Resale. Before creating tax exempt types, review your state's rules to be sure that your company is in compliance with applicable laws.

Zip Administrator

For each branch, enter the user or message group to receive update reports and messages regarding updates to the ZIP file.

Zip+4/Sales Tax Administrator

For each branch, enter the user or message group to receive update reports and messages regarding updates to the ZIP4 file.

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MAINT UTIL (Utilities) Control Maintenance Records

The following control maintenance record belongs to the UTIL (Utilities) area within the MAINT (Maintenance) category.

Enable Network File Utilities

Indicate whether to enable the Eclipse Network File Utility, instead of SAMBA, to control your network imaging functions.

- **Y –** The system uses Eclipse Network File Utilities.
- **N –** The system uses SAMBA calls.

  Note: Do not enable the Enable Network File Utilities until you have installed the Eclipse Network File Utility on all of the PCs where it will be used. Otherwise, no part of imaging will work.

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MAINT VEND (Vendor) Control Maintenance Records

The following control maintenance records belong to the VEND (Vendor) area within the MAINT (Maintenance) category.

Hubbell Distributor IDs

Complete this record if your company runs the Hubbell Rebate Report. For each branch, enter the Hubbell Distributor ID to use for the report.

Valid Vendor Types

Enter vendor types to assign to vendors for reporting purposes. Each type can be up to ten characters long.

You can also use vendor types to select items for the A/P Preview Queue and the Print Checks program. If your company uses the Print AD Checks program, list **AD** as one of the valid vendor types. Assign that vendor type in the **Vendor Type** field on the Vendor Maintenance screen for every AD vendor to include when you run the Print AD Checks program.

Typical vendor types are:

- **Inventory** – A company from which your company buys products for resale.
- **Expense** – A company from which your company buys a commodity, such as electricity, gas, telephone service, or security services.
- **1099** – A person hired to do work for your company.

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OIC (Online Instructional Content) Control Maintenance Records

The following control maintenance record belongs to the OIC Online Instructional Content category.

Online Instructional Content Path (Dflt)

For each branch, enter the path to the directory containing the online instructional videos to access from screens using the **F11** function key.

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PALM (Palm Applications) Control Maintenance Records

The following control maintenance records belong to the PALM (Palm Applications) category.

Default Palm Pocket Order Entry Sales Source

Enter a default sales source for orders generated using Pocket Order Entry. This sales source is the default for all Pocket OE users.

Eclipse Ship Vias To Be Used With Palm Ship Vias

Enter the default system ship via to use for each of the following Pocket Order Entry hard-coded ship vias:

- Best Way
- Our Truck
- UPS
- FedEx
- Airborne
- Will Call

Map Palm Phone Codes To Eclipse Phone Codes

Use this control maintenance record to map the Palm application phone codes to your Eclipse system phone codes.

On the Phone Codes screen, the system displays the phone codes defined in the Valid Phone Codes control maintenance record in the left column. For each system code in the left column, select the corresponding Palm phone code in the right column.

- When a user transmits an account or contact record from the system to a Palm device, the system converts the system phone code to the corresponding Palm phone code.
- When a user transmits an account or contact record from a Palm device to the system, the system converts the Palm phone code to the first system phone code in the control maintenance record list that is mapped to the Palm phone code.

Palm Manifest Administrator Settings

On the Palm Manifest Administrator Settings screen, for each branch that uses Palm manifests, assign the manifest comment and error administrator settings.

- In the **Branch** field, enter the branch number for which to specify administrator settings.
- In the **Administrator to Receive Manifest Comments** field, enter the user or message group to notify if the Palm unit contains comments for a particular stop.
- In the **Comment Communication Method** field, indicate whether the system sends manifest comment notification as a message or a tracker.

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- In the **Administrator to Receive Manifest Errors** field, enter the user or message group to notify if any errors occur during the Palm sync routine.
- In the **Error Communication Method** field, select how the system notifies the administrator of manifest errors.
  - **Message –** The system sends the user or message group a message. The administrator receives an error message and the signature remains in the MSG-ACK folder.

    The benefit of selecting **Message** is ease of use. After fixing the problem that is causing an image attachment error, the administrator can run the Reprocess Images in MSG-ACK program, which attaches the image to the corresponding invoice.
  - **Tracker –** The system sends the user or message group a tracker. The attaches the manifest signature image to the error tracker. The administrator must then attach the image to the correct invoice.

    The benefit of selecting **Tracker** is persistence. That tracker remains in existence until someone closes it. If you select **Message**, it is possible that the administrator might overlook the message.

Palm Pocket OE Administrator Settings

On the Palm Pocket Order Entry Administrator Settings screen, for each branch, assign the Pocket OE administrator settings.

- In the **Branch** field, enter the branch number for which to specify administrator settings.
- In the **Administrator to Receive Errors** field, enter the user or message group to notify with any error messages generated from uploading data from Pocket OE. This administrator can also review orders uploaded from Pocket OE to the Remote Order Entry Review Queue.
- In the **Message Writer On Order Errors (Y/N)** field, indicate whether the system notifies the writer of the order with error messages generated from uploading data from Pocket OE.
- In the **Error Communication Method** field, indicate whether the system sends error notification as a message or a tracker.

Palm Product File Price Basis Fields To Be Downloaded

For each hard-coded basis field in Pocket Order Entry, select a corresponding system global basis field name.

For additional information, see the Global Buy/Sell Basis Names control maintenance record.

Palm RDC And Pocket OE Default Product If Not Found

Complete this record if your company uses RF. Create a product record named ***PALM PRODUCT NOT FOUND*** in upper case and with the asterisks, which the RDC program can assign to an RDC order in the event that an incoming product number cannot be located in your product file. Once created, assign the product to this control maintenance record.

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Palm SFA Administrator Settings

On the Palm SFA Administrator Settings screen, for each branch, assign the SFA comment and error administrator settings.

- **Branch –** Enter the branch for which to specify Palm SFA administrator settings.

  The system notifies the administrator assigned to the user's home branch. If the user does not have a home branch, the system notifies the administrator assigned to the first authorized branch. If no branch is authorized, the system notifies the first non-null administrator listed in this record. Otherwise, the system does not notify anyone.

- **Administrator to Receive SFA Errors –** Enter the user or message group to notify if any errors occur during the SFA sync routine.
- **Error Communication Method –** Indicate whether the system sends error notification as a message or a tracker.
- **Message Writer with Errors (Y/N) –** Indicate whether the system notifies the writer with error messages generated from uploading data from SFA.

Valid E-Manifest Palm IDs

On the Valid E-Manifest Palm IDs screen, enter the names that identify each of the Palm units used with your delivery vehicles. The system uses these names when setting up Palm units for signature capture and when downloading manifest information to Palm units.

Note: A Palm ID cannot contain a period (.) or space in the name.

Valid Palm Buy Line Product Download

On the Valid Buy Lines screen, enter a list of buy lines to be used when syncing products in SFA.

- When downloading products to SFA on a laptop, the system only sends products in the designated buy lines with the product statuses designated in the Valid SFA Product Statuses control maintenance record.
- When downloading products to SFA on a Palm device, the system only sends products in the designated buy lines with the product statuses designated in the Valid Products For Palm Download By Status control maintenance record.
- If no buy lines are designated, the system downloads products from all buy lines.

Valid Palm Price Line Product Download

On the Valid Price Lines screen, enter the price lines that users can download to Palm devices or laptops for Palm and SFA applications.

- When downloading products to SFA on a laptop, the system only sends products in the designated price lines with the product statuses designated in the Valid SFA Product Statuses control maintenance record.
- When downloading products to SFA on a Palm device, the system only sends products in the designated price lines with the product statuses designated in the Valid Products For Palm Download By Status control maintenance record.

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- If no price lines are designated, the system downloads products from all price lines.

Valid Products For Palm Download By Status

Enter the product statuses that users can download to a Palm unit from the system. Use this record to restrict the products that users can download to a Palm unit to those with a product status that is specified in this record.

> **Note:** If you change the product statuses on the Valid Product Statuses screen, do a full refresh of the product file on the Palm unit using the **Full** option on the Product File Sync Update screen.

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PALM RDC Control Maintenance Records

The following control maintenance record belongs to the RDC (Remote Data Collection) area within the PALM (Palm Applications) category.

Disable RDC Sync Logging

Indicate whether to disable the generation of a sync log and messaging for RDC orders. If you leave this field blank, the default is **N**.

- **Y –** RDC sync logging is disabled. The system does *not* generate an RDC sync log when RDC creates an order. Disable the sync log if your company performs numerous syncs and is not experiencing any errors.
- **N –** RDC sync logging is enabled. The system generates an RDC sync log. When RDC syncs, the system sends a message to the RDC administrator for every non-zero item.

  Note: If your company uses RDC for consignment purposes, we recommend that you leave RDC sync logging enabled. Consignment orders are confusing and you can use the log to decipher how the system generated a suggested transfer amount.

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PALM SFA Control Maintenance Records

The following control maintenance record belongs to the RDC (Remote Data Collection) area within the PALM (Palm Applications) category.

Palm Contact Customer Account Description Synchronization

Complete the following fields to determine which fields the system updates in Customer Maintenance on the host and in Palm Contacts when syncing company name information. In Customer Maintenance the system stores the company name in two fields; on Palm devices, Contact Manager stores the company name in one field.

> **Note:** Before changing the setting in this record, sync all contact information.

Complete the following fields:

- In the **Palm Contact Customer Account Description To Download** field, select which name from Customer Maintenance the system downloads to the Contact Manager when users update their Palm units with customer information.
  - **Name –** The system downloads the name from the **Name** field on the Customer Maintenance screen.
  - **Index –** The system downloads the name from the **Index** field on the Customer Maintenance screen.
- In the **If Host's Contact Name and Index are Equal Update Both** field, indicate whether the system updates the **Name** and **Index** fields in Customer Maintenance when users change a company name in Contact Manager.
  - **Y –** The system updates both fields in Customer Maintenance.
  - **N –** The system only updates the field in Customer Maintenance used to download the customer name to the Palm device.

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PALM SRIAL (Serial Numbers) Control Maintenance Records

The following control maintenance records belong to the SRIAL (Serial Number) area within the PALM (Palm Applications) category.

Serial Number Sync Administrator Settings

On the Serial Number Sync Administrator Settings screen, for each branch that syncs serial numbers using Palm devices, designate who is to receive error messages and the method of communicating these errors.

- In the **Branch** field, enter the branch for which to define administrator settings.
- In the **Administrator to Receive Errors** field, enter the user or message group to notify if any errors occur during the serial number sync routine.
- In the **Message Writer with Errors (Y/N)** field, indicate whether the system sends a message to the order writer if a problem arises when serial numbers are synced with the system.
- In the **Error Communication Method** field, indicate whether the system sends error notification as a message or a tracker.

Sync Serial Number Receiving/Picking Data From Palm

For each branch, indicate whether to enable the syncing of serial numbers captured on a Palm unit back to the system during receiving and invoicing. The setting in this record also determines whether the OE Serial Entry screen displays the **Palm Queue** hot key for accessing the Palm Serial Number Queue, which displays serial number information that was not updated to a purchase or sales order.

- **Y –** The system syncs. The **Palm Queue** hot key displays.
- **N –** The system does not sync. The **Palm Queue** hot key does not display.

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POE Best Cost Check Control Maintenance Records

The following control maintenance records belong to the POE (Purchase Order Entry) category and apply to best cost checking.

Best Cost Check Through All Matrix Cells For Purchase Orders

The system uses this control maintenance record only if the Enable Best Cost Check In Purchase Order Entry control maintenance record is set to **N**.

Indicate whether the system checks all effective matrix cells for the best cost for an item, regardless of the type of matrix cell. The default is **N**.

- **Y –** Checks all effective matrix cells for the best cost for an item, regardless of the type of matrix cell. For example, if a vendor/group matrix cell has a better cost than a vendor/product matrix cell, the system uses the vendor/group cost.
- **N –** Checks effective matrix cells according to the normal costing hierarchy and respects the setting in **Best Price Check** field in the matrix cells that are checked.

  Note: The functionality in this control maintenance record is in effect for both Buy Matrix Maintenance and Quick Buy Matrix Maintenance.

Enable Best Cost Check In Purchase Order Entry

Use this record to ignore the effective date hierarchy imposed when finding the best price for a purchase order. In Release 7, if two buy matrix cells are created for the same vendor for the same product or group, the system uses the cell that has the most current effective date.

For Release 8, indicate whether to enable best cost checking in Purchase Order Entry. The default is **N**.

- **Y –** The system uses the buy matrix cell that has the better price for your purchase order. If multiple associated matrix cells are in effect for the same vendor and product/group, the system selects the matrix cell with the lowest cost, regardless of the effective date unless you select a different matrix cell with the **Use Matrix Cell** hot key on the Vendor Matrix Cell Selection screen.

  Note: You can override a system-selected contract and use a different contract by using the **Pricing** hot key and then the Matrix hot key. The **Matrix** hot key is highlighted if multiple matrix cells are in effect. Following an override, the system notes the user, associated information, and what the user did in the change log for Purchase Order Entry.

  - If multiple matrix cells are in effect, the **Matrix** hot key invokes both a select and copy functionality and you can use the **Select Cost Matrix** option.
  - If multiple matrix cells are not in effect, the **Matrix** hot key only invokes the copy functionality.

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- **N –** The system uses the buy matrix cell with the most current effective date. The system uses the setting in the Best Cost Check Through All Matrix Cells For Purchase Orders control maintenance record to determine which matrix cell to use.

  Note: The functionality in this control maintenance record is in effect for both Buy Matrix Maintenance and Quick Buy Matrix Maintenance.

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POE Defaults Control Maintenance Records

The following control maintenance records belong to the POE (Purchase Order Entry) category and apply to POE defaults.

Default Br Stock Value When A Product Becomes Active

For each branch, select the default stock value to display for a product in the **Stk** column on the Primary Inventory Maintenance screen when that branch activates a product. The first time a product is received, invoiced, or shipped in a branch and the stock value for the branch is not defined, the system assigns the value from this record to that branch. The options are:

- **Blank –** No change occurs
- **Y** – Stock
- **N –** Nonstock
- "-" – System-calculated

If you change the setting for a branch in this control maintenance record, that change only affects the stock value for a newly activated product. The values assigned to products activated before the change remain unchanged.

> **Note:** You can override the default setting for a product on the Additional Inventory Parameters screen. In this case, the system displays an asterisk (*) after the value.

Default P/O Procurement Confirmation Queue Sort

Select the default sort order for orders in the Procurement Confirmation Queue.

- **Customer** – Orders sort first by customer and then by order number.
- **Ship Via –** Orders sort first by ship via, then by customer, and then by order number.
- **Buy Line** – Orders sort first by buy line and then by order number.

Default Ship Via For Purchase Orders

Enter the default ship via to display for purchase orders on the P/O Procurement Confirmation screen. When you procure an item in order entry, you can use this default ship via or specify another.

Job Queue Default Comment For P/O Expedite Queue

Enter a comment to display on the first line of any tracker generated using the **Job Queue** hot key on the P/O Expedite Queue screen or the **Create Job Queue** hot key on the Log Call screen.

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POE General Control Maintenance Records

The following control maintenance records belong to the POE (Purchase Order Entry) category.

Allow Alternate Branch Bill-To Address

Indicate whether to allow branch records to use alternate bill-to addresses for purchase orders.

- **Y –** The Branch Maintenance screen displays the **PO Bill-To** and **PO Bill-To ID** fields.
- **N –** The Branch Maintenance screen does *not* display the **PO Bill-To** and **PO Bill-To ID** fields.

Auto Open Multiple Vendor Matrix Cells

Indicate whether the system displays the Vendor/Product Matrix Selection screen when multiple contracts are in effect for the same vendor and product during order entry.

- **Y –** Displays the Vendor Matrix Cell Selection screen. This screen lists all of the associated matrix cells and associated comments, if there are any, in effect for that vendor and product/group.

  Note: Using this functionality can become tedious on a very large purchase order. If multiple matrix cells are *not* in effect, the system does not display the Vendor Matrix Cell Selection screen, but uses the matrix cell it finds for the vendor and product.

- **N –** Does not display the Vendor Matrix Cell Selection screen.

  Note: To manually open the Vendor Matrix Cell Selection screen from Purchase Order Entry, use the **Pricing** hot key and then the **Matrix** hot key. When multiple contracts exist, the **Matrix** hot key is highlighted.

Automatically Calculate Duty Charges For Purchase Orders

Indicate whether the system calculates duty charges on purchase order products for which the **Duty Harmonizing Code** and **Country of Manufacture** fields are populated in Product Maintenance.

- **Y –** Calculates the duty and freight amounts when you add the product to a purchase order. If you remove the product from the order or change the quantity, the system adjusts the duty and freight amounts accordingly.
- **N –** Calculates the duty and freight amounts when you use the **Duty** hot key on the Purchase Order Entry screen to access the Customs Drawback Information screen for each line item.

Confirm Override Of Print Status 'E' On Purchase Orders

Indicate whether the system should prompt a user to confirm the change when the user manually changes the print status of a purchase order from an **E** to any other print status. The default is **Y**.

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If the user confirms the change, the system prompts with the standard Reason For Change box. The system records the reason for change in the order change log along with the following comment: Print Status Changed From E to New Status by [User ID].

- **Y** – Prompts the user to confirm the change.
- **N** – Does not prompt the user to confirm the change.

Copy Procure Comments To P/O

For each branch, set this control maintenance record to **Yes** to copy the comments regarding procurements to the associated purchase order. The default setting is **No**.

Exclude Original Sale Line Item Comment From Returned P/O

Indicate whether the system should copy original sales order line item comments to a purchase order created from the Return Goods Queue.

- **Y** – Does not print original sales order comments on the P/O.
- **N** – Copies original sales order comments to the P/O.

Flag Product As Exceptional In Purchase Order Entry For

Select when the system flags products as Exceptional for a credit/rebill transaction in purchase order entry. The default is **RCR**.

Option	Flags products as...
NON - None	Stock, regardless of the type of Credit/Rebill being done.
ALL - All	Exceptional, regardless of the type of Credit/Rebill being done.
CR - Credit/Rebill	Exceptional, only if the user performs both a Credit and a Rebill.
C - Credit Only	Exceptional, only if the user performs a Credit Only.
R - Rebill Only	Exceptional, only if the user performs a Rebill Only.
COR - Credit Only or Rebill Only	Exceptional, if the user performs a Credit Only -or- a Rebill Only.
CCR - Credit Only or Credit/Rebill	Exceptional, if the user performs a Credit Only -or- a Credit and Rebill.
RCR - Rebill Only or Credit/Rebill	Exceptional, only if the user performs a Rebill Only -or- a Credit and Rebill.

Regardless of how this control maintenance record is set, the system flags products as Exceptional only if they are flagged as Stock before the credit/rebill is performed. For example, if a product is flagged as Defective before a credit/rebill, the system keeps the Defective status after the credit/rebill is complete. Products that are tagged on the generation upon which a credit/rebill is performed change to Exceptional when appropriate on the credit and/or rebill generations.

Johnstone Corp Valid Ship Vias

Enter the Johnstone Corporation ship via choices to display when using the **Label** hot key on the POE Body screen.

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Include Directs In Vendor Target Check When Printing A P/O

Use this record to have the system check a vendor's minimum target level for directs as well as regular purchase orders before printing them.

- **Y –** The system checks the vendor's minimum target level for direct orders.
- **N –** The system does not check the vendor's minimum target level for direct orders.

Maximum Difference Percentage From Average Cost In POE

Use this record to regulate the amount of change users can make to the cost of an item on a purchase order.

For each pricing branch, enter the maximum percentage by which users can change the cost without the system displaying a warning. If you leave this field blank for a branch, the warning logic is not in effect.

When a buyer changes the cost of a line item on a P/O and the difference between the cost on the P/O and the moving average cost is greater than the percentage entered in this record, the system displays a warning. Users assigned the POE.MAC.OVERRIDE authorization key can override the warning.

> **Note:** If all quantities on a generation are tagged, and the Include Tagged Quantities In Cost Calculation control maintenance record for the *shipping* branch is not set to **Purchase Orders** or **Both**, the system does not perform this check.

PO Header Branch Change Copy To

Select whether to copy a change to the branch in a P/O header to the price branch, copy the change to all branches, or prompt the user to specify where to copy it.

Print P/O Receiver Instead Of Receiving Register

By default, when a user receives a purchase order on the Stock Receipt Entry screen, specifies **Y** in the **Prt** field on the Stock Receipts Status screen, and then presses **Esc** to exit the screen, the system prints the Receiving Register.

Use this record to enable branches to print the P/O Receiver instead of the Receiving Register in Stock Receipts. For each branch, indicate whether the system should print a P/O Receiver.

- **Y –** Prints the P/O Receiver for the purchase order.
- **N –** Prints the Receiving Register for the purchase order.

Re-Sort Purchase Items When Closed For Branch

For each branch, select whether the system re-sorts items on a purchase order by location when the order is received and, if so, how it re-sorts them. Re-sorting can facilitate putting away the order. The re-sort occurs at the time the system processes the order, generally when the Phantom prints the order. After the order is processed, the new order of line items displays on the purchase order and on the screen.

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- **Primary Loc** – Sorts by the primary location specified in Product Location Maintenance.
- **Line Item Loc** – Sorts by the location selected for the line item on the order using the Scheduling screen. The system uses the ship/stock branch.
- **Description** – Sorts by product description.
- **No** – Does not sort.

  Note: If you set a branch to **Primary Loc** or **Line Item Loc**, unattached comments sort to the top of the list, since they do not have an assigned location.

Shipping Branch Override For POE

For each branch, enter the default shipping branch to assign to a purchase order when a **Shipping Branch Override** is not assigned to the vendor and a shipping branch is not assigned to the terminal where the order is being written.

Update The Required Date With The Ship Date Received On An EDI 855

Indicate whether the system updates the required date on EDI purchase orders with the ship date received on EDI 855 P/O Acknowledgements.

You can override the system default at the trading partner level using the **Use the Update Req'd Date with the Ship Date** field on the EDI Add'l Doc Info screen for inbound 855s.

Use Vendor Print Status Override On The P/O Side Of A Direct

Indicate whether the system should use the setting in the **Print Status Override** field on the Miscellaneous Vendor Information screen when determining the default print status of the purchase order side of a direct order.

If the **Print Status Override** field is blank or this control record is set to **N**, the Order Status Print Status Defaults control maintenance record determines the default print status for the system.

- **Y** – Uses the vendor **Print Status Override** setting.
- **N** – Does not use the vendor **Print Status Override** setting.

Valid Vendor ASL Types

On the Valid Vendor ASL Types screen, define codes used to identify whether a vendor is on an approved supplier list. Once defined, you can assign codes to vendors in Vendor Maintenance and create vendor supplier lists for customers in Customer Maintenance. To define each code:

- In the **Code** field, enter a one-character alphanumeric code.
- In the **Description** field, enter a description of the vendor type the code represents.
- In the **Hold** field, indicate whether this type of vendor is an approved supplier.
  - **Y** - Approved supplier.
  - **N** - Not an approved supplier.

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When a purchase order is placed with an unapproved supplier, it is placed on hold. Users assigned the POE.ASL.RELEASE authorization key can release the hold.

Vendor Freight Terms

On the Vendor Freight Terms screen, define freight terms codes to assign to vendors. The terms can restrict entry of freight on a purchase order, require a freight vendor to be specified, notify the user that the vendor is freight allowed, require the user to enter a freight amount when the purchase order is received, or prohibit the user from entering a freight vendor on the Totals screen of the purchase order.

For each freight terms code you create, you can assign any of the following pre-defined restrictions:

Restriction	Function
Warn On Freight Entry	Warns you that the vendor is freight allowed if you attempt to add freight to the order.
Do Not Allow Freight	Prevents you from adding freight to the order and warns you that you cannot enter freight under that freight term.
Require A Freight Vendor	Requires you to specify a freight vendor if you enter freight on the order.
Require Freight When Received	Requires you to enter a freight amount when the P/O is received.
Do Not Allow A Freight Vendor	Prohibits you from entering a freight vendor on the Totals screen of the P/O.
Require BOL When Received	Requires you to enter a Bill of Lading number (BOL) on the POE Totals screen when the P/O is received.

When you create a purchase order, the system populates the **Freight** field on the order's Header screen with the vendor's freight terms code. You can change the default terms. If freight terms are not defined for the vendor, the system prompts you to complete the **Freight** field. For more information, see Defining Vendor Freight Terms.

> **Note:** Before changing the settings for this control maintenance record, you must contact Eclipse Support. If you delete the entry for this record, the system reverts back to an earlier version of the record, where the only options were Yes or No.

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POE Prompts Control Maintenance Records

The following control maintenance record belongs to the POE (Purchase Order Entry) category and applies to prompts.

Prompt For Lot ID On Process Of P/O

Indicate whether the system prompts for a lot ID when it processes a lot item on a purchase order.

- **Y –** The system displays the Split Locations screen, so the user can assign the received quantity to an existing location and lot ID, split the quantity among any number of existing locations and lot IDs, or not assign the quantity to any location and lot ID. If the user does not assign the quantity to an existing location and lot ID, the system then assigns the quantity to the next lot ID number.
- **N –** The system assigns the quantity to the next lot ID number without prompting the user with the Split Location screen.

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POE COST Control Maintenance Records

The following control maintenance record belongs to the COST area within the POE (Purchase Order Entry) category.

Capitalize Tax On Purchase Orders

For each branch, indicate whether the system should capitalize the purchase order tax by including it in the Landed Average Cost and Landed Last Cost calculations when the branch is the receiving (material) branch for a purchase order. The default is **N**.

- **Y –** Tax capitalization occurs.
- **N –** Tax capitalization does not occur.

  Note: This record does not apply to direct purchase orders.

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POE RETRN (Returns) Control Maintenance Records

The following control maintenance records belong to the RETRN (Returns) area within the POE (Purchase Order Entry) category.

Append Return Comments To Return Goods Queue And Rtrn Gds PO

Indicate whether to print return comments on a return sales order. The default is **Y**.

- **Y –** If you enter a comment for a returned product in the **Return Comments** field on the Return Goods Verification screen, that comment displays in the **Product Description** field on the Sales Order Entry screen for the return order.
- **N –** Comments entered in the **Return Comments** field on the Return Goods Verification screen do not display on the return order.

Return Goods Queue Default Select Option

Select whether to display **Buy Line** or **Price Line** as a selection field in the header of the Return Goods Queue screen.

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POE SRIAL (Serial Numbers) Control Maintenance Records

The following control maintenance record belongs to the SRIAL area within the POE (Purchase Order Entry) category and applies to serial numbers.

Prompt For Serial Numbers When Processing Any Type Of Order

For each branch in the company, indicate whether the system prompts for serial numbers for serialized products during receiving and invoicing. The default is **N**.

- **Y** – Prompts for serial numbers as follows:
    - If a product is set up for *incoming* serial numbers, the system prompts the user to enter serial numbers when a purchase order for that product is received.
    - If a product is set up for *outgoing* serial numbers, the system prompts the user to enter serial numbers when a sales order for that product is invoiced.
- **N –** Does not prompt for serial numbers during receiving or invoicing.

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POE SUBS (Substitutes) Control Maintenance Records

The following control maintenance records belong to the SUBS (Substitutes) area within the POE (Purchase Order Entry) category.

Auto Open Substitute Window For Items W/O Avail In POE

Indicate whether the system displays the Substitute/Add On Sale Item screen in purchase order entry if a user enters a product with no current available quantity and the product has a valid substitute or other product type.

- **Y** – Displays the screen.
- **N** – Does not display the screen.

Default B/O Days For Purchase Orders

Enter the default number of backorder days the system should use when the **B/O Days** field in Vendor Maintenance is null. If you leave this record blank, the default is three days.

Default Setting For Bill Incoming Freight To Tagged Sales Order Field

For each branch, enter the default setting, **Y** or **N,** for the **Bill Incoming Freight to Tagged Sales Order** field on the POE Totals screen.

The setting in this record also determines the freight factor billing default when distributing freight costs from the Shipment Maintenance screen. When you use the **Freight** hot key on the Shipment Notification screen, the system populates the **Bill Incoming Freight to Tagged Sales Order** field with this value.

Purchase Order Freight Capitalization Default

For each branch, select the default load factor at the purchase order level when distributing freight costs on the POE Totals screen. The system populates the **Capitalize Freight** field on the purchase order Totals screen with this value.

- Dollars
- Pieces
- Weight
- Load Factor
- Freight Factor
- None

The value in this record also sets the default load factor at the purchase order level when distributing freight costs from the Shipment Maintenance screen.

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Require Purchase Order Entry Header Screen Entry

Indicate whether to force the POE Header screen to display upon the first escape from the POE Body screen. If you go back again to the Body of the order before leaving the order completely, the Header screen does not display on the subsequent escape.

- **Y –** Forces the POE Header screen to display.
- **N –** Does not force the POE Header screen to display.

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RDC (Remote Data Collection) Control Maintenance Records

The following control maintenance records belong to the RDC (Remote Data Collection) category.

RDC Administrator Settings

For each branch, designate who to notify about order or cycle count errors generated using the RDC system.

- In the **Branch** field, enter the branch for which to assign the order and cycle count error administrators. You must enter a branch to move the cursor to the other fields.
- In the **Administrator to Receive Order Errors** field, enter the user ID or message group to notify about order errors.
- In the **Message Writer with Order Errors (Y/N)** field, indicate whether the system should notify the writer of the order about order errors.
- In the **Administrator to Receive Cycle Count Errors** field, enter the user ID or message group to notify about errors that occur during an RDC cycle count.
- In the **Error Communication Method** field, select whether the system sends the administrator a message or tracker when an error occurs.

Round To Sell Package Quantity On RDC Orders And Pocket OE Orders

Indicate whether the system should round the order quantity on RDC orders to the sell package quantity.

- **N** (No) – Does not round the order quantity.
- **F** (Force) – Rounds the order quantity.
- **W** (Warn) – Displays a warning that you should round the order quantity.

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RDC SRC (Source) Control Maintenance Records

The following control maintenance record belongs to the SRC (Source) area within the RDC (Remote Data Collection) category.

Default RDC Sales Source

Enter a default sales source for remote data collection.

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RENTL (Rentals) Control Maintenance Records

The following control maintenance records belong to the RENTL (Rentals) category.

Commission Base Rental GP%

For each branch, enter the gross profit percentage to use for calculating commissions on rentals.

The Commissions Report uses this percentage when rentals are included in the report.

Default Rental Check-Out/Check-In Times

On the Default Rental Check-Out/Check-In Times screen, flag the time and date options that determine the default check-in and check-out times for your company. If you leave this record blank, the system prompts users to enter the date and times in Rental Agreement Entry.

Default Rental G/L Account

Enter the default general ledger account used for billing rental products.

Default Rental Retirement Method

Use this record to specify how the system calculates depreciation of rental items. Select the method the system uses to assign a default residual value to a retired rental item. The system displays this value in the **Retirement Value** field on the Rental Product Retirement screen. You can change the default value while retiring the item, if necessary.

- In the **Retirement Method** field, select an option:
  - **Depreciated Rate** - The system calculates the retirement value by depreciating the original value yearly by the percentage entered in the **Depreciated Percentage** field. This is the default method.
  - **Full Initial Rate** - The system uses the original purchase price of the item as the retirement value
- In the **Depreciated Percentage** field, enter the percentage by which the system should calculate the retirement value, if you selected Depreciated Rate as the retirement method. Otherwise, you cannot access this field.

Enable Rental Best Price Check

Indicate whether the system should compare all possibilities for pricing a rental item and select the best price. For example, if you rent an item for three weeks, the monthly rental rate may be cheaper than the weekly rate multiplied by three.

- **Y –** The system checks for the best price.
- **N –** The system bases the price on the rental code entered on the rental agreement.

Rental Deposit %

Enter the default percentage of the original cost of the item required as a deposit.

If a deposit percentage is not entered on the Rental Product Maintenance screen, the system uses the percentage in this record to calculate the required deposit.

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Rental Hours Per Day

Enter the number of hours, 0-99999, that constitute a rental day. Some companies use an eight-hour day, while others might use a 12-hour or even a 24-hour day. This number must match the calculated day rate entered on the Rental Code Maintenance screen.

Because all rental codes are user-defined, the rental hours per day must be specified in advance for billing purposes.

Rental Minimum Rate Amount

Use this control maintenance record to set a minimum rental rate amount for all rental products.

- In the **Rental Minimum Rate Code** field, select the rental time code to which to apply the minimum rate amount. For example, if the minimum rental time is three hours, select HR. To designate a minimum flat charge that is not dependent on time, select FLAT.
- In the **Rental Minimum Rate Amount** field, enter the amount to charge for the minimum time specified in the **Rental Minimum Rate Code** field.

A minimum rental rate amount entered at the product level overrides the setting in this record. If you leave this record blank and do not enter a minimum rate at the product level, the system does not charge a minimum rental rate amount for the designated product.

When a minimum rate amount is specified for a product, the system compares the calculated rental price to the minimum rate amount and selects the higher number.

Rental Order Default Billing Cycle

Select the default billing cycle for billing customers for rental products. If you leave this record blank, the default is OneTime.

- OneTime
- Monthly

Rental Product Return To Inventory Status

Select the status the system assigns by default to a rental product when it is returned.

- **In Stock –** The product is in the rental area and available for renting.
- **Maint Due –** The product is in the maintenance area being serviced and unavailable for renting.
- **Check In –** The product has been returned, but someone must decide whether it should go to Maintenance or back to In Stock.
- **Pick Up –** The product is ready to be picked up at a customer site and is unavailable for renting.

Use Split Rate Calculation On Rental Orders

Indicate whether the system can calculate a rental charge using multiple rental rates.

- **Y –** The system calculates the rental charge using the two rental codes defined on the Rental Code Maintenance screen that are most appropriate, time-wise, to the amount of

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time a customer rents an item. If the system calculates a charge for each of two rates, those charges are combined to determine the total charge.

For example, your company rents items by the day at $100/day for a 24-hour day, or by the hour at $20/hour. If a customer rents an item for 28 hours, the system charges for one day ($100) and four hours (4 * $20/hour = $80) for a total of $180 ($100 + $80).

- **N –** The system bases the charge on the rental rate nearest to the amount of time an item is rented.

  Using the above example, the charge would be one day for a total of $100.

  Note: The setting in this record determines the default rate calculation method. You can edit totals on the Rental Agreement Body screen and override split rate calculation on the Rental Agreement Header screen.

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RF CONV (Conveyor) Control Maintenance Records

The following control maintenance records belong to the CONV (Conveyor) area within the RF (Radio Frequency) category and apply to tote parameters.

RF Conveyor Number Of Chutes

Complete this record if the RF Enable Conveyor For Picking Totes control maintenance record is set to **Y**.

Enter the number of chutes connected to the conveyor.

RF Conveyor Number Of Totes Per Chute

Complete this record if the RF Enable Conveyor For Picking Totes control maintenance record is set to **Y**.

For each branch, enter the maximum number of totes each chute can hold.

RF Enable Conveyor For Picking Totes

For each branch, indicate whether to enable a conveyor system for picking totes.

- **Y** – Enables a conveyor system.
- **N** – Does not enable a conveyor system.

User To Be Messaged With RF Conveyor Errors

Complete this record if the RF Enable Conveyor For Picking Totes control maintenance record is set to **Y**.

Enter the user or message group to notify when the system detects errors with the conveyor system, such as an invalid tote number assigned to a chute number.

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RF COUNT Control Maintenance Records

The following control maintenance records belong to the COUNT area within the RF (Radio Frequency) category and apply to inventory counting parameters.

Unauth User Finds Discrepancy In RF Cycle Cnt By Loc

Use this record to prevent unauthorized users from creating inventory adjustments through the Eclipse RF cycle count by location.

Press **F10** and select one of the following to determine that If a location count is off for a product, then:

- **Queue Remaining** – The system generates immediate count requests for this product/location and all remaining related locations for this product not yet counted on the current cycle count date. A user with PRD.LOCATION.MAINT Level 3 authorization can count these locations and make any needed adjustments.
- **Force Count All –** The user must count the items in all locations for this item. If the overall on-hand of the product does *not* change, the system makes the adjustment by moving locations around. On the other hand, if at the end of this count the on-hand quantity is still incorrect, the item and all locations for it generate immediate count requests for an authorized user to review.

Allow Abort From Related Counts In RF

When an item is counted in a location and the quantity does not match, the system requires that all known locations for that item be cycle counted. Use this control maintenance to queue locations to be cycle counted.

Indicate whether to allow a user to abort out of the Related Counts screen during a cycle count after changing the quantity of an item at a location on the Cycle Counting screen.

- **Y –** Allows a user to abort.

  Note: If set to **Y** and an item quantity at one location is changed and the other locations for the item are not counted, there may be a discrepancy between the actual quantity on hand and the quantity that the system thinks you have on hand.

- **N** – Does not allow a user to abort.

  We recommend that you keep this record set to **N**, except on a temporary basis when you set it to **Y** before doing a count of the entire warehouse. Remember to change the setting back to **N** after finishing the cycle count.

  Note: The RF.COUNT.ABORT and RF.COUNT.ABORT.IM authorization keys override the setting in this record. We recommend using the authorization keys to control cycle counting.

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Allow Vendor Consignment Modifications Through RF Cycle Count

For each branch, indicate whether to allow users to decrease vendor consigned inventory using RF cycle counting. Enter one of the following:

- **N –** Does not allow users to decrease vendor consigned inventory using RF cycle counting. If users attempt this process, the system displays a warning message and maintains the current consigned quantity. This is the default.

  For example, if location N1-C1-01 has eight stock items and four vendor consigned items and a user attempts to change the total count to three items, the system maintains the vendor consigned quantity at four, displays the error message, and then decreases the stock items to zero.

- **Y –** Allows users to decrease vendor consigned inventory through RF cycle counting. For example, if you set this control maintenance record to **Y**, the system decreases the stock items to zero and the consigned inventory items to three.

  Note: Users cannot increase vendor consigned inventory quantity using this control maintenance record even if it is set to **Y**.

Location Types To Be Included In RF Cycle Count

Enter the product location types to include in an RF cycle count. You can create a list with multiple product location types. The default entry is **S – Stock**. Options include:

- **S – Stock**
- L – Display
- F – Defective
- O – Over Shipment
- R – Review

This record controls which product location types are updated. Tagged on-hand locations are not updated.

