



Creating and Maintaining Branches and Territories on Solar Eclipse

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Entity Maintenance Overview

Each customer, vendor, and branch must have its own record for pricing, reporting, and product information.

You can set up a variety of information in your customer and vendor records, including:

- Cross-references between the customer or vendor's product numbers and the system-generated part numbers.
- A list of contact numbers within the customer or vendor's company, such as those of purchasing agents, sales representatives, and accountants.
- Activity triggers that tell the system to send automatic email confirmations to customers when orders are shipped, or fax notifications to vendors when ship dates are missed.
- A way to determine which customers can order from which of your branches, and which of your branches can order from which vendors.
- The ability to receive or ship consigned inventory.

Each branch record contains information, such as:

- The customers and vendors that order from or sell to the branch.
- An assigned remit-to branch if a branch does not maintain its own finances.
- The credit card types that can be used.
- The method used to transport goods to and from the branch.
- The process used to verify checks.

Setup Requirements for Customer and Vendor Maintenance

Following are the control maintenance records and authorization keys used for Customer and Vendor Maintenance.

Only a system administrator is authorized to set control maintenance records and authorization keys.

This topic contains the following sections:

- Customer and vendor control maintenance records.
- Customer and vendor authorization keys.

Customer Control Maintenance Records

The following control maintenance records relate to Customer Maintenance:

ACCT (Accounting)

Set the following control maintenance records:

- A/P Over/Short Maximum Parameters
- Auto C/R Default Customer If Not Found
- Cash Over/Short Maximum Parameters
- Credit Card Default Reference Number
- Credit Card Level III Summary Line Item
- Default Auth Method for New Credit Cards
- Include Service Charges In Service Charge Calculation
- Maximum Collection Days Date
- Minimum Check Distribution Amount
- Restrict Access to Customer Maint Based On User Authorized Branches
- Valid ACH Formats
- Valid Cash Sources
- Valid Customer Statement Cycles
- Valid Invoice Select Codes

DLOT (Detail Lot Tracking)

- Valid Detail Lot Product Quality Ranks
- Valid Detail Lot QC Inspection Levels

EMAIL (E-mail)

- Corporate Customer
- Default E-mail Print Styles
- Valid E-mail Preference

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- Valid E-mail Types

GENRL (General)

Set the following control maintenance records:

- Activity Trigger Subroutine Overrides
- Customer Classification Sort List
- Valid Customer Price Classes
- Vendor Classification Sort List

INVM (Inventory Management)

- Assign Demand Forecast To Price/Ship Branch Or By Zip Code

MAINT CUST (Customer Maintenance)

- Customer Maintenance Authorization Levels
- Customer Maintenance Authorization Levels For New Customers BT/ST
- Default Customer Price Class
- Default Customer Salesperson
- Job Lien Days By State
- New Customer Maintenance Template
- Prompt To Copy Tax Information From Bill-Tos to All Ship-Tos
- User Defined Customer Notes
- Valid Customer Invoice Status Codes
- Valid Customer Points Programs
- Valid Customer Select Codes
- Valid Customer Types
- Valid Job Types
- Valid Job Nature Types
- Valid Sale Categories

MAINT PROD (Product Maintenance)

- Valid Product Certification Codes
- Valid Product Zones

MAINT (Vendor Maintenance)

Set the following control maintenance records:

- Disable Home Branch Check In Vendor Maintenance
- User Defined Vendor Notes

- Valid Vendor Types

POE (Purchase Order Entry)

Set the following control maintenance records:

- Capitalize Tax On Purchase Orders
- Default B/O Days For Purchase Orders
- Include Directs In Vendor Target Check When Printing a P/O
- Vendor Freight Terms
- Valid Vendor ASL Types

SFA (Sales Force Automation)

- SFA Administrator

SOE (Sales Order Entry)

Set the following control maintenance records:

- Allow Multiple Products To Be Associated With One Customer Part #
- Allow Sending Credit Card Level 3 Data
- Apply Extra Handling For Shipping To First Gen Only
- Display Customers/Vendors Who Are Inactive At A Branch
- Display Products Within A Customer's Product Zones
- Duplicate Customer P/O Number Check
- Duplicate Order Check
- Enable Auto Routing On Creation Of Sales Order
- Exclude From Ship-To/Ship-From Selection If Excluded From Index
- Invoice Print Copies = 0, Q Status Invoices To Invoice Preview Queue
- Minimum Variance Before Last Price Reduction
- New SOE Customer Template
- Number Of Digits Of Accuracy For Product Weight
- Order Status Print Status Defaults
- Pass-Along Discount Holdback Percent
- Percent Of Order To Fill Before Automatically Shipping
- Prompt For Required Date In Sales Order Entry
- Use Last Price/Cost Logic
- Validate Name In 'Ordered By' Field Against Customer Contact
- Valid Product Matrix Types

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TOE (Transfer Order Entry)

Set the following control maintenance record:

- Default Vendor Consignment on Transfers

WIP (Work Order Processing)

Set the following control maintenance record:

- Valid Vendor Work Order Process Codes

Customer and Vendor Authorization Keys

Set the following authorization keys:

- COGS.VIEW
- CONVERT.PROSPECT
- CREDIT.CARD.ACCT
- CREDIT.CARD.REQD.OVR
- CUST.CREDIT.EDIT
- CUST.BR.AUTH.ONETIME
- CUST.BR.AUTH.OVRD
- CUST.CERTIFY.EDIT
- CUST.DEMAND.BR.OVRD
- CUST.POINTS
- CUST.PRICING.EDIT
- CUST.TAX.VIEW
- CUSTOMER.MAINT
- CUSTOMER.MAINT.LEVEL
- ENTITY.PN.EDIT
- ENTITY.TRIGGER
- FREIGHT.TARGET.OVERRIDE
- INVALID.VEN.TYPES
- POE.ASL.RELEASE
- PRD.ZONE
- SLSMN.CUSTOMER.MAINT
- SOE.CREDIT.RELEASE
- VALID.VEN.TYPES
- VEN.BR.AUTH.ONETIME

Setup Requirements for Customer and Vendor Maintenance

- VEN.BR.AUTH.OVRD
- VENDOR.MAINT
- VENDOR.MAINT.LEVEL

Setup Requirements for Contact Maintenance

Following are the control maintenance records and authorization keys used for Contact Maintenance. Only a system administrator is authorized to set control maintenance records and authorization keys.

Control Maintenance Records

Set the following control maintenance records:

- Contact Classification Sort List
- Validate Name In 'Ordered By' Field Against Customer Contact
- Valid Phone Codes
- Valid Salutations
- Valid SFA Contact Classifications

Authorization Key

Set the following authorization key:

- CONTACT.MAINT

Setup Requirements for Branch and Territory Maintenance

Following are the control maintenance records and authorization keys used for Branch and Territory Maintenance.

Only a system administrator is authorized to set control maintenance records and authorization keys.

Control Maintenance Records

- Check Verification: Required Information
- Display Active Primary Index Products First In Product Search
- Restrict Access to Customer Maint Based On User Authorized Branches
- RF Pick Selection Sort
- Valid Cost Center Types
- Valid Phone Codes

Authorization Keys

- BRANCH.MAINT
- CREDIT.CARD.SETUP
- RF.LOAD.OVRD
- TERRITORY.MAINT

Setup Requirements for Company Branches

Creating a branch in the system involves several system program settings. You must set up branches as entities to track sales and expenses, and to use the branch in transfer orders. Generally, you create branches representing different physical locations, but you can also create a fictitious branch, such as *Corporate*, to maintain and track expenses that are not applied to inventory or pricing branches.

Complete the following to set up a branch:

- Set up control maintenance records and authorization keys for Branch and Territory Maintenance.
- Create a branch record and associate it with a customer record, so the branch activities can be tracked and you can use the branch for transfer orders. If this is a non-stocking branch and you will never order from this branch, activate No Order Entry in customer credit control parameters.

Alternatively, you can specify a class for your transfer entities to accomplish the same purpose. For example, assign all branches a class of BRCH, and create a Class/All matrix cell.

- For each branch customer record for which you anticipate creating transfer orders, set up Customer/Group/All sell matrix cells so there is no gross profit percent calculated on transfer orders.
- Define territory authorization levels for users in User Maintenance. Determine a user's authority based on their assigned branches and how they need to use the system's territories.
- Set up customer and vendor access to branches with which your customers and vendors will do business.
- Create territories.
- Organize your branches into territories.

See Also:

Branch and Territory Maintenance Overview

Creating Branch Records

Creating Territories

Adding Branches to Territories

Branch and Territory Maintenance Overview

A branch is an entity that is part of your company. Branch designations in the system provide the structure used to maintain accuracy and detail throughout the system.

The system uses branch designations in the following ways:

- Control maintenance records set up by branch. For example, RF may be enabled at one warehouse but not at any other warehouse.
- Each customer, vendor, and user is assigned a home branch for pricing, accounting, reporting, and tracking purposes.
- Accounting branch designations provide accuracy for A/P, A/R, and reports. General ledger postings are identified by branch. For example, in your general ledger, you may want to differentiate between A/R collected from your different branches.
- Pricing is assigned according to branch or location. For example, items purchased from Branch 10, located on an island community, may be priced higher than items purchased from Branch 1 on the mainland.
- Tax jurisdictions are assigned according to the geographic location of a branch.

A territory is a name given to a group of branches. It is much easier to maintain branches within territories because you can set branch-specific pricing, product, or entity parameters for multiple branches at a time, rather than spending hours changing parameters for each branch.

Your branches can reside in more than one territory, depending on how you organize your company. For example, you can organize branches in territories according to geographic location, what products you sell at each branch, or branch functionality, such as pricing or shipping. Territories are prioritized so that the system knows what branch-specific setting to use for reports and transactions. Territory priorities create the branch hierarchy, which allows you to define branch-specific settings at the territory level throughout the system.

Territory Priority Basics

A territory is a name given to a group of branches. Eclipse's branch hierarchy allows you to define branch-specific settings at the territory level, rather than entering the same setting, for example sell package quantity, branch by branch. The branch hierarchy eliminates the need for complicated mass load operations when setting branch parameters.

Territory priorities create the organization for branches that are in multiple territories. Plan your territory and branch structure before creating territories and assigning branches to them. Create categories for your branches when the branches have similar settings, or reporting needs. Branch categories can reflect regions, states, and products, for example. This process helps you create a branch hierarchy that the system can use to efficiently maintain branch-specific options in many areas of the system.

Throughout the system you can add and view only branches and territories to which you have access. Branch and territory access is defined in User Maintenance. To view or edit the Territory Maintenance screen, where you define territory priorities, you must be assigned the TERRITORY.MAINT authorization key.

When you change territory priorities, the system requires that you rebuild the territory list. We recommend that you schedule the rebuild for after normal business hours to ensure that the process does not interfere with daily transactions.