When handling discrepancies during cycle counting and you select the **Enter Related Counts** or **Queue Related Counts** option, the system displays only those locations containing location types defined in this control maintenance record. If a location contains more than one location type and at least of its types is included in the control maintenance record, then the user's count is for all location types in the location.

RF Cycle Count Dollar Cutoff

Use this record to *not* force users to count other locations if the dollar variance is considered negligible.

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For each branch, enter a minimum dollar variance that the system will accept during a daily cycle count and the price basis to use for calculating the variance.

- In the **Dollar Amount** field, enter the allowable dollar variance.
- In the **Basis to Use** field, press **F10** and select the price basis to use for calculating the variance amount.

When entering a count, the system responds in one of the following ways:

- If the total variance for a counted location *is less than or equal to* the minimum specified in this record, the system updates the count and directs the user to the next count location.
- If the total variance for a counted location *exceeds* the minimum specified in this record, the system forces the user to count all locations for the product before continuing to the next pick in the sequence.

If you leave this record blank, the system follows the normal daily cycle count process.

Use the **Copy to Br/Tr/All** hot key to copy the settings for one branch to another. At the prompt, enter the branch, territory, or the word **all**.

RF Cycle Count Location Priority

On the RF Cycle Count Location Priority screen, for each branch specify which location types should receive priority when an adjustment is necessary for a location with more than one stock type. Priority location #1 holds onto its inventory the longest.

If you leave this record blank, the default priority locations are: 1) Tagged, 2) Stock, 3) Over Shipment, 4) Review, 5) Defective, and 6) Display.

To change the default priority locations, at each priority number press **F10** and select a location. Assign locations to all six priorities.

To copy the priorities set up for one branch to other branches, use the **Copy to Br/Tr/All** hot key. At the prompt, enter the branch or territory to copy to. Enter **All** to copy the priorities to all branches and territories.

RF Cycle Count Max Entries

For each branch in the company, enter the maximum number of items, 0-99999, that can be in the Cycle Count Queue. The default number is 300.

> **Note:** The system assigns negative quantities and bad locations to the queue regardless of the number entered here.

RF Cycle Count Min Cycle Repeat Days

For each branch, enter the number of days, 0-999, from an item's count date before the item displays again for cycle counting. The default number is 60, which means that the system counts all A ranked items every 60 days.

RF Cycle Count Use Rank Number

For each branch, select the product ranking method number the Warehouse Operation Queue program uses to select items for the Cycle Count Queue. If you leave this record blank, the default is 1.

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Note: The ranking methods assigned to Rank #1-Rank #5 are defined on the Product Ranking screen.

RF Physical Count Qty Warning Level

For each branch, enter an RF physical count quantity, 0-99999, at or above which the system displays the following message: Is Qty REALLY ---? (Y/N).

- If the user answers **Y**, the system accepts the quantity entered.
- If the user answers **N**, the system displays a new prompt asking the user to enter a quantity.

Stop Immediate Cycle Count When Variance Found

For each branch, indicate whether users can stop an immediate cycle count if they have accounted for the variance that initiated the cycle count.

In the Enter Related Counts portion of the cycle count program, if the user enters one or more quantities for different locations that bring the product's total on-hand to what the system thought it should be before the cycle count began, the system consults this control maintenance record.

- **Y –** The system prompts the user to continue counting or stop, because the variance has been found. If the user chooses to stop, the system assumes that the quantities for every un-counted location are correct and the cycle count finishes as if the user had counted them.
- **N –** The system requires the user to continue counting each location.

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RF MAIN Control Maintenance Records

The following control maintenance records belong to the MAIN area within the RF (Radio Frequency) category.

Enabled RF Branches

Lists the total number of branches authorized to use RF, and the total that have been enabled using the RF Enable Inprocess Queue for Types control maintenance record. This record also lists which branches are enabled for RF.

Default View For RF Location Maintenance

Select the default view for the RF Location Maintenance screen.

View	Displays columns for...
Location/Qty	Product Location, Onhand Quantity, Lot/Serial#, Location Type, Product Location Status, Warehouse Status, and Home Location.
Location/Qty/Type	Product Location, Onhand Quantity, Location Type, Product Location Status, Lot/Serial#, Warehouse Status, and Home Location.
Location/Qty/Stat	Product Location, Onhand Quantity, Product Location Status, Location Type, Lot/Serial#, Warehouse Status, and Home Location.
Replenish Min/Max	Product Location, Minimum Quantity, Maximum Quantity, Location Type, Product Status, Warehouse Status, and Home Location.
Location/Cnt Date	Product Location, Onhand Quantity, Product Last Count Date, Location Type, Product Status, Warehouse Status, Lot/Serial#
Location/Exp Date	Product Location, Onhand Quantity, Product Expiration Date, Location Type, Product Status, Warehouse Status, Lot/Serial#
Location/Recv Date	Product Location, Onhand Quantity, Product Receive Date, Location Type, Product Status, Warehouse Status, Lot/Serial#
Location/Qty/UM	Product Location, Onhand Quantity, Unit of Measure, Receive Date, Location Type, Product Status, Warehouse Status, Lot/Serial#

RF Default Location Status

For each branch, select the default location status the system uses when RF programs create a location. We recommend that you select **F–Floating**, because the system deletes a floating location once it is empty. Options include:

- **P** – Primary
- S – Secondary
- F – Floating
- R – Remnant

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RF Enable Tote Validation

For each branch, indicate whether the system validates that totes scanned during RF Picking, Receive Verify, Replenishment, Tote Consolidation, Tote Auditing, Move Product, and Tote Inquiry have TOTE as the prefix.

- **Y –** The system validates totes. If the scanned tote does not contain TOTE as the prefix, the system beeps and re-prompts the user to scan the tote.
- **N** – The system does not validate totes.

  Note: If the RF Scan Location To Tote For Immediate Put Away control maintenance record is activated, de-activate this control maintenance record so that users can scan a location in the **Tote** field.

RF Enable Warehouse Inprocess Queue For Types

For each branch that uses RF, press **F10** and select the types of orders the RF system handles.

If your company uses Manual Shipment Receiving, you must select the **Shipment Receiving Only** type to enable the creation of in-process records when shipments are created in Shipment Receipts Entry.

- **S** – Sales Order Picking
- **C** – Sales Order Receiving (Returns)
- **P** – Purchase Order Receiving
- **R** – Purchase Order Picking (Returns)
- **T** – Transfer Picking
- **X** – Transfer Receiving
- **W** – Work Order Picking
- **V** – Work Order Receiving
- **H** – Shipment Receiving Only

You can only enable Warehouse Inprocess Queue types for the number of branches enabled for RF in the Enabled RF Branches control maintenance record.

RF Menu Default

Enter the default menu to display on all RF hand-held scanners, regardless of who logs on and what their normal menu is. Set the menu to RF.MAIN for a standard RF system.

RF Valid Order In-Process Statuses

Enter the alphanumeric status codes, up to 15 characters long, that users can assign to an order in the RF system while it is in process. Type the statuses in all capital letters and enter them in the sequence in which the system will process them.

You must define a minimum of four statuses for the system to properly close orders from the Warehouse In Process Queue. We recommend that you define PICKING, STAGING,

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PACKING, and CLOSED as the minimum in-process statuses. You can define as many statuses as you want.

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RF PICK Control Maintenance Records

The following control maintenance records belong to the PICK area within the RF (Radio Frequency) category and apply to picking parameters.

Consolidate RF Product Picks

This record controls picking of a product entered multiple times on the same sales order. For each branch, indicate whether to combine multiple entries of the same product into one pick on the RF unit.

- **Y –** Combines the entries into one pick on the RF unit.
- **N –** Displays each entry of the product as a separate pick on the RF unit.

Default Zone For OE Quick Scan

Quick Scan is a way to bypass the RF gun when items are brought to the counter for the customer, or if you have items in front of your counter that your customer can bring to check out. Typically wedge scanners are used with Quick Scan.

For each branch, select the default zone to display in the **Zone** field on the OE Quick Scan screen.

Display Weight On RF Pick Select Screen

Indicate whether to display a product's weight along with the product description on the RF Pick Select screen.

- **Y –** Product weight displays.
- **N –** Product weight does not display.

Force Valid Picker IDs

Indicate whether the system should validate IDs entered as pickers in RF against IDs flagged as pickers in User Maintenance.

- **Y –** Validates users entered as pickers in RF against user IDs flagged as pickers in User Maintenance.
- **N –** Accepts any valid user ID as a picker in RF.

Lock Tote To Order In RF Picking

For each branch, indicate whether to lock the tote to the order when using RF for picking an order.

- **No –** The system ignores the lock order to tote logic.
- **Yes –** If you attempt to scan a tote to an item when that tote has already been scanned to an item on a different order, the system displays a warning message indicating that the tote is locked to order number *xxxxx* and that the picker is not allowed to assign the tote to the newly selected item.

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- **Prompt –** If you attempt to scan a tote to an item when that tote has already been scanned to an item on a different order, the system displays a warning message indicating that the tote is locked to order number *xxxxx*. The picker can override the initial lock and assign the scanned tote to the newly selected item.

Print RF Excluded Items Work Ticket

If ordered items require work before picking, such as wire or pipe that needs to be cut, the system can exclude them from the RF queue if you exclude the locations holding the product in Zone Maintenance, and print them on a work ticket.

For each branch, select when the system should print RF-excluded items on work tickets by entering one of the following in the **Regular Excluded** column:

- **Never –** Does not print any RF-excluded items on a work ticket. This is the default.
- **First OE/Bid Change –** Prints all RF-excluded items on a work ticket upon exiting the order the first time or when a bid changes to an order.
- **Order Processing –** Prints all RF-excluded items on a work ticket upon processing the order.
- **Prompt On Exiting OE** – Prompts the user to print all RF-excluded items on a work ticket upon exiting the order.

RF # Of Manifest Stops To Pick For Same Stage Locn

For each branch, enter the maximum number of manifest stops the system can pick to the same staging location.

For example, if you have a truck manifest with 9 stops and you have 1 staging location that can handle material for a maximum of 3 stops, you must begin loading the truck to clear the staging location before the system can assign the 4th and subsequent orders to be picked.

RF Allow Staging Of Individual Totes

For each branch, indicate whether to allow users to stage a tote at any time during the picking process and prior to the transaction being complete. The default is **N**.

- **Y –** Users can stage a tote at any point in the picking process.
- **N –** Users can stage a tote only when all items in a zone have been completely picked. When a single user is picking an order from multiple zones, the user can stage the tote when picking is completed.

RF Automatically Close Order After Staging

For each branch, indicate whether to close orders picked using RF when all totes for the order are staged.

- **Yes –** When all totes are staged, an order closes without the operator having to use the **Close** hot key on the staging screen.
- **No –** When all totes are staged, an order does not close. To close the order the picker must use the **Close** hot key from the staging screen.

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- **Prompt –** When all totes are staged, the final picker sees a message that the order is ready to be closed. That picker then has the option of exiting without closing the order. To close the order the picker must use the **Close** hot key from the staging screen.

RF Automatically Select Next Order To Pick

For each branch, select how the RF system selects the next order for picking.

- **0 –** No Autoselect. Users must manually select the next order to pick.
- **1 –** Normal Picks Only. The system assigns the next non-manifest pick.
- **2 –** Manifest Picks Only. The system assigns the next manifest pick.
- **3 –** Both Normal and Manifest Picks. The system assigns the next non-manifest or manifest pick.

RF Automatically Stage And Close Quick Picks

For each branch, indicate whether the system forces the Staging screen to display following a quick pick.

After the order is picked:

- **Y –** The system displays the Staging screen, from which the picker cannot escape until the order is staged. If the order is complete, the system closes the order.
- **N –** The picker must display the Staging screen.

RF Create Immediate Cycle Count When Location Picked Negative

Indicate whether the system queues an immediate cycle count if during picking a location's quantity becomes negative in the system.

- **Y –** The system queues an immediate cycle count.
- **N –** The system does not queue an immediate cycle count. The system selects the location for a cycle count through the warehouse operation queuing functionality.

RF Display Hazard Description And Print Pick Ticket

For each branch, indicate whether to display a product's hazardous material comments on the Pick screen and print the comments on the pick ticket.

- **Y –** When a hazardous materials comment is associated with a product, a **C** displays in red on the Pick screen. Tapping the **C** displays the comment. The comment prints below the product description on the pick ticket.
- **N –** Hazardous materials comments associated with a product cannot display on the Pick screen and do not print on the pick ticket.

RF Enable Check For B/O Of Ship Complete Order

For each branch, select how the system should respond when a picker is back-ordering for an order with a Call When Complete, Ship When Complete, or Ship Item Complete status.

- **0 –** Does not check the order status.
- **1 –** Warns the picker that the order has a Complete status.

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- **2** – Warns the picker that the order has a Complete status. The picker must be assigned the RF.BO.SHIP.COMPLETE authorization key or enter a password to continue with the backorder.

RF Enable Delayed Picking

For each branch, indicate whether to enable the delayed manifest picking process. The default is **N**.

- **Y –** The system builds a complete manifest before releasing any orders for picking.
- **N –** Orders are available to pick.

RF Generate Pick Ticket When Order Closed

Indicate whether the system prints a packing slip when an order is closed.

- **Y –** Prints a packing slip.
- **N –** Does not print a packing slip.

RF Make Short Pick A REVIEW Status Location

For each branch, indicate whether the system should change the location type to REVIEW following a short pick to prevent further orders from being directed to that location. The default is **N**.

When there is not sufficient quantity at a location to fill the pick quantity displayed on the RF terminal:

- **Y –** Users enter the quantity they are picking from that location, the system changes the location type to REVIEW, the system generates an immediate cycle count for that location, and the system suggests the next alternate location with available inventory to complete the pick. If there are no other locations in the warehouse with enough product to complete the pick, the system alerts the user to back-order the item.
- **N –** Users have the option to split or back-order the quantity. If they split the quantity, they must go to RF Location Maintenance to view other locations for the item in the warehouse. They must review in-process orders, as RF Location Maintenance displays on-hand quantities, not available quantities. A split or backorder generates an immediate cycle count but does not place the location in a REVIEW location type.

RF Manifest Report To Run After Truck Loading

For each branch, enter the manifest report the system runs after the truck is loaded.

RF Notify Guns On Pick Up Now Order

For each branch, indicate whether to notify RF users when a pick-up order has been processed and must be picked.

- **Y –** The system sends a musical tune to RF guns when a pick-up order must be picked. The system notifies all users logged on through RF Terminal Specification. You can assign different tunes to different ship vias.
- **N –** The system does not send a tune to RF guns when a pick-up order must be picked.

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RF Null Pick Group

For each branch, enter the pick group that the system uses in the Warehouse Zone Maintenance program if the **Pick Group** field on the Warehouse Zone Maintenance screen is blank.

RF Order Status After All Items Are Picked

Enter the in-process status to assign to an RF order after all items on the order are picked. Typically, this status is STAGING, but you might have customized statuses, such as INSPECTION, for steps between picking and staging.

> **Note:** If using RF, do not leave this record blank and do not specify CLOSE or CLOSED as the order status.

RF Order Status After All Items Are Staged

Enter the in-process status to assign to the order after all items on the order are staged.

- If using manifest picking for RF, set the record to MANIFEST.
- Otherwise, set the record to CLOSED or enter a custom status, such as PACKING, for steps between staging and closing.

RF Pick – Display User Defined 1 or Order Picks Remaining

For each branch, select how you want to indicate the number of picks remaining on the Pick in Process screen:

- **User Defined #1** – Displays the value entered in the User Defined #1 field in the Price Updating ID Maint screen (from Product Maintenance, use the **UPC** hot key, and then the **UD Maint** hot key). Assigning additional UPCs help link your product IDs to your vendor product IDs when using EDI or PDW.

  Use this option to help your pickers better identify the products they need to pick.
- **Order Picks Remaining** – Displays the number of picks remaining assigned to the picker for the order selected in the **Order** field. As the picker completes the picks the number in this field decreases.

RF Pick Into Stage Locn Before Prior Manifest Stop Is Loaded

For each branch, indicate whether the system can pick the next manifest stop to a staging location before the prior manifest stop is loaded into the delivery truck.

- **Y** – Releases the next stop for picking once all products for one stop have been staged.
- **N** – Does not release the next stop for picking until the staging location is empty.

RF Pick Selection Sort

For each branch, select the sort criteria for listing items in the Pick Select screen. The options are:

- By SVIA Priority By SVIA By Release Time
- By SVIA Priority By Release Time By SVIA

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RF Picking Label Format

Select the label format the system uses, such as Location Zebra Label, when printing product labels during the picking process.

RF Scan Final Tote Location At Order Close

Indicate whether to consolidate all totes when a picked order is closed.

> **Note:** The final tote scanning logic does not apply to quick picks.

- **Y –** When the picker closes the order, the system displays the Close Tote screen, which shows all totes scanned to the order. The picker must scan each tote again. When all totes are scanned, the system prompts the picker to scan the final location for all scanned totes.

  If a final location for each tote has not been scanned, the system displays a message. The picker cannot close the order until all totes have a final location scanned to them.

  Note: If set to **Y**, you cannot use the **Close All** hot key on the Staging Select screen. Use the **Close All** hot key if you do not stage picked orders.

- **N –** A final tote location is not necessary.

RF Scan Pick Selections

Indicate whether the system provides a blank line on the RF Pick Select screen for scanning a pick ticket.

- **Y –** The picker can scan the ticket, enter the ticket number, or press **Enter** to move the cursor through this field to receive further selections.
- **N –** The picker scrolls through the list of orders and selects one.

RF Tote Status Before Loading Trucks

For each branch, select the default order in-process status that the system assigns to totes before loading into trucks. The RF Valid Order In-Process Statuses control maintenance record defines these statuses.

RF Valid Product Loc Pick Statuses

This record is specific to picking, receiving, and restocking in the fastener industry and is not used in a general RF application. If required by your company, the installer will set it up.

RF Verify Pick Qty

For each branch, indicate whether the RF picker must enter the quantity picked.

- **Y –** The RF picker must enter the quantity picked.
- **N –** The system accepts the quantity displayed on the screen as correct.

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RF Warn User At Order Close If All Totes Are Not Staged

For each branch, indicate whether the system warns users who try to close an order when there are totes that have not yet been staged. This record is useful if your branch has multiple pickers for single orders.

- **Yes –** The system displays the following message: Not All Totes are Staged, Close Anyway?
- **No –** The system does not display a message and closes the order.
- **Always –** The system forces the user to stage the tote. The system does not allow closing of the order if staging locations have not been scanned to all totes.

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RF RECV (Receiving/Put Away) Control Maintenance Records

The following control maintenance records belong to the RECV area within the RF (Radio Frequency) category and apply to receiving/put away parameters.

Default Response For Direct Put-Away Location Change

Indicate whether the system displays "Yes" or "No" as the response to the prompt it displays when a user scans a location different from the location to which the system directed them.

- **Yes –** The system displays "Yes" as the default.
- **No –** The system displays "No" as the default.

Display Product Rank In RF Receiving/Put Away

For each branch, enter the ranking method number, 1-5, against which to compare each product being received or put away to determine the product's rank, A-G. If you enter a ranking method number, each product's rank with respect to that ranking method displays on the fourth product description line on the RF screen during the receiving/put-away process.

The intent of this record is to provide guidance when changing locations for products being put away. Move products with a high ranking closer to the shipping area.

Enable Product Locations By UOM

Indicate whether to enable the assignment of default units of measure to product locations.

- **Y –** Default units of measure can be assigned.
- **N –** Default units of measure cannot be assigned.

Enable 856 Advanced Shipping Notice in RF Receiving

For each branch, indicate whether your system can receive purchase orders with EDI 856 advanced shipping notices, using the **Scan** function in Recv Verify.

- **Y** – The system can receive purchase orders with an 856 using the Scan function.
- **N** – The system cannot receive purchase orders with an 856 using the Scan function.

Enable Shipment Manual Receiving

For each branch, indicate whether to enable Manual Shipment Receiving, which activates the **RecEdit** hot key on the Shipment Receipt Entry screen for non-RF branches. The default is **Y**.

- **Y –** The **RecEdit** hot key is active.
- **N –** The **RecEdit** hot key is not active. To receive transfers or purchase orders in a shipment, use the stock receipts or transfer receiving processes.

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Intelligent Put Away Use Rank

For each branch, enter the product ranking method number Intelligent Put Away uses to map product to product groups. If you leave this record blank, the default is 1.

> **Note:** The ranking methods assigned to Rank #1-Rank #5 are defined on the Product Ranking screen.

Lock Warehouse Zone To Tote In RF Receive Verify

For each branch, indicate whether to activate warehouse zone and tote locking functionality. This functionality locks a warehouse zone to a tote, which ensures that users only place items from the same warehouse zone into a tote. The default is **No**.

- **No –** Warehouse zone and tote locking functionality is *not* active.
- **Yes –** Once a user places an item from a warehouse zone in a tote, only items from that zone can be placed in that tote. If the zone for the current item is different from the zone previously scanned into a tote, the system warns the user and does not permit the user to scan the item to that tote.
- **Prompt –** Once a user places an item from a warehouse zone in a tote, the system displays a warning for any item from a different warehouse zone that the user places in the same tote. The user has the option of continuing with the additional zone in the tote.

Prompt To Print Lot Barcode Labels In RF Receive Verify

For each branch, indicate whether the system prompts for a lot number in RF Receive Verify and then prints barcode labels that include the product ID and lot number.

- **Y –** Prompts.
- **N –** Does not prompt.

Require PUTSTAGED Or REPLEN Status For Tote Putaway Selection

For each branch, indicate whether to enable the RF Receive Verify Staging functionality and allow users to select totes for put away if the totes have a status other than PutStaged or Replen.

- **Yes –** Enables the RF Receive Verify Staging functionality and requires totes to have a status of PutStaged or Replen to be selected for put away.
- **No –** Does not enable the RF Receive Verify Staging functionality and does not require totes to have a specific status to be selected for put away.
- **Prompt –** Enables the RF Receive Verify Staging functionality and warns users if totes do not have a status of PutStaged or Replen when selected for put away.

Required Header Values For Shipment Maint

For each branch that uses RF, on the Required Header Values in Shipment Maint screen specify which header fields on the Shipment Maintenance screen users must complete.

- In the **Br** field, select the branch for which to specify which header fields are required.
- To list a field as being required, in the data portion of the screen position the cursor on a blank line and select from the following field names:

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- BOL#
- Vendor Shmt ID
- Freight Vendor
- Freight Amount
- Pieces
- Ship Date
- Receive Time

Note: The **Vendor** and **Receive Date** fields are always required. The **Container** field is validated. The system notifies the user on exit if the quantity entered matches the number of containers entered for the shipment.

RF Enable Hot Tote Warning For Avail

For each branch, specify whether the system should alert a user putting away items with an RF unit when the item being put away is a high priority put-away, because the item is not available.

- **Disable** – The system does not alert the user.
- **Less Than Zero** – If an item being put away using RF has an availability less than zero, the system plays the message tune specified in the RF Hot Tote Warning Tune control maintenance record and displays the word *HOT* in the upper right hand corner of the screen on the RF unit.
- **Less Than/Equal to Zero** – If an item being put away using RF has an availability that is less than or equal to zero, the system plays the message tune specified in the RF Hot Tote Warning Tune control maintenance record and displays the word *HOT* in the upper right hand corner of the screen on the RF unit.

RF Hot Tote Warning Tune

Select the tune that the system plays for the user when the RF Enable Hot Tote Warning For Avail control maintenance record is set to Less Than Zero or Less Than/Equal to Zero and an item being put away using RF has an availability less than or equal to zero. The default tune is CHARGE.

This message tune plays to alert the user who is putting the item away that it is a priority put-away. In addition, the word *HOT* displays in the upper right corner of the screen on the RF unit.

If the RF Enable Hot Tote Warning For Avail control maintenance record is set to Disable, an entry in this record has no effect.

RF Overstock Type

For each branch, select how to post overshipped materials in RF. The default value is O-Overstock. The options are:

- F-Defective
- L-Display

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- O-Overstock
- R-Review
- S-Stock

RF Put Away Method

For each branch, select which method the RF system uses to put away product.

The suggested location might change each time the product displays in Receive Verify or Receive Put Away. A location that is empty during the receiving process may be filled before the put-away process begins.

- **Blank** – The system directs you to put away product in each product's primary location, in sequence with the layout as defined in Zone Maintenance. This method is useful for the put away of large purchase orders, because the system directs you to each primary location in an efficient path as defined in Zone Maintenance.

  Note: If a product has only one primary location and the product currently in that location has a type of Review, the system still directs you to put away the product in the primary location. The system assigns the product you are currently putting away the type of Stock to distinguish it from the review-type product.

- **Most Recent Put Away Location** – The system directs you to put away product in the youngest location holding the product. If the youngest location is not available to hold the product, then the system directs you to the following locations respectively as they are available:

  - Another location containing the product.
  - A blank location.

  This method is useful if your warehouse uses the first in first out (FIFO) logic for controlling inventory.

- **Empty Location** – The system directs you to put away product in an empty location which holds the product. If there are not any empty locations available to hold the product, then the system directs you to a blank location.

  This method is useful if your warehouse is large. The system direction to empty locations saves users from having to search for such locations.

  Note: The Empty Location setting applies only to limited users who have set up warehouse locations in a location database. For more information, contact Eclipse Advanced Technical Support.

RF Putaway Primary Location Override Warning

In RF Receive Putaway, the system directs users to the primary location of an item. If they discover that the location is full, then they change the location.

Use this control maintenance record to indicate whether the system checks if the newly scanned location is a primary location for another product.

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- **Y –** The system checks and displays a warning if the scanned location is listed as a primary location for another item.

  Users must be assigned the RF.PUTAWAY.OVRD.LOC authorization key to override and accept the location. Otherwise, the system returns them to the **Location** field on the RF putaway screen, so they can scan another location.

- **N** – The system does not check or display a warning.

RF Receive Verify Default Receiving Option

For each branch, select a default receive/verify receiving option to use with the RF receiving function.

- **One-Old Rcpt**
- **One-New Rcpt**
- **All**

The selected option displays in the **Recv** field after scanning an item and selecting the corresponding purchase order, transfer order or credit sales order. If you leave this record blank, the default is **All**.

RF Receive Verify Prompt To Enter Quantity

Indicate whether the system prompts the user to enter the received quantity at time of receive verify. The default is **N**.

- **Y** – Prompts the user to enter the quantity.
- **N** – Does not prompt the user to enter the quantity.

RF Receive Verify Suggest Location Based On Lot Entered

For each branch, indicate whether RF suggests a default put away location, based on the location assigned to the lot in Product Location Maintenance.

- **Y** – RF suggests a put away location.
- **N** – RF does not suggest a put away location.

RF Scan Location To Tote For Immediate Put Away

For each branch, indicate whether pickers in the branch can scan a location into the **Tote** field for an immediate put away.

- **Y –** Pickers can scan a location into the **Tote** field. The system determines whether it is a tote or location.

  Note: Begin every tote name with TOTE- when you select this option.

  This process decreases the number of keystrokes required to perform replenishments, because pickers do not have to arrow to the **Location** field to scan a temporary location.

- **N** – Pickers cannot scan a location into the **Tote** field.

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RF Tag Viewing User Defined Label

Enter the label format the system uses when a user prints labels from the RF Tag Viewing screen. If you leave this field blank, the system prompts the user to select a format.

RF Use B/O Days On B/O'd Receipt

For each branch, indicate whether to use the days specified in the **B/O Days** field on the Vendor Maintenance screen to determine the expected receive date for a backorder.

- **Y –** If days are specified in the **B/O Days** field on the Vendor Maintenance screen, the system uses the specified days to calculate the expected receive date for a backorder. Backorders that have days specified do not go to the B/O Review Queue.
- **N –** All backorders go to the B/O Review Queue and the purchasing agent must enter the date.

RF Valid Product Loc Rec Statuses

This record is specific to picking, receiving, and restocking in the fastener industry and is not used in a general RF application. If required by your company, it will be set up by the installer.

RF Verify Put-Away Qty

For each branch, indicate whether the RF put-away person must manually enter the quantity put away.

- **Y –** The RF put-away person must manually enter the quantity put away.
- **N –** The system assumes that the quantity displayed on the screen is correct.

RF W/H Area To Store Hot Nonstock Items

For each branch, enter a temporary location close to the shipping dock to which incoming nonstock products that will be shipped out right away should be put away.

RF W/H Area To Store Hot Nonstock Transfer Items

For each branch, enter a temporary location close to the shipping dock to which incoming nonstock transfer products that will be shipped out right away should be put away.

Split Picking/Receiving On RF Orders Based Upon Units Of Measure

Indicate whether to allow split picking and receiving for products that have package quantities. For example, the pick request for 50 items that ship in cartons of 24 each is split into two pick tickets, one for two cartons and one for two single items.

- **Y –** Allows split picking and receiving.
- **N –** Does not allow split picking.

Valid RF Final Shipment Notes

For each branch, define standard *final* notes that a user can attach to a shipment to document item discrepancies identified once the shipment has been received. Users can view these notes from the Shipment Receipt Entry screen.

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Note: The system prompts for a final note when the shipment has a variance. If one or more notes are defined in this record, select a note at the prompt. If notes are not defined in this record, you must enter a freeform note.

Valid RF Item Shipment Notes

For each branch, define standard notes that users can attach to a shipment for item discrepancies identified when receiving and verifying against a shipment. Users can view these notes on the Shipment Maintenance screen.

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RF REPL (Replenishment) Control Maintenance Records

The following control maintenance record belongs to the REPL (Replenishment) area within the RF (Radio Frequency) category.

Re-Queue Replenishments Not Scanned To Destination Location

For each branch, indicate whether the system re-queues a replenishment that a picker does not scan to the designated destination location. For example, if a forklift operator takes a product off the shelf and scans it to a temporary location on the floor, the system generates a new replenishment task to move the product from the temporary location to the original destination.

- **Y –** The system adds a new replenishment task to the queue.
- **N –** The system does not add a new replenishment task to the queue.

RF Automatically Select Next Product To Replenish

For each branch, indicate whether the system assigns the next product to replenish when a picker uses the **Slct** hot key on the Immediate Replenishment screen.

- **Y –** The system displays the next product to replenish.
- **N –** The system prompts the user to enter a pick group and then displays that group's list of products to replenish. The picker then selects products from the list.

RF Replenishment Task Size

For each branch, enter the number of different products the system assigns to a replenishment task. This number enables the system to split up the replenishment work load among multiple users more easily. If you leave this record blank, the system assigns all products that need replenishing to a single task.

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RF SRIAL (Serial Number) Control Maintenance Records

The following control maintenance records belong to the SRIAL (Serial Number) area within the RF (Radio Frequency) category.

Prompt For Serial Number Entry In RF

For each branch, indicate whether the system prompts for serial numbers when using the RF system.

- **Y** – The system prompts for serial numbers based on the following conditions:
  - If the order is a sales order and the user enters a product with a serial number tracking type of **I** (Inbound & Outbound), **O** (Outbound Only) or **R** (Returns & Outbound Only) and a location during RF picking and receiving, the system displays the following prompt: Enter Serial Number Now (Y/N). At that prompt, enter **Y** to record the serial number at that time or enter **N** to not record the serial number at that time.
  - If the order is a transfer and the user is picking a product with a serial number tracking type of **O** (Outbound Only) or **R** (Returns & Outbound Only), the system only prompts for a serial number if the Prompt For Serial Numbers On Outbound Transfers control maintenance record is set to **Y**. For products with a serial number tracking type of **I** (Inbound & Outbound), the system prompts for a serial number regardless of the setting in the Prompt For Serial Numbers On Outbound Transfers control maintenance record.
  - For products being received that have a serial number tracking type of **I** (Inbound & Outbound) or **R** (Returns & Outbound Only), the system prompts you to enter those serial numbers on the Receive Verify screen. If you do not enter them on that screen, the system prompts for them again on the Receive Put Away screen.

  Note: When products with serial numbers are either picked or received in RF, the system prompts you to enter the same number of serial numbers as the number of products on the order that have serial numbers.

- **N** – The system does not prompt for a serial number when picking a serialized product using the RF system.

RF Exclude Unverified Receipts From Inprocess Onhand

Indicate whether to exclude unverified POE, TOE, or SOE receipts entered using the RF Verify program from being considered a part of on-hand inventory. Set this record to **Y** in an RF environment.

- **Y** – Unverified receipts are not considered part of on-hand inventory.
- **N** – Unverified receipts are considered part of on-hand inventory.

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Store Serial Numbers By Location

When a product is received, the serial numbers are entered and attached to the product as a whole. If product is put away into multiple bin locations, the serial numbers can be stored at the bin location level.

Complete this record to enable or disable location-specific serial numbers.

- In the **Store Serial Numbers by Location** field, indicate whether to store serial numbers by location rather than by branch. The default is **N**.
  - **Y –** Stores serial numbers by location.
  - **N –** Stores serial numbers by branch.
- When you change the setting in this field, the **Conversion Required** field displays **Yes**, which indicates that you need to schedule a conversion routine that converts the way the system stores serial numbers in the database. Once the conversion routine has run, the **Conversion Required** field displays **No**.

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ROE (Remote Order Entry) Control Maintenance Records

The following control maintenance records belong to the ROE (Remote Order Entry) category.

Check Product Availability On Remote Orders

Indicate whether the system should check each line item on remote orders for product availability.

- **Y –** Checks the availability of each line item against the order quantity. If one or more line item does not have sufficient availability, the system changes the order status to B (Bid) and appends the following comment to the order log: Products Not Available, Status Changed From <previous status> to B. The system adds an entry to the Remote Order Entry Review Queue with the error type Avail for each line item that cannot be filled.
- **N –** Does not check each line item for product availability.

  Note: The setting in the **Check Availability on Remote Orders** field on the Remote Order Entry Parameters screen for an order's ship-to or bill-to customer overrides the setting in this control maintenance record.

Default iProcure Sales Source

Enter the sales source to assign to incoming orders from iProcure.

Default Remote Order Entry (ROE) Messaging

Select who the system should notify when a remote user logs into the system, enters a new order, or changes an order.

- Writer
- Inside salesperson
- Outside salesperson

The settings in this record apply to all remote order entry applications used by all customers. You can override these settings for individual customers on the Customer Maintenance > Remote Order Entry Parameters screen.

Default RF Order Entry Print Status

Enter the default print status the system assigns to RF Order Entry orders.

Default RF Order Entry Ship Via

Enter the default ship via the system assigns to RF Order Entry orders.

ROE Discount Applicable Order Types

Enter the remote order types to which the system applies the discount entered in the **Remote/WOE Order Entry Discount%** field on the Remote Order Entry Parameters screen in Customer Maintenance.

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If you leave this record blank, the system checks the discount field for the following order types: WOE, ROE, MBX, EDI, and IX.

Remote Order Review Queue Branch

Enter the branch to host the Remote Order Review Queue.

- P-Price
- S-Ship
- G-G/L

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SFA General Control Maintenance Records

The following control maintenance records belong to the SFA (Sales Force Automation) category.

Default SFA Sales Source

Enter a default sales source to assign to orders generated through SFA.

Download COMM-COST To SFA

Indicate whether to download the COMM-COST to SFA clients for display in the reorder pad.

- **Y** – Downloads COMM-COST to the SFA reorder pad.
- **N** – Does not download COMM-COST to the SFA reorder pad.

Old Set System Time Zone

This control maintenance record is no longer used.

- Use the Set System Time Zone control maintenance record to set the time zone where your server is located.
- Use the User Maintenance Default Time Zone control maintenance record to specify a time zone to be assigned to all new user records.

SFA Administrator

Enter the user or message group to monitor messages and trackers received by the system following an SFA synchronization regarding submitted orders or changes made to accounts and contacts.

SFA New Customer/Vendor Default Template

Enter the customer and vendor records to use as templates to assign default information when a user creates a customer or vendor in SFA. The system assigns the default record information to the new record when you sync the new entity with the system.

Valid SFA Categories

Enter a list of valid categories that categorize the user-defined dictionary items/fields created in the system and sync'd to the SFA laptop. Categories can be up to 20 characters long. The information displays in the Category Selection screen accessed by using the **Category** hot key on the Customer Maintenance or Contact Maintenance > User Defined Data screen in the system and on the Account > Contacts User-Defined tab in SFA.

Valid SFA Contact Classifications

Enter a list of valid classifications, up to 20 characters long, that users can assign to contacts in the **Classification** field on the Contact Maintenance screen in the standard system and the **Classification** field on the Contacts > Main tab in Sales Force Automation.

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SFA Product Parameters Control Maintenance Records

The following control maintenance records belong to the SFA (Sales Force Automation) category and apply to product parameters.

SFA Default Product If Not Found

Complete this record if your company uses SFA. Create a product record named ***SFA PRODUCT NOT FOUND***, in upper case and with the asterisks, which the system can assign to an SFA order in the event that an incoming product cannot be located in your product file. Once created, assign the product to this record.

Valid SFA Buy Line Product Download

To restrict the product download to products in designated buy lines, enter the buy lines in this record.

The system only downloads products that meet *all* the parameters specified in the Valid SFA Product Statuses, Valid SFA Price Line Product Download, and this control maintenance record.

Valid SFA Price Line Product Download

To restrict the product download to products in designated price lines, enter the price lines in this record.

The system only downloads products that meet *all* the parameters specified in the Valid SFA Product Statuses, Valid SFA Buy Line Product Download, and this control maintenance record.

Valid SFA Product Statuses

Enter a list of product statuses to use when syncing products in SFA. When downloading products to SFA, the system only sends products with the designated product statuses. If no product statuses are designated, the system downloads only products with the product status Stock to SFA.

> **Note:** This record works with the Valid SFA Buy Line Product Download and Valid SFA Price Line Product Download control maintenance records.

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SFA Scheduler Parameters Control Maintenance Records

The following control maintenance records belong to the SFA (Sales Force Automation) category and apply to the scheduler.

Valid Scheduler Statuses

Enter a list of statuses to assign to scheduled events and tasks. Statuses can be up to 20 characters long. You can enter the statuses in any order. The system uses this list in the **Status** field on the Scheduler's Detailed Schedule screen and the **Status** field on the Scheduler / Modify (or Create New) Event screen in Sales Force Automation.