Defining Territories

Use the Territory Maintenance screen to create as many territories as you need to maintain the system's branch-specific settings. Create territories to organize branches into geographic locations, or types of products sold. For example, you might run reports on regions, such as South and East, or you might run a report focused on two states, for example Alabama and Georgia. If your branches sell different types of products, you might categorize territories as plumbing and HVAC to accurately report sales at those branches.

If your company has only one branch or multiple branches, use the ALL territory to maintain branch settings throughout the system. That way, if you ever add a branch, the new branch can inherit all of the properties of other branches through the ALL territory. You can also set different parameters for the new branch, if necessary, because individual branch settings always override territory settings.

Note: You do not have to create the ALL territory, it was created as part of the Eclipse system.

If a Control territory displays, you cannot change these settings. Control indicates the default system settings. This display helps you compare your territory settings with the settings automatically assigned by the system.

Assigning Territory Priorities

A branch can belong to more than one territory. The branches in these territories may need different settings for reporting purposes, tax purposes, pricing setup, inventory, and products. How does the system know what settings to use for branches maintained in multiple territories? You give each territory a priority for product and entity settings that the system uses to determine which parameter to use, such as package quantity for products and branch-specific overrides for entities. You can always override territory settings at the branch level.

Set territory priorities, from 1-99, according to the specificity of each territory, giving more specific territories a higher priority than less specific territories. You cannot maintain data on a territory that does not have a priority number; such territories can be used only for reporting purposes.

In this example, a higher priority is assigned to a territory focusing on automation products than to a territory containing all of the Southeastern branches, as shown in the following table. You will determine the correct priority for doing business at our own company.

Territory	Product Priority
AUTO	90
ELECGRP	80
GEORGIA	75
SOEAST	50

For example, you have ten branches in the Southeast, five in Georgia, and five in Alabama, and sell electrical products at all of your branches, and automation products at 6 of those ten branches. Your state branches have equal priority, and are more specific than the regional, SOEAST territory, and less specific than the ELECGRP territory. Product and entity priority settings do not need to be the same for a territory, but should remain equal between like territories. The following table shows the priority distribution for state, regional, and product-specific territories:

Territory Name	Number of Branches	Product Priority	Entity Priority
AUTO	6	90	95
ELECGRP	10	80	85
ALABAMA	5	75	70
GEORGIA	5	75	70
SOEAST	10	50	40

You purchase a Midwestern company that has five branches, two in MICHIGAN, and three in OHIO. All five branches sell electrical products, but none sell automation products. Now you have two regional territories and four state territories. Give both regions equal priority, and give all of the states equal priority. The number of branches in the ELECGRP territory jumped to 15 because all of your branches fall into that category. The following table shows how the addition of branches and territories can change the branch hierarchy:

Territory Name	Number of Branches	Product Priority	Entity Priority
AUTO	6	90	95
ELECGRP	15	80	85
ALABAMA	5	75	70
GEORGIA	5	75	70
OHIO	3	75	70
MICHIGAN	2	75	70
MIDWEST	5	50	40
SOEAST	10	50	40

Creating and Maintaining Branches and Territories

To determine which territories have priority within the branch hierarchy, set territory priorities in Territory Maintenance.

If you change the priority settings, you must rebuild the authorized territory list, exit the Eclipse program you are in and then re-enter a branch-specific screen to see the change in priority. We recommend scheduling these rebuilds for after work hours to avoid interfering with normal business transactions.

Branch Hierarchy Details

Eclipse's branch hierarchy lets you define branch-specific settings at the territory level, rather than having to define multiple settings for each branch. Branches are categorized in territories and each territory is given a priority. The level of priority establishes the order of the territory list within the branch hierarchy. The system uses the branch hierarchy to apply the correct branch setting to a given system parameter, such as sell package quantity for a product, or the minimum order cycle for a buy line. Maintaining settings at the territory level, rather than at the branch level, eliminates the need for complicated mass load operations when making company wide changes to branch settings.

Each Eclipse screen where you can set branch-specific parameters, such as Product Price Maintenance or Buy Line Maintenance, lets you do one of the following:

- View overrides for the branches and territories for which you have access.
- Add an override to a branch or territory setting.
- View settings for a specific branch, and where those settings came from.

Viewing Territory Override Settings

When you enter a screen that displays branch-specific parameters, such as Product Price Maintenance, the branches and territories that currently have settings display in the **Branch/Territory** column. The column lists branch overrides first, followed by territory settings that are currently in effect.

Note: You can identify a screen with branch-specific parameters by its **File > Hierarchy** option.

To add an override to another branch or territory, press **Alt + Insert** and enter the branch or territory name at the prompt. Scroll to the column that needs an override, and enter the value. You can add branches and territories only if you have access to them, and only if they have a priority assigned to them in Territory Maintenance.

Viewing a Branch with its Associated Territories

To view the territory list for a selected branch, in a screen that has branch-specific parameters, select the **File > Hierarchy** option and enter the branch. The system populates the **Branch/Territory** column with the selected branch at the top as the highest priority, and lists all of the territories containing that branch that you have authorization to view in the order of their priorities. The highest priority territory is directly under the branch, and the lowest priority territory is at the bottom of the list. If you have added the ALL territory to your authorized territories in User Maintenance, the ALL territory displays at the bottom of the list. Territories that contain the selected branch, but do not have a priority setting do not display in this list, and you can use them only for reporting purposes.

In screens with branch-specific settings, you can set the parameters by territory, rather than having to set individual branch priorities. You can still set overrides at the branch level because the branch is always the highest priority level.

Creating Branch Records

Create a record in Branch Maintenance for each branch at your company, and assign parameters that associate the branch with system events and procedures. Associate branches with a customer record, so you can track branch activities and you can use the branch for transfer orders. Also, assign a home branch to users, customers, and vendors for pricing, accounting, reporting, and tracking purpose. For more information about setting up a branch for company use, see Setup Requirements for Company Branches.

Branch Maintenance is not the only place in the system where you enter branch-related parameters. The system has at least 15 screens where you set branch-related parameters, such as Product Price Maintenance, Buy Line Maintenance, and Procurement Group Maintenance. You can identify screens throughout the system that have branch-specific parameters by the **File > Hierarchy** option that when selected, prompts you to enter a branch.

To create a branch record:

1. From the **Maintenance > Branch** menu, select **Branch** to display the Branch Maintenance window.
2. Complete the following fields, as needed:

Field	Description
Branch	Enter the name or number used to identify the branch or click the New Branch button to create a new branch ID. We recommend checking the naming convention your company uses. There are no numbering restrictions. For example, creating a branch 5000 does not have a negative impact on the system.
Short Description	Enter the name of the branch, using up to 12 alphanumeric characters. This description displays on selection lists when a user is prompted to select a branch, such as on reports.
Long Description	Enter a detailed description of the branch, up to 33 alphanumeric characters. This description displays on certain reports that display that branch.
Branch Entity	Enter one of the following to map the branch name to the branch's customer record: <ul style="list-style-type: none"> • All or part of the branch name, as it displays in customer maintenance. • The last four digits of the branch phone number. • The branch record name preceded by a period (.). The Entity ID field displays the branch's customer ID. Note: If you have not created a customer record for this branch, select Maintenance > Edit Entity to create a record in Customer Maintenance. See the table, below.
Remit To	Enter one of the following to indicate the branch that receives payments for this branch's transactions: <ul style="list-style-type: none"> • Part of the branch's name. • The last four digits of the branch phone number. • The record name preceded by a period.

Field	Description
P/O Bill-To	Enter an alternate bill-to entity to display on purchase orders. The P/O Bill-To ID field displays the bill-to entity ID entered in the P/O Bill-To field. Note: The P/O Bill-To and P/O Bill-To ID fields display only if the Allow Alternate Branch Bill-To Address control maintenance record is set to Yes .
Default Price Class	Enter the branch's default price class. If you assign a default price class in Customer Maintenance, the customer's setting overrides this setting.
Branch Manager	Enter the name of the manager of this branch. To display a list of users that match your entry enter part of the manager's name and press Enter .
Cost Center	Enter this branch's primary function, such as Distribution , or Showroom . Cost center types are defined in the Valid Cost Center Types control maintenance record.

3. Select the **Stocking Branch** check box if this branch handles product.

In addition to performing money related tasks, users at a stocking branch can perform tasks such as, entering orders, adjustments, pricing, and edit product parameters.

To limit the products displayed to those with on-hand quantities or on transactions at the stocking/shipping branch, activate the **Display Active Primary Index Products First In Product Search** control maintenance record. This record can limit the products displayed to those with on-hand quantities or on transactions at the stocking/shipping branch.

Note: If you change the stocking branch status, you must run the Delete Branch Cache Files utility. Run the utility after hours to avoid slowing the system during business hours.

More Options for Creating Branch Records

The following are some common options you might use while creating branch records:

To...	Select...
do one of the following: <ul style="list-style-type: none"> • Edit a customer record that is also a branch. • Edit an existing branch's customer record. • Create a branch that will also be a customer. 	Maintenance > Edit Entity and select one of the following: <ul style="list-style-type: none"> • Branch Entity - Displays the customer record associated with the branch. • Remit-To - Displays the branch's remit-to branch, if one exists, otherwise the current branch's customer record displays.
set up credit card processors to be used by the branch.	Maintenance > Credit Card Branch Set Up
display the Inventory Inquiry Branches dialog box.	Maintenance > Inventory Inquiry Branches enter all of the branches to associate with this branch. When the displayed branch is your home branch, you can view information for these branches in Inventory Inquiry. For example, your home branch is Denver, but you need to view all Colorado branches in Inventory Inquiry. When the Denver branch is displayed on the Branch Maintenance screen, use this option to list all of the Colorado branches. Then when you display inventory in Inventory Inquiry, the system looks to your home branch, and displays only information for that branch and its associated branches.

Creating and Maintaining Branches and Territories

To...	Select...
assign the branch's default method of transporting product.	Maintenance > Ship Via Branch Overrides
set up a check processor for the branch.	Maintenance > Check Verification
set up a pricing hierarchy for your branches.	Maintenance > Matrix Hierarchy

Assigning Ship Vias to Branches

Ship vias are the methods used to move product from the warehouse to the customer. Before you can assign a ship via to any order, you must create a file containing the ship vias that your company uses. Your system is installed with a set of ship vias defined.

Use the Ship Via Maintenance program to define the additional ship vias required for each branch of your company. Once defined, ship vias have many interrelated uses in Eclipse. By assigning a ship via to a *branch* you can do the following:

- Determine if a ship via requires a routing ticket for deliveries.
- Search for a ship via.
- Assign all ship vias to a branch at once.
- Set up auto scheduling overrides.
- Change the branch tax jurisdiction method.
- Set up a pick ticket printer location.