Valid Scheduler Types

Enter a list of types to assign to scheduled events and tasks. Types can be up to 20 characters long. You can enter the types in any order. Example types are Marketing, Sales, Development, and Personal. The system uses this list in the **Type** field on the Scheduler's Detailed Schedule screen and the **Type** field on the Scheduler / Modify (or Create New) Event screen in Sales Force Automation.

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SFA EPIM (Eclipse Personal Information Manager) Control Maintenance Records

The following control maintenance records belong to the EPIM area within the SFA (Sales Force Automation) category and apply to the Eclipse Personal Information Manager companion product integration.

Mobile Domain Name

Enter the base path to the Eclipse Mobile data on your sever to create links to access a contact, customer, or vendor's information directly from a synced record in Microsoft Outlook. This record applies to the Eclipse Personal Information Manager companion product.

Eclipse Personal Information Manager – EPIM Settings

For each branch that uses Eclipse Personal Information Manager, designate who receives regarding contact, customer, and vendor record changes that users with Review access to a record have made.

- In the **Branch** field, enter the branch for which to define administrator settings.
- In the **Administrator to Receive Errors** field, specify the user or message group to notify of any errors.
- In the **Error Communication Method** field, indicate whether the system should send error notification as a message or tracker.
- In the **Message Writer with Errors (Y/N)** field, indicate whether the system should send a message to the order writer if a problem arises with the system.

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SOE ATO Parameters Control Maintenance Records

The following control maintenance records belong to the SOE (Sales Order Entry) category and apply to ATO parameters.

ATO Default Customer If Not Found

Complete this record if your company uses the Automatic Transfer Order (ATO) program. Create a customer named ***ATO CUSTOMER NOT FOUND*** (in upper case and with the asterisks), which the system can assign to an ATO order in the event that an incoming customer cannot be located in your customer file. Once created, assign the customer to this control maintenance record.

ATO Default Product If Not Found

Complete this record if your company uses the Automatic Transfer Order (ATO) program. Create a product record named ***ATO PRODUCT NOT FOUND*** (in upper case and with the asterisks), which the system can assign to an ATO order in the event that an incoming product cannot be located in your product file. Then assign the product to this control maintenance record.

ATO Default Sales Source

Complete this record if your company uses the Automatic Transfer Order (ATO) program. Enter a default sales source to assign to orders generated through ATO.

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SOE Bid Parameters Control Maintenance Records

The following control maintenance records belong to the SOE (Sales Order Entry) category and apply to bid parameters.

Archive MJBs When Junior Orders Are Completed

Indicate whether the system checks master job bids (MJBs) to determine whether they can be archived.

- **Y** – The system checks. After the system processes a generation on a junior order, if no material detail is scheduled or open and no price is open or un-launched, the system considers the MJB ready for archiving. The system flags the MJB as archived and sends a tracker to the project manager, junior order project manager, or current user, indicating that the master project status has changed.
- **N** – The system does not check.

  Note: If a MJB has been archived, the **Archived** column in the Project Status view of the Master Job Bid Review Queue displays a **Y**.

Bid Date To Order Date

For each branch, indicate whether the bid date changes to the current date when a bid converts to an order.

- **Y** – The order date is the current date.
- **N** – The order date is the original bid date.

Consolidate Line Items When Opening A Bid

For each branch, indicate whether to allow users to consolidate multiple identical line items to single line items when converting bids to open orders. When users change the status of a bid to any open status, the system checks whether this functionality is enabled for the ship branch in this control maintenance record.

- **Y** – When identical line items (line items that have a common Part Number, Ship Branch, Price, Cost, and COGS) exist, the system prompts the user to consolidate the line items.

  Note: Miscellaneous charge items, lot items, and detail lots do not consolidate. Bid quantities that have locations defined retain those location assignments through the consolidation process. Attached comments follow consolidated quantities. Subtotal lines on the bid generations are deleted when consolidating. On generations with expired pricing, all prices and costs are considered to be identical.

- **N** – When identical line items exist, the system does not prompt the user to consolidate them.

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Duplicate Bid Days To Check

Enter the number of days, 0-99999, prior to an order date for which the system checks bids for duplicate items.

If the Duplicate Order Check control maintenance record is set to **N**, the system does not use this record.

If the **Duplicate Order Check** control maintenance record is set to **Y**, the system checks bids whose order date falls within the specified number of days prior to and including the order date for the item entered.

For example, if you enter 1, the system only checks bids that have an order date that is the same as the order date of the item that was just entered. If you enter 30, the system checks bids that have an order date that is the same as the order date of the item that was just entered and bids that have an order date that fall within the previous 29 days.

If you enter zero (0) or leave this record blank, the system does not check bids for the item being entered on the order.

By default, the system includes all bids with an order date later than the order date of the item that was just entered in the duplicate check.

> **Note:** Convert all existing bids to orders or cancel them before setting this record to **Y**. The system checks for duplicates only when a user adds an item to the bid. The system does not check items for duplicates when the user converts a bid to an order. Products with a LotItem status do not trigger a check for duplicates.

Number Of Days Before Bid Pricing Expires

Enter the number of days, 0-99999, after the order date to display a warning that a bid's pricing has expired. When you enter a bid and use the **Pricing** hot key, the expiration date reflects the number of days specified in this record. An authorized user (SOE.BID.PRC.EDIT, POE.BID.PRC.EDIT, TOE.BID.PRC.EDIT) can override the warning and keep original bid pricing in effect.

Sort Bids In Fast Select From Newest To Oldest

Indicate whether the system sorts bids from newest to oldest in the fast select list. For example, list the newest bids first so they are easier to find and open.

- **Y** – Sorts bids from newest to oldest.
- **N** – Sorts bids from oldest to newest.

Valid Master Job Bid Statuses

On the Valid Master Job Bid Statuses screen, enter valid statuses for master job bids. Enter choices such as Pre Quote, In Process, or other statuses that make sense for your company. The entries are available on the order's Job Maintenance screen, where you specify the status for the master order. The entries are also available as selection options in the Master Job Bid Review Queue. The project status also displays on the master order's Status screen, following the order status.

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The **Closed** status is always available as a choice, so you do not need to specify it in this control maintenance record.

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SOE Branch Parameters Control Maintenance Records

The following control maintenance records belong to the SOE (Sales Order Entry) category and apply to branch parameters.

Additional Brs To Show Availability On Product Primary Index

By default, the system displays the available inventory for the ship branch. Use this record to display multiple branch inventory amounts in the Product Primary Index (PPI).

For each ship branch, enter additional branches for which to show availability for products listed on the Product Primary Index when users search for products in order entry.

> **Note:** This record also applies to the Product Primary Index displayed in Inventory Inquiry if the Display Availability In Inventory Inquiry Product Index control maintenance record is set to **Y**.
>
> Adding additional branches may significantly slow down the PPI. The PPI screen displays any branch entered in the control record, regardless of the authorized branches for the current user. We recommend that you only enter branches that are authorized for all users.

Enable Branch Specific Products For

Select whether to enable branch access authorization for products and price lines by user branch or by price branch. This works with the authorized branches assigned to a user.

On the Additional Data screen accessed using the **Add'l** hot key in Product Maintenance, the **Branch Access** hot key displays the Accessible Branches screen for the corresponding product. On the Price Line Maintenance screen, the **Branch Access** hot key displays the Accessible Branches screen for the corresponding price line.

- **Disabled –** The system does not enable branch access authorization.

  If you specified branch specificity for a product or price line before changing this record to Disable, use the **Branch Access** hot key on the Product Maintenance Additional Data screen and the **Branch Access** hot key on the Price Line Maintenance screen to remove assigned branches.

- **User Branch –** Use the **Branch Access** hot keys to specify for each branch whether the products are accessible in those branches using any of the standard product searches. All product searches at a branch check the product record for authorized branches.

  The system compares the product's or price line's authorized branches to the user's authorized branches. If the user's branch is not one of the authorized branches for the item, the user cannot put that item on the order or transfer.

- **Price Branch –** Use the **Branch Access** hot keys to specify for each branch whether the products are accessible in those branches using any of the standard product searches. All product searches at a branch check the product record for authorized branches.

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The system compares the product's or price line’s authorized branches to the price branch on a sales order or the shipping branch on a transfer. If the price branch on the sales order is not one of the authorized branches for the item, the user cannot put that item on the order or transfer.

Limit SOE Branches In Home Territory By User Authorization

Indicate whether the system limits a user's ability to view and edit sales orders according to the user's branch authorizations.

- **Y –** The system determines a user's authority to view and edit sales orders according to the settings in the **Auth** column on the user's Accessible Branches screen for the branches to which they have access.
- **N –** Users have full authority to view and edit sales orders for any branch to which they have access.

Re-Sort Sales Items When Closed For Branch

For each branch, select how the system re-sorts the items on a sales order by location when the order is invoiced. Use re-sorting to facilitate picking the order. The re-sort occurs at the time the order is processed, generally when it prints. After the order is processed, the new order of line items display on the ticket and the screen.

- **Primary Loc –** Sorts by the primary location specified in Product Location Maintenance.
- **Line Item Loc –** Sorts by the location selected for the line item on the order using the Scheduling screen. The system uses the ship/stock branch.
- **Description** - Sorts by product description.
- **No –** Does not sort.

Note: If you set this record to **Primary Loc** or **Line Item Loc**, unattached comments sort to the top of the list, because they do not have an assigned location.

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SOE Default Parameters Control Maintenance Records

The following control maintenance records belong to the SOE (Sales Order Entry) category and apply to SOE default parameters.

Customer B/O Action Default

The system uses this record, along with the **B/O Status** field in Customer Maintenance and the **Dflt Status** field in Ship Via Maintenance, to determine the status of a backordered item.

Select the default status to assign to a customer backorder if the **B/O Status** field on the customer record is blank. Use one of the following backorder statuses or leave the field blank.

- **L** (Call When Available) – The system displays the order in the Customer Calling Queue when any item on that generation, even a partial quantity of that line item, is available.
- **A** (Ship When Available) – The system ships items on the generation of an order as they become available even if the total quantity of that line item is not available.
- **C** (Call When Complete) – The system displays the order in the Customer Calling Queue when the entire generation of the order is available.
- **H** (Ship When Complete) – The system ships the entire generation of the order when it is complete.
- **M** (Ship Item Complete) – The system ships total line item quantities on the generation of an order as they become available. It does not ship partial quantities of line items.
- **B** (Bid) – The system assigns Bid status to the item, which does not commit inventory.
- **X** (Cancel) – The system does not allow any backorders.

  Note: If your default ship status is set to P for pick up now, the system automatically applies the X (Cancel) setting to this control maintenance record. For more information on setting default ship statuses, see Adding Miscellaneous Customer Information.

Default Copy Mode For OE Header Screen

Select the copy mode default the system uses when a user makes changes to the information displayed on an OE Header screen. The option you select here displays in the **Copy to All** field next to the hot keys on the OE Header screen. Users can override the default on the order Header.

- **On** – The system *copies* the changes made on the Header of one order generation to the Headers of all the other order generations.
- **Off** – The system *does not copy* the changes made on the Header of one order generation to the Headers of the other order generations.
- **Prompt** – The system prompts you to select whether to copy the changes to the Headers of the other order generations.

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Default Imaging Profile ID For MSDS

Select which image, attached at the product level, to associate with a product's Material Safety Data Sheet, based on the document's IMG.PROFILE ID. The default is MSDS. The system uses this record to distinguish which image is the Material Safety Data Sheet, if there are multiple images attached to a product. Products with attached images display the image icon in the MSDS Review Queue.

Default Lead Time Days For Branch Procurement

Enter the default number, 0-99999, of lead time days for procurements from a branch. If you do not set this control maintenance record and leave a null setting, or if you enter 0 (zero), the system sets the default number of lead time days to three.

Default Product Xref Subroutine

Enter the subroutine for starting your default web browser. Enter **DDE.WEB.BROWSER** unless instructed otherwise by your installer. The system uses this subroutine if the **Agent ID** field on the DDE Agent Maintenance screen is not filled in.

Default Selection For Reorder Pad

You can select a default view for the reorder pad when the customer account is a ship-to.

Select the default view for the Reorder Pad screen when the customer is a ship-to account.

- **Bill-To –** Displays products purchased by the bill-to customer and all associated ship-to customers.
- **Ship-To –** Displays products purchased by that ship-to customer.

When the customer is a bill-to account, the reorder pad has only one view and the hot keys do not change it.

Display Credit Manager Column For Credit Items

This control maintenance record applies to the Open Order Status Review Queue.

If this record is set to **Yes** and the **Sel Items** field in the queue is set to **Credit**, the queue displays the **Crdt Mgr** column when you populate the queue. If the **Sel Items** field is set to anything other than **Credit**, the queue displays the **Picker** column instead of the **Crdt Mgr** column. If you set this record to **No**, the system displays the **Picker** column even if the **Sel Items** field is set to **Credit**.

GP Preview Report Parameters

The Detailed Invoice GP% Report uses this control maintenance record.

- In the **Minimum GP%** field, enter the minimum gross profit percentage invoices can have to not be selected for the report. The system selects invoices with a lower gross profit percentage for the report.
- In the **Maximum GP%** field, enter the maximum gross profit percentage invoices can have to not be selected for the report. The system selects invoices with a higher gross profit percentage for the report.

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- In the **Restrict User from Changing Percentages** field, indicate whether the users running the report can change the percentages. This includes superusers.
  - **Y –** Users cannot change the percentages.
  - **N –** Users can change the percentages.

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SOE Display Parameters Control Maintenance Records

The following control maintenance records belong to the SOE (Sales Order Entry) category and apply to display parameters.

Display Active Primary Index Products First In Product Search

Indicate whether the system displays active products in the Product Primary Index for the stocking/shipping branch when users do product searches. Using the **F10** key in the search results list repeats the search in additional product indexes.

Activating this control maintenance record increases system performance by limiting the products displayed to those with on-hand quantities or on transactions at the stocking/shipping branch. When activating this control maintenance record, the system prompts you to build the active product index. To avoid system performance issues, build the index during non-peak use hours. When de-activating this control maintenance record, the system prompts you to delete the active product index to free disk space. To avoid usage conflict, delete files during non-peak use hours. When adding, removing, or changing a branch designation from stocking to non-stocking, the system also prompts to build or delete the index.

- **Y –** The system displays active products in the Product Primary Index for the stocking/shipping branch. Press **F10** to repeat the search in the Product Primary Index for all stocking/shipping branches. Press **F10** a second time to repeat the search in the Product Catalog Index. Press **F10** a third time to repeat the search in the PDW Catalog Index, if your company has PDW installed. If a product is not active for a branch, the system defaults to the Product Primary Index for all stocking/shipping branches.
- **N –** The system displays the Product Primary Index for all stocking/shipping branches. Press **F10** to repeat the search in the Product Catalog Index. Press **F10** a second time to repeat the search in the PDW Catalog Index, if your company has PDW installed.

  Note: The F9 Additional Search Criteria functionality is available for all product searches. For screens on which a branch entry is not required, such as the Customer/Vendor Part Number Detail screen, the system defaults to the user's home branch designated in User Maintenance.

Display Alternate Billing Address In OE

Indicate whether the system displays the alternate billing address in the Body and Header screens for sales order entry when a ship-to customer has an alternate billing address or for transfer order entry when a ship-from branch has an alternate billing address.

- **Y –** Displays the alternate billing address followed by *Alt*.
- **N –** Does not display the alternate billing address.

Display Customers/Vendors Who Are Inactive At A Branch

Use this record to enable the functionality that allows authorized users to override denied branch accessibility for customers and vendors.

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- **Y –** With appropriate levels of authorization, users can activate an inactive customer or vendor at a branch if the **Branch Activation Level** field and **One-Time Activation Level** field on the Accessible Branches screen for the customer or vendor are not blank.
- **N –** Users cannot activate inactive customer or vendors.

Display Invoice Print Date In SOE Header

Indicate whether the system displays the date an invoice was printed as a message when users access the order's Header screen.

- **Y –** Displays the first invoice print date, if it has been printed.

  Note: The system does not display subsequent invoice reprint dates.

- **N –** Does not display the invoice print date.

Display Products Within A Customer's Product Zones

Complete this record if your company defines product zones. Use this record to restrict users to viewing only the products within the customer's zones.

- **Y –** Only the products that are within the customer's product zones display.
- **N –** All products, including products outside the customer's defined product zones, display.

Display Reminder Notes Until Next Product Is Entered

For each type of order entry, indicate whether the system displays product reminder notes until the next product is entered.

- **Y –** The product message displays until you enter a valid product on the next line.
- **N –** The product message displays until you move the cursor to a new field.

  Note: The product reminder disappears when you select a line that contains a different product.

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SOE Duplicate Checking Parameters Control Maintenance Records

The following control maintenance records belong to the SOE (Sales Order Entry) category and apply to duplicate checking parameters.

Allow Material Detail Type/Tag-SubType Duplicates

Indicate whether the system allows duplicate Tag/Type and SubType combinations on the Lot Item Material Detail screen/window for master orders.

- **Yes** – Allows duplicates.
- **No** – Prevents duplicates.
- **Prompt** – Prompts users whenever they enter duplicate entries.

The system displays this setting in the **Allow Type/Tag-SubType Duplicates** field on the Lot Item Material Detail / Lot Detail Additional Information screen/window. Users must be assigned the OE.LOT.OVRD.TYPE.DUPS authorization key to edit this field.

Duplicate Customer P/O Number Check

Indicate whether the system checks sales orders for duplicate purchase order numbers. The validation is not case sensitive. For example, TEST123 and test123 are considered to be duplicates.

The value you enter determines the action the system takes when a user enters a value in the **Customer P/O #** field on the SOE Header screen:

- **Y** – The system checks for duplicate P/O numbers on all open or invoiced sales orders for the bill-to customer and any of its related ship-to customers.

  If the system finds a duplicate customer P/O number for the bill-to or any of its associated ship-to accounts, the system displays the following prompt: Customer P/O # Already on File. Continue? N.

  - **Y** – Allows use of the duplicate P/O number.
  - **N** – Repositions the cursor in the **Customer P/O #** field and awaits the input of a different customer P/O number.

- **N** – The system does not check sales orders for duplicate purchase order numbers.

  Note: To disable this record for a customer, enter **Y** in the **Disable Duplicate P/O# / Order Check (Y/N)** field on the Miscellaneous Customer Information screen.

Duplicate Order Check

Indicate whether the system checks if the item being entered on a sales order is already on an existing order.

- **Y** – Checks for duplicates. If found, the system warns that you may be creating a duplicate order for the item.

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Existing orders are open orders and any closed orders with ship dates that are found within the time period specified in the Duplicate Order History Days To Check control maintenance record. The system includes bids in this check only if the Duplicate Bid Days To Check control maintenance record is assigned a value greater than zero.

Entering a negative order quantity for a returned item does not trigger a duplicate order check and the system does not present returns as possible duplicate orders.

Products with a LotItem status do not trigger a check for duplicates.

- **N –** Does not check for duplicates.

Note: To disable this record for a customer, enter **Y** in the **Disable Duplicate P/O# / Order Check (Y/N)** field on the Miscellaneous Customer Information screen. To disable this record for a product, enter **Y** in the **Disable Duplicate Order Check (Y/N)** field on the Miscellaneous Product Information screen.

Duplicate Order History Days To Check

Enter the number of days, 0-99999, prior to and including the current day for the system to check open and invoiced orders for duplicate items.

If the Duplicate Order Check control maintenance record is set to **N**, this record has no effect.

If Duplicate Order Check is set to **Y**, the system checks open and invoiced orders based on the ship date for the specified number of days prior to and including the current day for the item that is being entered on a sales order. For example, if you enter 1, the system checks only the current day. If you enter 30, the system checks the current day and the 29 previous days. If you set this record to zero (0) or leave the record blank, the system does not check open or invoiced orders for possible duplicates.

Note: Products with a LotItem status do not trigger a check for duplicates.

Duplicate Product Check On Current Order

Indicate whether the system checks all products on all open generations of an order for a match when a user enters a product on a sales order.

- **Y –** The system checks for duplicates on the same order. If the product has already been entered on the same or a different generation, the system displays a message telling you that the product is already on the order, along with the line number where the product was previously entered.
- **N –** The system does not check for duplicate products on the same order.

Products with a LotItem status do not trigger a check for duplicates.

The setting in the **Disable Duplicate P/O# / Order Check (Y/N)** field on the Miscellaneous Customer Information screen has no effect on this record.

To disable this record for a product, enter **Y** in the **Disable Duplicate Order Check (Y/N)** field on the Miscellaneous Product Information screen.

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The duplicate product check is never in effect for consignment billings. It is in effect for consignment transfers, but only for comparing consignment transfers that involve the same customer and the same product.

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SOE Filter Parameters Control Maintenance Records

The following control maintenance records belong to the SOE (Sales Order Entry) category and apply to filtering parameters.

Exclude All Sales Orders Outside The Plenty Date From Avail Calc

Indicate whether the system excludes all sales orders outside the plenty date from the availability calculation.

- **Y –** The system ignores all sales orders with a ship date beyond the plenty date, regardless of order status. Inventory is not committed if the ship date is on or outside the plenty date.
- **N –** The system considers all sales orders with a ship date beyond the plenty date, based on status. If an order has an immediate need status, inventory is committed, regardless of the ship date.

Exclude Direct Sales Orders From PIL Check

Indicate whether the system omits the PIL check for each product on an open sales order that is changed into a direct vendor shipment.

- **Y –** The system does not check the PIL.
- **N –** The system checks the PIL. If changing the order to a direct affects the maximum days supply, the system displays a warning message.

Exclude Exceptional Sales From Customer Demand Index

Indicate whether the system excludes exceptional sales from the Customer Demand Index. The default is **N**.

- **Y –** Excludes exceptional sales.
- **N –** Includes exceptional sales.

Exclude From Ship-To/Ship-From Selection If Excluded From Index

Indicate whether the system excludes a customer or vendor name from the selection list if the record is flagged to be excluded from the index. The default is **N**.

- **Y** - If a customer/vendor record's **Exclude from Index** field on the Additional Information screen is set to **Y**, that name does not display in the ship-to/ship-from selection list when creating a new order.
- **N** - Even if a customer/vendor record's **Exclude from Index** field is set to **Y**, that name still displays in the ship-to/pay-to selection list in order entry when an associated bill-to-only/pay-to-only customer/vendor is originally specified on the order entry screen.

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Exclude MiscChrg Products From Customer Demand Index

Indicate whether the system excludes MiscChrg products from the Customer Demand Index, which the system uses to update demand for the Reorder Pad function in SOE. The default is **N**.

- **Y** – Excludes.
- **N** – Includes.

Exclude New Sales Orders From PIL Check

Indicate whether the system excludes products added to and removed from new orders before saving the order from the projected inventory level (PIL) check. The PIL check prevents exceeding the allowable maximum days supply of the product specified in the Maximum Days Supply control maintenance record. This record also applies to purchase, transfer, and adjustment orders.

- **Y –** Excludes new orders. For example, when a user makes a change to a nonstock product on a new sales order, the system does not display a message indicating that the maximum days supply of the product will be exceeded.

  The reason for this safeguard is if a salesperson puts a nonstock product on an order, they are advised that the action is affecting the inventory level of the item. Since nonstock items have zero demand, one of a nonstock item is an infinite days supply.

- **N –** Does not exclude new orders. For example, when a user makes a change to a nonstock product on a new sales order, the system displays a message indicating that the maximum days supply of the product will be exceeded.

  Note: When you set the Exclude New Sales Orders From PIL Check control maintenance record to **Y**, the system overrides the settings in the Exclude SOE Returns From PIL Check control maintenance record.

Exclude Procure Comments From OE Group Procurements

Indicate whether the system attaches procurement comments to items that are procured through the Order Entry Job Bid Subtotal Maintenance screen.

- **Y** – Does not attach procurement comments.
- **N** – Attaches procurement comments.

Exclude SOE Returns From PIL Check

Indicate whether the system checks to see if the quantity for a product returned in SOE puts the product over the amount specified in the Maximum Days Supply control maintenance record. The default is **N**.

- **Y –** Excludes SOE returns from PIL check. Enter **Y** if your company takes a returned product no matter how the returned quantity affects your inventory level.
- **N –** Includes SOE returns from PIL check. Enter **N** if your company does not take a product return if the quantity returned puts your inventory level over the Maximum Days Supply amount.

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Note: When you set the Exclude New Sales Orders From PIL Check control maintenance record to **Y**, the system overrides the settings in the Exclude SOE Returns From PIL Check control maintenance record.

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SOE General Control Maintenance Records

The following control maintenance records belong to the SOE (Sales Order Entry) category.

Activate Country Of Manufacture Search On Process Of Sales

Indicate whether the system searches for the country of manufacture of each product when processing sales order generations.

- **Y** – Searches for country of manufacture of each product.
- **N** – Does not search for country of manufacture of each product.

Allow Users To Pick Orders Outside Their Home Branch

Complete this record if multiple branches use the same warehouse. Indicate whether the home branch assigned to a picker can be different than the order's ship from branch. The default is **N**.

- **Y** – A picker's home branch can be different from the order's ship from branch.
- **N** – A picker's home branch must be the same as the order's ship from branch.

Credit Card: Auth Screen In View Only Mode For Reference Only Cards

Indicate whether the system displays the Credit Card Authorization screen in view-only mode if the card is a Reference Only type. The default is **N**.

- **Y** – The screen displays in view-only mode.
- **N** – The screen displays in edit mode.

Default Delivery Label Parameters

In the **Default Delivery Label Per** field, select the system default to use for delivery label printing in the warehouse:

- **Delivery Group** – One label prints for each delivery group, regardless of how many units are associated with a delivery location. For example, a contractor orders a quantity of 10 of a line item, instructing the order taker that five units go to KITCHEN and five to DINING. Two labels print: one for each delivery group.
- **Item** – One label prints for each item. For example, a contractor orders a quantity of 10 of a line item, instructing the order taker that five items go to KITCHEN and five to DINING. Ten labels print: one for each item.

  This control maintenance record can be overridden for individual products, using the Delivery Label Per field in the Product Information Miscellaneous window. Users can also override this setting, or a product-level setting, when entering delivery label information during order entry.

  If you do not set a company default using the Default Delivery Label Parameters control maintenance record, and the product being entered has no product-level default, the system uses the Delivery Group setting as a default. Regardless of how you set this control maintenance record or any product-level defaults, users can override these

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defaults when associating products with delivery locations in the Delivery Label Detail window during order entry.

Note: You must set this control maintenance record in Eclipse, but the settings only apply to the delivery labels feature in Solar Eclipse.

Enable Picking Confirmation

For each branch, indicate whether to enable the Warehouse Picking Confirmation program.

- **Y –** Enables the program.
- **N –** Does not enable the program.

Ignore Cash Required Check When No Ship Via

Indicate whether the system ignores the prompt for payment from a COD customer when there is an amount due for an order generation, no ship via is specified for that generation, and the user escapes out of the SOE Status screen.

- **Y** – The prompt for payment does not display.
- **N** – The Totals screen displays and prompts for payment.

Job Management Admin

To set up default settings for using the Eclipse Job Management companion product, complete the following fields.

- **Default Product Template –** (Required) Select the product record to use as a template when working in Job Management.
- **Engineering Fee Product** – (Required) Select the non-stock product record to use on direct orders created with any engineering fees. The product is used on the direct orders for billing and general ledger posting purposes.
- **Default Print Status** – Select the default print status to use for orders created for jobs. For example, select **N** for no printing or **B** for batch printing.
- **Customer Used for Pricing** – Select the customer to use for pricing information for jobs.
- **Branch Used for Pricing** – Select the branch to use for pricing.
- **Returns Write Off Account** – Select the general ledger account to use for returns if the vendor credit is less than expected, and you want to write off the difference rather than debit it back to the customer.
- **Auto Approve Payables –** Set this field to **Yes** to have all payables created for jobs in the Job Management set to Approved when they are written to Eclipse. Setting this field to **Yes** gives your project managers the ability to approve payables that are in balance directly from the web application. If you prefer that your Payables clerk review each payable for a job and approve them while your Job Management project manager enters the receiving information for the job, set this field to **No**.
- **Receiving URL** – Automatically directs your accounts payable personnel entering Job Management payables on the Eclipse system to to the Job Management system to finish

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the payable process there. This can be set by the Job Management administrator and is the URL they use to get to Job Management. Enter:

http://eclipse-server-IP:PORT/jobManagement/payable.seam

Enter a URL in this field if your accounts payable department is primarily responsible for completing the receiving for orders in Job Management.

Leave this field blank if someone in your Job department or a single accounts payable person is responsible for finalizing receiving in Job Management.

- **Allow Awarding Job When Customer on Credit Hold –** Enter **Yes** to allow a job to be awarded to a customer who is currently on credit hold. Hold for Release purchase orders and Release purchase orders are not printed regardless of how this setting is set if the customer is on credit hold. However, you are able to award the job to the customer.
- **Default Customer Print Style –** Select the print style to use for invoices printed for orders created for a job. If you enter a print style here, it overrides the Orders print style for Job Management invoices.
- **AP Difference Account –** Select the account the system uses for disputed differences in payables when receiving less than what you have reconciled.
- **Use Quoter as Writer –** Enter **Yes** to use the quoter of a job as the order writer for jobs that your company creates. Setting this field to **No** uses the Project Manager as the writer for a job. The default setting is **No**.
- **Use for Inside Sales –** Select whom the system uses as the inside sales person on orders created in Job Management. The default setting, **Use Customer**, uses the inside sales person assigned in Customer Maintenance for the winning customer.

Maximum Line Count Per Day

To limit the number of line items the system releases per day through a phantom process, enter the maximum number of line items. For example, if you enter 1000, the system only releases the first 1000 line items, regardless of the number of orders or the quantity of the items. Remaining items print the following day.

New SOE Customer Template

For each branch, enter the customer record to use as a template to populate fields with defaults when a new customer record is created in SOE.

Parameters For Documents Imaged Onto Invoiced Sales Orders

On the Image Profile Setup for SOE screen, enter print status parameters for documents imaged onto invoiced sales orders.

When you attach a document image to a sales order, you assign it to a document profile. The profile determines where the system stores the document image. The system then compares the document profile to the parameters defined in this control maintenance record. If parameters are defined for the document profile, they determine whether to change the print status assigned to the order and which status to change it to.

For each document profile associated with invoiced sales orders:

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- In the **Document Profile** field, press **F10** and select a document profile.

  If you leave this field blank, the logic associated with this control maintenance record applies for all documents attached to any invoice that matches the print status in the **Cur Prt** field.

- In the **New Prt** field, enter the new print status to assign to an invoiced sales order after the designated document has been attached, if the current invoice status matches the value in the **Cur Prt** field.

  If you leave this field blank, the system does not use the logic associated with this control maintenance record.

- In the **Cur Prt** field, enter the print status an invoiced order must have, when a document is attached, for the system to change the status to the **New Prt** status.

  If you leave this field blank, the system changes the print status of all invoiced sales orders to the **New Prt** status.

Pass-Along Discount Holdback Percent

Enter the percentage, as a decimal, to use for pass-along holdbacks. The system subtracts a holdback discount percent from a vendor pass-along discount due the customer on an order.

The holdback percent is an absolute value, not a percent of the pass-along discount percent. For example, if a pass-along discount due to a customer is 2% and the holdback percent is .5%, the system reduces the pass-along discount percent to 1.5%.

A percentage entered in the **Pass-Along Discount Holdback Percent** field on the Additional Customer Credit Data screen in Customer Maintenance overrides the setting in this control maintenance record.

Note: The system does not allow a holdback percent to make a pass-along discount negative so that a customer receives a credit.

Restrict Post OE IDs to Pre-Assigned IDs

Use this control maintenance record to indicate whether the system restricts users to enter only post-order entry IDs in sales order entry and purchase order entry that are within a specific range.

Post-order entry IDs are orders that you enter in the system after the order has actually been taken. For example, you might need to enter order IDs after the fact when you:

- Are transferring orders from your old system into your new Eclipse system.
- Have salespeople taking manual orders in the field who are not, at that time, connected to the system.
- Need to input handwritten orders for any reason.

Note: For more information on entering pre-assigned sales order entry and purchase order entry ID numbers, see Posting Sales Orders From Another System and Posting Legacy Purchase Orders.

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Before you use this control maintenance record, you must determine the range of pre-assigned IDs that you want your users to be restricted to. You determine this range on the Pre-Assigned Oder ID Maint screen. To display this screen, you can use the Program Editor. For more information on how to pre-assign IDs, see Pre-Assigning and Auditing Order IDs. Alternately, you can add the screen to a menu. The program name for this screen is POST.OE.PRE.MAINT.

When you have determined the range of pre-assigned IDs that you want users to use, enter one of the following:

- **N –** Does not restrict the use of post-order entry IDs to pre-assigned order entry IDs within a specific range. This is the default.
- **Y –** Restricts the use of post-order entry IDs to pre-assigned order entry IDs within a specific range.

When you want to see which range of order entry ID numbers are available for a particular branch or order type, you can view this information on the Pre-Assigned Order ID Audit screen. To display this screen, you can use the Program Editor. For more information on how to determine which pre-assign IDs have been used, see Pre-Assigning and Auditing Order IDs. Alternately, you can add the screen to a menu. The program name for this screen is POST.OE.PRE.AUDIT.

Routing Administrator

Complete this record if your company uses a third party routing interface. For each branch, enter the routing administrator settings by completing the following fields:

- **Branch –** Enter the branch for which to assign the routing administrator settings.
- **Administrator to Receive Communications –** Enter the user or message group to who to send routing communications and error messages.
- **Communication Method –** Select whether the system sends manifest comment notification as a message or a tracker.

Routing Ship Vias

Complete this record if your company uses a third party routing interface. For each branch, enter the ship vias to route by default to the third party routing software. If you leave this record blank, defaults are not defined.

Sales Order Entry Auto Apply Mode

For each branch, select whether to override the automatic application of sales deposits and/or credit balance invoices to the A/R when the next order segment is shipped and processed as an invoice. When left blank, the default is **D**.

- **N-No Auto Apply –** All deposits display as unapplied receipts in the Cash Receipts program and have to be applied manually.
- **D-Deposits Only –** Any deposit received prior to an invoice segment being processed (shipped) is auto-applied.
- **A-All Credit Bals –** All deposits and credit balance invoices are auto-applied.

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Note: Each of the above only applies to deposits and credits occurring on the same order number transaction. We recommend that you assign one of the choices to each branch.

Standard Delivery Label Groups

Enter the names of commonly used delivery locations that salespeople can use when assigning products to delivery locations in Sales Order Entry. For example, you can enter common room names such as kitchen, bathroom, or master bedroom.

Note: You must set this control maintenance record in Eclipse, but the settings only apply to the delivery labels feature in Solar Eclipse.

Stock Availability Service Level Tracking

Indicate whether to enable stock availability service level tracking. When enabled, the system records data for the Stock Availability Service Level Report, which measures the percentage of times that the complete quantity ordered for a stock item is on the shelf when the customer orders it.

- **Y** – Enables tracking.
- **N** – Does not enable tracking.

Note: You must set this control maintenance record to Yes in order to be able to run the Stock Availability Service Level Report. For more information on this report, see Running the Stock Availability Service Level Report.

Update Customer Calling Queue When Ship Date Changed By Direct Ack

Set this control maintenance record to determine whether or not to update the ship date on the sales order side of a direct when an acknowledgment is received. Enter one of the following:

- **Y** – Does not update the ship date when an acknowledgement is received on a direct, instead, sends notification to the Customer Calling Queue.
- **N** – Updates the ship date when an acknowledgement is received on a direct.

Valid Job Award Codes

Enter job award codes, up to 15 characters long, that users can award to a job bid in the **Award Code** field on the Job Bid Maintenance screen. Award codes explain why a job bid was or was not awarded to one of your customers. For example, you might enter Awarded, Lost - Price, Lost - Avail, or Lost - Brand.

Valid Release Numbers

For Eclipse internal use only.

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SOE General Order Parameters Control Maintenance Records

The following control maintenance records belong to the SOE (Sales Order Entry) category and apply to general order parameters.

Always Prompt For The Unit Of Measure In OE

If your company maintains and sells product in units of measure other than “ea,” the system can prompt the writer of a sales, purchase, or transfer order to enter the unit of measure for each item ordered.

For each type of order entry, indicate whether the system displays the valid units of measure whenever a user enters a quantity and product on the order. The default is **N**.

- **Y** – Displays the valid units of measure defined for the product, from which the user can select the one to use.
- **N** – Uses the default unit of measure defined for the product.

Change Credit Hold Order Statuses To

Select how the system changes the order status when sending a credit hold transaction to the Open Order Status Review Queue.

- **No Change** – If the order status is A – Ship When Available or M – Ship Item Complete, the system changes the status to C – Call When Complete. In all other cases, the system does not change the order status.

  Note: If a sales order has a status of H – Ship When Complete or S –Ship When Specified and if the credit manager does not make any status changes when the order is released from credit hold, the system retains the original ship status, ship date, and ship via, which continues to control the processing and ultimate disposition of the order.

- **Call When Complete** – The system changes the order status to C– Call When Complete.

Check Availability When Adding Items To Processed Invoices

For each branch, indicate whether the system checks availability when an authorized user adds line items or quantities to a closed (invoiced) order generation. The default is **N**.

- **Y** – Checks availability.
- **N** – Does not check availability.

Enable Auto Routing On Creation Of Sales Order

For each branch, indicate whether to enable auto routing upon creation of a sales order.

- **Y** – Enables auto routing.
- **N** – Disables auto routing.

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Enable FET Calculation

Indicate whether the system calculates federal excise tax (FET) for orders.

- **Y –** Calculates the FET amount, if defined, and displays it on the Totals screen of an order.
- **N –** Does not calculate FET, even if defined.

  Note: If your company does not need to calculate FET, you can improve your system performance by setting this record to **N**.

Force Sell Package From Print Phantom And OE

Complete this record if your company uses sell package quantities.

Indicate whether the system forces users to respect package quantities when selling products for which sell package quantities are defined. For example, if the sell package quantity is 12, the system can prompt an order writer selling 11 or 13, but not a writer selling 12, 24, 36, or so on.