To assign a ship via to a branch:

1. From the **Maintenance > Branch** menu, select **Branch** to display the Branch Maintenance window.
2. In the **Branch** field, enter the branch name to display the branch record.
3. Select **Maintenance > Ship Via Branch Overrides** to display the Ship Via Branch Overrides dialog box.
4. In the **Ship Via** column, enter the ship vias to assign to this branch.
5. In the **Tax Jurisdiction Method** column, enter the tax jurisdiction method for the system to use when determining the tax jurisdiction associated with this ship via.
6. In the **Pick Ticket Print Location** column, select the printer location for each branch where the Automatic Shipping Ticket Printing program or the Batch Transfer program prints pick tickets. This setting overrides the setting in the **Default Printer Location For Branch** control maintenance record.
7. In the **Auto Scheduling** column, select one of the following to set the automatic scheduling of tickets that are manually added to the manifest:
 - **On** - Enables the auto scheduler, so when you add a ticket to the manifest, the system calculates the delivery time and stop number for the ticket.
 - **Off** - Disables auto scheduler, so all delivery scheduling must be done manually. When you add a ticket to the manifest, the system adds the ticket where the cursor is positioned on the manifest and creates a new stop if the ship-to address does not match that of the prior order on the manifest.

This setting overrides the **Auto Schedule** setting on the Shipping Manifest Queue (**Warehouse Management > Warehouse Queues**).
 - **Default** - The auto scheduler uses the setting on the Shipping Manifest Queue (**Warehouse Management > Warehouse Queues**).

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8. In the **Routing Ticket** column, if the ship ticket requires a routing ticket for deliveries, check the box.
9. In the **Pick Priority** column, enter a number from **0** to **99** to assign a priority to each ship via. Zero is the highest priority, and 99 is the lowest priority. If you leave any ship via unselected, this ship via is considered the highest priority.

If two or more ship vias have the same pick priority, blank or otherwise, the system determines the ship via priority by the setting on the **RF Pick Selection Sort** control maintenance record.

The Ship Via Pick Priority Maintenance dialog box in Warehouse Maintenance and this field work together. If you enter a value for a ship via on one dialog box, it overrides the value for the same ship via on the other dialog box.

10. The **Override Freight** and **Ship Via Override** columns work together:

- If this branch's ship via can have a freight override, then the **Override Freight** column is checked.
- If this branch's ship via can have a freight override, the **Override Value** field displays **Yes**.

Enter the override status of the ship via for this customer at this branch if you set the **Override Customer Freight Out Exempt** field on the Ship Via Maintenance window (**Maintenance > Ship Via**) to **B**, and you activate the **Override Freight** field here. See *Overriding Customer Freight Exempt for a Branch* for more information.

11. Select **Additional > Branch Ship Via Additional Data** to display the Branch Ship Via Additional Data window. Use this window to do the following:

- Assign RF criteria to specific ship vias and assign statuses to ship vias at a branch.

To...	Do the following...
specify a staging location	Enter the default location where the ship via is staged in the Staging Location field.
combine all full orders across multiple zones into one pick.	check the Combine All Zones in RF Pick Select check box.
hold all manifests from the picking queue until they are manually released.	Select the Hold RF Picking Until Released check box. If left unselected, the system sends all picks to the picking queue as soon as they are released from sales or transfer order entry.
enable fleet routing for this ship via and branch.	Select the Use in Fleet Routing check box.
assign statuses to ship vias at a branch.	In the Order Inprocess Status Selection area, enter the ship via status for the ship via. Ship via statuses defined here override the ship via set up in Ship Via Maintenance. List the statuses in order of progression, for example, PRINTED, PICKING, STAGING, and MANIFEST. Each branch can have its own ship via priority. For example, branches 1 through 6 use statuses PRINTED, PICKING, STAGING, and MANIFEST, but branch 5 requires a PACKING step between STAGING and MANIFEST. For branch 5, enter PACKING in the appropriate order.

To...	Do the following...
prevent users from closing orders after they are staged in RF.	Select the Prevent Close During Staging check box. If a user is assigned the RF.LOAD.OVRD authorization key, they can override this setting and close orders after staging.
print a document when you close an RF order from the Warehouse In Process Queues:	Select one of the following types of documents in the Document to Print on RF Order Close field: <ul style="list-style-type: none"> • N - None • T - Pick Ticket • O - Ship Ticket • F - Routing Ticket
use carton packing at your branch	Select Use Order Packing/Verification check box. Then use the remaining fields to indicate how to handle cartons: <ul style="list-style-type: none"> • Carton Staging Location - Enter the location you want to use for staging cartons at this branch. • Carton Loading Print Option - Select when to print the ship ticket for the carton. You can choose not to print a ship ticket, print it when the carton is loaded, or for a manifest. • Validate Carton Loading Manifest Sequence - Select if you want the system to validate carton loading for cartons at this branch.
override customer freight exempt for a branch	See Overriding Customer Freight Exempt for a Branch.
set a default status after packing in the review queue	Enter the status you want to use in the Review Queue Status After Pack Complete field.

- Setup delivery schedules for sales order entry.

12. Save your changes and exit the dialog box.

Verifying Check Processors for Branches

Set up an electronic check verification system for a branch to automatically verify the authenticity of a check when it is accepted at that branch. Information required for authorization is drawn from the **Check Verification:Required Information** control maintenance record.

Before you begin auto-verifying checks, define the default check processor information on the Check Verification Processor Setup window.