- **Y –** Prompts users to enter sell package quantities.

  When the quantity entered is not divisible by the sell package quantity, the system displays a warning. Users assigned the SOE.PACKAGE.QTY authorization key can override the package quantity requirement.
- **N –** Does not prompt users to enter sell package quantities.

Ignore Tax On Freight On Sales Orders W/O Taxable Line Items

Indicate whether the system excludes freight and handling from the taxable amount if there are no taxable line items on an order. The default is **N**.

- **Y –** Excludes freight and handling from the taxable amount.
- **N –** Includes freight and handling in the taxable amount, even when there are no taxable line items on the order.

  Note: If there is at least one line item that is taxable, the system taxes the full freight amount.

Keep Original Commitments On Order Consolidation

Indicate whether the system retains a date/time stamp to indicate the inventory commitments for items on an open order during order consolidation. If you leave this record blank, the default is **Never**.

- **Always –** Retains all commitments, regardless of whether the item was left on the original order.
- **Moved –** Retains commitments for items moved to the consolidated order but canceled from the original order.
- **Never –** Does not retain product commitments during order consolidation or when moving the item to a different order.

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Note: You can view the commitment dates/times using the Priority view in the Future Ledger.

Multiply Product Family Quantities By The Order Quantity

Indicate whether the system multiplies the quantities defined for the items belonging to a product family by the quantity users enter when placing that product family on an order. The default is **N**.

- **Y –** Multiplies product family item quantities by number of product families ordered.
- **N –** Does not multiply product family item quantities by the number of product families ordered. Regardless of the quantity entered on the order, the system adds the items for just one product family to the order.

Notify Buyer When Canceled Item Is On An Open Purchase Order

Complete this record if your company uses maximum days supply and would like the system to send a job queue tracker to writer of a purchase if an item is deleted from an open purchase order and results in over committing your projected inventory level (PIL).

- **Y –** Checks the future ledger for any open purchase orders that contain the item and then sends a tracker to the buyer/writer of the purchase order, informing them that the item was deleted off the sales order.
- **N –** Does not check the future ledger or notify the buyer.

Notify User When Quantity Backordered

For each branch in the company, enter the writer, inside salesperson, outside salesperson, other user, or message group to whom the system sends a tracker when a picker or receiver backorders material or the quantity shipped on an invoiced sales order generation changes. If you leave this record blank, the system does not send a tracker.

Note: This record does not apply to direct orders.

Number Of Days For Matrix Cell Expire Date For Order Entry

Enter the number of days from the price date the system uses to calculate the expiration date on the sales order matrix. If you leave this record blank, the default is 30 days. The expiration date displays on the Copy Override Pricing to Matrix screen.

Order Status To Change To When Credit Is Denied

Select the status the system assigns to an order when a user denies credit using the **Deny** hot on the Sales Order Credit Override screen. The default is **C – Call When Complete**.

- **C – Call When Complete**
- B – Bid

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Remove Converted Sales Orders From Sales History

Indicate whether the system removes reversal postings created by conversion programs from the Entity Transaction file (ENTITY.TRX). The default is **N**.

- **Y –** Removes reversal postings.
- **N –** Does not remove reversal postings.

When the system converts sales-related history, it creates two types of records: one for sales history purposes and one for open A/R. Both have their G/L postings reversed. Converted sales history records with the G/L reversals are required to build sales history in ENTITY.TRX.

Update Associated Trackers Upon Invoicing Of Orders

Indicate whether the system appends a comment to all trackers linked to the order when a user invoices a sales, purchase, or transfer order. The default is **Yes**.

- **Yes –** Appends a comment to all trackers linked to the order, indicating that the order has been invoiced. All users on the tracker forward lists receive a message that the tracker has been updated.
- **No –** Does not append a comment to trackers linked to the order.

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SOE Log Entry Parameters Control Maintenance Records

The following control maintenance records belong to the SOE (Sales Order Entry) category and apply to log entry parameters.

Create Log Entry When A Transfer Is Shipped Incomplete

Select the user to whom the system sends a tracker when the quantity shipped for a transfer is less than the quantity ordered.

- **Writer** – Sends a tracker to the writer's User Activity Log.
- **Inside** – Sends a tracker to the inside salesperson's User Activity Log.
- **Outside** – Sends a tracker to the outside salesperson's User Activity Log.
- **Null** – Does not send a tracker.

Log Pick Up Now In Open Order Review Queue

For each branch, indicate whether the system places orders processed using the Pick Up Now status in the Open Order Status Review Queue.

- **Y** – The system places orders in the queue as follows:
  - In an *RF* environment, the system places orders in the queue with a status code of PICKING, where they can be confirmed for printing, as is normally done with tickets printed and processed via Phantom Shipping Ticket printing.
  - In a *non-RF* environment, the system places orders in the queue with a status code of PRINTED, where they can be confirmed for printing as is normally done with tickets printed and processed via Phantom Shipping Ticket printing.
- **N** – The system does not place orders in the queue, in either an *RF* or *non-RF* environment.

Log Product Replacements On New Orders

Indicate whether the system logs product replacements on new orders.

- **Y** – Creates a log entry.
- **N** – Does not create a log entry.

  Note: The system automatically logs product replacements on existing orders.

Log Sell Price, Purchase Price & Cost Overrides

For each branch, indicate whether the system logs sell price, purchase price, and cost overrides for two price-related reports.

- **Y** – The system creates the data necessary for two price-related reports. You must run these reports on a regular basis to purge these override data files. Failure to run these reports can affect the speed of order entry.

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The Price Overrides Report logs user overrides to the sell price or the cost on sales orders.

The Purchase Price Overrides Report logs purchase order overrides.

- **N –** The system does not save the data necessary for these reports.

Note: Enter a purge date for old overrides. Failure to purge old data causes the OVERRIDES.LOG to become large and cause degradation of the performance of order entry.

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SOE Lot Item Parameters Control Maintenance Records

The following control maintenance records belong to the SOE (Sales Order Entry) category and apply to lot items.

Change Order Commitments Flow To Junior Order Lot Items

This control maintenance record is no longer used.

Default New Lot Item Generations To Hold For Vendor Release

Indicate whether the system places new lot item generations on hold by setting the default status to Hold for Vendor Release.

- **N** (None) – Does not place new lot item generations on hold.
- **M** (Master Job Bids) – Places new lot item generations for junior orders on hold.
- **S** (Standard Lot Orders) – Places new lot item generations for standard lot orders on hold.
- **B** (Both) – Places new lot item generations for junior orders and standard lot orders on hold.

Lot Item Advance Billing Factor

In the **Adv Bill Factor** field, enter the factor, 0.0 to 999.9, used to calculate the suggested amount to bill to a customer for lot item shipments. For each shipment, the system calculates the percentage of the open Lot Cost against the vendor invoice being reconciled. The system then multiplies the percentage by the ABF to determine the customer invoice amount. This is a global default setting for all lot items. You can manually override this factor in Sales Order Entry/Lot Item Status screen at any time.

- Use a higher number to bill more in the beginning of the life cycle of the lot order.
- Use a lower number to bill more in end of the life cycle of the lot order.
- If the field is blanked out by pressing the **Spacebar**, the value changes to 0.0. If you leave 0.0 as the entry, no billing is generated during reconciliation. We recommend that you not leave this value at 0.0.

  Note: We recommend using 1.0, which provides a consistent billing ratio throughout the life cycle of the order.

In the **Break Point %** field, enter a percentage amount, which is used along with the ABF. This is the point in the vendor billing when the customer billing rate changes. This change ensures the customer reaches 100% billing at the same time you reach 100% vendor billing. In general, specify a lower Break Point Percentage when using a higher ABF. The ABF multiplied by the break point must be less than 100%.

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SOE Point of Sale Parameters Control Maintenance Records

The following control maintenance records belong to the SOE (Sales Order Entry) category and apply to point-of-sale parameters.

POS Receipt Message

Enter the message to print at the bottom of a POS point-of-sale receipt.

SOE Payments Open Cash Drawer

For each branch, on the Cash Drawer Opening Payment Types screen, select the payment types that will open the cash drawer in that branch. If you leave this record blank, then the cash drawer opens on all payment types. Options include:

- Cash
- Check
- Credit Card

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SOE Pricing Parameters Control Maintenance Records

The following control maintenance records belong to the SOE (Sales Order Entry) category and apply to pricing parameters.

Default Rank For Velocity Pricing

For each branch, enter the rank the system should use if the product does not have a rank established for the pricing branch of an order. For more information on velocity pricing, see Assigning Rank in Product Velocity Pricing.

Minimum Variance Before Last Price Reduction

On the Minimum Variance Before Last Price Reduction screen, for each branch, define a threshold variance and a cost reduction factor the system can use to reduce a price if the current cost is less than the previous cost and the difference exceeds the threshold. If you leave a field blank, the system does not check for a variance or change a sell price for that branch.

The system uses the following formula to calculate the variance between the current and previous cost: Variance % = 100 - (Current Cost /Previous Cost).

If the difference between the current and previous cost exceeds the threshold, the system decreases the sell price using the following formula to calculate the cost reduction: New Sell Price = Previous Sell Price - Cost Reduction Factor (Previous Rep Cost - Current Rep Cost).

The system adds the following comment to the order change log: Price Reduced Because of Cost Reduction on Item<x>. Last Price is <$>.

For example:

If...	Then...
Variance % = 10% Cost Reduction % = 50% Previous Sell Price = $19.00 Previous Cost = $15.00 Current Cost = $11.00	Variance % = 100 - (Current Cost /Previous Cost) Variance % = 100 – (11/15) = 26.66% Since the variance threshold is reached (10%), the price will be reduced using the cost reduction factor of 50% New Sell Price = Previous Sell Price – Cost Reduction Factor (Previous Rep Cost – Current Rep Cost) New Sell Price = $19.00 - .50 (15-11) = $17

Override Basis Name For Last Price Calculation

Enter a global basis name whose associated value will be used to override the actual last price when using last price pricing.

> **Note:** For the setting in this record to have any effect on a customer, the Use Last Price/Cost Logic control maintenance record must be enabled or last price pricing must be enabled for an individual customer in Customer Maintenance. The setting for a customer overrides the setting in the control maintenance record.

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Price Ceiling Global Basis Name

To make sure users do not sell above a maximum price, enter a global basis name to set as the maximum list basis field. If you leave this record blank, this logic is turned off.

> **Note:** The record works with the SOE.MAX.PRICE authorization key.

Reprice Sales Order Upon Invoicing

For each branch, indicate whether the system reprices the sales order at the time of invoicing using current pricing information, if the product price or the pricing rules for a product change between the time an order is entered and when it is invoiced.

- **Y –** The system reprices the sales order at the time of invoicing, using current pricing information. If a price override has been assigned to a product on an order, no repricing occurs. The override price remains in effect at the time of invoicing, even if this record is set to **Y**.
- **N –** A change to a product price or pricing rules does not affect the price of a product on an order that is not yet invoiced.

  Note: This record has no effect on purchase orders or transfers.

Reprice/Recost Order On Change Of Shipping Branch

Indicate whether the system reprices/recosts items on an order generation when the user changes the shipping branch on that generation.

- **Yes –** The system always reprices/recosts items on the order generation when the user changes the shipping branch.

  Users must be assigned the SOE.OPEN.ORDER.EDIT and SOE.OPEN.PRC.EDIT authorization keys for the system to reprice/recost the items on the order generation.
- **No –** The system never reprices/recosts the items on an order generation, or prompts the user to reprice/recost the items on an order generation when the user changes the shipping branch.
- **Prompt –** If a user changes the shipping branch on an order generation and the new shipping branch has a sell price or cost that is different from the sell price or cost at the original shipping branch, the system prompts the user to specify whether the system should reprice/recost the items to use the sell price/cost at the new shipping branch.

  Users must be assigned the SOE.OPEN.ORDER.EDIT and SOE.OPEN.PRC.EDIT authorization keys to reprice/recost the items. If a user has not been assigned those keys, the "Reprice/Recost Items (Y/N)" prompt does not display.

If a product on an order is scheduled on multiple generations with different ship dates and the shipping branch is changed for one of the generations, the change affects the item on all generations, if repricing/recosting is done.

> **Note:** This record works independently of the setting in the Reprice Sales Order Upon Invoicing control maintenance record, which affects the repricing/recosting of items at the time an order is processed.

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Use Central Warehouse Branch Rank If No Pricing Branch Rank

Enter one of the following to determine whether to use the branch rank of your central warehouse if you do not have a pricing rank set:

- **Y –** The system uses the branch rank settings as established for your central warehouse.

  Note: If you use velocity pricing, we recommend that you set this control maintenance record to **Y**.

- **N –** The system does not use the branch rank settings as established for your central warehouse. Instead the system uses the rank settings as established for each branch.

  Note: If your pricing branch is the same as your central warehouse, then the system uses the branch rank settings as established for your central warehouse.

The system uses the following hierarchy when this control maintenance record is set to Y:

- If a pricing branch has a rank, use that rank.
- If a pricing branch without a rank, use the rank for the central warehouse
- If the central warehouse has a rank, use that rank.
- If the central warehouse does not have a rank, use the settings in the Default Rank For Velocity Pricing control maintenance record.

Use Last Price/Cost Logic

Specify whether a customer's last price and cost for a product should determine the current price and cost for that product.

- **Prompt –** The system prompts the user to enter a price or cost for an item.

  The system displays the Last Price Verification screen for all customers in SOE when a product is placed on an order.

- **Price Only –** The system uses the last price as the current price of an item. To determine the current cost, it uses the normal costing calculation.

  Last price pricing disregards all other pricing or matrix cells with the exception of contract pricing and customer-specific matrix cells (ship-to or bill-to) and generates an order entry price based on the percentage of markup on the last sale of the item to that customer.

  When a contract price or customer specific matrix cell is not in effect, the system prices an item at the COGS cost multiplied by the gross margin of the selling price from the customer's most recent shipment for the same item. The pricing audit displays the basis as "LP" and the formula as the percentage of difference between the last price and the calculated new price. For example, if the customer's price for the item on the most recent invoice was $1.25, the cost was $1.00 (a margin of 25%), and the current cost is $1.10, then the new price will be $1.375 and the audit will display LP+.10.

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Note: Setting this record to **Price Only** overrides promotional pricing, if last price pricing is found, and changes the standard best-price-check logic. Typically only companies whose business type dictates it activate last price pricing at the time the system is implemented.

- **Cost Only –** The system uses the last cost as the current cost of an item. To determine the current price, it uses the normal pricing calculation.
- Both **–** The system uses the last price and last cost of an item as the current price or cost of an item.
- None **–** Last price pricing and last cost costing are disabled for all customers.

Note: Setting the **Use Last Price/Cost Logic** field to **Both**, **Price Only**, **Cost Only**, **Prompt,** or **None** on the Additional Customer Pricing/Printing Data screen overrides the setting in this control maintenance record.

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SOE Print Parameters Control Maintenance Records

The following control maintenance records belong to the SOE (Sales Order Entry) category and apply to print parameters.

Enable MSDS Print With Invoice

Indicate whether the system prints material safety data sheets (MSDS) along with those invoices that require one.

- **Y –** Prints invoices that do not require an MSDS, followed by the invoices that do require an MSDS. As the invoices that require an MSDS print, the system prints the corresponding MSDS on a different printer.

  Following the invoices that require an MSDS, the system prints an MSDS Order Summary page. This page lists all of the products on the invoice that require an MSDS and the MSDS that each requires. The MSDS Order Summary might contain multiple pages. The system also prints the MSDS number on the invoice as a line item comment associated with the product that requires it.

  If a product on an invoice requires an MSDS but one is not printed for it, the system sends a tracker to the user or message group specified in the User To Get Tracker When MSDS Is Not Printed For Product control maintenance record. The tracker contains the invoice number, customer number, product number, and MSDS number.

  Note: You must specify the printer to be used for printing MSDSs in the Eclipse Server Setup control maintenance record.

- **N –** Does not print MSDS sheets or an MSDS Order Summary page. Does not sort invoices according to their need for MSDS sheets before printing.

Invoice Print Copies = 0, Q Status Invoices To Invoice Preview Queue

Indicate whether the system sends invoices for customers who have the **Invoice Print Copies** field on the Customer Pricing/Printing screen set to zero to the Invoice Preview Queue.

- **Y –** Sends invoices to the Invoice Preview Queue.
- **N –** Does not send invoices to the Invoice Preview Queue.

Order Status Print Status Defaults

For each transaction type, select a default print status code.

> **Note:** Filling in the **Print Status Override** field on the Miscellaneous Vendor Information screen overrides the setting in this record for standard P/Os. For the vendor override to apply to the P/O side of direct orders, you must set the Use Vendor Print Status Override On The P/O Side Of A Direct control maintenance record to **Y**. The Default Print Status To "E" For All EDI Vendors control maintenance record, when set to **Y**, overrides the setting in this record for purchase orders to EDI vendors.

Orders can have the following status codes:

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- **Y-Yes Print –** Prints a copy of the appropriate document.
- **N-No Print –** No document prints.
- **F-Fax –** Faxes a copy of the appropriate document to a customer.
- **A-E-mail –** E-mails a copy of the appropriate document to a customer.
- **H-Hold for Printing –** Use to hold a printing

Invoices can have the following additional status codes:

- **P-Detailed Invoice Preview Report –** Causes the invoice to be selected for and included in the Detailed Invoice Preview Report. This is a typical print status setting for an invoice.
- **Q-Invoice Preview Queue –** Causes the invoice to be selected by the Invoice Preview Queue, if that program is used before the Detailed Invoice Preview Report.

  At the Invoice Preview Queue, the print status of the invoice can be changed to **P** to include the invoice in the Detailed Invoice Preview Report.
- **B-Batch Print –** Makes the invoice available to the Print Invoices program.
- **M-Flag to be Placed on Manifest –** Flags the order so it can be placed on a shipping manifest.

  Once the system places the invoice on a manifest, the print status remains an **M** until the shipping manifest is closed. Once the shipping manifest is closed, the system looks at the Print Status Override On Manifest Close control maintenance record for the associated branch to see if the print status should then be overridden. If no override is specified, when the shipping manifest is closed, the print status is reset to the default print status that was assigned to the invoice transaction type in this (Order Status Print Status Defaults) control maintenance record.
- **H-Hold-No Batch Print –** Puts a hold on printing the invoice as part of a batch through the Print Invoices program.

Print All Open Gens Of An Order On First Print Of Acknowledgement

Complete this record if your company uses Outbound E-mail.

When a salesperson creates an open order that has multiple generations (or backorders), the system can automatically print the entire order on the acknowledgment.

Indicate whether to print all generations of an open order on the first print of acknowledgment.

- **Yes –** Prints all generations.

  The first e-mail printing acknowledges the total quantity on all generations of the order. Subsequent printings acknowledge just the items on the designated generation.
- **No –** Does not print all generations.

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Print Phantom Waits For In-Process Receipts

For each branch, indicate whether the system waits for in-process items to be put away before printing an order generation.

- **Y –** The system waits.

  If an order is not processed because this record is set to **Y**, the system assigns the open order status **Waiting-IP** to the order in the Open Order Status Review Queue. The user can ignore the in-process quantity and manually select and process orders in the Open Order Status Review Queue with a status of **Waiting-IP**, which means the system prints the generation with what is available.

- **N –** The system does not wait.

Print Ship Ticket Instead of Pick Ticket

Use this control maintenance record to print acknowledgements for return goods using the phantom processor. Set this control maintenance record to Yes if your company uses ship tickets in lieu of pick tickets.

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SOE Procurement Parameters Control Maintenance Records

The following control maintenance records belong to the SOE (Sales Order Entry) category and apply to procurement parameters.

Allow Procurement From Unauthorized Vendor Branches

Indicate whether the system can create a procurement purchase order for vendors not authorized for a branch.

- **Y** – Can create procurement purchase orders for unauthorized vendors.
- **N** – Cannot create procurement purchase orders for unauthorized vendors. The vendor does not display as an option if it does not have access to the branch.

Define Routing Vs. Sourcing

On the Define Routing vs. Sourcing screen, indicate whether each branch is a routing or sourcing branch for obtaining requested items. Complete the following fields:

- In the **Typ** column, select the branch type. If you leave this field blank, the branch is a normal stocking branch.
    - **R-Routing** – A branch set up to create direct sales orders for items routed to it based on the product routing tables set up in Customer Maintenance.
    - **S-Sourcing** – A branch set up to generate procurements for items routed to it based on the product routing tables set up in Customer Maintenance.
- If the branch type is **S**, in the **Sourcing Status** column select the order status the system should assign to the purchase order it creates.
    - If you assign an open order status, the system creates a suggested procurement and places it in the Procurement Confirmation Queue.
    - If left blank, the system assigns the Bid status.

Procure Items On Original Ship Date

By default when you procure a product on the Order Entry Procurement screen, the system updates the ship date to the available date for the procured product. Use this control maintenance record to designate order statuses for which the system should not necessarily change the original ship date for the procured item.

On the Included Statuses/Display Prompt screen, for each branch specify which statuses can retain the original ship date for a procured item. Complete the following fields:

- In the **Br/Tr/All** field, enter the branch or branches for which to designate order statuses. Enter **all** to designate order statuses for all branches.
- In the **Statuses** field, enter each order status for which the original ship date can be used as the procure date. Separate each status by a comma with no space. You can also select the statuses. This prompt accepts any status except Bid or Cancel.

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- In the **Prompt** field, indicate whether the system should prompt the user to procure the items for the original ship date when exiting the Order Entry Procurement screen. The default value is **N**.
  - **Y –** Displays the following prompt: Procure Items On Original Ship Date?
  - **N –** Sets the ship date for the procurement to the original ship date without prompting the user.

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SOE Product Parameters Control Maintenance Records

The following control maintenance records belong to the SOE (Sales Order Entry) category and apply to product parameters.

Auto Show Availability When Product Is Unavail

For each branch, select when the system displays the Product Availability screen during sales order entry.

- **Never –** If the on-hand quantity of a product is unavailable to meet the order quantity, the system does not check to see if the product is available at other branches of the company.
- **Unavail –** If the on-hand quantity of the product is unavailable to meet the order quantity, the system checks to see which branches are accessible to the user, and then checks those accessible branches for the entered product. If the product is available at any of the user's accessible branches, the system displays the Product Availability screen and lists the branch number and available quantity at that branch.
- **Always –** Every time a line item is entered on an order, the system checks to see which branches are accessible to the user, and then checks those accessible branches for the entered product. If the product is available at any of the user's accessible branches, the system displays the Product Availability screen and lists the branch number and available quantity at that branch.

Branches To Display In OE Product Availability Window

For each branch, select the branches for which the system displays availability in the Product Availability screen in order entry.

- **Accessible –** Displays availability for the user's authorized branches, those from which the user can ship products.

  Note: If you set this control maintenance record to Accessible, you must also define which branches display in the Additional Brs To Show Availability On Primary Product Index control maintenance record.

- **Inv Inq Territory –** Displays availability for the branches for which the user has inventory inquiry access.

Check Other Dynamic Kits For Needed Parts

Complete this record if your company uses dynamic kitting.

For each branch, indicate whether the system considers other dynamic kits as a source from which to acquire kit components.

When a dynamic kit has been added to a sales order, and the kit is not in stock in its whole form, the system determines the availability of the kit by checking the stock of its individual components. In some cases, the needed components may be available only as components of

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other dynamic kits. Whether the system can use these components depends on how this record is set.

- **Y** – Considers the components of other dynamic kits for determining availability.
- **N** – Does not consider the components of other dynamic kits for determining availability.

Commit Qty From Display Location

For each branch, indicate whether users can commit products from a display location to a sales order.

> **Note:** Regardless of how this record is set, display items sold are excluded from the demand calculation.

- **Y –** If there is not enough product in a stock location, but there is enough product in a display location to fill the order, the system prompts the user to commit the items from the display location to the order.
  - If the user enters **Y**, the system schedules the items from the display location.
  - If the user enters **N**, the system backorders the item for normal scheduling.

  Whether the system displays the prompt to commit items depends on the level assigned to the user with the SOE.SCHEDULE authorization key.

  If there is not enough product in a stock location, and there is some but not enough product in a display location to fill the order, the system notifies the user of the number required to fill the order and the number available on display, and then prompts the user to continue. This process backorders the items for normal scheduling.
- **N –** The system notifies the user that there is product in the display location, but the system does not prompt the user to commit the items to the order.

Minimum Days From Today For Open P/O To Show As Available

Enter the minimum number of days, 0-99999, from the current day before the products on an open purchase order display in Sales Order Entry as available. If you leave this record blank, the default is **3**.

Number Of Digits Of Accuracy For Product Weight

Enter the number of decimal places of accuracy, 0-9, to display for the weight of a product in the **LBS/** field on the Product Maintenance screen. The default is 4. Use this record to eliminate rounding errors. The number in this control maintenance record works with the number of digits in the **Quant** field on the Product Maintenance screen, which represents the smallest unit of measure for the product.

Example:

If this record is set to 9 and the smallest quantity is 1, you are allowed nine digits of accuracy. If it is 2-9, you are allowed eight digits of accuracy.

If this record is set to 6 and the smallest quantity is 1, you are allowed six digits of accuracy. If it is 2-9, you are allowed five digits of accuracy.

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Note: Do not change the value of this record after implementation. Changing the value requires an update to all products in the Product file.

Only Check PIL At Local Level

Indicate whether the system checks the PIL only at the local level, rather than the network level. The default is **N**.

- **Y –** Checks PIL only at the local level.
- **N –** Checks PIL at the network level.

Order To Inventory Factor For SOE

Use this record to specify an order to inventory factor for all products. Enter a percentage of the quantity of each product to maintain on hand.

The entry in this record works with the entry in the **Order to Inventory Factor For SOE** field on the Miscellaneous Product Information screen. The factor assigned to a product overrides the factor in this control maintenance record.

If a user enters an order quantity for a product that represents a percentage of inventory that is greater than the percentage specified at the product level or in this record, the system warns the user with a message in SOE and allows the user to continue or delete the item from the order. For example, if this record is set to 50, there are 100 of a particular item in inventory, and a customer orders 51 of the item, the warning message displays.

The Message Buyer On Inventory Factor Override In SOE control maintenance record works together with the entry in this record and the entry in the **Order to Inventory Factor For SOE** field on the Miscellaneous Product Information screen. If that record is set to **Y**, the inventory factor specified in this record is exceeded, and the order taker continues with the order, the system sends a tracker to the buyer assigned to the buy line for the product. The tracker contains the following comment: User *x* has overridden the Inventory Factor for Product Number *y* on sales order *z*.

Product Location Default

For each branch, specify the default product location and location status to assign to a new nonstock item created through order entry. A product location can be up to 10 characters long. The nonstock product must be created from the order entry screen for this control maintenance record to assign the default product location and location status.

Enter each location followed by a comma (with no spaces on either side of the comma) and a **P** or **S** (the default location status). For example, the entry must be in the form *WHSE,P* where WHSE is the default product location and P is the default location status.

Note: The default location status must be **P** for Primary or **S** for Secondary, and it must be assigned along with the default location. Otherwise, the location does not display on the Product Location Maintenance screen.

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Require Product Catalog In Sales Order Entry

For each branch, indicate whether the system prompts for a product catalog when you display the SOE Header screen. The product catalog indicates where information about the products on the order can be found.

- **Y –** Prompts.
- **N –** Does not prompt.

When prompted, display the list of catalogs defined in the Valid Product Catalogs control maintenance record. If catalogs are not defined in this record, type your own entry in the field. The catalog name you enter displays in the **Product Catalog** field on the Additional Header Information screen.

Skip Ret Goods Verif For Prod Types

Select the product types for which the Return Goods Verification screen should not display when a negative quantity is entered on a sales order. When left blank, the screen displays for all product types.

Valid Reason For Return Codes

Enter reason for return codes that users can assign to a returned product in the **Reason Code** field on the Return Goods Verification screen when entering a return on a sales order. Codes can be up to 20 characters long.

To require a reason for return code to be entered in the **Reason** field on the Return Goods Verification screen when entering a return on a sales order, set the Require Reason For Return Code control maintenance record to **Y**.

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SOE Prompts Control Maintenance Records

The following control maintenance records belong to the SOE (Sales Order Entry) category and apply to SOE prompts.

Always Prompt For The Unit Of Measure In OE

Indicate whether the system always prompts the user to enter the unit of measure in order entry.

- **Y** – Prompts.
- **N** – Does not prompt.

Prompt For Edit Of Required Date On Change Of Ship Date

Indicate whether the system prompts you to edit the required date when you exit an order after changing the ship date.

- **Y** – Prompts you to edit the required date.
  - If you answer **Y**, the system displays the Status screen, changes the view to the Required Date view and positions the cursor on the associated required date for editing.
  - If you answer **N**, normal processing continues.
- **N –** Does not prompt you to edit the required date.

  Note: The Edit Required Date question never appears when creating a new order.

Prompt For Original Description On Substitutes

For each branch, indicate whether the system prompts the user to keep the description of the original item on an order instead of the description of a substitute item when the original item is replaced by a substitute product.

- **Y –** Displays the following prompt: Do you wish to keep the original description?

  If you answer **Y**, the system places the original item's product description on the order, prefixed with a caret (^). This caret only appears on screens, and does not appear on the customer's invoice or acknowledgment. For example, if you substitute Item B for Item A, the following appears in the **Product Description** field on the Sales Order Entry Body screen: ^ Item A Description.

  If you answer **N**, the system places the substitute item's product description on the order. For example, if you substitute Item B for Item A, the following displays in the **Product Description** field on the Sales Order Entry Body screen: Item B Description.
- **N –** Does not prompt the user to keep the original product's description on the order when you substitute another item for it. Instead, the system places the substitute item's description on the order, and displays a comment with the description of the original item that was ordered.

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For example, if you substitute Item B for Item A, the following displays in the **Product Description** field on the Sales Order Entry Body screen: Item B Description * Sub for : Item A Description.

Prompt For Picked Postdated Orders During Physical

For each branch, indicate whether the system asks the user if all postdated orders have been picked, upon printing the Variance Report or updating physical on-hands.

- **Y –** Asks the user if postdated orders have been picked.
  - If all postdated orders *have* been picked, the system does not add the ship quantity of the postdated orders to the starting inventory on-hand quantities for the Variance Report or to the on-hand quantities used to determine the new on-hand count.
  - If all postdated orders *have not* been picked, the system adds the ship quantity on all postdated orders to the on-hand quantities for the Variance Report and to the on-hand quantities used to determine the new on-hand count.
- **N –** Does not ask the user if postdated orders have been picked. The system always assumes that all postdated orders, if any exist, have not been picked.

Prompt For Required Date In Sales Order Entry

For each branch, indicate whether the system should prompt the user to complete the **ReqrDate** field in Sales Order Entry. The required date is the date when the customer wants to receive ordered material.

- **Y –** Always prompts for an entry in the **ReqrDate** field.
- **N –** Does not prompt for an entry; the system populates the **ReqrDate** field with the current date and positions the cursor on the next field requiring data entry.
- **D –** Populates the **ReqrDate** field with the current date and positions the cursor in that field, so the user can change it if desired.

  Note: If the **Initial Status Override** on the Additional Customer Information screen in Customer Maintenance or the **Dflt ShipVia** on the Customer Maintenance screen is set to **P** for Pick Up Now, or if the order status assigned to the terminal being used to enter the order is set to **P** for Pick Up Now, the system will not prompt for a required date even if this record is set to **Y** or **D**.

Prompt For Ship Date Change When Releasing Order From Credit Hold

Indicate whether the system prompts users to change the ship date when they release an order from a credit hold in the Open Order Status Review Queue. The default is **N**.

- **Y –** Prompts.
- **N –** Does not prompt. Ship date remains unchanged.

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SOE Shipping Parameters Control Maintenance Records

The following control maintenance records belong to the SOE (Sales Order Entry) category and apply to shipping parameters.

Change Ship Date If Required Date Edited On Schedule Screens

Indicate whether the system changes the ship date accordingly, when a user changes the required date on either the Order Entry Schedule screen or the Order Entry Detail Scheduling screen.

- **Y** – Changes the ship date and, if necessary, puts the item on a new generation of the order.
- **N** – Only updates the line item required date. The system does not change the ship date and does not update the required date for that generation.

Change Ship Date On P/O When Ship Date On Invoiced Direct Changes

Indicate whether the system changes the shipdate on the P/O when the shipdate on an invoiced direct changes.

- **Y** – Changes the shipdate on the P/O.
- **N** – Does not change the shipdate on the P/O.

Force Required Date To Match Ship Date On Phantom Process

Indicate whether the system forces the required date to match the ship date on orders that are shipped before the required date on the order.

- **Y** – When an order with an auto-print status of Ship When Complete, Ship When Specified, Ship When Available, or Ship Item Complete is picked up by the print phantom, if the required date on the order is different from the ship date, the system changes the required date to match the ship date.

  If the invoice date is set for the phantom, the system changes the required date to match the invoice date.

  This record respects any value in the **Required Date Lead Time** field on the Miscellaneous Customer Information screen. The system adds the Required Date Lead Time days to the ship date on the order before matching the required date to the ship date.
- **N** – The required date for the order remains as originally specified.

Mirror Required Date And Ship Date For New Orders

For each branch, indicate whether, if you change the ship date or required date on the SOE Status or Detail Scheduling screen when creating a new order, the other date changes to match the date you changed.

- **Y** – The other date changes to match the date you changed.

  This control maintenance record uses the value in the **Required Date Lead Time** field on the Miscellaneous Customer Information screen. The system adds the required date

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lead time days to the ship date on the order before matching the required date to the ship date.

- **N –** The other date does not change to match the date you changed.

Note: If the Prompt For Edit Of Required Date On Change Of Ship Date control maintenance record is set to **Y**, the system displays a prompt that lets the user change the required date to match the ship date during order updates.

Percentage Of Order To Fill Before Automatically Shipping

You can set a percentage of the order that needs to be complete before the phantom processes the ship ticket for orders with a Ship When Available status.

To limit the number of partial shipments the system sends for an order with the Ship When Avail status, enter a minimum percentage of the order that must be filled before making a shipment.

When an order has a status of Ship When Avail, the system waits until the designated percentage of the order is available before creating a partial shipment, and then backorders the remaining quantity. The **Default B/O Status** defined in Customer Maintenance or Control Maintenance determines the status of the newly created backordered generation.

- In the **Percentage Of Order To Fill Before Automatically Shipping** field, enter the percentage of items that must be available before the system creates a partial shipment.
- In the **Fill Rate Measurement** field, select whether to use units, weight, or dollars to determine the percentage of the order that is available.

Note: The settings in the **Percentage Of Order To Fill Before Automatically Shipping** and **Fill Rate Measurement** fields on the Customer Pricing/Printing screen override the settings in this record.

Restrict Pick Up Now Shipdates To Today

Indicate whether the system restricts Pick Up Now shipdates to today's date.

- **Y –** Restricts Pick Up Now shipdates.
- **N –** Does not restrict Pick Up Now shipdates.

Set Starting Warehouse Confirmation Tracker ID Number

Enter the number from which the system auto-generates a unique tracker ID for each package shipped from the Warehouse Confirmation Queue.

Note: For this control maintenance record to take effect, you must set the Use Whse Confirmation Queue With Tracking Number control maintenance record to **Y**.

Shipping Branch Override For SOE

For each branch, specify the default shipping branch to assign to a sales order when a **Shipping Branch Override** is not assigned to the customer and a shipping branch is not assigned to the terminal where the order is being written.

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Use Whse Confirmation Queue With Tracking Number

Indicate whether the Warehouse Picking Confirmation screen displays two additional columns for storing quantities and tracker IDs for each shipped package. The default value is **N**.

- **Y –** The screen displays the quantity and tracker ID columns.

  Note: When you set this record to **Y**, you should also complete the Set Starting Warehouse Confirmation Tracker ID Number and Warehouse Tracking Column Titles control maintenance records.

- **N –** The screen does not display the additional columns.

Verify Shipping Address In SOE

Indicate whether the system requires users to verify the ship-to address on a sales order.

- **Y –** The SOE Header screen displays upon escaping from the Body. The system positions the cursor on the first line of the Ship To address, and prompts you to verify that this is the correct address.
- **N –** The SOE Header screen does not display.

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SOE Verification and Validation Parameters Control Maintenance Records

The following control maintenance records belong to the SOE (Sales Order Entry) category and apply to verification and validation parameters.

Check Verification: Required Information

Flag the information required when users record check information on the Check Authorization screen in SOE. For each of the following fields, indicate whether that piece of check information is required:

- Check Amount
- Check Number
- Check Type
- ID Type
- ID Number
- Routing Number
- Bank Account Number

Force City Verification On SOE Address Change

Indicate whether to force city verification on an SOE address change.

- **Y –** Forces city verification as follows:
    - If the information in the first address line is changed, the system clears the second address line, city, state, and zip code to force reentry of that information.
    - If the information in the first address line is not changed but the information in the second address line is changed, the system leaves the first address line alone but clears the city, state, and zip code to force reentry of that information.
- **N –** A change to either line of address information or the city only affects that part of the address.

Validate Name In 'Ordered By' Field Against Customer Contact

Indicate whether the system validates the entry in the **Ordered By** field on the SOE Header screen against the contacts associated with the customer. The default is **N**.

- **N –** Does not validate the entry. The following conditions apply to this option:
    - Authorized personnel entered on the Customer Authorization Maintenance screen can be free-form text.
    - If the **Only customer's authorized personnel may place orders** field on the customer's Credit Control Parameters screen *is* flagged and the customer has authorized order personnel defined on the Customer Authorization Maintenance

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screen, the user must select a name from that list for the **Ordered By** field on the SOE Header screen.

- If the **Only customer's authorized personnel may place orders** field on the customer's Credit Control Parameters screen *is not* flagged, users can enter any user ID or free-form text in the **Ordered By** field in the SOE Header screen.

- **Y –** Does validate the entry. The following conditions apply to this option:
  - To set the **Only customer's authorized personnel may place orders** field on the customer's Credit Control Parameters screen, the customer must have contacts attached to the customer record. When the field is set for the first time, all contacts are automatically added to the Authorized Personnel list. You can remove contacts from the Authorized User list so they are not available for selection in the **Ordered By** field when editing an order.
  - If the **Only customer's authorized personnel may place orders** field on the customer's Credit Control Parameters screen *is* flagged and authorized personnel are entered on the Customer Authorization Maintenance screen, users must select a name from the list.
  - If the **Only customer's authorized personnel may place orders** field on the customer's Credit Control Parameters screen *is* flagged, but no authorized personnel are entered on the Customer Authorization Maintenance screen, users can enter any contact associated with the customer.
  - If the **Only customer's authorized personnel may place orders** field on the customer's Credit Control Parameters screen *is not* flagged, users can enter a name in the **Ordered By** field which starts the process of creating a new contact for that customer.
  - If the customer is flagged as a **Branch Cash** account, and the **Only customer's authorized personnel may place orders** field on the customer's Credit Control Parameters screen *is not* flagged, you can enter free-form text in the **Ordered By** field in the SOE Header screen. You are not prompted to create a new contact for the customer.

  When a valid contact is entered, the system takes the first phone number that is assigned "Work" in the **Codes** field on the Contact Maintenance screen and displays that number in the **Phone Number** field on the Header screen.

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SOE Warning Prompts Control Maintenance Records

The following control maintenance records belong to the SOE (Sales Order Entry) category and apply to SOE warning prompts.

OE Warn If Procuring From Vendor Consignment

Indicate whether the system displays a warning on the Order Entry Procurement screen if a user is attempting to procure from a branch that has vendor consignment stock on hand.

The potential exists for the material to be allocated from a vendor consignment location in the shipping branch and placed in a tagged location type in the receiving branch. When the material is actually transferred, the branch that the material is transferred to no longer indicates that the material is vendor consignment stock. This can cause problems for sites that identify sales of vendor consignments *only* when the material is actually billed on a sales order, as opposed to considering branch transfers of vendor consignment material as sales.

- **Y –** Displays the following warning message on the OE Procurement Screen: You Are About To Procure Material From A Branch That Contains Vendor Consigned Material, Continue (Y/N). If the user enters **Y**, then procurement continues as usual, with the understanding that the material might be allocated from a vendor consignment location. If the user enters **N**, then procurement is aborted.
- **N –** Does not display a warning.

Warn About Additional Lead Time During OE

Indicate whether the system displays a warning message on the OE Body or Status screen indicating the number of lead-time days required for a new order.

- If set to **Y** and a number is specified in the **Required Date Lead Time** field on the Additional Customer Data screen, the system displays a message.
- If set to **N** and no value is assigned in the **Required Date Lead Time** field for a customer, the warning message never displays for that customer.
- If a value is assigned in the **Required Date Lead Time** field, the Mirror Required Date And Ship Date For New Orders control maintenance record, if set to **Y**, has no effect.

Warn User If Customer Within X% Of Credit Limit

Enter the percentage, 0 to 99.99, of a customer's credit limit at which the system should display a warning message.

When this record is set to a number greater than zero and the customer's balance is within, but not yet over, the designated percentage of their credit limit, the system displays a message in SOE warning the user that the customer is within this percentage of their credit limit. This is only a warning. When the credit limit is exceeded, the system puts the account on hold.

Warn User If Customer Within X% Of Past Due Limit

Enter the percentage, 0 to 99.99, of a customer's past due limit at which the system should display a warning message.

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When this record is set to a number greater than zero (0) and the customer's balance is within, but not yet over, the designated percentage of their past due days limit, the system displays a message in SOE warning the user that the customer is within this percentage of their past due days limit. This is only a warning. When the past due limit is exceeded, the system puts the account on hold.

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SOE CMNT (Comments) Control Maintenance Records

The following control maintenance records belong to the CMNT (Comments) area within the SOE (Sales Order Entry) category.

Backordered Partial Kit Comment

Enter a general comment for the system to add to order line items for kits for which the system has back-ordered some non-key components.

Copy Internal Notes From Direct Sales Order To P/O

Indicate whether the system copies internal notes from a direct sales order to the corresponding purchase order.

- **Y –** Copies any Internal Notes that exist for the customer or notes entered on the header of a direct order to the corresponding purchase order header. These notes supercede any Vendor Internal Notes.
- **N –** Does not copy internal notes from a direct sales order to the corresponding purchase order.

Hazard Comment

Enter a comment for the system to add as a line item comment under the product description on the SOE Body screen when users enter a hazardous product on a sales order. A product is considered hazardous when the **ID Number** field on the Product MSDS / Hazardous Information screen is populated.

Invoice Transmit File Path

Complete this record if your company uses FTP to transmit invoice data. Enter the Unix file path and other information for transmitting invoice data.

Line Item Standard Comments

Enter comments that users can insert as line item or header comments on the SOE Body screen using the **Comment/Standard Comments** hot key. Each comment can be up to 70 characters.

Nonstock Comment

For each branch, enter a comment that the system displays beneath a nonstock item on a sales order. This is notification to the customer of your return policy for nonstock items. The default comment supplied with the system is: ** Above not returnable ini_____ **. A comment can be up to 35 characters.

Procure Comment

Enter a procure comment that the system can attach to procured line items on the SOE Body screen. A comment can be up to 35 characters.

Return Goods Standard Comments

Enter standard comments that users can assign to returned items on a sales order. Each comment can be up to 70 characters.

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When you enter a return item on the order, the system displays the Return Goods Verification screen to record return information. You can enter free-form comments in the **Return Comments** field or you can press the **Std Cmts** hot key to display the standard comments defined in this control maintenance record. You can assign any of those comments by positioning the cursor on the comment and pressing the **Enter** key.

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SOE COMM (Commissions) Control Maintenance Records

The following control maintenance records belong to the COMM (Commissions) area within the SOE (Sales Order Entry) category.

Assign Commission Plan At Time Of Invoice Process

Indicate whether the system assigns a commission plan at the time an invoice is processed.

- **Y –** The system sets the **Commission Plan Option** field on the Commissions Report screen to **Invoiced**.

  Invoiced means that commissions for each sales order are calculated according to the plan in effect for the salesperson when each sales order was invoiced.

- **N –** The system sets the **Commission Plan Option** field on the Commissions Report screen to **Current**.

  Current means that commissions for each sales order are calculated according to the plan in effect for the salesperson when the Commissions Report is run.

Branch That Controls Salesperson Commission Group Assignment

This record is no longer used.

Calculate Negative Commission When GP Negative

Enter one of the following to indicate whether the system can calculate negative sales commissions when a sales order has a negative gross profit (GP):

- **Never –** Never calculate negative commission, even when the GP is negative. The salesperson is not penalized. The salesperson's commission never goes below zero.
- **Always –** Always calculate negative commission when GP is negative, even when the commission base calculation is positive, based on Plan type calculations.
- **Sales Plans Only –** Only calculate negative commissions on Sales Plans if the GP is negative. The system calculates a negative commission, figured as a percentage of the loss, for the salesperson based on the formula in the salesperson's applicable commission plan.
- **GP Plans Only –** Only calculate negative commissions on GP Plans if the GP is negative. The system calculates a negative commissions, figured as a percentage of the loss, for the salesperson based on the formula in the salesperson's applicable commission plan.

Minimum Credit Order GP$ For Commission

For each branch, specify the minimum credit order gross profit dollar amount, 0.00-999.99, for commission. If the total gross profit dollar amount for a returned line item is greater than the amount entered here, a commission is not paid.

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Minimum Sales Order GP$ To Earn Commission

For each branch, specify the minimum sales order gross profit dollar amount, 0.00-999.99, required to earn commission. If the total gross profit dollar amount for a line item is less than the amount specified here, a commission is not paid on the sale.

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SOE COST General Control Maintenance Records

The following control maintenance records belong to the COST area within the SOE (Sales Order Entry) category.

Apply Rebates From Sell Group Rebate Table

Complete this record if your company uses sell group rebates.

When a customer orders a product, the price is typically derived from the item's price sheet and the active sell matrix. Alternately, you can set up rebate tables at the sell group level to apply rebates to products in a sell group. The system checks the sell matrix for active sell group rebates, then checks for defined rebate tables for the product's sell group. If the product's sell group has defined rebate tables, the system uses the most recent table relative to the order's pricing date to apply the rebate.

Indicate whether the system should check the sell matrix for active sell group rebates and recalculate COGS when a user updates a price on a sales order generation.

- **Y –** The system checks for active sell group rebates.
- **N –** The system does not check for active sell group rebates, even if rebate tables are set up.

Base Minimum GP% Price Check Off COMM-COST

Complete this record if you have overrides in either Price Line, Product, or User Maintenance that limit a user’s ability to lower a price on an order based upon a gross profit percent.

Release 7 uses your Cost of Goods Sold Basis to determine this gross profit percent. In Release 8 you can use the Commission Cost value instead of the COGS value.

Indicate whether the system bases the minimum GP% price check in SOE on COMM-COST cost for an item. The default is **N**.

- **Y –** The system bases the price check off COMM-COST.

  Note: Salespeople who can see the COGS value may question why they cannot enter a unit price that is within the percentage override designated in Price Line, Product, or User Maintenance.

- **N –** The system bases the price check off COGS cost.

Best Cost Check Through All Matrix Cells For Sales Orders

Indicate whether the system searches through the entire pricing hierarchy for the best cost override to determine the cost on a sales order. This record applies to both COMM-COST and COGS.

- **Y –** Searches through the entire hierarchy to find and use the cost override with the lowest cost. If there are no cost overrides found through the entire pricing hierarchy, then the system uses the standard default cost on the order.

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When set to **Y**, this record overrides any value entered in the **Best Cost Check** field in Sell Matrix Maintenance.

- **N –** Uses the first cost override found to determine the cost on the sales order.

  When set to **N**, the system checks the value entered in the **Best Cost Check** field in Sell Matrix Maintenance.

  Note: This control maintenance record does not apply to direct orders. This control record has no effect on pricing. If the control record Best Price Check Through Matrix Cells is set to **N**, then the system respects the standard pricing hierarchy for pricing, even if the cost continues to search through the hierarchy.

Copy COST To COGS For IAO Items In SOE

For each branch, indicate whether the system copies the COST value to the COGS value when a user adds an IAO item to a sales order. An IAO item is a stock or nonstock product that has been assigned an Inventory Account Override.

- **Y –** Copies the COST value of the IAO item to the COGS value.
- **N –** Does not copy the COST value of the IAO item to the COGS value.

  Note: This record only applies to adding an item to a sales order. The system respects all other control maintenance records related to copying COGS and COST, such as Change Both COGS And COMM-COST On Override. Users must be authorized to manually override COST, COGS or PRICE values of an IAO item on a sales order.

Direct COGS Always Vendor Price

For each branch, indicate whether the system uses vendor costs on the sales order side and purchase order side of a direct sale. We recommend you use option **B**. This control maintenance record does not apply to junior orders created from a master job bid order. If you need to change the COGS cost on a junior order, you need to do so manually.

The purchase order COGS and sales order COGS are always the same when you use options **N** or **Y**. They may be the same or different when you use options **R** or **B**.

- **N –** Uses the vendor cost, unless a sell matrix override exists.
  - If a sell matrix cost override exists, the system uses the override as the cost on both the sales and purchase order sides of a direct sale.
  - If a sell matrix cost override does not exist and a vendor buy matrix does exist, the system uses the cost from the buy matrix as the cost on both the sales and purchase order sides of a direct sale.
  - If a sell matrix cost override and a vendor buy matrix do not exist, the system uses the value assigned to the local basis name that is mapped to the global DFLT-COST basis name (from the All/All Buy Matrix) on the price line as the cost on both the sales and purchase order sides of a direct sale.

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- **Y –** Always uses the vendor cost.
  - If a vendor buy matrix exists, the system uses the cost from the buy matrix as the cost on both the sales and purchase order sides of a direct sale.
  - If a vendor buy matrix does not exist, the system uses the value assigned to the local basis name that is mapped to the global DFLT-COST basis name (from the All/All Buy Matrix) on the price line as the cost on both the sales and purchase order sides of a direct sale.
- **R –** Uses the vendor REP-COST, unless a sell matrix override exists.
  - If a sell matrix cost override exists, the system uses the override as the cost on the sales side of a direct sale and the value assigned to the local basis name that is mapped to the global REP-COST basis name on the price sheet as the cost on the purchase order side of the direct.
  - If a sell matrix cost override does not exist, the system uses the value assigned to the local basis name that is mapped to the global REP-COST basis name on the price sheet as the cost on both the sales and purchase order sides of a direct sale.
- **B –** Uses different costs, depending on whether rebate information exists.
  - If a sell matrix cost override and rebate information exist, the system uses the override for the sales order side and the cost from the vendor buy matrix, if one exists, or the value assigned to the local basis name that is mapped to the global DFLT-COST basis name (from the All/All Buy Matrix) on the price line on the purchase order side of a direct.
  - If a sell matrix override exists but rebate information does not exist, the system uses the override as the cost on both the sales and purchase order sides of a direct sale.
  - If a sell matrix override does not exist, the system uses the cost from the vendor buy matrix, if one exists, or the value assigned to the local basis name that is mapped to the global DFLT-COST basis name (from the All/All Buy Matrix) on the price line as the cost on both the sales and purchase order sides of a direct sale.

Include Item With Zero Average Cost In Average Cost Calculation

Complete this record if your company runs reports using average cost or if your Cost of Goods Sold basis is set to Average Cost.

In Release 7, the system does not include on-hand items with a 0.00 average cost in the average cost calculation when additional inventory is received. For example, a product has an on-hand quantity of 1 and an average cost of 0.00. When you receive a new item at a cost of 10.00, the system calculates the new average cost as 10.00.

In Release 8, indicate whether the system includes on-hand items with $0.00 average cost in the average cost calculation when additional inventory is received. The default is **N**.

> **Note:** This record affects average cost and landed average cost.

- **Y –** Includes on-hand items with $0.00 average cost in the average cost calculation. This allows for the current on-hand quantity to offset the new average cost calculated.

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Example:

On-hand qty = 9 with current average cost = $0.00

Receive 1 with $10.00 cost

New average cost = $1.00 ($0.00*9 + $10.00*1) / (9 + 1)

- **N** – Does not include on-hand quantities with $0.00 average cost in the average cost calculation.

  Example:

  On-hand qty = 1 with current average cost = $0.00

  Receive 1 with $10.00 cost

  New average cost = $10.00 (system did not include $0.00 average cost on-hand item)

Include Tagged Quantities In Cost Calculation

Complete this record if your company runs reports using average cost or if your Cost of Goods Sold basis is set to Average Cost.

In Release 7, products that are received in as tagged from a vendor have no impact on the average cost calculation, because they are not considered normal stock material.

In Release 8, for each branch, indicate which tagged quantities the system includes in the cost calculation.

- **N** – None. This is backwards compatible to Release 7.
- **T** – Tagged quantities from transfers. When transfers are received and tagged to sales orders, the quantities are used to recalculate average cost.
- **P** – Tagged quantities from purchase orders. When purchase orders are received and tagged to sales orders, the quantities are used to recalculate average cost.
- **B** – Tagged quantities from transfers and purchase orders. When both transfers and purchase orders are tagged to sales orders, the quantities are used to recalculate average cost.

Notify User When COGS Is Changed During Order Processing

For each branch in your company, identify the user you want to notify when the Phantom processes an order and changes the cost of goods sold (COGS). Select from the following options:

- Writer
- Inside Salesperson
- Outside Salesperson
- Message Group
- User

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For the system to send the notification, also flag the price line to notify a user when the COGS changes for an order in the Price Line Branch Data Maintenance screen.

Recalculate COGS And COMM-COST When Changing Bid To Open Order

Indicate whether the system recalculates costs that were not manually overridden at the time a bid changes to an open sales order generation.

- **Yes –** Recalculates COGS and COMM-COST. All manual overrides are lost.
- **No –** Does not recalculate COGS and COMM-COST. All manual overrides are kept.

  If you change a bid or order to a direct, the system always recalculates the COGS and COMM-COST, unless there is a manual override, in which case the system maintains the override.
- **Keep Manual Overrides –** Recalculates COGS and COMM-COST only if there is not a manual override.

  For example, if there is a manual override on COGS but not on COMM-COST, the system recalculates COMM-COST and retains the COGS override. If there is a manual override on COMM-COST but not on COGS, the system recalculates COGS and retains the COMM-COST override.

To See Standard Global Basis When Costing, User Must Have Level

Enter the COGS.EDIT authorization key level, 1-9, users must have to view Landed Cost, Average Landed Cost, Order COGS, and Order Comm Cost for a product.

Update Cost On Sales Order From Tagged Purchase Order

Indicate whether the system updates the cost on a sales order containing items that are tagged to a P/O for procurement when a price change is made to the tagged P/O.

- **0** (No update) – The cost on a sales order containing items that are tagged to a P/O for procurement is not updated when a price change is made to the tagged P/O.
- **1** (Update open Gens) – The system copies the price change back to all quantities on the open generation of a sales order tagged to a P/O to make sure that the cost on the order is the same as the tagged P/O price. This is only effective when you change the cost on the P/O itself, and only if the entire quantity for the line item on the generation is tagged to the P/O.
- **2** (Update open and closed Gens) – The system copies the price change back to all quantities on both open and closed generations of a sales order tagged to a P/O. The closed generation must still be in an open accounting period.

Update Cost On Sales Order From Tagged Return Purchase Order

For each branch, indicate whether the system updates the cost on a sales order tagged to a P/O created from the Return Goods Queue with the cost on the P/O.

- **Y –** The cost on a *return* purchase order that is tagged to a sales order transfers to both the COMM-COST and COGS-COST on the sales order, even if the cost on the sales order has been changed.

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- **N** or **blank –** The cost on a *return* purchase order that is tagged to a sales order does not transfer to the sales order.

Update Cost On Sales Order From Tagged Transfer Order

Indicate whether the system updates the cost on a sales order containing items that are tagged to a transfer for procurement when a change is made to the Transfer Received Price of the tagged transfer.

> **Note:** A change on the transfer affects the order COGS, but a change on the order does *not* affect the transfer COGS. If the Change Both COGS And COMM-COST On Override control maintenance record is set to a non-zero value, the system updates the COMM-COST as well as the COGS on the order.

- **0** (No update) – The cost on a sales order containing items that are tagged to a transfer for procurement are not updated when a change is made to the Transfer Received Price of the tagged transfer.
- **1** (Update open Gens) – The system copies the price change back to all quantities on the open generation of a sales order tagged to a transfer to make sure that the cost on the order is the same as the tagged transfer price. This is only effective when you change the Transfer Received Price on the transfer itself, and only if the entire quantity for the line item on the generation is tagged to the transfer.
- **2** (Update open and closed Gens) – The system copies the price change back to all quantities on both open and closed generations of a sales order tagged to a transfer. The closed generation must still be in an open accounting period.

Update Generic Cost During Processing

Indicate whether the system updates the Generic Cost (formerly labeled COMM-COST) that is filed with each transaction whenever the COGS-COST of a transaction is updated in processing.

- **N –** Generic Cost is not updated whenever COGS-COST of a transaction is updated in processing. COGS-COST is always updated.
- **Y –** Transaction profit reporting based on the two costs is identical for both stock sales and direct sales.
- **E** (Exclude Directs) – Generic Cost is not updated when COGS-COST is processed for direct sales, but it is updated on all other sales.

> **Note:** For the **R** setting in the **Direct COGS Always Vendor Price** control maintenance record to work, this record must be set to **N** or **E** so that costs on a direct are not updated.

When Costing, Do Not Show Basis With Level Below

Enter the view level, 1-9, which sets the lower boundary for viewing costs based on the view level (**VLvL**) assigned to each basis on the Price Line Maintenance screen for the products in a price line. Any user assigned a view level less than this value is prevented from seeing a cost basis name.

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SOE COST Overrides Control Maintenance Records

The following control maintenance records belong to the COST area within the SOE (Sales Order Entry) category and apply to cost overrides.

Change Both COGS And COMM-COST On Override

For each branch, indicate whether a change to either COGS or COMM-COST affects the other. The default is **0** (No). The control maintenance record does not apply to junior orders created from a master job bid order. If you need to change the COGS/COMM cost on a junior order, you need to do so manually.

- **0 (No) –** A change to one of the values does not cause the other to change.
- **1 (Yes) –** If you change the COGS-COST in the COGS view or the COMM-COST value in the Cost view on any screen in SOE, the other value changes to match it.

  If you have a Bid on which the COGS or the COMM-COST have been overridden, and you change the Bid to a Direct, the overrides disappear and the system recalculates the values.
- **2 (Direct) –** If the order is a *direct* and you change the COGS-COST in the COGS view or the COMM-COST value in the Cost view on any screen in SOE, the other value changes to match it. For all other sales orders, the costs do not change to match each other upon an override.
- **3 (Tagged) –** If the order is *tagged* and you change the COGS-COST in the COGS view or the COMM-COST value in the Cost view on any screen in SOE, the other value changes to match it. For all other sales orders, the costs do not change to match each other upon an override.
- **4 (Direct/Tagged) –** If the order is a *direct or tagged* and you change the COGS-COST in the COGS view or the COMM-COST value in the Cost view on any screen in SOE, the other value changes to match it. If you enter an override before making a procurement, the system copies the override COST and COGS to the procurement. This option also applies when you change an open sales order to a direct order. For all other sales orders, the costs do not change to match each other upon an override.

  Notes: If the Direct COGS Always Vendor Price control maintenance record is set to **R** (REP-COST), this record is ignored on direct sales orders. For the **R** setting in the Direct COGS Always Vendor Price control maintenance record to work, this record must be set to **0** (No), so costs on the sales order side and purchase order side of a direct are not made to be the same.

  For a detail lot item, if this record is set to **1** (Yes), in Sales Order Entry the **COGS** field displays the AVG-COST for the item instead of the COGS-COST defined in Product Price Sheet Maintenance, unless there is a Cost defined for the detail lot. Then both COGS-COST and COMM-COST show the defined values from Product Price Sheet Maintenance.

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Copy Override Costs From Sales Order To Tagged P/O

Select how the system should handle the copying of an overridden cost on a sales order to a procured purchase order.

- **None –** Does not copy any overridden cost on a sales order to a procured purchase order.
- **Manual** – If there is a manual override on the sales order COGS, the system copies this value to the purchase order cost.
- **Matrix** – If the item has a sales matrix override on the sales order, the system copies this value to the purchase order cost. If the item has a manual override and sell matrix cost override, the system copies the sell matrix cost override to the purchase order.
- **Both** – If the item has a manual override or sell matrix cost override, the system copies the manual cost override to the purchase order.
- **Prompt** – If there is either a manual cost override or matrix cost override, the system prompts the user to copy the overridden cost to the procured purchase order. If the item has a manual override and sell matrix cost override, the system copies the manual cost override to the purchase order.

Cost Override Code For Backordered Kits

Enter the cost override code to assign to partial kit overrides.

Prevent Cost Update On Order From Tagged Order If Matrix Override

Indicate whether to prevent the system from updating the cost on a sales order if there is a matrix cell cost override on a tagged purchase order, transfer order, or work order. The default is **N**.

- **Y** – Prevents.
- **N** – Does not prevent.

Prompt For Cost Code On Cost Override In SOE

Indicate whether the system prompts for a cost override code when a user changes the COGS or Cost on the Sales Order Entry Body screen or the Job Bid Subtotal Maintenance screen.

- **0 (No) –** Does not prompt for a cost override code.
- **1 (Yes) –** Prompts for but does not require an appropriate cost override code. If the matrix cell used for the product already has a cost override and corresponding cost override code assigned at the matrix cell level, you are not prompted again to enter a cost override code.

  Note: Valid cost override codes are defined in the Valid Cost Override Codes control maintenance record. If cost override codes have been defined, an **F10** list is available at the prompt. If no cost override codes have been defined, you can enter an unvalidated free-form code.

- **2 (Required) –** Prompts for and requires an appropriate cost override code.

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Recheck Matrix Cost Override During Process

Indicate whether to force the system to recheck the matrix Cost Override option at the time a shipment is processed as an invoice and a shipping ticket is generated. The default value is **N**.

- **Y** – Forces a recheck.
- **N** – Does not force a recheck.

We do not recommend doing this recheck, unless the Cost Override option is used extensively and timing is critical. It requires additional processing overhead and may result in a slight degradation of performance.

Search For Cost Overrides During Pricing

Indicate whether the system searches for cost overrides during pricing. The default is **N**.

- **N –** When a product is entered on an order, the system searches through the standard matrix cell hierarchy for the cell that will calculate the selling price to the customer without looking for any matrix cells that contain a cost override for that product.
- **Y –** When a product is entered on an order, while the system is searching through the standard matrix cell hierarchy for the matrix cell that will calculate the selling price to the customer, it also looks for a matrix cell that contains a cost override for the product. The matrix cell used for pricing will not necessarily be the same one that is used for costing.

  As the system searches, if it finds the matrix cell for pricing without having found a matrix cell with a cost override for the product, it keeps searching through the rest of the hierarchy to see if there is a matrix cell that contains a cost override. If it finds one, it stops searching and uses that cost override for costing the product.

  Likewise, as the system searches, if it finds a matrix cell with a cost override for the product before it finds the applicable cell for pricing, it stops the search for cost overrides and uses that cost override for costing the product. Then it continues searching until it finds the applicable matrix cell for pricing.

  Note: This record must be set to **Y** to be able to assign a matrix cell type of **O** (Ovrd Cost Only) to a matrix cell.

Update COGS On P/O When COGS Is Overridden On Invoiced Direct

Indicate whether the system changes the COGS on the purchase order side of an invoiced Direct when a user overrides the COGS on the sales order side of the Direct.

- **Y –** Updates the COGS on the P/O side of an invoiced Direct to match the COGS on the sales order side, unless the Direct COGS Always Vendor Price control maintenance record is set to “Replacement Cost,” in which case the system uses the vendor price.
- **N –** Does not change the COGS on the P/O side of an invoiced Direct.

  Note: If the Direct is not yet invoiced the system always updates the COGS on the P/O side of a Direct, regardless of the setting in this record. In this case, the system uses the Direct COGS Always Vendor Price control maintenance record to determine which COGS to use.

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Use Costing Matrix Override For Both COGS And COMM-COST

Indicate whether the system uses the cost override matrix cell to define both COGS and COMM-COST.

- **Yes –** Uses the override matrix cell to define COGS and COMM-COST.
- **No –** Uses the override matrix cell to define COGS.

Valid Cost Override Codes

Enter codes that explain why a cost override is assigned to a sell matrix cell or to a product in Sales Order Entry.

The system requires users to assign a cost override code when a cost override is assigned to a matrix cell on the Matrix Cost Override screen from either the Quick Sell Matrix Maintenance screen or the Sell Matrix Maintenance screen. The Prompt For Cost Code On Cost Override In Matrix Maintenance control maintenance record controls the assignment of a cost override code when a cost override is assigned to a matrix cell on the Matrix Cost Override screen from either the Quick Sell Matrix Maintenance screen or the Sell Matrix Maintenance screen.

The Prompt For Cost Code On Cost Override In SOE control maintenance record controls the assignment of a cost override code in Sales Order Entry when the COGS or Cost for a product is overridden on the Sales Order Entry Body screen. The Sell Matrix Price Overrides Proof Report reports on the existence of cost overrides. Other reports use cost override codes as part of the selection process.

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SOE CR (Credit) Control Maintenance Records

The following control maintenance record belongs to the CR (Credit) area within the SOE (Sales Order Entry) category.

Check Credit When Adding Items To Processed Invoices

When a user edits a processed order, the system can do a credit check to determine if the changes put the customer over their credit limit.

For each branch, indicate whether the system checks credit parameters when an authorized user adds line items or quantities to a closed (invoiced) order generation. The default is **N**.

- **Y –** Checks credit parameters.
- **N –** Does not check credit parameters.

Check Customer Credit On Procurement

You can require that salespeople be authorized to release a credit hold in order to place a procured item on a purchase or transfer order.

On the Check Customer Credit on Procurement screen, for purchase orders and transfers, indicate whether the system allows an authorized user to procure an item for an order that causes a customer to exceed their credit limit.

- In the **Purchase Orders** field, indicate whether an authorized user can release a credit hold in order to place a procured item on a purchase order. When using the **Create PO** or **Add to PO** hot keys on the Procurement Confirmation screen for an order on credit hold:
  - **Y –** The system checks the user's SOE.CREDIT.RELEASE authorization key, which determines whether they can release the credit hold. If the user releases the credit hold, the system places the item on the P/O, notifies the buyer and order writer, and makes an entry in the order log.
  - **N –** The system allows the user to procure an item for an order on credit hold.
- In the **Transfers** field, indicate whether an authorized user can release a credit hold in order to place a procured item on a transfer order. When using the **Create Xfer** and **Add to Xfer** hot keys on the Transfer Confirmation screen for an order on credit hold:
  - **Y –** The system checks the user's SOE.CREDIT.RELEASE authorization key, which determines whether they can release the credit hold. If the user releases the credit hold, the system places the item on the transfer, notifies the buyer and order writer, and makes an entry in the order log.
  - **N –** The system allows the user to procure an item for an order on credit hold.

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Disable Phantom Processing For Credit Sales Orders

Indicate whether the system disables Phantom processing of credit sales orders.

- **Y** – The Phantom prints but *does not process* credit sales orders. The Phantom updates the LEDGER.LOG to indicate that the generation has been printed. The next time the Phantom runs, this credit does not print again. You must manually process credit orders.
- **N** – The Phantom prints and processes credit orders.
- **C** – After the credit has been printed, the status of the credit generation changes to **Call When Complete** so that the credit generation is accessible in the Eclipse Calling Queue.

Flag Product As Exceptional In Sales Order Entry For

Select when the system flags products as Exceptional for a credit/rebill transaction in sales order entry. The default is **NON**.

Option	Flags products as...
NON - None	Stock, regardless of the type of Credit/Rebill being done.
ALL - All	Exceptional, regardless of the type of Credit/Rebill being done.
CR - Credit/Rebill	Exceptional, only if the user performs both a Credit and a Rebill.
C - Credit Only	Exceptional, only if the user performs a Credit Only.
R - Rebill Only	Exceptional, only if the user performs a Rebill Only.
COR - Credit Only or Rebill Only	Exceptional, if the user performs a Credit Only -or- a Rebill Only.
CCR - Credit Only or Credit/Rebill	Exceptional, if the user performs a Credit Only -or- a Credit and Rebill.
RCR - Rebill Only or Credit/Rebill	Exceptional, only if the user performs a Rebill Only -or- a Credit and Rebill.

Regardless of how this control maintenance record is set, the system flags products as Exceptional only if they are flagged as Stock before the credit/rebill is performed. For example, if a product is flagged as Defective before a credit/rebill, the system keeps the Defective status after the credit/rebill is complete. This rule does, however, apply to products with a tagged status. Products that are tagged on the generation upon which a credit/rebill is performed change to Exceptional when appropriate on the credit and/or rebill generations.

Include Open Orders In Credit Balance

Select the category of open orders to be included when the system calculates a customer's credit balance.

- **All** – Subtracts open, unshipped, sales order amounts (excluding bids) from a customer’s available credit limit. Most companies choose the **All** setting.
- **None** – Ignores unshipped orders in the calculation of available credit.
- **Tickets Only** – Is used in conjunction with a special **T** order status, which is generally only used in some companies during system implementation.

When the Phantom picks up a ticket for processing, it checks:

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- The customer's available credit.
- Whether the order will put them over the limit.
- Whether parameters are set correctly to let the system process the order.

Notify Credit Manager Of All Live Credit Releases

Indicate whether the system notifies the credit manager when a user releases an order on credit hold for pick up now.

- **Y** – The system sends a tracker to the user or message group designated in the User To Get Tracker When Order On Credit Hold control maintenance record.
- **N** – The system does not send any notification.

Use the User To Be Messaged With Auto Credit Approvals control maintenance record for automatic credit releases.

Notify Credit Manager Of Pick Up Now Credit Holds

Indicate whether the system notifies the credit manager when a user places a pick up now order on credit hold.

- **Y** – The system sends a tracker to the user or message group designated in the User To Get Tracker When Order On Credit Hold control maintenance record.
- **N** – The system does not send any notification.

Prompt For New Date On Credit/Rebill

Use this record to prompt users to specify a date, when doing a credit or rebilling in sales order entry. The system uses the date for the new transaction generations.

In the **Prompt For New Date On Credit/Rebill** field, indicate whether the system prompts users for a date.

- **Y** – Prompts the user.
- **N** – Does not prompt the user.

In the **Default Date For Credit/Rebill** field, if prompting for a date, specify the default date shown in the prompt. Select **Today** or **Current Ship Date**, which is shown on the order.

Ranking Method Used By SOE.CREDIT.REL.RANK

Select the ranking method the SOE.CREDIT.REL.RANK authorization key checks when it determines a customer's rank.

Require Credit/Rebill Code

Indicate whether the system prompts for a reason code that applies to the credit portion of a credit/rebill transaction in Sales Order Entry.

- **Y** – At the Credit/Rebill screen when the specified credit/rebill function for the invoice is either Both Credit and Rebill or Credit Only, after you supply appropriate information and press **Enter**, the system displays a Reason Code prompt that requires you to enter a

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reason for the credit. The system does not display this prompt if you selects Rebill Only or None.

Reason for credit codes are defined using the Valid Reason For Return Codes control maintenance record.

- **N –** The system does not prompt for a reason code when a credit is issued using the Credit/Rebill function.

Update MAC When Credit/Rebill Generations Are Created

Indicate whether the system updates the moving average cost (MAC) for the products on the credit and rebill generations when the credit/rebill generations are created. The default is **Y**.

- **Y –** Updates the MAC for each line item.
- **N –** Does not update the MAC for each line item.

Note: This setting for this control record does not change the functionality of MAC calculations on existing credit/rebill generations. The system always updates the MAC when a product is changed on an existing credit/rebill generation.

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SOE CRDC (Credit Card) Control Maintenance Records

The following control maintenance record belongs to the CRDC (Credit Card) area within the SOE (Sales Order Entry) category.

Allow Sending Credit Card Level 3 Data

For each branch, indicate whether to allow sending level 3 data in the credit card settlement process. The default is **N**.

- **N –** The system does not send level 3 data. This option provides a cost savings if your credit card merchant does not use the level 3 information.
- **Y –** The system sends level 3 data.

  Note: The setting in the **Disallow Sending Credit Card Level 3 Data For Customer** field on the Additional Customer Credit Data screen overrides the setting in this record.

  By default, the system always sends level 1 data, which includes:

  - Merchant Name
  - Amount
  - Date

  If available, the system also sends level 2 data, which includes:

  - Tax Amount
  - Customer Code
  - Merchant Postal Code
  - Tax Identification
  - Merchant Minority Code
  - Merchant State Code

  Merchants who have government customers often require level 3 data, which includes all of the above, plus the following:

  - Item Product Code
  - Item Description
  - Item Quantity
  - Item Unit of Measure
  - Item Extended Amount
  - Item Net/Gross Indicator

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- Item Tax Amount
- Item Tax Rate
- Item Tax Identifier
- Item Discount Indicator
- Ship from Postal Code
- Freight Amount
- Duty Amount
- Destination Postal Code
- Destination Country Code
- Alternate Tax Amount

Disallow Auto Apply Of Credit Card Payments

Indicate whether to disable the auto-applying of a credit card payment made against an invoiced sales order on the Totals screen.

- **Y –** The system does not auto-apply credit card payments.
- **N –** The system auto-applies credit card payments.

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SOE EMAN (E-Manifest) Control Maintenance Records

The following control maintenance record belongs to the EMAN (E-Manifest) area within the SOE (Sales Order Entry) category.

E-Manifest Signature Document Profile

Support supplies the entry for this record during installation of the E-Manifest Signature Capture software. After the installation or upgrade process is complete, the customer is responsible for maintaining or changing the settings of this control maintenance record.

> **Note:** In order for the Epad Signature Capture function to work correctly, you must populate the ePad Settings Maintenance screen. For more information, see Setting Up Host EPad Preferences.

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SOE EPAD (EPad Signature Capture) Control Maintenance Records

The following control maintenance records belong to the EPAD (EPad Signature Capture) area within the SOE (Sales Order Entry) category.

EPad Signature Document Profile

Enter the default document profile ID, created by Support for the company installing the ePad™ Electronic Signature Capture software.

Print Status Override On EPAD Signature Upload

For each branch, select the override print status the system assigns to an order generation after someone has signed for the order generation on an EPad unit and the system has uploaded the signature. Print statuses are:

- **N** – Do not print the invoice. Typically, the Print Invoices program assigns the **N** status after an invoice prints.
- **Q** – Allows the Invoice Preview Queue to select the invoice, if that program is used before the Detailed Invoice Preview Report.
- **P** – Allows the Detailed Invoice Preview Report to include the invoice.
- **B** – Makes the invoice ready for the Print Invoices program.

Print Status Override On POS Signature Upload

For each branch, select the override print status the system assigns to an order generation after someone has signed for the order generation on a Palm unit at the counter and the system has uploaded the signature. Print statuses are:

- **N** – Do not print the invoice. Typically, the Print Invoices program assigns the **N** status after an invoice prints.
- **Q** – Allows the Invoice Preview Queue to select the invoice, if that program is used before the Detailed Invoice Preview Report.
- **P** – Allows the Detailed Invoice Preview Report to include the invoice.
- **B** – Makes the invoice ready for the Print Invoices program.

Prompt For COD Payment During EPad Signature Capture

Select how the COD payment prompt works during EPad signature capture:

- **No COD Prompt** – The payment prompt does not display even if a COD payment is due for an order.
- **Prompt for COD** – The payment prompt displays when a COD payment is due for an order. This option allows users to attach a signature to an order even if payment is not made.

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- **Require COD for Attach –** The payment prompt displays when a COD payment is due. This option does not allow users to attach a signature to an order until payment is received in the system.
- If you have returns, use the additional Prompt For COD On Credit Balances prompt to select how the COD payment prompt works during returns using EPad signature capture:
  - **No COD Prompt –** The payment prompt does not display even if a COD payment is due for an order.
  - **Prompt for COD –** The payment prompt displays when a COD payment is due for an order. This option allows users to attach a signature to an order even if payment is not made.
  - **Require COD for Attach –** The payment prompt displays when a COD payment is due. This option does not allow users to attach a signature to an order until payment is received in the system.