To verify a check processor for a branch:

1. From the **Maintenance > Branch** menu, select **Branch** to display the Branch Maintenance window.
2. In the **Branch** field, enter the branch name to display the branch record.
3. Select **Maintenance > Check Verification** to display the Check Verification Branch Setup dialog box.
The current branch ID displays in the lower-left of the dialog box.
4. In the **Processor** field, select a processor for this branch.
5. In the **Subscriber ID** field, do one of the following:
 - If a default subscriber ID is defined on the Check Verification Processor Setup dialog box for the processor, this field displays that ID.
 - If no default subscriber is defined, enter the subscriber ID.
 - If a default entry is displayed, but the branch has a unique subscriber ID, change the default ID to the branch's ID.
6. Ignore the **Host ID** and **Service ID** fields. Their functions are not active at this time.
7. To copy the branch setup information, select one of the following:
 - **Copy > Copy From Branch** to copy the information from another branch to the displayed branch.
 - **Copy > Copy to Branch(es)** to copy information from the displayed branch to one or more other branches. When entering multiple branches, separate the branches with a comma.
8. Save your changes and exit the dialog box.

Overriding Customer Freight Exemptions for Branches

You may want to restrict certain types of shipping from customers who place orders through one of your branches. For example, if Branch 3 is in a remote location, and UPS Gold is an expensive shipping method from that branch, you can restrict customers from the freight exempt status at Branch 3 for UPS Gold.

This procedure overrides the setting in the **Freight Out Exempt** field on the Customer Maintenance window.

Perform the following procedures in the following order:

- Setting up the customer freight out exemption.
- Overriding the customer freight out exemption.

To set the customer freight out exemption:

1. From the **Maintenance** menu, select **Ship Via** to display the Ship Via Maintenance window.
2. In the **ShipVia** field, enter the ship via to which to apply a branch override.
3. On the **Primary/Freight** tab, in the **Override Customer Freight Out Exempt** field, enter **B** for branch. For more information, see Assigning Automatic Freight and Handling Charges to a Ship Via.

Override Freight column on the Ship Via Branch Overrides dialog box, described below, now accepts the override.

To override the customer freight out exemption for a branch:

1. From the **Maintenance > Branch** menu, select **Branch** to display the Branch Maintenance window.
2. In the **Branch** field, enter a branch ID to display the branch record.
3. Select **Maintenance > Ship Via Branch Overrides** to display the Ship Via Branch Overrides dialog box.
4. Any ship via to which you applied the "B" setting in the **Override Customer Freight Out Exempt** field in Ship Via Maintenance displays a check mark in the **Override Freight** column.
5. If you want this setting to override the entry in the **Override Customer Freight Out Exempt With** field in the Freight Data, set the **Ship Via Override?** column to **Yes**.
6. Save your changes and exit the dialog box.

Assigning a Pricing Hierarchy to Branches

Define a pricing matrix hierarchy of territories for a branch to determine the pricing for products sold at that branch.

To assign pricing hierarchy to a branch:

1. From the **Maintenance > Branch** menu, select **Branch** to display the Branch Maintenance window.
2. In the **Branch** field, enter a branch ID to display the branch record.
3. Select **Maintenance > Matrix Hierarchy** to display the Matrix Hierarchy dialog box.
4. Enter as many branches as you want to add to the hierarchy.
5. Save your changes and exit the dialog box.

Assigning Remit-to Addresses to Branches

Each branch in your company has a remit-to entity associated with it that receives payment for products sold at that branch. The remit-to entity's name, address, and phone number display on the customer's bill. You may have several sales branches and one accounting branch where you expect to receive payment. You can designate the accounting branch as the remit-to entity for a branch, to assure that the customer always sends payment to the correct branch.

You can create one or more remit-to override entities in Remit-To Maintenance to override the remit-to entity set up at the branch level for customers and for zip codes. For example, apply an override if you want a billing service to handle a customer's large construction project instead of handling the billing yourself.

To create customer remit-tos:

1. From the **Maintenance > Branch** menu, select **Remit-To Maintenance** to display the Remit-To Maintenance window.
2. In the **Remit-To ID/New** field, do one of the following to display a remit-to ID:
 - Click the **New Remit-To** button to create a new remit-to ID, and when prompted, enter the name of the remit-to.
 - Select an existing remit-to ID, or enter part of an ID to display a partial list of remit-tos.
3. In the **Name** field, enter the full name of the remit-to entity.
4. In the **Address** field, enter the remit-to entity's address.
5. In the **City**, **St**, and **Zip** fields, enter the name of the city where the remit-to entity is located.
6. In the **Phone** field, enter the remit-to entity's phone numbers. The first phone number in the list prints on invoices and statement forms.
7. In the **Codes** field, enter a phone code to a phone number. Phone codes are defined in the **Valid Phone Codes** control maintenance record.
8. In the **Description** field, enter the description of the phone number, such as "Main Office," or "Warehouse."

More Options for Assigning Remit-to Addresses to Branches

To...	Select...
copy the information defined for this remit-to entity to a newly created remit-to entity record	File > Copy
delete a remit-to override record	File > Delete If you delete the record for a remit-to entity that has been assigned to a zip code customer, the system uses the next remit-to entity in the hierarchy.
display the Maintenance Log Viewing window for this remit-to entity	File > Maintenance Log

Configuring Branch Credit Card Processors

Eclipse is certified with a credit card processor that enables your company to route credit card information to a credit card company, such as Visa, when you place credit card orders. Each branch that will take credit card orders must be set up with the credit card processor you are authorized to use.

To edit information on the Credit Card Branch Setup screen, you must be assigned the CREDIT.CARD.SETUP authorization key.