Reorder Pad Availability Display For

For each shipping branch, select the product availability shown when users display the reorder pad, a price line, or product family in order entry. Options include the available quantity in one of the following:

- **S –** The shipping branch of the order.
- **A –** All branches.
- **U –** The user's authorized territories.
- **H –** The customer's home territory and the shipping branch.

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SOE ESIG (ESignature) Control Maintenance Records

The following control maintenance record belongs to the ESIG (ESignature) area within the SOE (Sales Order Entry) category.

POS Signature Document Profile

Enter the default document profile ID created by Support for the company installing the POS Signature Capture software.

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SOE FRGHT (Freight) Control Maintenance Records

The following control maintenance record belongs to the FRGHT (Freight) area within the SOE (Sales Order Entry) category.

Auto Freight Posting MiscChrg Product

Enter the product record to be used for posting auto-freight charges.

Back Out Pass-Along Freight From COGS

Indicate whether the system should remove the billed pass-along freight amount from COGS and/or COMM (COST).

- **NO –** Does not back out the billed freight from COGS or COMM (COST). The landed costs remain with freight included.
- **COGS –** Backs out the billed freight amount from COGS.
- **COGS/COMM –** Backs out the billed freight amount from COGS and COMM (COST).

  Note: The system does *not* back out freight from COGS, if COGS was overridden by a cost override on a sell matrix, as indicated by an "!" on the sales order. This is typically done for rebateable items.

This control maintenance record is best optimized under the following scenarios:

- The company must be capitalizing freight charges when receiving P/Os.
- The company's Cost of Goods Sold Basis is Landed Average (COGS + freight).
- The company bills pass-along freight charges to the customer (or expenses freight).

Clippership COD Ship Vias

Enter the ship vias for which Clippership should skip freight and handling charges because they are COD ship vias.

For each ship via to add, position the cursor on a blank line, press **F10**, and select one. To delete a ship via, position the cursor on the one to delete and press **Alt-Delete**.

Clippership Collect Ship Vias

Enter the ship vias for which Clippership should skip freight and handling charges because they are Collect ship vias.

For each ship via to add, position the cursor on a blank line, press **F10**, and select one. To delete a ship via, position the cursor on the one to delete and press **Alt-Delete**.

Expense Incoming Freight If Customer Is Freight In Exempt

Indicate whether the system should add the cost of incoming freight on a P/O to a soft-tagged sales order as Expensed Incoming Freight, if the customer does not pay freight.

- **Y –** Adds the cost of incoming freight.
- **N –** Does not add the cost of incoming freight.

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Ignore Order Date For Pass Along Freight

Indicate whether the system ignores the order date when passing along freight from a purchase order to a soft-tagged sales order. This record does not apply to hard tags. The default is **N**.

- **Y –** The system always passes along freight from a purchase order to a tagged sales order.
- **N –** The system passes along freight from a purchase order to a tagged sales order only if the sales order was created before the purchase order.

Include Billed Incoming Freight In GP Calculation

Indicate whether the system should include inbound freight charges that have been billed to a customer in gross profit calculations. This control maintenance record is used for reporting purposes.

- **Y –** Includes inbound freight charges.
- **N –** Does not include inbound freight charges.

Pass Along Incoming Freight To Billable Freight Customers

Indicate whether the system should pass incoming freight costs along to customers who are not freight exempt. This record invokes the soft-tag logic.

- **Y –** Passes along incoming freight costs.
- **N –** Does not pass along incoming freight costs.

Product Ranks To Exclude From Pass-Along Incoming Freight Charges

Specify the product ranks the system should exclude from pass-along incoming freight charges. The intent of this record is to prevent freight from being passed to the customer for the shipment of material that the distributor should always have available.

In the **Rank Method(s) to Check** field, press **F10** and select a ranking method (for example, Demand).

In the **Rank(s) to Exclude** field, specify the product ranks, such as A, B, and C, for which to not charge the customer for incoming freight. To enter multiple ranks, type a rank and press **Enter**, then type the next rank and press **Enter**.

- If a soft-tagged item has a product rank equal to one of the ranks specified in this record, incoming freight is not calculated.
- If a soft-tagged item does not have a product rank equal to one of the ranks specified in this record, the system calculates the prorated billable incoming freight amount from the received P/Os and passes that amount on to the customer as Incoming Freight: Billable.

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SOE MANIF (Manifest) Control Maintenance Records

The following control maintenance records belong to the MANIF (Manifest) area within the SOE (Sales Order Entry) category.

Default Manifest Report Type

Specify the default type of manifest to print from the Shipping Manifest Queue. Select one of the following options:

- Full Manifest w/ BC & Ship Tickets
- Full Manifest & Ship Tickets
- Full Manifest Report
- Pre-load Manifest Report
- Palm Pilot EManifest Download
- Full Manifest w/ BC

If left blank and the Signature Cropping add-on product is...	Then the default is...
not installed	Full Manifest Report
installed	Full Manifest Report w/ BC

Default Pre-Load Manifest Report Sort Option

For each branch, select the default sort option to use when the Pre-Load Manifest Report is generated from the Shipping Manifest Queue. Options include:

- Product
- Ticket
- Select Code
- Zone/PickGrp/Product
- Zone/Stop#/PkGrp/Product

Do Not Allow Editing Of A Locked Manifest

Indicate whether to prevent users from editing a locked manifest.

- **Y** – Users cannot edit a locked manifest.
- **N** – Users can edit a locked manifest by adding, inserting, and deleting tickets from the Shipping Manifest Queue body, as well as using the **SelTks** hot key to select tickets.

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Do Not Change Ship Date Or Ship Via On Manifest Close

Indicate for each branch whether to update the ship date and ship via for all orders on a manifest to match the dates on the manifest upon manifest close.

- **Y –** The ship date and ship via do not change when a manifest is closed.
- **N –** The ship date and ship via change to what is entered on the shipping manifest for the orders on the closed manifest.

Manifest COD Message

Enter a custom COD message to be displayed on the Shipping Manifest Queue screen and the Shipping Manifest Report along with the amount due.

Manifest Queue Enabled

Indicate whether to enable the Shipping Manifest system.

- **Y –** Enables the system.
- **N –** Disables the system.

Number Of Signatures/Barcodes Required On A Manifest

Specify whether the system should print the barcode and signature lines on a shipping manifest by order or by stop. If left blank, the default is **One per Order**.

- **One per Order –** Prints a barcode and signature line for each order, regardless of whether the orders are for the same customer or for different customers.
- **One per Stop –** Prints one barcode and signature line per customer stop, regardless of the number of orders there are for a particular customer.

Print Package Quantities On Manifest

For each branch, indicate whether to print package quantities and totals on manifest report types that include bar code labels.

- **Y –** The printed report includes package quantities and totals.
- **N –** The printed report does not display package quantities and column headings.

Print Shipping Instructions On Manifest

Indicate whether the system should print shipping instructions on a manifest. This setting is used as the default in the **Show Shipping Instructions** field on the printing setup screen that appears when you use the **Print** hot key on the Shipping Manifest Queue screen.

- **Y –** Prints shipping instructions on the manifest.
- **N –** Does not print shipping instructions on the manifest.

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Print Status Override On Manifest Close

For each branch, specify the override print status the system should assign to an order generation with an **M** status when the shipping manifest is closed.

- **N** – Indicates that an invoice will not be printed at this time. The system normally assigns the status **N** after the Print Invoices program prints an invoice.
- **Q** – Allows an invoice to be selected in the Invoice Preview Queue if that program is used before the Detailed Invoice Preview Report.
- **P** – Allows an invoice to be included on the Detailed Invoice Preview Report.
- **B** – Makes an invoice ready for the Print Invoices program.

Print Status Override On Manifest Processor Sig Upload

For each branch, specify the override print status the system should assign to an order generation when a signature is attached through Manifest Processor.

- **N** – Indicates that an invoice will not be printed at this time. The system normally assigns the status **N** after the Print Invoices program prints an invoice.
- **Q** – Allows an invoice to be selected in the Invoice Preview Queue if that program is used before the Detailed Invoice Preview Report.
- **P** – Allows an invoice to be included on the Detailed Invoice Preview Report.
- **B** – Makes an invoice ready for the Print Invoices program.

Note: If the print status is already **N** or the order is in a closed period, the status does not change.

Print Status Override On Palm E-Manifest Signature Upload

For each branch, specify the override print status the system should assign to an order generation when a signature is attached to a manifest through E-Manifest.

- **N** – Indicates that an invoice does not printed at this time. The system normally assigns the status N after the Print Invoices program prints an invoice.
- **Q** – Allows you to select an invoice in the Invoice Preview Queue if that program is used before the Detailed Invoice Preview Report.
- **P** – Allows the the Detailed Invoice Preview Report to include the invoice.
- **B** – Makes an invoice ready for the Print Invoices program.

Note: If the print status is already N or the order is in a closed period, the status does not change.

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Set Print Status When Order Placed On Manifest

Select the print status the system assigns to an order when it is placed on a manifest. Select from the following print status options:

- **N** – No Print
- **P** – Detailed Invoice Preview Report
- **Q** – Invoice Preview Queue
- **B** – Batch Print
- **M** – Flag to be Placed on Manifest

When you close a manifest, the system updates the print status for the order to the setting in the Print Status Override On Manifest Close control maintenance record. If you manually add an order to a shipping manifest after you print the order's invoice, the print status changes to **M**.

Shipping Manifest AutoSched Default To ON

For each branch, indicate whether the system should set the default for AutoScheduling in the Shipping Manifest Queue to ON. The default is **N**.

- **Y** – Sets the default to ON.
- **N** – Sets the default to OFF.

Valid Package Types

Specify package types to be used on the Shipping Manifest Queue screen. Package types can be up to four characters.

The system uses the first four valid package types defined on this screen as the titles of the four right-hand columns on the Shipping Manifest Queue screen when viewed in the Shipping Packages view.

Unlimited package types can be used in the RF system. When a tote is staged, the system prompts you to enter a quantity for as many package types as have been defined under Valid Package Types.

The system also validates against these package types when users enter carton types during Order Packing and Carton Loading.

Verify Ship Date/Ship Via For Ready To Manifest

Indicate whether, when the manifest system is enabled, the system should let you verify and edit the ship date and ship via before adding a ticket to a shipping manifest.

When you use the **Ready to Mnfst** hot key on the Order Reprinting Options screen to add a ticket to a shipping manifest:

- **Y** – Displays the Ready to Manifest screen and allows you to make changes to the ship date and ship via on the ticket. Upon pressing **Esc**, the system adds the ticket to the manifest with the latest values in the **Ship Date** and **Ship Via** fields.
- **N** – Displays the Ready to Manifest screen briefly and then adds the ticket to the appropriate manifest without allowing any revision to the values on the screen.

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Note: In both cases, before adding a ticket to a manifest, the system checks to see if the ticket has any in-process quantities and, if there are any, does not allow the ticket to be added to the manifest. If the ticket is added to a manifest, the system displays a message informing the user of the manifest number to which the ticket has been added.

Warehouse Tracking Column Titles

Specify the titles of the columns the system adds to the Warehouse Confirmation Queue screen when the **Use Whse Confirmation Queue With Tracking Number** control maintenance record is set to **Y**. Enter each title on a separate line. Each title can be up to seven characters long.

Note: For this control maintenance record to take effect, you must set the Use Whse Confirmation Queue With Tracking Number control maintenance record to **Y**.

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SOE NOST (Nonstock) Control Maintenance Records

The following control maintenance records belong to the NOST (Nonstock) area within the SOE (Sales Order Entry) category.

Assign Prices To All Price Sheet Effective Dates For New Nonstock

Indicate whether, when a user creates a new product record from the Non-Stock Entry screen, the system should copy the prices assigned to the basis names on that screen to all of the price sheet effective dates defined for the product or only the most recent date. The number of price sheet effective dates defined for the price line to which the product is assigned determines the number of possible effective dates for the new product record. NONSTOCK is the default price line.

- **Y** – Assigns the specified prices to all price sheet effective dates defined for the product.
- **N** – Assigns the specified prices to only the most recent price sheet effective date defined for the product.

New Nonstock Buy Line Default

Enter the default buy line to assign when a nonstock product is created through sales order entry. If the buy line entered here is not valid, the buy line is set to NONSTOCK.

New Nonstock Price Line Default

Enter the default price line to assign when a nonstock product is created through sales order entry.

New Nonstock Primary/Catalog Index

Indicate whether a nonstock product created through SOE should be added to the **Primary** or **Catalog** product index. The default is **Primary**.

New Nonstock Procure Group Default

Enter the default procure groupto assign when a nonstock product is created through sales order entry.

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SOE PRICE Decimal Place Parameters Control Maintenance Records

The following control maintenance records belong to the PRICE area within the SOE (Sales Order Entry) category and apply to decimal place parameters.

Number Of Digits Of Accuracy - Override For Sales Pricing Only

Enter the number of digits to the right of the decimal, 0-9, to be used in calculating unit prices in SOE.

If blank, the system uses the value in the Number Of Digits Of Accuracy For Pricing control maintenance record.

> **Note:** Standard rounding (1-4 rounds down and 5-9 rounds up) is in effect for sales orders, unless the Round Up Any Fraction After Sales Pricing Accuracy Digits control maintenance record is set to **Y**. If set to **Y**, any fraction after the number of digits of accuracy causes the last digit of accuracy to be rounded up to the next higher number.

Number Of Digits Of Accuracy For Pricing

Enter the number of digits to the right of the decimal, 0-9, to be used for sales orders, purchase orders and transfers in calculating unit prices.

> **Notes:** The system uses the setting in this record for sales orders if the Number Of Digits Of Accuracy - Override For Sales Pricing Only control maintenance record is blank. If that record has a value, it overrides the value in this record.
>
> Standard rounding (1-4 rounds down and 5-9 rounds up) is always in effect for purchase orders and transfers. Standard rounding is in effect for sales orders, unless the Round Up Any Fraction After Sales Pricing Accuracy Digits control maintenance record is set to **Y**. If set to **Y**, any fraction after the number of digits of accuracy causes the last digit of accuracy to round up to the next higher number.

Round Up Any Fraction After Sales Pricing Accuracy Digits

Indicate whether the system should round up all fractions in sales order entry.

- **Y –** Any fraction after the number of digits of accuracy causes the last digit of accuracy to round up to the next higher number. Rounding up makes money for your company.
- **N –** Standard rounding (1-4 rounds down and 5-9 rounds up) is in effect for sales orders.

> **Notes:** This record works with respect to the Number Of Digits Of Accuracy For Pricing control maintenance record, unless overridden by the number specified for the Number Of Digits Of Accuracy - Override For Sales Pricing Only control maintenance record.

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If necessary, the system re-rounds the price according to the setting in this record after it rounds per matrix rounding rules.

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SOE PRICE General Control Maintenance Records

The following control maintenance records belong to the PRICE area within the SOE (Sales Order Entry) category.

Best Price Check Through Matrix Cells

Enter one of the following to indicate how the system should check matrix cells for the best price for an item. You must log off the system and back on for this control maintenance record to take affect.

- **C-Contract Cells –** Checks for contract matrix cells at the ship-to level and uses the one with the best price. If no contract matrix cells exist at the ship-to level, the system checks for contract matrix cells at the bill-to level and uses the one with the best price. If no contract matrix cells exist, the system follows the logic for option **N-No Cells**.
- **A-All Cells –** Checks all effective matrix cells for the best price for an item, regardless of the type of matrix cell. If a class/group matrix cell has a better price than a customer/product matrix cell, the system uses the class/group price.
- **N-No Cells** – Checks effective matrix cells according to the normal pricing hierarchy. The system respects the setting in **Best Price Check** field in the matrix cells that are checked. This is the default.

  Note: If you set this control maintenance record to **N**, the system respects the settings in the **Best Price Check Field (Y/N)** on the Sell Matrix Maintenance screen. For more information, see Creating Individual Matrix Cells.

- **P-Contract and Promo Cells –** Checks for contract cells at the ship-to level and selects the one with the best price. If no contract cells exist at the ship-to level, the system checks for contract cells at the bill-to level and selects the one with the best price. It then compares the selected cell with all available promotional cells and uses the one with the best price. If no contract cells exist, the system uses the best promotional cell. If no contract or promotional cells exist, the system performs the normal best price check, as if the control record were set to **N-No Cells**.

  Note: The functionality in this control maintenance record is in effect for both Sell Matrix Maintenance and Quick Sell Matrix Maintenance. The system applies best price check logic before applying rounding rules.

Check For Line Items With Zero Pricing

The system can warn your salespeople if there is an item on their order that has a zero unit price.

Indicate whether the system should display a message when one or more products on an order have zero pricing. This alerts the salesperson that the customer would get the products without charge.

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- **Y –** Displays the message after the user presses **Esc** from a sales order's Body screen.
    - To allow a zero-price item, the user must be assigned the SOE.MIN.GP authorization and enter **Yes** in response to the message.
    - To return to the Body screen to enter a price or another product, the user must enter **No** in response to the message.
- **N** – Does not display the warning message.

Check For Rebate Information For Matrix Cell Cost Overrides

Select whether the system displays a warning message when a user exits Sell Matrix Maintenance or Quick Sell Matrix Maintenance without completing rebate information on the Matrix Cell Rebate Maintenance screen for a Cost or COGS override.

- **Null –** Does not display a warning.
- **Warn –** Displays the following warning message: Rebate information is missing and there is a Cost or COGS Override. Continue? (Y/N). If a user enters **N**, the system positions the cursor on the first matrix cell with missing rebate information.
- **Required –** Does not allow the user to exit the screen until the user enters the missing rebate information. the system positions the cursor on the first matrix cell with missing rebate information.

  If you set this control maintenance record to **Required**, you can determine which fields on the Matrix Cell Rebate Maintenance screen must be populated before the user can exit the Sell Matrix Maintenance or Quick Sell Matrix Maintenance screens. Enter **Y** (Required) or **N** (Not Required) in the following fields on the control maintenance record screen to determine whether or not users must populate the corresponding field on the Matrix Cell Rebate Maintenance screen:

Enter Y in this field...	To make this field required...
Check Contract #	**Contract #**
Check Vendor	**Rebate Vendor**
Check Effective Date	**Prc Eff Date Ovrd**
Check Expire Date	**Expire Date**

Default Retail Price Class

Select the price class the system should use as the default retail price class.

This price class displays in the **Class** column in the View Pricing view of the SOE Body screen. This view is designed for the salesperson who may be working in the presence of the customer, such as in a showroom.

- If this record defines a default retail price class, that price class determines the price displayed in the **Class** column and the class number displays in the column heading.
- If this record does not define a default retail price class, class pricing for the product comes from the Default (All-All) matrix cell.

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When the Print Style Maintenance screen displays **Dft Retail** as the print style in the **Basis** column, the calculated retail price prints on any document using that print style.

Disable Reminder Messages In Reorder Pad

Indicate whether to disable the display of product reminder messages in the reorder pad.

- **Y –** Reminder messages do not display in the reorder pad, but do display in the body of the order.
- **N –** Reminder messages display in the reorder pad when the cursor moves to a new row and in the body of the order.

Disallow Inv/Cus Inquiry From Changing Price In Quick Price Screen

Indicate whether the system should disallow a product inquiry from the Last Price Verification screen in SOE from changing the Current Sale Price of a product on the Last Price Verification screen and subsequently on the current order. The default is **N**.

If from the SOE Body screen the user displays the Last Price Verification screen, then uses the **Cust Inv Hist** hot key or **Inv Hist** hot key to display one of those inquiry screens, and then positions the cursor on an invoice and presses **Esc**, the system:

- **N –** Changes the Current Sale Price for the product on the Last Price Verification screen and subsequently on the current order to match the price for the product on the invoice.
- **Y –** Does not change the price for the product on the Last Price Verification screen or on the current order.

Display All Quantity Breaks

Indicate whether, in standard order entry, the system displays all quantity breaks for a customer/vendor who has quantity break prices defined for a product in Sell/Buy Matrix Maintenance.

If the order quantity for the product exceeds the percentage specified in the Quantity Break Display Percentage control maintenance record, the system displays:

- **Y –** All quantity breaks for the product.
- **N –** The next quantity break for the product.

  Note: If the quantity break screen does not display for a customer/vendor when you think it should, the reason may be that the matrix cell applicable to the customer/vendor is not defined for quantity breaks.

Display Warning When A Master Job Bid Exceeds The Estimated Totals

Indicate whether the system displays a warning when the price or cost values in order entry exceed the estimated price or cost values for a master job bid. If the estimated price or cost values are zero (0) or blank, the system does not display a warning.

- **Y –** Displays a warning.
- **N –** Does not display a warning.

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Enter Sell Matrix Maintenance In Edit Mode From Sales Order Entry

Indicate whether authorized users can enter Sell Matrix Maintenance in edit mode from a line item in Sales Order Entry using the **Inq** and then **Matrix Pricing** hot keys.

- **Y –** Authorized users can access Sell Matrix Maintenance from SOE.

  Note: Sell Matrix Maintenance respects the SMATRIX.MAINT, SMATRIX.MAINT.CUS.CLASS, and OE.PRICE.CLASS.LEVEL authorization keys.

- **N –** Users cannot access Sell Matrix Maintenance from SOE.

Include Price Line With Sell Groups For Pricing

Indicate whether the system should look at the matrix cell for the price line a product is in if the matrix cell for the sell group to which the product is assigned does not have an assigned pricing formula. In other words, if the price line is not set up as a sell group for a product, should the system include the price line when checking for sell groups to find valid matrices during pricing.

When the price line to which a product belongs is not being used as the sell group for the product, the system:

- **Y –** Includes the price group that represents the price line in the list of sell groups associated with the product when searching for a matrix cell match during Sales Order Entry.

  If a product on a sales order is not found in a customer/sell group or price class/sell group matrix cell, the system looks at the matrix cell for the price group that represents the price line to which the product is assigned to arrive at the price for the product.

  - If the product is found in a customer/sell group or class/sell group matrix cell, and the **Best Price Chk (Y/N)** field is set to **Y** in that matrix cell, the system continues on and looks at the matrix cell for the price line for a better price.
  - If a better price is then found in the matrix cell for the price line, that is the price the system uses for the product.

- **N –** Does not include the price group that represents the price line in the list of sell groups associated with the product when searching for a matrix cell match during Sales Order Entry.

Leave Prices Unchanged On Pricing Branch Change On Header

Indicate whether the system should leave prices unchanged when a user changes the pricing branch on an order, reprice the order, or let the user decide. The default is **N**.

- **Y –** Does not reprice the order.
- **N –** Reprices the order.
- **Prompt –** Displays the following prompt: Reprice All Items (Y/N)?

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Post Invoicing Auto Apply Mode

For each branch, indicate whether the system automatically posts unapplied payments to invoices when a user exits an order, when that branch is the price branch for the first generation of the order. The default is **N**.

- **Y –** The system posts an unapplied payment on the order to an invoice for the order if the payment amount exactly matches the invoice amount being checked. If the payment amount does not match any invoice amount, the system displays the Apply Payment screen, so the user can choose if or how to apply the payment. If there are multiple unapplied payments, the system displays the Apply Payment screen for each one.
- **N –** The system does not automatically post unapplied payments.

Price View Level

Enter the minimum OE.PRICE.VIEW.LEVEL authorization key view level, 0-9, a user can be assigned to be able to print, fax, and e-mail a direct purchase order.

Users assigned the OE.PRICE.VIEW.LEVEL authorization key with a level greater than or equal to the number specified here, can print, fax, and e-mail a direct purchase order.

> **Note:** For users to fax direct purchase orders, this record must be set to a number greater than zero (0).

If this control maintenance record is left blank, order entry assumes a default price level value of 8.

Prohibit Quantity Break Repricing On Closed Orders

Indicate whether to prohibit the re-pricing of lines when changing quantities or price branch on closed orders. Orders are closed once a ship ticket has been printed.

- **Y –** Disallows quantity break pricing on closed orders.
- **N –** Allows quantity break pricing on closed orders.

Prompt For Price Branch When Absent In Terminal Setup

Indicate whether, if the user does not have a default branch specified in Terminal Setup, the system should prompt the user to enter a price branch on every new sales order.

- **Y –** Prompts the user to enter a price branch on each new sales order.
- **N –** Prompts the user to enter a price branch for the initial sales order entered by the user. On each subsequent order, the system assigns the price branch used on the previous order.

  > **Note:** If the user has a default price branch specified in Terminal Setup, the system enters that price branch on orders created by this user.

Quantity Break Display Percentage

Specify, for customers/vendors who have quantity break prices defined for a product in Sell Matrix Maintenance/Buy Matrix Maintenance, how close to the next break point they must be when ordering an item before the system shows the next break point and its pricing.

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Enter a percentage, 0-99. If you leave this record blank, the percentage defaults to 75.

The order quantity must be greater than the specified percentage for the system to display the next break point. The lower the percentage, the more likely it is that the next quantity break point will be displayed. To always display the next break point when quantity breaks are defined for a product, set the percentage at zero (0).

For example, if the customer is offered a price break for Product X at 10 units and this percentage is set at 70, if the customer orders eight or nine of the product (more than 70% of 10), the screen showing the next price break and price displays. If the customer only orders seven of the product (equal to 70% of 10), the screen showing the next break point and price does not display.

The Display All Quantity Breaks control maintenance record determines whether the system displays the next quantity break or all quantity breaks for the designated product.

> **Note:** If the quantity break screen does not display for a customer/vendor when you think it should, the reason may be that the matrix cell applicable to the customer/vendor is not defined for quantity breaks.

Respect Price Branch When Searching For Last Price Of Last Sale

For each branch, indicate whether the last price verification program searches for the last price of the last sale in the current pricing branch.

- **Y –** Searches the current pricing branch for the last price.
- **N –** Searches for the last price of the last sale regardless of branch, if the Use Last Price/Cost Logic control maintenance record is set to Yes or Prompt. If last pricing logic is not enabled, then the system searches the current pricing branch for the last price.

Search Contract Pricing In Order Listed

Enter one of the following to indicate how and in what order the system searches through contracts:

- **Y –** System searches contracts in the order the contracts are listed, first checking for a Contract/Product cell, then a Contract/Group cell. The search starts at the first contract in the list, and when it finds a matrix cell, it stops. Using this method it is possible to set up contracts in a specific order so that a Contract/Group cell is used over a more specific Contract/Product cell.
- **N –** System looks through all contracts for a Contract/Product cell and stops at the first one found. If a Contract/Product cell is not found we then look through all contracts again for a Contract/Group cell.

  Note: For more information on contract pricing, see Using Contract Pricing with Customer Records.

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Show Unit Price And Unit Of Measure Based On Order Unit Of Measure

Indicate whether to base the unit price and unit of measure displayed in the Unit Price order entry view on the order's unit of measure.

- **Y –** Displays prices based on the order's unit of measure. If the order is entered using a mixed quantity, such as 1 cs and 4 ea, the system uses the lowest unit of measure entered for the product.
- **N –** Displays prices based on the product's default unit of measure defined for order entry.

Stop Best Price Check At First Valid Sell Group

Indicate whether the system should stop at the first valid sell group matrix cell found within a hierarchy level or check multiple sell group matrix cells within each pricing hierarchy level when doing a best price check.

- **Y –** Stops at the first sell group matrix cell found.
- **N –** Loops through all sell group matrix cells to find the one with the best price, assuming the best price flag is set for each cell. This process applies to all sell group levels for contract and non-contract pricing.

Valid Buy/Sell Group Types

Specify system-level types to assign to groups defined in Buy/Sell Group Maintenance for reporting purposes.

Valid Product Matrix Types

Enter the product matrix types to which you can assign customer price classes. A matrix type can be up to 15 upper case characters.

If you populate this record with entries, the system requires users to select a type in the **Matrix Type** fields on the Product Price Maintenance screen and the Nonstock Entry screen.

From the Customer Pricing/Printing screen, use the **Price Class Ovrd** hot key to display the Price Class Override screen, where you can override the matrix types assigned to a customer's prices classes.

> **Note:** We recommend that once you have created and used a product matrix type, do not delete it.

While Repricing A Bid Should All Open Gens Be Repriced

Indicate whether the system should reprice all open generations when users reprice bids.

- **Y –** The system reprices all open generations of the bid.
- **N –** The system reprices only the current bid generation.

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SOE RETRN Default Settings Control Maintenance Records

The following control maintenance records belong to the RETRN (Returns) area within the SOE (Sales Order Entry) category and are related to default settings.

Default Handling Charges For Returns

On the Default Handling Charges for Returns screen, enter a minimum handling charge in the form of a **Minimum Amount** or a **Percentage** for returned items. If both parameters have an entry, the system uses the one that results in the highest charge.

Use the **Exclude Return Types** hot key to designate return types that should not be charged handling.

To exclude a customer from default handling charges, enter **N** in the **Exclude for Handling** field on the Freight Data screen in Customer Maintenance.

Default Location For F, O, R Type Returns

For each branch, enter a default location where a product on a return sales order that is assigned the Defective (F), Overship (O), or Review (R) return type will be placed. If left blank, the location defaults to the primary location (P) specified in the LocStat column on the Product Location Maintenance screen. If no location is defined on that screen, the system uses the location entered in the Product Location Default control maintenance record.

Default Location For S Type Returns

For each branch, enter a default location where a product on a return sales order that is assigned the Stock (S) return type will be placed. If left blank, the location defaults to the primary location (P) specified in the LocStat column on the Product Location Maintenance screen. If no location is defined on that screen, the system uses the location entered in the Product Location Default control maintenance record.

Default Location On All Credits To The Primary Location

For each branch, enter one of the following to determine whether the system should set the default location for all returns, credit/rebill orders, and price adjustments at the time that the line item is entered to the primary stock location:

- **Y –** Sets the location of the return to the current primary stock location. If you have not defined a primary stock location for that product for the shipping branch, leave this field blank.

  If the ship branch changes on an order, then the location on all negative or credit/rebill items changes to the primary location for the new ship branch.

- **N –** Sets the location of the return to the original stock location for the ship branch on the order, which may or may not be the location from which the item was picked on the original sales order.

  Note: The Default Location For S Type Returns and Default Location For F, O, R Type Returns control maintenance records override this record, because

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they change the location at the time the order is processed. For this control maintenance record have the desired effect, set the Default Location For S Type Returns and Default Location For F, O, R Type Returns control maintenance records to blank.

Default Return Goods Quantity Type

For each branch, specify the default return goods quantity type (S-Stock, R-Review, or F-Defective) to assign to all products entered as a returned good on a sales order. If you leave this record blank, the user must select a return type at the Sales Order Entry screen.

Default Warranty Information Screen

If you create a user-defined Default Warranty Information Screen for your company, you must assign the screen name in this control maintenance record. If you do not assign a screen here, the system uses the user-defined Default Warranty Information Screen called UD.DFLT.WARRANTY.

Return Goods Queue Default Select Option

Indicate whether to display Buy Line or Price Line as a selection field in the header of the Return Goods Queue screen.

SOE Return/Credit Default Parameters

To prevent returned items from posting an immediate credit to a customer's account, use this record to override the system default invoice status code and print status assigned to an invoiced order containing returned items. This enables you to track the item in the warehouse, but not give the customer credit until the vendor to which you return the item approves it.

For each branch, specify a credit definition, default invoice status code, and default print status. If, upon the invoicing of a sales order, the order meets the criteria set in the credit definition, the system assigns the invoice status code and print status specified in this record.

On the SOE Return/Credit Default Parameters screen, complete the following fields:

- In the **Branch** field, enter the branch for which you are defining these parameters.
- In the **Return/Credit Definition** field, select the credit definition to use:
  - **Any Return Line Items –** The order is considered a credit if any line item on the order generation has a negative quantity (a return).
  - **Negative Total Invoice Amount –** The order is considered a credit if the total dollar amount on the order generation is negative.
- In the **Default Print Status** field, select the print status for the system to assign if the order is considered a credit, as defined in the **Return/Credit Definition** field. If you leave this field blank, the system does not use this control maintenance record to assign the print status.
- In the **Default Invoice Status Code** field, select the invoice status code to be assigned if the order is considered a credit, as defined in the **Return/Credit Definition** field. If you leave this field blank, the system does not use this control maintenance record to assign the invoice status.

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Note: Invoice status codes are defined in the Valid Customer Invoice Status Code control maintenance record.

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SOE RETRN General Control Maintenance Records

The following control maintenance records belong to the RETRN (Returns) area within the SOE (Sales Order Entry) category.

Append Return Comments To Product Description

Indicate whether the system should append return comments to the product description on a return order.

- **Y –** Appends return comments.
- **N –** Does not append return comments.

Check History On Sales Order Returns With

When customers return products, the system can check the Customer Inventory History or the Inventory History Ledger to determine whether the customer purchased the item from your company.

Indicate which history on sales order returns the system should check:

- Inventory History
- Customer Inventory History

Display Inventory History If No Order # Entered For Returned

Indicate whether the system should display the Inventory History Ledger screen for users when they don't enter a sales order number on the Return Goods Verification screen.

If the original sales order number is not entered on the Return Goods Verification screen when a customer returns a product, pressing **Esc** does one of the following:

- **Y –** Displays the Inventory History Ledger for the product.

  This helps the user find the original sales order number. The user can still press **F12** at the Inventory History Ledger screen to avoid entering a sales order number on the Return Goods Verification screen and return to the Sales Order Entry screen.
- **N –** Returns the user directly to the Sales Order Entry screen.

Include Original Customer P/O # In SOE Return Comment

For each branch, indicate whether the system should add the customer P/O # from the original sales order to the comment on a return sales order.

- **Y –** Adds the customer P/O # from the original sales order to the return comment.

  Note: This does not occur if there is no original sales order reference
- **N –** Does not add the customer purchase order number from the original sales order to the return comment.

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Maximum Days Allowed For Returns On Nonstock Items

For each branch, enter the maximum number of days beyond the ship date of the original order that an unauthorized user can return a nonstock item. If you leave this record blank, any user can return items with any status other than **Stock** at any time, regardless of authorization.

The SOE.RETURN.ALLOWED authorization key determines the user's authorization.

> **Note:** If you specify a number in this record, use the Types That Can Be Returned Any Time control maintenance record described below to designate product type exceptions.

Maximum Days Allowed For Returns On Stock Items

For each branch, enter the maximum number of days beyond the ship date of the original order that an unauthorized user can return a stock item. If you leave this record blank, any user can return items with any status other than **NonStock** at any time, regardless of authorization.

The SOE.RETURN.ALLOWED authorization key determines the user's authorization.

> **Note:** If you specify a number in this record, use the Types That Can Be Returned Any Time control maintenance record described below to designate product type exceptions.

Require Reason For Return Code

For each branch, indicate whether the system should require that a reason for return code be entered in the **Reason** field on the Return Goods Verification screen when users enter a return on a sales order.

- **Y –** Displays a message indicating that a reason code is required and requires that a code be entered before the user can escape out of the screen.
- **N –** Does not require the user to enter a reason for return code before escaping out of the screen.

Restocking Charge Item

The system can automatically charge a handling or restocking fee for return orders.

Enter the miscellaneous charge product record the system adds to a sales order when items are returned and you have assigned a restocking fee to the order. The system posts the amount of the restocking fee to the assigned G/L account.

- If there are multiple return items on the order and there is a product specified in this record, the restocking charge item is added to the order one time and the fees for the returned items are added together on the order.
- If a product is specified in this record but a restocking price fee is not specified on the Return Goods Verification screen, the system cannot charge a restocking fee for the returned items.

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Restrict Quantities On Return Orders To Package Quantity

Indicate whether items that were purchased in a package quantity must be returned in the package quantity. The default is **N**.

- **Y** – Return items must be in the package quantity.
- **N** – Return items can be in any quantity.

Return Items Affect The Required Deposit

Indicate whether the returns on an order should affect the calculation of a required deposit.

- **Y** – If the order total is less than the required deposit, the required deposit is set to zero (0.00).
- **N** – If there is a required deposit for an order, the system does not take into account the value of any items being returned on the order, and calculates the deposit based only on the sale portion of the order.

Types That Can Be Returned Any Time

Enter the product types that can be returned at any time. For each product type, position the cursor on a blank line and select a type. The system does not check user authorization for these returns.

Note: To set limits for returning stock and nonstock items, refer to the Maximum Days Allowed For Returns On Stock Items and Maximum Days Allowed For Returns On Nonstock Items control maintenance records listed above.

When Creating A Return Order, Use Writer From Original Order

Indicate whether the system should assign the writer from the original order to a return.

When a user creates a return order and the original order number is entered on the Return Goods Verification screen:

- **Y** – The system assigns the writer from the original order to the return order. This lowers the commission of the original writer, instead of the writer entering the return order.
- **N** – The writer entering a return order remains as the writer of the return order. The system lowers the commission of the writer who enters the return order, instead of the writer who created the original sales order.

  Note: For the system to lower a commission, you must set the Calculate Negative Commission When GP Negative control maintenance record to **Y**.

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SOE SRIAL (Serial Numbers) Control Maintenance Records

The following control maintenance records belong to the SRIAL (Serial Numbers) area within the SOE (Sales Order Entry) category.

Prompt For Serial Numbers On Return Sales Order For O Type

Indicate whether the system should prompt for serial numbers when serialized products assigned an O (Overship) type are returned in SOE.

- **Y –** The Serial Number Entry screen displays.
- **N –** The Serial Number Entry screen does not display.

Prompt For Serial Numbers On Sales Orders With A Ship Ticket Status

Indicate whether the system should prompt for serial numbers on orders with a ship ticket status.

When an order generation with a Temporary Shipping Ticket (T) status contains a line item that requires a serial number and the correct number of serial numbers has not been assigned, if you position the cursor on that line item:

- **Y** – The system displays the Serial Number Entry screen.
- **N** – The system does not display the Serial Number Entry screen.

Require Auth To Process Sales Order With Open Serial Numbers

Indicate whether, if any line item on a sales order generation that requires a serial number has not been assigned the correct number of serial numbers, the system requires a user assigned the SOE.PROCESS.OPEN.SERS authorization key to enter the appropriate password in order to process the order without actually entering the required serial numbers.

- **Y –** Users must have authorization.
- **N –** Any user can process the order without entering the required serial numbers.

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SOE STAR (StarShip) Control Maintenance Records

The following control maintenance records belong to the STAR (StarShip) area within the SOE (Sales Order Entry) category.

Apply Extra Handling For Shipping To First Gen Only

Indicate whether the system applies the amount specified in the Extra Handling Charge for Shipping control maintenance record to the first generation or every generation of an order to which the charge is applicable.

- **Y –** Applies the amount to only the first generation.
- **N –** Applies the amount to every generation.

Note: Whether an extra handling charge is applied to an order also depends on the setting in the **Extra Handling Charge** field on the Additional Header Data screen in SOE. If that is set to **N**, an extra handling charge for shipping is not applied.

Apply Misc StarShip Charges To Freight Or Handling

Select whether miscellaneous StarShip charges, such as COD or hazardous material charges, for an order post to outgoing billable Freight or Handling on the SOE Totals screen. The default is **Freight**.

Note: These charges will not post to the Totals screen unless the Post Charges From StarShip control maintenance record is set to **Y**.

Apply Misc WorldShip Charges To Freight Or Handling

Select whether miscellaneous WorldShip charges, such as COD or hazardous material charges, for an order post to outgoing billable Freight or Handling on the SOE Totals screen. The default is Freight.

Note: These charges will not post to the Totals screen unless the Post Charges From WorldShip control maintenance record is set to **Y**.

Apply StarShip Handling Charges To Freight Or Handling

Select whether a StarShip handling charge for an order posts to outgoing billable Freight or Handling on the SOE Totals screen.

Note: These charges will not post to the Totals screen unless the Post Charges From StarShip control maintenance record is set to **Y**.

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Apply StarShip/Clippership Frght To Expense Frght If Cust Frght Exmt

For a customer who has the **Frt Out Exempt** field in the customer record set to **Y**, use this record to determine whether the system records outgoing freight for deliveries to that customer as an Expense on the OE Freight Distribution screen for an order.

- **Y –** Records StarShip freight under Expense on the OE Freight Distribution screen.
- **N –** Records StarShip freight only in the change log for the order.

Apply WorldShip Frght To Expense Frght If Cust Frght Ex

For a customer who has the **Freight Out Exempt** field in the customer record set to **Y**, use this record to determine whether the system records outgoing freight for deliveries to that customer as an Expense on the OE Freight Distribution window for an order.

- **Y** – Records WorldShip freight under Expense on the OE Freight Distribution window.
- **N** – Records WorldShip freight only in the change log for the order.

Apply WorldShip Handling Charges To Freight Or Handling

Indicate whether a WorldShip handling charge for an order posts to outgoing billable Freight or Handling on the SOE Totals tab.

- Freight
- Handling

  Note: These charges will not post to the Totals screen unless the Post Charges from WorldShip control maintenance record is set to **Y**.

Extra Handling Charge For Shipping

Specify the amount, $0.00-$99.99, of an extra handling charge for shipping that posts to outgoing billable Freight on the Sales Order Entry Totals screen for an order.

Note: Whether an extra handling charge is applied to an order also depends on the setting in the **Extra Handling Charge** field on the Additional Header Data screen in SOE.

Post Charges From StarShip

Indicate whether the system should post StarShip charges (freight, handling, and miscellaneous) for an order to the Totals screen and the general ledger.

- **Y** – Posts StarShip charges (freight, handling, and miscellaneous) for an order to outgoing billable **Freight** or **Handling** on the Order Entry Totals screen, as specified in the Apply Misc StarShip Charges to Freight or Handling and Apply StarShip Handling Charges to Freight or Handling control maintenance records, and to the appropriate general ledger record. The charges are recorded in the change log.
- **N** – Does not post StarShip charges for an order to the Totals screen or to the general ledger. The system records the charges in the change log. If you set this record to **N**, the remaining StarShip control maintenance records have no effect.

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Note: If the **Frt Out Exempt (Y/N)** field in Customer Maintenance or the **Freight Allowed (Y/N)** field on the Additional Header Data screen in Sales Order Entry is set to **Y**, the customer is not charged freight.

Post Charges From WorldShip

Indicate whether the system should post WorldShip charges (freight, handling, and miscellaneous) for an order to the Totals screen and the general ledger.

- **Y –** Posts WorldShip charges (freight, handling, and miscellaneous) for an order to outgoing billable **Freight** or **Handling** on the Order Entry Totals tab, as specified in the Apply Misc WorldShip Charges to Freight or Handling and Apply WorldShip Handling Charges to Freight or Handling control maintenance records, and to the appropriate general ledger record. The charges are recorded in the change log.
- **N –** Does not post WorldShip charges for an order to the Totals tab or to the general ledger. The system records the charges in the change log. If you set this record to **N**, the remaining WorldShip control maintenance records have no effect.

  Note: If the **Frt Out Exempt (Y/N)** field in Customer Maintenance or the **Freight Allowed** field on the Additional Header Data tab in Sales Order Entry is set to **Y**, the customer is not charged freight.

Post StarShip Freight On Return P/Os

Indicate whether the system should add freight charges to return P/Os. The default entry is **N**.

- **Y** – Adds freight charges to return P/Os. This bills the vendor for the freight.
- **N** – Does not add freight charges to return P/Os. The system records shipping information in the change log.

Print Status Override From StarShip

For each branch, enter the override print status to assign to the order generation after a shipping ticket has been processed through StarShip. Override statuses are:

- **N** (No Print) – No print occurs.
- **Q** (Invoice Preview Queue) – Causes the invoice to be selected by the Invoice Preview Queue, if that program is used before the Detailed Invoice Preview Report.

  At the Invoice Preview Queue, the print status of the invoice can be changed to **P** to include the invoice in the Detailed Invoice Preview Report.
- **P** (Detailed Invoice Preview Report) – Causes the invoice to be selected for and included in the Detailed Invoice Preview Report. This is a typical print status setting for an invoice.
- **B** (Batch Print) – Makes the invoice available to the Print Invoices program.

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Print Status Override From WorldShip

For each branch, enter the override print status to assign to the order generation after a shipping ticket has been processed through WorldShip. Override statuses are:

- **N** (No Print) – No print occurs.
- **Q** (Invoice Preview Queue) – Causes the invoice to be selected by the Invoice Preview Queue, if that program is used before the Detailed Invoice Preview Report.

  At the Invoice Preview Queue, the print status of the invoice can be changed to **P** to include the invoice in the Detailed Invoice Preview Report.
- **P** (Detailed Invoice Preview Report) – Causes the invoice to be selected for and included in the Detailed Invoice Preview Report. This is a typical print status setting for an invoice.
- **B** (Batch Print) – Makes the invoice available to the Print Invoices program.

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SOE SUBS (Substitutes) Control Maintenance Records

The following control maintenance records belong to the SUBS (Substitutes) area within the SOE (Sales Order Entry) category.

Add OE Message For Additional Sale/Substitute Products

Designate whether the system should display a Substitute/Add On Sale Items screen, a reminder message, or do neither when a product with additional items (substitute products or related products) assigned to it on the Substitute screen in Product Maintenance is entered on the SOE Body screen. The options are:

- **Disabled** – Neither the Substitute/Add On Sale Item screen nor the following reminder message displays: Additional Sale Items Exist on this Product.
- **Display** – The following reminder message displays: Additional Sale Items Exist on this Product.
- **Auto Select** – The Substitute/Add On Sale Items screen displays those items.

Auto Open Substitute Window For Items W/O Avail In SOE/TOE

Indicate whether the system should display the Substitute/Add On Sale Item screen when a product with a valid substitute or other product type assigned to it and no current available quantity is entered on a sales order or transfer order. This lets the user select a substitute or other type of product that is displayed on the screen.

- **Y** – Displays the screen.
- **N** – Does not display the screen.

Auto Open Substitute Window For Items With Type

Enter the product types for which the system displays the Substitute/Add On Sale Item screen in SOE, POE, or TOE. When you enter a product that has substitute products with these product types, the system displays the Substitute/Add On Sale Item screen.

Only Show Substitute/Add On Sale Items Window When Adding Line Item

Indicate whether the system should display the Substitute/Addon screen only when users add a new line item to the order or replace an existing one.

- **Y** – Displays the Substitute/Addon screen only when users add a new line item to the order or replace an existing one.
- **N** – Displays the Substitute/Addon screen whenever users place a cursor on a line item.

Related Products Display Mode

Define substitute, related, and required items and indicate how you want the system to notify the order writer.

Use the grid provided to indicate what the system should do when a parent product is available or unavailable. The screen is divided between Substitutes on the top of the screen and Required

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and Related products on the bottom of the screen. For more information, see Substitutes, Required, and Related Items.

Use the columns to show how to handle substitute, related and required products when the parent product is available and when it is not available. Indicate what action the system should take using the following standard selections:

- **Default** – The system uses the value you set in the Default Actions row.

  Use the row labeled Default to tell the system what setting to use when there is no other value listed or when the value is set to Default. This option is not available for Substitutes.

- **Auto-Fill** – This selection only applies to related items. The system automatically adds required or related items to the order without prompting the salesperson. The system uses the recommended or suggested quantity that is set up in Product Maintenance.
- Reminder – The system provides a reminder message to the salesperson to indicate that substitutes, required items or related items are available. The salesperson must use Subs hot key from the order to access the substitute or related items screen.
- Review – The system opens the substitute or related items screen automatically so that the salesperson can substitute or add related items as needed.
- None – No action taken by the system. Users must manually open the Product Relationships screen.

Valid Product Relationship Types

Define the product types you want available to assign to products that are set up as either required or related products. Product types can be up to 25 characters. These types are used in order entry when adding required or related products to sales, purchase, or transfer orders.

For example, define a type called CORD to make sure that all the extension cords sold are grouped together for reporting purposes.

Valid Substitute Product Types

Define substitute product types to assign to products that are set up as valid substitutes for other products. Product types can be up to 25 characters.

You must define SUB as one of the valid substitute product types. You can also define substitute product types for such things as add-on products, downgraded products, upgraded products, replacement products, etc.

Only the first five characters of the type display in the **Type** field on the Substitute Product screen in Product Maintenance. Use the remaining characters for a more complete description of the type. For example, enter DOWN - Downgraded Product.

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SOE TAX Control Maintenance Records

The following control maintenance records belong to the TAX area within the SOE (Sales Order Entry) category.

Disable Edit Ability Of TaxCode In Line Item Taxability View

Indicate whether to prevent users from editing the **Tax Code** column in the Line Item Taxable View in sales order entry. The default is **N**.

- **Y** – Users cannot edit this column.
- **N** – Users can edit the tax code column.

Enter GL ID For Goods & Services Tax (GST) GL Account

For Canadian customers to whom GST taxes apply, in addition to PST taxes, enter the ID of the GST Payable G/L account.

- If you specify a G/L account, the system prints the GST and PST taxes on separate lines of the POS receipt.
- If you do not specify a G/L account, the system prints only the PST tax on the POS receipt.

Recalculate Tax On Credit

Indicate whether the system recalculates the tax on the credit generation of a credit/rebill transaction.

- **Yes – Recalc tax using the original ship date** – Recalculates the tax on the credit generation, using the original ship date of the credit generation.
- **Yes – Recalc tax Using the rebill ship date** – Recalculates the tax on the credit generation, using the ship date of the rebill generation.
- **No – copy tax from original sale as an override** – Copies the tax from the original generation to the credit generation as an override.

Recalculate Tax On Rebill

Indicate whether the system should recalculate the tax on a rebill generation if the tax rate on the original tax jurisdiction has changed, when a user executes a credit and rebill.

- **No – copy tax from original sale as an override** – Does not recalculate the tax. The credit and rebill taxes are the negative of the original sales tax. The system flags the credit and rebill tax amounts with an asterisk (*) to indicate an override. Users must be assigned the highest level of the SOE.TAX.EDIT authorization key to edit these amounts. Tax jurisdiction and any exemption information carries over to the credit and rebill from the original invoice.
- **Yes – Recalc tax using the original ship date** – The credit is the negative of the original sales tax. The system flags the rebill amount with an asterisk (*) to indicate an override.

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The system recalculates the rebill sales tax based on the ship date of the original order generation. There are three possible exceptions to this:

- If the user adds or deletes an item on the rebill, the system recalculates the tax based on the ship date of the rebill generation. The system ignores comments and subtotals in determining whether items have been added or deleted.
- If the user changes the ship via on the rebill, the system displays the following prompt: This ship via change will cause sales taxes to be recalculated. Continue (Y/N)? If the user responds **Y**, the system recalculates the tax based on the ship date of the rebill generation. If the user responds **N**, the system returns the ship via to its original value and does not recalculate the sales tax.
- If the user changes quantities for any items on the original order generation on which a credit/rebill was done, but no line items are added, deleted, or changed to different products, the system recalculates the sales tax based on the ship date of the original order generation.

- **Yes – Recalc tax using the rebill ship date –** The credit is the negative of the original sales tax. If the rate on the original tax jurisdiction has changed, the system flags the rebill amount with an asterisk (*) to indicate an override. The system recalculates the rebill sales tax based on the ship date of the rebill order generation, using current information from the entity file, the ship via file, and the tax jurisdiction rules. The system copies all tax jurisdiction and exemption information from the original sale, so if the original invoice was tax exempt, then the rebill will be tax exempt. The totals screen displays the new **Sales Tax** amount with no asterisk (*). The header screen displays an asterisk by the **Tax Jurisdiction** field.

Use Branch That Receives Credit For The Sale For NST Taxable States

Complete this record if your company uses the National Sales Tax companion product. Indicate whether the system bases taxes for taxable states on the branch that receives credit for the sale.

- **Y –** The system uses the branch specified in the Branch That Receives Credit For The Sale control maintenance record.
- **N –** The system uses the shipping branch.

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TIME (Time Clock) Control Maintenance Records

The following control maintenance records belong to the TIME (Time Clock) category and are only effective if you use the Time Clock product.

Default Time Clock In/Out Response

Select how the system sets the default response for clocking in or out when users access the Time Clock In/Out programs.

- **Yes** – Sets the default clock in/out response to **Y**.
- **No** – Sets the default clock in/out response to **N**.
- **Prompt** – Prompts the user to manually enter a **Y** or **N** to clock in or out.

Time Clock Auto Deduction Category

Enter the deduction category you want to use for automatic deductions. For example, you set your time sheet to deduct 30 minutes for every 4 hours of work. The setting in this control maintenance record is the deduction category used to track those deductions.

You can select from any of the categories set up in Deduction Maintenance.

Time Clock Employee Types

Enter employee types to assign to employees for use with the Time Clock program. Employee types can be up to 20 characters long. Typical types are Full Time and Part Time.

Time Clock Minutes

Indicate whether the system sets time to hours and minutes, rather than hours and fractional hours, throughout the Time Clock application.

- **Y –** The time displays in hour and minutes.

  For example, for an employee clocked in for five hours and fifteen minutes, the time displays as 5:15.

- **N –** The time displays as hours and fractional hours.

  For example, for an employee clocked in for five hours and fifteen minutes, the time displays as 5.25.

Time Clock Snap On Manual Entry

Indicate whether to enable the time clock snap for minutes function on manual entries.

Snap for minutes is the interval in minutes in which you want the time clock to round down. For example, if you enter 5 and your employee clocks out at 1:04, the time clock rounds down to 1:00. If your employee clocks in at 1:37, the time clock rounds down to 1:35.

- **Y** – Enables snap for minutes on manual entries.
- **N** – Does not enable snap for minutes on manual entries.

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Time Off Category Maintenance

Define which categories you want employees to use to clock their time off. In addition, indicate for each of those categories, how the system should handle overtime, how an employee should be paid for any overtime worked, and if the category contributes to a period or daily overtime accrual.

Use the following guidelines:

<table>
<tr><th>Column</th><th>Guideline</th></tr>
<tr><td>Time Off Category</td><td>10-digit character limit
Use common names, such as Jury Duty, Sick Time, or Bereavement
Names are user-defined, so you can use whatever codes or abbreviations correspond to your payroll system. For example, if your company allowed for unpaid sick time, you may have a code called UNPDSICK.
Use the Rename Time Off Category hot key to rename any of the current categories. If you rename a category, the system prompts you to update any current time sheets in the system.</td></tr>
<tr><td>Overtime Behavior</td><td>Never O/T – Hours clocked to a category with this behavior will never be paid at an overtime rate, regardless when the time off has been added to the time sheet.
Always O/T – Hours clocked to a category with this behavior will always be paid at an overtime rate, regardless of when the time off has been added to the time sheet.
Normal Hours – Hours clocked to a category with this behavior will be treated as normal hours. The hours clocked will be paid at either the normal rate or the overtime rate based on when then hours were worked. For example, the system always treats vacation time at normal hours.</td></tr>
<tr><td>Overtime Multiplier</td><td>One number to two decimal points, such as 1.50 for normal overtime or 2.00 for a holiday category.</td></tr>
<tr><td>Contributes to Period O/T</td><td rowspan="2">Enter Yes or No
Indicate if any overtime will count toward the defined period or daily overtime amounts.
A period is defined as a normal work week for your employee or staff. For example, if you run a warehouse that is in operation 24 hours per day and 7 days per week, then you have employees who are on shift work. These shifts may be 12 hour days for 3 days per week. Therefore, the work period is 32 hours. However, in the same warehouse, you may have employees in the office staff who work 9-6 daily. Their work period is 40 hours. Overtime can be treated differently for each type of shift employee.
In addition, you may need to adhere to rules laid down between management and a worker's union. Use these selections to ensure that overtime is handled appropriately.</td></tr>
<tr><td>Contributes to Daily O/T</td></tr>
</table>

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Valid Departments

Enter a list of valid departments that can be assigned to users. This list displays when users press **F10** in the **Department** field on the User Maintenance screen and several Time Clock screens.

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TOE (Transfer Order Entry) Control Maintenance Records

The following control maintenance records belong to the TOE (Transfer Order Entry) category.

Copy Comments For Hazard Items To Transfers

Indicate whether the system copies the hazard comments to the transfer order when a user places a hazard product on a transfer.

- **Y –** Copies hazard comments.
- **N –** Does not copy hazard comments.

Copy Comments For Procured Items To Transfers

When a product is procured from another branch (tagged), the system can copy attached comments from the sales order to the purchase order.

When the system has procured an item and a confirmation transfer has occurred from another branch, the system copies the procured product from the sales order to the transfer order.

Indicate whether the system also copies product comments from the sales order to the transfer order. The default is **N**.

- **Y –** Copies all comments for the product, except for the customer part number and location, to the transfer order.
- **N –** Does not copy comments for the product to the transfer order.

Default Ship Via For Transfers

Select the default ship via for transfers if the **Via** field on the Transfer Confirmation screen is left blank.

Default Vendor Consignment On Transfers

Select the how the system handles consignment items on a transfer order if the **Consignment Transfers** field on the Miscellaneous Vendor Information I screen is blank.

- **Consigned to Inventory** – The system adds the items to regular stock inventory in the receiving branch.
- **Consigned to Consigned –** The system adds the items to consignment inventory in the receiving branch.

Enable Branch Authorization For Transfers

Indicate whether the system requires users to have access to the ship-to and ship-from branches on a transfer in order to create the transfer. The default is **N**.

- **Y –** Users must have access to the ship-to and ship-from branches. You can assign which branches users have access to on the Accessible Branches screen.

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Note: A user cannot create new transfer orders to ship-to branches, or receive transfer orders into ship-to branches if the user does not have access to those branches identified in Accessible Branches in User Maintenance.

- **N –** Depending on the assigned TOE authorization keys, any user can create or edit an existing transfer order from any branch to any branch, regardless of whether those branches are accessible to the user.

  For more information, see Defining Vendor branch Override Capabilities.

Enable User To Receive Transfers Shipped In A Period Now Closed

Indicate whether the system enables users to receive transfers shipped in a period that is now closed.

- **Y –** Initially the TOE Body screen is view-only. When you escape to the TOE Status screen, the system displays the shipping and receiving generations for the transfer. The shipping generation is view-only. You can edit the receiving generation. You can make changes to the:
  - Receive quantity of the receiving generation on the Body screen.
  - Status of the receiving generation on the Status screen.
  - Shipping instructions on the Header screen.
- **N –** The transfer is view-only.

Print Transfer Receiver Instead Of Transfer Register

Complete this record if your receiving department prints a Transfer Receiver Report that shows locations when receiving transfers.

Indicate whether the system prints a transfer receiver instead of a transfer register.

- **Y –** Prints transfer receiver.
- **N –** Prints transfer register.

Re-Sort Transfer Items When Closed For Branch

For each branch, specify whether the items on a transfer order are re-sorted by location when the order is shipped and, if so, how they are re-sorted. Re-sorting can be used to facilitate picking the order. The re-sort occurs at the time the order is processed. The new order of line items is displayed on the ticket and the screen.

- **Primary Loc –** Sorts by the primary location specified in Product Location Maintenance.
- **Line Item Loc –** Sorts by the location selected for the line item on the order using the Scheduling screen. Uses the ship/stock branch.
- **Description –** Sorts by product description.
- **No –** Does not sort.

  Note: If set to **Primary Loc** or **Line Item Loc**, unattached comments, since they do not have an assigned location, sort to the top of the list.

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Use Receiving Branch When Pricing Transfers

For each branch, indicate whether the system prices transfers using the receiving branch.

- **Y –** Prices transfers using the receiving branch price sheets.
- **N –** Prices transfers using the shipping branch price sheets.

  Note: The shipping and receiving branch assignments on the ledger record do not change.

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TOE SRIAL (Serial Numbers) Control Maintenance Records

The following control maintenance record belongs to the SRIAL (Serial Number) area within the TOE (Transfer Order Entry) category.

Prompt For Serial Numbers On Outbound Transfers

Indicate whether the system prompts for serial numbers on outbound transfers. The default is **N**.

- **Y** – Prompts for a serial number when a product assigned a serial number type of **O** (Outbound Only) or **R** (Returns & Outbound Only) on the Product Price Maintenance screen in Product Maintenance is entered on a transfer.
- **N** – Does not prompt for a serial number when a product with a serial number type of **O** or **R** is entered on a transfer.

  Note: If set to **N**, the Prompt For Serial Number Entry In RF control maintenance record has no effect on transfers.

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UET (Unquality Event Tracking) Control Maintenance Records

The following control maintenance records belong to the UET (Unquality Event Tracking) category.

Auto Log JQ Deletes User ID List

Enter the IDs of the user job queues for which you want the system to automatically log a UET event every time a tracker is deleted from the queue.

Note: Due to the high overhead associated with this feature, use it only for critical job queues for which you want detailed analysis of all activity going on in that queue.

Auto Log JQ Add User ID List

Enter the IDs of the user job queues for which you want the system to automatically log a UET event every time a tracker is added to the queue.

Note: Due to the high overhead associated with this feature, use it only for critical job queues for which you want detailed analysis of all activity going on in that queue.

Auto UET Enabled

For each branch, indicate whether to enable the Unquality Event Tracking (UET) system. The default is **N**.

- **Y** – Enables UET.
- **N** – Does not enable UET.

Auto UET Message Display

Indicate whether to enable the UET message that displays in the status line at the bottom of the screen and the UET tune that plays every time the system records an unquality event.

- **Y** – Enables the UET message and tune.
- **N** – Does not enable the UET message and tune.

Note: The Auto UET Enabled control maintenance record must be set to **Y** for this record to take effect.

Log UET On New Order Line Deletions

For each branch, enter one of the following to determine whether the system creates a UET log entry when a line item is deleted from an order. The default is **N**.

- **Y** – Logs a UET entry, with a UET automatic group code of SOCL, when a line item is deleted off a new order.

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- **N –** Logs a UET entry, with a UET automatic group code of SCCL, when a line item is deleted off an existing order.

  Note: To use this control maintenance record, you must first set up the automatic group code in UET Code Maintenance. For more information, see Maintaining UET Codes.

UET Log View: Display Even If Ship-To # No Longer Matches Ledger

Indicate whether the system displays a UET log entry on the UET Log Viewing screen if the ship-to customer in the ledger record is different from the ship-to customer on the original order.

- **Y –** Displays the UET log entry.
- **N –** Does not display the UET log entry.

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UJQ (User Job Queue) Control Maintenance Records

The following control maintenance records belong to the UJQ (User Job Queue) category.

Bypass Header Information For Call Tracking Entry

Indicate whether the system bypasses the header fields on the Call Tracking Entry screen for new trackers. The default is **N**.

- **Y** – Bypasses the header fields and positions the cursor on the **All Comments** field.
- **N** – Positions the cursor on a field in the header.

Cust/Vend/User Activity Log Viewing Default Transaction Type

Select the type of trackers shown on the default display on the Customer, Vendor, and User Activity Log Tracker Viewing screens.

- **MANUAL** – Displays trackers created manually.
- **SYSTEM** – Displays trackers created by the system.
- **ALL** – Displays all trackers.

Default Status For New Entry In Call Tracking Followup List

Select the default status to assign when you add a user to the Forward To list on the Forwarding screen.

Disable Automatic Display Of Unread Trackers In User Job Queue Viewing

Indicate whether to disable the User Job Queue Viewing screen from automatically displaying trackers with new appends that the user has not yet read.

- **Y** – Unread trackers do not automatically display.
- **N** – Unread trackers automatically display with a carat (^) at the top of the queue.

Enable Auto Hours Tracking In Call Tracking System

Indicate whether the system prompts users to log hours by displaying the Tracking Hours screen when they escape from a tracker.

- **Y** – Prompts users to log hours if any changes were made to the tracker or if the tracker was open for more than two minutes.
- **N** – Does not prompt users to log hours regardless of the time spent in the tracker or changes made to the tracker.

Job Tracking Default Early Release Status

Select the job tracking default early release status:

- Requires Review
- Available
- Not Available

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Next Action By For Dollars Invoiced Quote

Enter the user whose ID the system adds to the Forward list and placed in the **Next Action** field of a tracker when the system creates a quote. This occurs when the user enters an amount in the **Invoiced Dollars** field on the Call Tracking Entry Quote Details screen.

Number Of Days Before Job Quote Expires

Enter the number of days, 0-999, after which a quote for services expires. When you use the **Quote** hot key, the system displays the current date in the **Date Quoted** field and then adds the number of days specified in this record to the current date and displays it in the **Expire Date** field. When you display the Forward screen, the system displays the date from the **Expire Date** field in the **Alarm Date** field on the Forward screen.

Number Of Records To Save In User Quick Access Lists

For each data type, enter the number, 0-100, of most recently accessed records to list in the user's quick access list.

When a user presses **F10** in an **ID** field associated with a data type, the system lists the designated number of records most recently accessed by the user. For example, when a user presses **F10** in the **ID** field on the Call Tracking Entry screen, the system lists the last *xx* trackers the user has viewed, where *xx* is the number entered in the **Number of Trackers** field in this record.

Update Trackers With Invoiced Sales Orders At Line Item Level

Indicate whether the system appends the "Order Id: S#### has been invoiced" message only to the trackers attached to line items that have been invoiced. The default is **N**.

- **Y –** Updates only the trackers attached to line items being invoiced on the order.
- **N –** Updates all trackers attached to the order.

Use User's Sec Level As Default For Queue Entries

Indicate whether the system assigns a user's corresponding authorization key (CUST.ACTIVITY.VIEW, USER.ACTIVITY.VIEW and VENDOR.ACTIVITY.VIEW) level as the security level whenever the user creates an entry (tracker) in the Customer Activity Log, User Job Queue, or Vendor Activity Log.

- **Y –** The system assigns every Customer Activity Log, User Job Queue, and Vendor Activity Log entry a security level equal to the authorization level for the CUST.ACTIVITY.VIEW, USER.ACTIVITY.VIEW or VENDOR.ACTIVITY.VIEW authorization key assigned to the user creating the log entry.

  For example, a Customer Activity Log entry made by a Superuser is assigned a security level of 99. To view that entry, another user must be assigned the CUST.ACTIVITY.VIEW authorization key with an authorization level of 99.

- **N –** Each user must manually assign a security level to every Customer Activity Log, User Job Queue, or Vendor Activity Log entry created if the intent is to restrict viewing of the entry to only those users assigned the CUST.ACTIVITY.VIEW, USER.ACTIVITY.VIEW or VENDOR.ACTIVITY.VIEW authorization key with an authorization level equal to or greater than the security level assigned to the log entry.

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For example, if a Superuser, with an authorization level of 99, creates a Customer Activity Log entry without assigning it a security level, the entry can be viewed by any user assigned the CUST.ACTIVITY.VIEW authorization key, regardless of the authorization level assigned.

Valid Activity Sources

Enter categories that users can assign to activity log entries (trackers) describing how, where, or why the tracker originated. You can use these categories as sort and selection criteria when viewing any activity log or printing reports from the log. COLLECT should always be one of the valid activity sources.

Valid Tracker Report Types

Enter a list of report types that users can assign to trackers in the **Report Type** field on the External Problem/Solution screen. These are used for reporting purposes.

Valid Tracker Resolution

Enter a list of resolution codes that users can assign to trackers in the **Resolutn** field on the External Problem/Solution screen. The codes indicate how the tracker problem was resolved and are used for reporting purposes.

Valid Tracker Severity

Enter a list of severity codes that users can assign to trackers in the **Severity** field on the External Problem/Solution screen. These are used for reporting purposes.

Valid Tracker Types

Define tracker types, up to 15 characters, that users can assign to trackers in the **Tracker Type** field on the Call Tracking Detail Information screen. You can use the types for sorting and reporting purposes.

Valid User Job Queue Statuses

Enter statuses that can be assigned to trackers in a user's job queue. Statuses can be up to eight characters. One status must be Newitem. The spelling of this status is case-sensitive. When displayed in a selection list, the statuses display in the same order in which you list them here. The system also uses this order when sorting a user's job queue by status.

> **Note:** Users can also create a personal list of statuses, using the **Statuses** hot key on the User Maintenance > Additional Data > User Job Queue/Tracker Settings screen.

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WIP (Work Order Processing) Control Maintenance Records

The following control maintenance records belong to the WIP (Work Order Processing) category.

Auto Reconcile Work Orders

Use this record to enable automatic reconciliation of the setup and material costs on a work order. Select one of the following options:

- **Off –** There is no automatic reconciliation of the setup and material costs on a work order. To reconcile the displayed work order, use the **Reconcile** hot key or **Auto Reconcile -On/Off** hot key and select one of the **On** options. The **Auto Reconcile-On/Off** hot key on the Work Order Entry screen is set to **Off** and the box in the bottom right-hand corner of the Work Order Entry screen is blank.
- **by Step** or **by In/Out Grouping –** The system takes the setup costs and process costs applicable to the work being done and applies those costs to the material costs of the finished product coming back when you specify the quantity going into stock on the Work Order Entry Material Detail screen. The system sets the **Auto Reconcile-On/Off** hot key on the Work Order Entry screen to **On** and the selected option displays in the bottom right-hand corner of the Work Order Entry screen.
    - **by Step** – The system reconciles material by individual step.
    - **by In/Out Grouping –** The system reconciles material coming out of stock with material going into stock, regardless of the number of steps.

  Note: If you plan to use auto reconcile once you have created the template to get the cost of the finished product going back into stock, we recommend that you select **by In/Out Grouping** and have the system do it for you when you escape out of the Material Details screen.

Display Process Comments In Work Order Processing Body

Indicate whether the system displays all process comments, either predefined standard comments or comments entered manually, in the body of the work order and when printing steps.

- **Y –** Displays all process comments.
- **N –** Does not display process comments.

Method For Calculating Process Qty For Work Orders

Select the method to use for calculating process quantity for work orders. The default is **In to Stock**.

- **In to Stock –** The process quantity is the quantity in the **In to Stk** column on the Work Order Entry Material Detail screen.
- **Out of Stock** or left blank – The process quantity is the quantity in the **Out of Stk** column on the Work Order Entry Material Detail screen.

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Update Cost On Sales Order From Tagged Work Order

Select whether to update the cost on a sales order containing items that are tagged to a work order when a cost changes on the work order.

- **0** (No update) – The cost on a sales order containing items that are tagged to a work order is not updated when a cost changes on the work order.
- **1** (Update open Gens) – The system copies the price change back to all quantities on the open generation of a sales order tagged to a work order to make sure that the cost on the order is the same as the tagged work order price. This is only effective when you change the cost on the work order itself, and only if the entire quantity for the line item on the generation is tagged to the work order.
- **2** (Update open and closed Gens) – The system copies the price change back to all quantities on both open and closed generations of a sales order tagged to a work order. The closed generation must still be in an open accounting period.

Update Cost On Work Order From Tagged Purchase Order

Select whether to update an item's cost in the materials list on a work order based on the cost of the tag when procuring material in order to fulfill a work order.

- **0** (No update) – The cost of an item on a work order that is tagged to a purchase order is not updated by the cost on the purchase order.
- **1** (Update open Gens) – The system only updates the item's cost on the work order if the item is on a step that is currently in an open status.
- **2** (Update open and closed Gens) – The system updates the cost of all the items on the work order for any step in an open or closed status.

The system updates the cost on the work order on initial creation of the tag and then any time the cost on the tag changes.

Update Cost On Work Order From Tagged Transfer Order

Select whether to update an item's cost in the materials list on a work order based on the cost of the tag when transferring material from a branch in order to fulfill a work order.

- **0** (No update) – The cost of an item on a work order that is tagged to a transfer order is not updated by the cost on the transfer order.
- **1** (Update open Gens) – The system only updates the item's cost on the work order if the item is on a step that is currently in an open status.
- **2** (Update open and closed Gens) – The system updates the cost of all the items on the work order for any step in an open or closed status.

The system updates the cost on the work order on initial creation of the tag and then any time the cost on the tag changes.

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Valid Vendor Work Order Processing Codes

On the Process screen, enter the processes, such as welding, plating, bending and cutting, that you farm out to service vendors. Processes can be up to 15 characters. The work order processes defined here are available to be assigned to a work order in Work Order Entry.

To attach comments to a process, position the cursor on the process and use the **Std Cmts** hot key.

Work Order Processing Branch Selection

Complete the following fields to indicate how the system determines the shipping and pricing branch for work orders created from the Suggested Work Order screen, the OE Schedule screen, and a copied work order.

- In the **Use Suggested Work Order Branch For Work Order Shipping Branch** field, enter one of the following:
  - **Y** (Yes) – Uses the suggested shipping branch as the work order shipping and pricing branch.
  - **N** (No) – Uses the original work order template shipping and pricing branch as the work order shipping and pricing branch.
  - **P** (Prompt) – Prompts the user to use the suggested shipping branch as the work order shipping branch. The user can change the value to another branch for which the user is authorized.
- In the **Use SOE Shipping Branch For Work Order Shipping Branch** field, enter one of the following:
  - **Y** (Yes) – Uses the shipping branch of the sales order as the work order shipping and pricing branch.
  - **N** (No) – Uses the original work order template shipping and pricing branch as the work order shipping and pricing branch.
  - **P** (Prompt) – Prompts the user to use the shipping branch of the sales order as the work order shipping branch. The user can change the value to another branch for which the user is authorized.
- In the **Prompt For Work Order Branch When Copying From Template In WIP** field, enter one of the following:
  - **Y** (Yes) – Prompts the user for a shipping branch.
  - **N** (No) – Uses the original work order template shipping and pricing branch.

Work Order Processing Default Write-Off Account

Select the default G/L account to credit, instead of the Work Order Holding Account, in the case when a work order does not have incoming material on any steps and all of the steps have been set to Complete.

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Use this when you send material out for testing and do not expect or want to put the material back into inventory when the testing is finished. It might be that the material is destroyed and cannot be put back into inventory.

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Work Order Processing Pricing Override Vendor

Enter a pay-to vendor for the system to use to calculate the price for all outgoing material (material coming out of stock) on a work order.

Work Order Processing Prompt For Multiplier Quantity

Indicate whether the system prompts users to enter a multiplier quantity when they copy a work order template to a work order.

- **Y –** The system prompts for a multiplier and then adds the template items to the work order using the multiplied quantities.
- **N –** The system does not prompt for a multiplier. The system adds the template items to the work order using the template quantities.

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WOE CONT (Contact) Control Maintenance Records

The following control maintenance record belongs to the CONT (Contact) area within the WOE (Web Commerce) category and applies to contact record settings.

New WOE Contact Template (CMP:WOE.CONT.TEMPLATE)

Identify a generic contact record whose default settings the system can copy into any new contact record created in WOE.

When you allow a new contact record to be created on the fly in WOE, the new contact will enter basic information, such as name, address and phone number. The WOE program will populate the defaults on the Contact WOE Parameters screen using the data stored in this record.

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WOE CUST (Customer) Control Maintenance Records

The following control maintenance records belong to the CUST (Customer) area within the WOE (Web Order Entry) category and apply to customer account settings.

Allow Creation Of New Ship-To Accounts In WOE (CMP:WOE.ALLOW.NEW.ST)

Indicate whether the system allows customers and their contacts to create a new ship-to account on the Choose a Shipping Address page in WOE. The default value is **N**.

- **Y** – Allows creation of new ship-to accounts in WOE.
- **N** – Does not allow creation of new ship-to accounts in WOE.

Settings at the customer and contact level override the setting in this control maintenance record.

The following table describes how the system determines a user's authorization:

If...	Then...
The user is logged in to WOE as a contact	The system uses the value entered in the **Allow Ship To Creation** field on the contact's Contact WOE Parameters screen.
The contact field is blank or the user is logged in to WOE as a customer	The system uses the value entered in the **Allow Creation of New Ship To Customers** field on the customer's B2B/WOE Remote Order Entry Parameters screen.
The customer field is blank	The system uses the value in this control maintenance record.

Allow Customer To View Product Groups Of Related Customers In WOE (CMP:WOE.RELATED.PRD.GRPS)

Indicate whether a ship-to customer can view product groups for other ship-to customers assigned to the same bill-to entity. The default is **N**.

The My Product Groups page in WOE:

- **Y** – Displays a link to view product groups for related shipping addresses.
- **N** – Does not display a link to view product groups for related shipping addresses.

Allow Editing Of Existing Ship-To Accounts In WOE (CMP:WOE.ALLOW.EDIT.ST)

Indicate whether the system allows editing of existing ship-to accounts from WOE.

- **Y** – Allows editing from WOE.
- **N** – Does not allow editing from WOE.

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Enable Ship-To Editing In WOE (CMP:ENABLE.SHIPTO.EDITING)

Indicate whether the system allows customers to edit their ship-to information. If you leave this record blank, the default is **Yes**.