Note: If you are using the Element processing, see *Configuring the Element Credit Card Processor at Your Branches* in the Element documentation.

To set up a branch credit card processor:

1. From the **Maintenance > Branch** menu, select **Branch** to display the Branch Maintenance window.
2. In the **Branch** field, enter the branch name to display the branch record.
3. Select **Maintenance > Credit Card Branch Set Up** to display the Credit Card Branch Setup dialog box.
The branch displays in the bottom left of the dialog box.
4. In the **Processor** column, enter the name of a credit card processor used by this branch.
5. In the **Merchant** column, enter the name or number that identifies this branch to the credit card processor. The ID is assigned by the processor.
6. The **Device ID** column displays the name or number assigned to the branch by the credit card processor.
7. The **Terminal ID** column displays the name or number assigned to the branch by the credit card processor.
8. To copy another branch's credit card information into the current branch file, select **Additional > Copy Credit Card Info From Branch** and enter the branch whose information you want to copy when prompted.
9. Select a processor, and then select **Additional > Additional Credit Card Information** to display detailed information provided by your processing bank.
10. Save your changes and exit the dialog box.

Creating Territories

A territory is a name given to a group of branches. Maintain territories that include one or multiple branches, and name territories by physical locations, such as state or city, by types of products sold at the branches, or by any other category that makes sense for your business.

If you have one branch or multiple branches include your branches in the ALL territory, because if you ever add a branch, the new branch can inherit branch-specific settings from the other branches. This strategy makes setting up a new branch easier than manually entering system-wide branch parameters.

If you have two or more branches that have similar settings, create a territory for those branches. For example, you have two branches in the Denver city tax district, and the rest of your branches are located outside of the Denver tax district. Create a territory named DENVER that includes the two Denver branches. Compare these branches by running reports on the DENVER territory.

A branch can reside in more than one territory. For example, you have 10 branches in Colorado: 2 branches in Denver, 5 branches along major highways on the eastern plains, and three branches in small mountain communities that require a higher rate of freight. In this case, your territories might be named COLORADO, DENVER, PLAINS, and MOUNTAIN. All 10 branches are in the COLORADO territory, and each of those branches also belongs to the territory named for its geographic location.

In any branch-specific screen, such as Product Price Maintenance, you can set territory and branch parameters. Branch settings always override territory settings. You can identify a screen with branch-specific parameters by its **Hierarchy** hot key.

You can edit and view only branches and territories to which you have access. To view or edit the Territory Maintenance screen, you must be assigned the TERRITORY.MAINT authorization key. Branch and territory access is defined in User Maintenance.

To create a territory:

1. From the **Maintenance > Branch** menu, select **Territory** to display the Territory Maintenance window.
2. In the **Territory Name** field, enter the territory's name. If this is an existing territory, any branches belonging to the territory display in the table.

Note: The ALL territory was created as part of your Eclipse DMS, so you do not need to create it.

3. In the **Territory Description** field, enter up to 32 alphanumeric characters to clearly describe the territory. For example, if you have three branches in Iowa for the territory you are creating, you might include each branch's geographic location in each description, as follows:
 - Iowa - Des Moines
 - Iowa - Ames
 - Iowa - Sioux City
4. In the **Entity Priority** and **Product Priority** fields, enter the level of importance for the territory, from 1-99. 99 is the highest priority:

Creating and Maintaining Branches and Territories

- In the **Entity Priority** field, rank the territory based on customer and vendor parameters, as you would find on the Branch-Specific Overrides dialog box.
- In the **Product Priority** field, rank the territory based on product parameters, as you would find on the Forecast Parameters Maintenance window.

Is the territory assigned a priority?

- **No** - The territory is used only for reporting purposes.
- **Yes** - Users with authorizations have access to the Branch-Specific Overrides dialog box from customer and vendor records. You can include the territory in the Authorized Territories screen in User Maintenance only if the territory is assigned an entity or product priority.

If you do not assign a priority, you can use the territory for reporting purposes only. Include this territory in the Authorized Territories screen in User Maintenance only if you assigned it an entity or product priority.

When you view any screen with branch-specific fields, such as the Product Price Maintenance screen, select **File > Hierarchy**, and enter a branch. The selected branch displays at the top of the **Branch/Territory** column, followed by the territories that contain the selected branch and that you have authority to view. The territories are listed in order of their priority, with the highest priority at the top.

Note: If you add or remove branches, or if you change territory priorities, the system requires you to delete branch cache files and to rebuild the authorized territories list. Run these utilities only after business hours to avoid interfering with daily business transactions.

Select the **Aggregate to ADS** check box if you want to include the branches in this territory in data uploads for Zoom 360, a part of the Activant Distribution Suite. If you do not select this option, you cannot see the territory in Zoom 360; however, the branches that comprise this territory remain available, as Zoom 360 uploads data for all branches.

Note: For additional information about Zoom 360, contact your inside sales representative.

5. In the **Branch** column, list the branches in this territory. The system sorts the branches alphanumerically the next time you display the screen.

The **Branch Name** column displays the full branch name.

6. Select the following options as needed:

To...	Select this menu item...
delete a territory.	File > Delete The system prompts for confirmation. If you enter delete at the prompt, the system prompts to rebuild authorized territories. If you have the Override Automatic Build field set to Yes in your user record, the territory is not deleted from the list. If the territory has an entity or product priority, the system prompts to delete cache records. Delete cache records when changes are made to territories, and only after business hours.
return the entries to what they were before you started making changes.	File > Recall
find a branch in the list.	File > Find

7. Save your changes and exit the dialog box.

Adding Branches to Territories

You can add branches to your territories based on your business changes. For example, if a territory expands, and you need to add a branch location to a territory. Additionally, if your company expands or reorganizes, you can change a branch's assigned territory or create a new territory to include new or different branches.