- **Yes –** Allows ship-to editing.
- **No** – Does not allow ship-to editing.

  Note: A setting in the **Enable Ship-To Editing (Y/N)** field on the contact record's Contact WOE Parameters screen or customer ship-to or bill-to record's B2B/WOE Remote Order Entry Parameters screen overrides the setting in this field.

Hide Account Inquiry Button In WOE (CMP:WOE.HIDE.AR.INQ.BUTTON)

Indicate whether the system hides the link to the Account Inquiry page in WOE. The default is **N**.

- **Y** – Hides the link.
- **N** – Does not hide the link.

When the link is not hidden, you can still restrict access to this information on a customer-by-customer basis by assigning a password in the **Web Order Entry A/R Information Password** field on the customer's B2B/WOE Remote Order Entry Parameters screen. When a user placing an order for that customer clicks the **Account Inquiry** button, the system prompts them to enter the customer's password.

Hide Account Inquiry And Order History Buttons In WOE (CMP:WOE.HIDE.AR.LED.BUTTON)

Indicate whether the system hides the link to the Account Inquiry and Order History pages in WOE. The default is **N**.

- **Y** – Hides the links.
- **N** – Does not hide the links.

  When the links are not hidden, you can still restrict access to this information on a customer-by-customer basis by assigning a password in the **Web Order Entry A/R Information Password** field on the customer's B2B/WOE Remote Order Entry Parameters screen. When a user placing an order for that customer clicks the Account Inquiry button, the system prompts them to enter the customer's password.

Hide Bill-To And Other Ship-To's Order Information In WOE (CMP:WOE.OVERRIDE.BILL.BID)

Indicate whether to prevent access to bill-to and other ship-to information when a ship-to customer does an inquiry in WOE.

- **Y** – Ship-to customers cannot view orders associated with the bill-to or other ship-to entities.

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- **N** – Ship-to customers can view orders associated with the bill-to or other ship-to entities.

Hide Order History In WOE (CMP:WOE.HIDE.AR.LED.BUTTON)

Indicate whether the system hides the link to the Order History page in WOE. The default is **N**.

- **Y** – Hides the link.
- **N** – Does not hide the link.

When the link is not hidden, you can still restrict access to this information on a customer-by-customer basis by assigning a password in the **Web Order Entry A/R Information Password** field on the customer's B2B/WOE Remote Order Entry Parameters screen. When a user placing an order for that customer clicks the **Order History** button, the system prompts them to enter the customer's password.

New WOE Customer Template (CMP:WOE.CUST.TEMPLATE)

Identify a generic customer account whose default settings the system can copy into any new customer account created in WOE.

When you allow a new customer account to be created on the fly in WOE, the new customer will enter basic information, such as name, address and phone number. The WOE program will copy the rest of the account information, such as credit and pricing settings, from the generic customer account specified here. This account is generally created solely for this purpose.

Prevent WOE Customers From Modifying Non-WOE Bids (CMP:WOE.MODIFY.BID)

Indicate whether customer contacts with Web Order Entry access can modify bids entered for this customer from the host system. The default is **N**.

- **Y** – Contacts can only modify bids entered for their customer through WOE. They can view, but not modify, bids entered from the host system.
- **N** – Contacts can modify any bids entered for their customer, regardless of whether they were entered through WOE or from the host system.

  Note: The setting in the **Prevent Modification of Non-WOE Bids** field on the B2B/WOE Remote Order Entry Parameters screen in Customer Maintenance and the Contact WOE Parameters screen in Contact Maintenance overrides the setting in this control maintenance record.

Show Signatures In WOE (CMP:WOE.SHOW.SIGNATURE)

Indicate whether to enable signature notification in Web Commerce. When enabled, the system displays signatures on the Order Detail page and indicates whether signatures exist on the Account Inquiry page. The default is **N**.

- **Y** – Enables signature notification.
- **N** – Does not enable signature notification.

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WOE Check Alternate Cust For Cust Specific Part Numbers (CMP:WOE.CHECK.ALT.CN)

Indicate whether the system checks alternate customers for customer-specific part numbers during product searches.

- **Y –** Checks alternate customers.
- **N –** Does not check alternate customers.

WOE Ship Branch Override (CMP.WOE.SHIP.OVERRIDE~INENABLE)

Indicate whether users can override the ship branch for orders in web commerce for designated ship vias.

- In the **Enable Ship Branch Override in WOE** field, indicate whether to enable shipping branch override functionality in WOE.
  - **Y –** Users can override the ship branch in web commerce for the ship vias listed in the next field. A **Branch** field is available in the Shipping Information page in web commerce site.
  - **N –** Users cannot override the ship branch in web commerce. The Branch field does not displays on the Shipping Information page in the web commerce site.
- In the **Overridable Ship Vias** field, enter the ship vias for which users can override the ship branch in WOE.

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WOE DEFAU (Defaults) Control Maintenance Records

The following control maintenance record belongs to the DEFAU (Defaults) area within the WOE (Web Order Entry) category and applies to default parameters.

Use 'WOE' As The Writer For WOE Orders (CMP:WOE.DEFAULT.WRITER)

Indicate whether the system designates "WOE" as the order writer for WOE orders.

- **Y –** The system populates the **Written By** field in the sales order Header with **WOE**.
- **N –** The system populates the **Written By** field in the sales order Header with the name of the contact who creates the order in WOE.

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WOE DISP (Display) Control Maintenance Records

The following control maintenance records belong to the DISP area within the WOE (Web Order Entry) category and apply to display parameters.

Disable Display Of Drill Counts In WOE (CMP:WOE.SHOW.DRILL.CTS)

Complete this record if you use WOE Level 2. Indicate whether the system disables the display of the number of items in product categories listed on a product search page.

- **Y –** Disables the display of item counts.
- **N –** Does not disable the display of item counts.

Display *CALL* When Price Is Zero In WOE (CMP:WOE.DISP.CALL.PRICE)

Indicate whether the system displays *CALL* in WOE when a price is zero.

- **Y –** Displays *CALL*.
- **N –** Does not display *CALL*.

Display All Quantity Breaks In WOE (CMP:WOE.DISP.ALL.QB)

Indicate whether to display all quantity breaks for a customer/vendor who has quantity break prices defined for a product in Sell Matrix Maintenance/Buy Matrix Maintenance, when using WOE.

- **Y –** If the order quantity for the product exceeds the percentage specified in the Quantity Break Display Percentage control maintenance record, the system displays the next quantity break and the following message: Press <Enter> to display next message. Upon pressing **Enter**, the screen showing all quantity breaks displays.

  If the order quantity does not exceed the quantity specified in the Quantity Break Display Percentage control maintenance record, the screen showing all quantity breaks displays.

- **N –** The screen showing *all* quantity breaks never displays. The entry in the Quantity Break Display Percentage control maintenance record and the order quantity determine whether the *next* quantity break displays.

  Note: If the next quantity break screen and all quantity breaks screen do not display for a customer/vendor when you think they should, the reason may be that the matrix cell applicable to the customer/vendor is not defined for quantity breaks.

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Display Availability On Checkout Page In WOE (CMP:WOE.DISP.AVAIL.ON.REV)

Indicate whether the system displays product availability on the Checkout and Modified Bid Review pages in Web Order Entry Level 1 and Web Order Entry Level 2. If you leave this field blank, the default is **N**.

- **Y** – Displays product availability.
- **N** – Does not display product availability.

The system uses this control maintenance record with the setting in the **Display Product Availability** field on a customer's Remote Order Entry Parameters screen to determine how to display the product availability.

If Display Product Availability is...	And this record is set to...	The Checkout and Modified Bid Review pages...
Hide	**Y or N**	Do not display any availability information.
Show w/ Qty	**Y**	Display numeric availability.
	N	Do not display any availability information.
Show w/o Qty	**Y**	Display availability as "In Stock" or "Out of Stock."
	N	Do not display any availability information.

Display Availability On Order Submit Page In WOE (CMP:WOE.DISP.AVAIL.ON.SUBMIT)

Indicate whether the system displays product availability on the Order Submitted and Submitted Bid pages in Web Order Entry Level 1 and Web Order Entry Level 2. If you leave this field blank, the default is **N**.

- **Y** – Displays product availability.
- **N** – Does not display product availability.

The system uses this control maintenance record with the setting in the **Display Product Availability** field on a customer's Remote Order Entry Parameters screen to determine how to display the product availability.

If Display Product Availability is...	And you set this record to...	The Order Submitted and Submitted Bid pages...
Hide	**Y or N**	Do not display any availability information.
Show w/ Qty	**Y**	Display numeric availability.
	N	Do not display any availability information.
Show w/o Qty	**Y**	Display availability as "In Stock" or "Out of Stock."
	N	Do not display any availability information.

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Display Availability On Product Group Page In WOE (CMP:WOE.DISP.AVAIL.ON.GROUP)

Indicate whether to display product availability on the Product Group Detail page in WOE.

- **Y** – The Product Group Detail page displays an **Availability** column.
- **N** – Availability does not display.

Display Availability On Product Return Page In WOE (CMP:WOE.DISP.AVAIL.ON.RET)

Indicate whether the system displays product availability on the Product Return page in Web Order Entry Level 1 and Web Order Entry Level 2. If you leave this record blank, the default is **N**.

- **Y** – Displays product availability.
- **N** – Does not display product availability.
- **Show Info Icon** – Displays the "i" icon for more information.

The system uses this control maintenance record with the setting in the **Display Product Availability** field on a customer's Remote Order Entry Parameters screen to determine how to display the product availability.

If Display Product Availability is...	And you set this record to...	The Product Return page...
Hide	**Y or N**	Does not display any availability information.
Show w/ Qty	**Y**	Displays numeric availability.
	N	Does not display any availability information.
	Show Info Icon	Displays the "i" icon for more information.
Show w/o Qty	**Y**	Displays availability as "In Stock" or "Out of Stock."
	N	Does not display any availability information.
	Show Info Icon	Displays the "i" icon for more information.

Display Catalog Products In WOE (CMP:WOE.DISP.NSTK)

Indicate whether the system displays catalog products in WOE product searches. If you leave this record blank, the default is **N**.

- **Y** – Displays catalog items.
- **N** – Does not display catalog items.

You can override this record at the customer level in the **Display Catalog Products** field on the Remote Order Entry Parameters screen in Customer Maintenance.

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Display Frame 1 Category Images In WOE (CMP:WOE.DISP.IMG.FRM1)

Indicate whether the system displays category images in WOE Frame 1.

- **Y** – Displays category images.
- **N** – Does not display category images.

Display Line Item Comments On Checkout In WOE (CMP:WOE.SHOW.LINE.CMT.INP)

Indicate whether the system displays line item comments on the Checkout page. The default is **N**.

- **Y** – Displays line item comments.
- **N** – Does not display line item comments.

Display Line Item Comments On My Product Groups In WOE (CMP:WOE.SHOW.PRD.GRP.CMTS)

Indicate whether the system displays line item comments on the My Product Groups page. The default is **N**.

- **Y** – Displays line item comments.
- **N** – Does not display line item comments.

Display List Price In WOE (CMP:WOE.DISP.LIST.PRICE)

Indicate whether the system displays the list price in WOE. The default is **N**.

- **Y** – Displays the list price in addition to the customer price.
- **N** – Displays only the customer price.

You can override this record at the customer level in the **Show List Price in Web Order Entry** field on the WOE Remote Order Entry Parameters screen in Customer Maintenance.

Display List Price On Order Review Page In WOE (CMP:WOE.DISP.LIST.ON.REV)

Indicate whether the system displays separate line items for each addition when users add the same product to a WOE cart multiple times. The default is **N**.

- **Y** – Displays separate line items for each addition of the same product.
- **N** – Displays a single line item and then increases the total quantity for each addition of the same product.

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Display Minimum Package Quantity In WOE (CMP:WOE.DISP.MIN.PKG.QTY)

Indicate whether the system displays the minimum package quantity in WOE product search results.

- **Y –** Displays minimum package quantity.
- **N –** Does not display minimum package quantity.

Display PDW Products In WOE (CMP:WOE.DISP.PDW)

Indicate whether the system displays PDW products in WOE product searches. If you leave this record blank, the default is N.

- **Y** – Displays PDW items.
- **N** – Does not display PDW items.

You can override this record at the customer level in the **Display PDW Products** field on the Remote Order Entry Parameters screen in Customer Maintenance.

Display Pricing/Availability In WOE For Nonstocks (CMP:WOE.DISP.NSTK.COST)

Indicate whether the system displays pricing and availability for nonstock items in WOE. The default is **N**.

- **Y** – Displays pricing and availability for nonstock items in WOE.
- **N** – Displays *Call* in the pricing column to prevent your customer from seeing the price and availability of a nonstock item in WOE.
- **Avail –** Displays pricing and availability for nonstock items only if the availability is non-zero. For pages that display only pricing, the system displays *Call* in the pricing column, regardless of availability.

Display Product Availability In WOE (CMP:WOE.PRODUCT.AVAIL)

Select how the system displays product availability in web order entry.

- **Hide –** Does not display availability.
- **Show w/ Qty –** Displays available quantity.
- **Show w/o Qty –** Displays availability as In Stock or Out of Stock.

  Note: A value entered for a customer in the **Display Product Availability** field on the Customer Remote Order Entry screen overrides the setting in this record.

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Display The Credit Card Information Page In WOE (CMP:WOE.DISP.CC.INFO)

Specify whether the system displays the credit card information page in WOE so customers can submit credit card orders. The default is **N**.

- **Y –** Displays the credit card information page. Customers can pay for orders by selecting an existing credit card or entering a new credit card.
- **N** – Does not display the credit card information page.

Display Two Main Frames In WOE Level 1 (CMP:WOE.SHOW.TWO.FRAMES)

Complete this record if you use Web Order Entry Level 1. Indicate whether the application displays its information in two rather than three main frames. The default is **N**. This record does not change the functionality of the application.

- **Y** – Displays two main frames.
- **N** – Displays three main frames.

Display Waiting Page While Executing WOE Searches (CMP:WOE.SHOW.WAIT)

Complete this record if you use WOE Level 2. Indicate whether the system displays a Waiting page while WOE executes product searches. If you leave this record blank, the default is **N**.

- **Y** – Displays a Waiting page.
- **N** – Does not display a Waiting page.

Display Zip Code Validation Screen In WOE (CMP:WOE.VAL.ZIP.CODE)

Indicate whether the system displays a new window when users enter a zip code that does not match the city and state they entered on the Shipping Information page in WOE.

- **Y** – Displays the City, State and Zip Code Do Not Match window, where you can select a city and state that match the zip code or enter a new city, state, and zip code.
- **N** – Displays an error message on the Shipping Information page indicating that the city and state do not match the zip code.

Enable Branch Availability Pop-Up Window In WOE (MP:WOE.BR.AVAIL.POPUP)

Indicate whether the system displays links to the Branch Availability window in web order entry.

- **Y** – The link displays in the following places:
    - On the Checkout and Modified Bid Review pages, if the **Display Product Availability** field in the customer record or the Display Product Availability In WOE control maintenance record is not set to **Hide** and the Display Availability On Checkout Page in WOE control maintenance record is set to **Y**.

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  - On the Product Return page, if the **Display Product Availability** field in the customer record or the Display Product Availability In WOE control maintenance record is not set to **Hide** and the Display Availability On Product Return Page In WOE control maintenance record is set to **Y**.
- **N –** The link does not display.

  Note: Users cannot display the Branch Availability window from the Order Submitted or the Submitted Bid pages.

Include Branches With Zero Available In WOE (CMP:WOE.BR.AVAIL.ZERO)

Indicate whether the system displays product availability information in the web order entry Branch Availability window for branches that have zero (0) quantity on hand.

- **Y –** Displays availability for all branches.
- **N –** Displays availability only for branches that have an on-hand quantity.

  Note: This record takes effect only if the Enable Branch Availability Pop-Up Window In WOE control maintenance record is set to **Y**.

Limit WOE Description Length On Product Return Page To (CMP:WOE.LIMIT.PROD.DESC)

By default the system can display up to 999 characters for the product description in WOE.

To limit the number of characters displayed in the description of product search results, enter that number in this control maintenance record. If the specified length is less than what is needed to display the full description, the system truncates the description and displays an ellipsis (...) at the end.

Number Of Name/Address Characters Displayed In WOE Ship Info Frame (CMP:WOE.LIMIT.SHIP.DESC)

By default the system can display up to 999 characters for the shipping address in WOE.

To limit the number of characters displayed for the shipping address in the ship frame at the top of the WOE main page, enter the number of characters in this control maintenance record. If the specified length is less than what is needed to display the full address, the system truncates the address and displays an ellipsis (...) at the end.

Order Statuses Displayed In WOE (WOE.ORDER.STATUS.MAINT~INBID)

Use the Order Statuses Displayed In WOE screen to change the default statuses the system displays in response to a search on the Open Orders page for the following four types of orders:

Order Type	Default Order Status
Open Bids	Submitted
Open Orders	In-Process
Invoiced Orders with a Balance	Open Balance

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Order Type	Default Order Status
Invoiced Orders with Zero Balance	Completed

To change a default status, clear the field and enter a new status description. To reset all the fields to the system defaults, use the **Default** hot key.

Note: If the search process yields a single order, the system skips the Open Orders page and displays the Order Detail page for the matching order.

Show Availability For Branches In WOE (CMP:WOE.AVAIL.BRANCHES)

Select whether the product availability shown in web order entry is the available quantity in the **Ship Branch**, the user's **Home Territory**, **Authorized Branches**, or **All Branches**. If you leave this field blank, the system displays the availability for the ship branch.

This control maintenance record is active only if the **Show Product Availability (Y/N)** field on the customer's Remote Order Entry Parameters screen is set to **Y**.

You can override this record at the customer level in the **Show Availability for Branches** field on the Remote Order Entry Parameters screen in Customer Maintenance.

WOE Display Availability For

Specify whether the product availability shown in WOE is the available quantity in the **Ship Branch**, the user's **Home Territory**, or **All Branches**. If left blank, the system displays the availability for the ship branch.

This control maintenance record is only active if the **Show Product Availability (Y/N)** field on the WOE customer's Remote Order Entry Parameters window is set to **Yes**.

You can override this record at the customer level in the **Show Availability for Branches** field on the Remote Order Entry Parameters window in Customer Maintenance.

WOE Display Manufacturers (CMP:WOE.PRICE.LNE)

Complete this record if you use WOE Level 2. Indicate whether to enable the Browse by Manufacturer feature and how to display the manufacturers if enabled. Select one of the following options:

- **N** (No Display) – The Browse by Manufacturer option does not display.
- **B** (By Buy Line) – When customers click the Browse by Manufacturer option, the program displays a list of WOE buy lines.
- **P** (By Prince Line) – When customers click the Browse by Manufacturer option, the program displays a list of WOE price lines.

WOE Display Pricing Unit Of Measure For (CMP:WOE.PRICE.UOM)

Select when the WOE system uses the pricing unit of measure for display purposes. The default is Pricing Only.

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The pricing unit of measure is defined in Product Price Maintenance. The inventory unit of measure is the unit of measure flagged for sales in Product Maintenance. If a unit of measure other than sales is selected on the Order Review or Bid Review pages in WOE, the selected one becomes the active sales unit of measure.

- **Pricing Only** – WOE uses the pricing unit of measure to display unit prices and inventory unit of measure to display availability.
- **Inventory Only** – WOE uses the inventory unit of measure to display unit prices and the pricing unit of measure to display availability.
- **Both Pricing and Inventory** – WOE uses the pricing unit of measure to display unit prices and availability.
- **Neither Pricing nor Inventory** – WOE uses the inventory unit of measure to display unit prices and availability.

The following table shows the effect each option has when a product has an inventory UOM "bx" and pricing UOM "ea," you order 1 bx, with 1 bx = 5 ea and price is $1.00/ea, and 100 bx are available:

Using Price UOM for...	Ord Qty	Unit Price	Avail	Ext Price
Pricing Only	1 bx	1.00 ea	100 bx	5.00
Inventory Only	5 bx	5.00 bx	500 ea	5.00
Both Price and Avail	5 bx	1.00 ea	500 ea	5.00
Neither Price nor Avail	1 bx	5.00 bx	100 bx	5.00

WOE Display Substitute Products (CMP:WOE.SHOW.SUBSTITUTES)

Indicate whether the system displays substitute products in Web Commerce.

- **Y** – The system displays substitute products if the **Accepts Substitutes (Y/N)** field on the customer's Miscellaneous Customer Data screen is set to **Y**.
- **N** – The system does not display substitute products.

WOE Level 2 Top Navigation Color Scheme (CMP:WOEB.COLOR.SCHEME)

Complete this record if your company uses WOE Level 2. Select the default color scheme for the web pages.

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WOE GENRL (General) Control Maintenance Records

The following control maintenance records belong to the GENRL area within the WOE (Web Order Entry) category and apply to general parameters.

Allow Duplicate Line Items In WOE Orders (CMP:WOE.DUP.LINES)

Indicate whether the system displays separate line items for each addition when users add the same product to a WOE cart multiple times. The default is **N**.

- **Y –** Displays separate line items for each addition of the same product.
- **N –** Displays a single line item and then increases the total quantity for each addition of the same product.

Automatically Delete Saved Carts When Selected In WOE (CMP:WOE.DEL.CART.SLCT)

Indicate whether the system deletes the old saved cart record when users select a previously saved cart to be the current cart. The default is **N**.

- **Y –** Deletes the old saved cart record. If users exit WOE without saving the current cart, the system creates a new saved cart record.
- **N –** Does not delete the old saved cart record. If users exit WOE without saving the current cart, the system creates a *new* saved cart record. Users must manually delete all saved carts.

Default Document Storage Location ID For WOE (CMP:WOE.DFLT.PROFILE.ID)

Identify where to store WOE product and product category images.

Display the list of Storage Location IDs, which are defined on the Document Storage Location Maintenance screen, and select one.

Default Document Storage Location ID For WOE Signatures (CMP:WOE.DFLT.SIG.ID)

Identify where to store WOE signature image files. Enter the path to the directory where you want the system to store this information.

For example, you might enter **//boulderweb/tempimages/**.

Default WOE Sales Source (CMP:WOE.DFLT.SALES.SRC)

Select the default sales source for orders submitted through WOE.

Display Terms Discount As Days Allowed In WOE (CMP:WOE.TERMS.DAYS)

Indicate whether the discount message at bottom of an order displays the number of days from the ship date, as opposed to a date, by which the customer must pay in order to receive the

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discount. In both cases, the system uses the predicted ship date to calculate the number of days. The default is **N**.

- **Y** – The discount message reads "...discount if paid w/in xx days of shipment."
- **N** – The discount message reads "....discount if paid by xx/xx/xx."

Enable WOE Contact Credit Limits (CMP:WOE.EMAIL.CREDIT.AUTH)

Indicate whether to enable e-mail credit authorization functionality for contacts who submit WOE orders.

- **Y** – Enables.
- **N** – Does not enable.

Force Information To Be Entered On The WOE Credit Card Page

Indicate whether to require users who don't have credit set up yet or have cash-only accounts to enter credit card information before the system accepts a WOE order. The default is **N**.

- **Y** – Requires users to enter credit card information.
- **N** – Does not require users to enter credit card information.

Notes: This control record is active only if the Display The Credit Card Information Page in WOE control maintenance record is set to **Y**. You can override the setting in this record at the customer level using the **Force Credit Card Info** field on the customer's WOE Remote Order Entry Parameters screen.

Hide The Top Navigation Dropdown In WOE (Level 2 Only)

Complete this control maintenance record if you use WOE Level 2. Indicate whether the system hides the Top Navigation Dropdown. Doing this may solve problems with browser caching.

- **Y** – Hides.
- **N** – Does not hide.

Number Of Days To Save WOE Carts

Enter the number of days the system retains shopping carts saved by the system before purging them. This record does not affect carts saved by customers.

Note: This control record only applies to shopping carts saved by the system. Use the Web Purge Carts program to purge all shopping carts.

Require E-mail And Phone Number On WOE Shipping Info Page

Indicate whether the system requires customers to enter their e-mail address and phone number on the Shipping Information page in WOE. The default is **N**.

- **Y** – Requires entry.
- **N** – Does not require entry.

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Require Ordered By In WOE

Indicate whether the system should require customers to fill in the **Ordered By** field in WOE. If left blank, the default is **N**.

- **Y** – Requires customers to fill in the **Ordered By** field.
- **N** – Does not require customers to fill in the **Ordered By** field.

Note: You can override the setting in this record at the customer level using the **Require Ordered By** field on the B2B/WOE Remote Order Entry Parameters screen.

Round To Minimum Package Quantity In WOE

For products that are sold in package quantities, indicate whether users must order a quantity through Web Order Entry that is an even multiple of the package quantity. If left blank, the default value is **No**.

- **No –** Users can order package quantities below the minimum.
- **Force –** The system rounds the ordered quantity up to an even multiple of the package quantity.
- **Warn –** A warning message displays, indicating that the quantity ordered is not an even multiple of the package quantity for this product. The system rounds the ordered quantity to an even multiple of the package quantity. Users can change this back to the quantity originally entered.

Note: The setting in the **Round to Sell Pack Qty on Remote Orders** field on the Remote Order Entry Parameters screen in Customer Maintenance overrides this control maintenance record.

Use Current Ship Branch As Work Order Ship Branch In SOE

Indicate whether the system assigns the shipping branch from a sales order to a spawned work order. The default is **No**.

- **Yes –** The system assigns the SOE shipping branch to the work order.
- **No –** The system does not assign the SOE shipping branch to the work order.
- **Prompt –** The system prompts the user to assign the SOE shipping branch to the work order.

Note: The pricing branches on the created work order do not change. The Branch That Receives Credit For The Sale control maintenance record determines the G/L branch, which may change if the shipping branch changes.

Valid WOE Ship Vias

Enter the ship vias that customers can use to ship orders submitted through WOE. For each entry, position the cursor on a blank line and select a ship via.

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WOE Fast CGI Virtual Directory (Optional)

To enable UT.REP.STR to replace the fast CGI call with a different fast CGI call, enter the directory address for that call in this record.

WOE IP Address (If Different From URL Home Address)

Complete this record if your company has a different IP from your WOE address. Enter the full http:// address of your web site, for redirect programs to use.

WOE Quickpad Stop At Exact Customer Part # Match

Indicate whether the system stops a Quickpad product search as soon as it finds an exact customer part number match. Otherwise, the system continues searching for additional matches. The default is **N**.

- **Y –** The Quicklist Summary lists only the matching product and the system adds it to the cart.
- **N –** The Quicklist Summary lists the matching product and additional near matches.

WOE Return Policy Content

Enter the text of your company's return policy. Customers can view this information from links on the order review page and the credit card checkout page.

WOE Shipping Policy Content

Enter the text of your company's shipping policy. Customers can view this information from links on the order review page and the credit card checkout page.

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WOE IMAGE (Imaging) Control Maintenance Records

The following control maintenance record belongs to the IMAGE (Imaging) area within the WOE (Web Commerce) category.

Setting WOE, PDW Image Priorities, IMG

When PDW items are created, the images are all assigned data provider meta tags instead of the usual full screen or thumbnail meta tag. The system can obtain images displayed when using Web Order Entry or Product Data Warehouse from the PDW, a directory of product images on your system, or data providers on the internet.

Complete this record if your company has more than one image provider for products. Use this record to prioritize which images display.

On the WOE Image Priorities screen, enter the web site addresses of image providers for full images and thumbnails in order of priority. The provider at the top of each list has the highest priority.

To list the image providers for each type of image:

1. Use the **Full Images** or **Thumbnails** hot key to select an image type.
2. To specify a directory on your system that contains product images:
   - Leave the **M** field blank.
   - In the **Base Path** field, enter the path name to a directory on your system containing product images.
3. To specify an internet web site that contains product images:
   - Leave the **M** field blank.
   - In the **Base Path** field, enter the address of a web site. If the address is long, use the **Expand** hot key to display an expanded field.
   - Enter an asterisk (*) in the **M** field and a meta ID in the **Base Path** field.
4. To specify a meta ID that points to PDW images:
   - In the **M** field, enter an asterisk (*).
   - In the **Base Path** field, enter the meta ID.

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WOE LOGIN Control Maintenance Records

The following control maintenance records belong to the LOGIN area within the WOE (Web Order Entry) category and apply to login parameters.

Enable WOE Anonymous Logins

Indicate whether the system allows users who do not have assigned login IDs and passwords to access WOE.

- **Y –** The **Create a New Account** button, which lets new users access the program, displays on the WOE Authorization page. Clicking this button take users into the WOE application, where they can shop and fill a cart. When they submit their order, they are prompted to enter new account information.
- **N –** The **Create a New Account** button does not display.

Enable WOE Anonymous Logins & Gather New Acct Info Up Front

Indicate whether the system allows users who do not have assigned login IDs and passwords to access WOE, and require them to enter the new account information before they can enter an order.

- **Y** – The **Create a New Account** button, which lets new users access the program, displays on the WOE Authorization page. Clicking this button prompts the user to enter their new account information before they can shop and fill a cart.
- **N** – The **Create a New Account** button does not display.

Maximum Allowable Bad Login Attempts In 24 Hours In WOE

Enter the maximum number of times within 24 hours that anyone can try accessing the web site using a bad login before you disable the IP address of WOE.

- We recommend allowing a maximum of three to five attempts.
- If you leave this record blank, the system allows a maximum of three bad logins.

The WOE Number Of Hours To Disable IP If Maximum Bad Logins Exceeded control maintenance record determines the length of time the web site will be disabled.

WOE Lost Password Admins

Specify the users to whom the system sends a tracker when a client using WOE clicks **Forgot your Password** and the system can't find a contact or account associated with the client's e-mail address.

The system sends an e-mail anytime a password request is made, as long as the site from which the request originates has Outbound E-mail installed. The system sends the e-mail to the address the user specifies. If the system cannot find a user name or account to match the e-mail address, the e-mail message asks the user to contact an administrator to obtain the password.

The system sends a tracker to the users listed in this control maintenance record only if the site from which the request originates is not authorized for Outbound E-mail.

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Note: For the system to correctly create a tracker, you need to set the Corporate Customer control maintenance record.

WOE Number of Hours To Disable IP If Maximum Bad Logins Exceeded

Designate the length of time to disable the web site if the maximum number of bad logins is exceeded. We recommend disabling WOE for 24 hours. After this amount of time, the system enables the web site IP address again.

If you leave this record blank and a user exceeds the maximum number of bad logins, the system disables WOE for one hour.

The Maximum Allowable Bad Login Attempts In 24 Hours In WOE control maintenance record defines the maximum number of bad logins allowed.

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WOE ORDER Control Maintenance Records

The following control maintenance record belongs to the ORDER area within the WOE (Web Order Entry) category and applies to order parameters.

WOE Required Date Lead Time

Enter the number of days the system adds to the current date to determine the required date for a web order.

If you leave this record blank, the system uses the number of days entered in the **Required Date Lead Time** field on the customer's Miscellaneous Customer Information screen. If that field is blank, the system uses the current date as the required date.

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WOE PROD (Product) Control Maintenance Records

The following control maintenance records belong to the PROD area within the WOE (Web Order Entry) category and apply to product and price line parameters.

Disable Logging of Customer Part Number Changes in WOE

Indicate whether to prevent all logging of the creation, deletion, or changes to customer part number information in WOE. The default is **N**.

- **Y** – Disables logging.
- **N** – Does not disable logging.

Display Product Reminder Messages In WOE

Indicate whether the system displays product reminder messages as mouse-overs on the product return, order review, and group detail pages in Web Order Entry. When enabled, reminder messages also display as text under the Additional Information heading on the product detail page. Reminder messages are selected based on type, only those flagged for SOE, and branch. Multiple messages or extremely long ones split into multiple lines on the detail page and concatenate with commas in mouse-overs.

> **Note:** On the WOE Level 2 product return page, this functionality overrides the regular long description mouse-over. On the WOE Level 1 group detail page, the mouse-over displays even though the product descriptions are not links.

- **Y** – Displays product reminder messages as mouse-overs.
- **N** – Does not display product reminder messages as mouse-overs.

Display Product Status In WOE

Indicate whether the WOE product information page displays an additional line that shows the product status.

- **Y** – Displays "Status: Stock" or "Status: Nonstock" on an additional line.
- **N** – Does not display the status line.

Use Alternate Product Description, If Available, In WOE

Complete this record if you use Web Order Entry Level 2. Indicate whether the system displays a product's alternate description, when available, on the Compare Items and Product Detail pages in WOE.

- **Y** – Displays alternate product description.
- **N** – Displays primary product description.

> **Note:** WOE product search results always display the product primary description.

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Use DDE Agent Description In WOE

Indicate whether to use the DDE agent description from DDE Agent Maintenance as the link description on the WOE product information page. The default is **Yes**.

- **Yes –** The system obtains the link description from the **Description** field on the DDE Agent Maintenance screen.
- **No –** The system obtains the link description from the **Description** field on the Product External References Maintenance screen.

Valid WOE Product Statuses

Enter the product statuses that determine what kind of products will be available for purchase through WOE. For each entry, position the cursor on a blank line and select a product status.

View Custom Part #s And Availability In WOE By Default

Indicate whether the system displays custom part numbers and availability when the Additional Product Information page displays. The default is **N**.

- **Y –** Displays customer part numbers and availability. Users can click the **Hide Custom PNs And Availability** link to hide this information.
- **N –** Does not display customer part numbers and availability. Users must click the **View Custom PNs And Availability** link to display customer part numbers and availability.

  Note: The system does not allow users to create custom part numbers for PDW products in Web Commerce, even if you enable this control maintenance record.

WOE Allowed Price Lines

To limit WOE product searches to designated price lines, enter the price lines in this record. If you leave this record blank, all price lines are available in WOE.

WOE Default Part # Used For Creating A Nonstock Item

Enter the part number of the default product for the system to use in WOE when creating a nonstock item.

WOE Master Product Select Message

This record is reserved for future enhancements and is not active.

WOE Restrict Customers To Specified Price Lines (CMP:WOE.SELECTED.PLINES)

Indicate whether the system restricts WOE customers to ordering products only from the price lines entered on the Price Line Selection screen associated with their respective customer record. The default is **N**.

- **Y –** Restricts customers. For each customer using WOE, you need to enter the price lines from which they can order products on the Price Line Selection screen.
- **N –** Does not restrict customers.

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- **Auth** – Sends an authorization e-mail to the credit manager when WOE customers order items outside specified bid lists.

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WOE SRCH (Search) Control Maintenance Records

The following control maintenance records belong to the SRCH area within the WOE (Web Order Entry) category and apply to search parameters.

Limit WOE Search Results To (CMP:WOE.SRCH.LIMIT)

To limit the number of search results returned by the WOE program, enter the maximum number in this record.

WOE PDW Catalog Search: Included/Select Separately (CMP:WOE.PDW.CAT.SELECT)

Indicate whether the system includes the Product Data Warehouse (PDW) product catalog in all WOE product searches. The default is **S**.

- **I** (Included) **–** The system searches both the Product Data Warehouse product catalog and the Primary Product Catalog in all WOE product searches.
- **S** (Select Separately) **–** The system displays the **CATALOG SEARCH** button on the WOE main menu, which allows users to do a separate search through the products in the Product Data Warehouse product catalog.

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WOE WEB Control Maintenance Records

The following control maintenance records belong to the WEB area within the WOE (Web Order Entry) category and apply to World Wide Web parameters.

Close WOE Site For Maintenance (CMP:WOE.SITE.CLOSED)

This record is for WOE administrator use only. Use this record to close the WOE site for maintenance purposes. The default is **0**.

- **0** – No
- **1** – Yes

WOE Check To Make Sure IP And WID Always Match (CMP:ENABLE.IP.TRACKING)

Indicate whether the system checks to make sure the IP and WID always match.

- **Y –** Checks.
- **N –** Does not check.

WOE Clear Out IP Address Lock-Out Records (WOE.CLEAR.IP.LOCKS~IN.DOIT)

If a user exceeds the number specified in the Maximum Allowable Bad Login Attempts In 24 Hours In WOE control maintenance record:

- The system creates a WOE IP lock-out record.
- The system disables the IP address for the length of time specified in the WOE Number Of Hours To Disable IP If Maximum Bad Logins Exceeded control maintenance record.

Use this control maintenance record to clear all WOE IP lock-out records and enable all disabled IP addresses sooner than the specified time. At the prompt, enter **Y** to clear the lock-out records and enable all disabled IP addresses. The system displays a message stating the number of lock-out records cleared.

WOE Company Websites Directory Information (WEBSITE.DIR.MAINT~IN.COMP)

Complete this record if your company has multiple web sites. Identify them in this record on the Company Websites Directory Information screen.

- In the **Company Code** field, enter a code, up to 20 characters, that identifies the website.
- In the **Directory Name** field, enter the directory where the website is located. For example, enter **/remorder/**.
- In the **Website** field, enter the website address. For example, enter **www.eclipseinc.com**.

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WOE Enable Cookies (CMP:WWW.SET.COOKIE)

Indicate whether the system writes out cookies after every WEB.WRT.RESP call.

- **Y** – Writes cookies.
- **N** – Does not write cookies.

WOE Set Timeout For Web Sessions (CMP:WEB.SESSION.TIMEOUT)

Enter the amount of time a user can be connected to the WOE application in an inactive state before you disconnect them. If you leave this record blank, users' sessions time out after one hour.

WOE WWW URL Name (CMP:WWW.URL.NAME)

Enter the name by which to identify your company's web site.

WOE Webmaster Mail-To Address (CMP:WOE.WEBMASTER.URL)

Enter the e-mail address for contacting your company's webmaster. This address displays on the Forgot Your Login page.

WOE Webmaster Phone Number (CMP:WOE.WEBMASTER.PHONE)

Enter the phone number for contacting your company's webmaster. This number displays on the Forgot Your Login page.

WOE World Wide Web Home Page WWW URL (CMP:WWW.HOME.URL)

Enter the web address of your company's home page. This allows a user to return from the WOE application to your company's home page.

For example, enter **http://www.companyname.com**.

If your organization includes multiple companies, identify the default web site in this record. Use the WOE Company Websites Directory Information control maintenance record to identify the additional web sites.

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