You can edit and view only branches and territories to which you have access. To view or edit the Territory Maintenance screen, you must be assigned the TERRITORY.MAINT authorization key. Branch and territory access is defined in User Maintenance.

To add a branch to a territory:

1. From the **Maintenance > Branch** menu, select **Territory** to display the Territory Maintenance window.
2. In the **Territory Name** field, enter the territory ID.
Note: The branches belonging to the territory, if any, display in the table.
3. Complete the fields in top of the screen.
4. In the **Branch** column, enter the number of the branch, or select from the list.
The branch name displays in the **Branch Name** field.
Note: To delete a branch from the list, select the branch from the table and right-click.
Select **Delete**.
5. Save the branch information and exit the window.
6. The system prompts to delete branch cache records. Select **Yes** to continue with your changes and display the Delete Branch Cache Records dialog box. You can run the utility now or schedule it to run later.
7. In the **Customer** field on the Customer Maintenance window, enter the branch you added to the territory
8. Select **Orders > Accessible Branches** to display the Accessible Branches dialog box.
9. Change the **Home Branch** field to the new branch number.
10. Save your changes and exit the window.
Note: If you add or remove branches, or if you change territory priorities, the system requires you to delete branch cache files and to rebuild the authorized territories list. Run these utilities only after business hours to avoid interfering with daily business transactions.

Deleting Branch Cache Files

The system stores data for each branch in branch cache files. When you enter an order or make a branch inquiry, the system retrieves only the data it needs for that branch, rather than having to search a huge database of multiple branch settings. This logic enables the system to retrieve data quickly and efficiently.

The Rebuild Authorized Territory Lists utility and the Delete Branch Cache Records utility were developed to clear old data from the system and to ensure that the system could quickly and effectively retrieve the most up-to-date branch and territory data possible. The utilities are triggered by the following system changes:

- If you change a priority in Territory Maintenance, the system prompts to delete the branch cache files. The system retrieves data from the old branch cache files until you delete the old files. After running the Delete Branch Cache File utility the system can access the new data.
- If you change the list of branches in Territory Maintenance, the system prompts to delete cache records and then to rebuild the Authorized Territory List. The system cannot find the new data until you delete the old cache files. Running the Rebuilt Authorized Territory List enables the changes you made to the territory priorities.

Important: Run the Delete Branch Cache Records utility and the Rebuilt Authorized Territory List utility only after business hours to avoid interfering with daily transactions.

This topic contains the following instructions:

- Change branches in a territory.
- Delete cache records.

To change to branches within a territory:

1. From the **Files > Branch** menu, select **Territory** to display the Territory Maintenance window.
2. In the **ID** field, enter the territory name to display the territory record, including the branches associated with the territory.
3. In the **Branch** field, make the necessary changes to the branches.
4. Click **OK**.

The system clears the fields on the Territory Maintenance screen. The changes are saved, but they are not effective until you delete the cache records and rebuild the Authorized Territory List.

5. To change more branch records, enter another branch name in the **ID** field.
Continue steps 2-5 until you have completed making changes to all the branches you want to change.
6. Press **OK** to display the Delete all Branch Cache Records prompt.
7. Enter one of the following:
 - **Yes** - Deletes the old records. DO NOT enter **Yes** during business hours.
 - **No** - Displays the Rebuilt Authorized Territory prompt.

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To delete cache records:

1. At the prompt to delete all branch cache records, enter **Yes** to display the Delete Branch Cache Records dialog box.

Note: You can also run the Delete Branch Cache Records utility from the **Maintenance > Branch** menu.

2. In the **Files** field, enter the name of the file to delete, if applicable. For example, you can occasionally run the utility by line for the PROD.BR file to clear the cache during working hours, if necessary.

Note: You most commonly manually run the utility for the PROD.DYNAM file.

3. In the **Branch** field, enter a branch to delete, if applicable.
4. Select one of the following options:
 - **File > Begin** - Starts deleting cache files now. DO NOT run this process during business hours.
 - **File > Schedule** - Displays the Phantom Scheduler where you schedule a time to run the utility.

Rebuilding the Authorized Territory List

Run the Rebuild Authorized Territory Lists utility to update the list of branches within a territory. When you change a territory record, this utility updates the branch hierarchy lists in the **Branch/Territory** column on any screen that displays branch-specific data, such as the Product Price Maintenance screen.

The Rebuild Authorized Territory Lists utility and the Delete Branch Cache Records utility have a similar purpose in that they were developed to clear old data from the system and to ensure that the system could quickly and effectively retrieve the most up-to-date branch and territory data possible. The utilities are triggered by the following system changes:

- If you change a priority in Territory Maintenance, the system prompts to delete the branch cache files. The system retrieves data from the old branch cache files until you delete the old files. After running the Delete Branch Cache File utility the system can access the new data.
- If you change the list of branches in Territory Maintenance, the system prompts to delete cache records and then to rebuild the Authorized Territory List. The system cannot find the new data until you delete the old cache files. Running the Rebuilt Authorized Territory List enables the changes you made to the territory priorities.

Important: Run the Delete Branch Cache File utility and the Rebuilt Authorized Territory List utility only after business hours to avoid interfering with daily transactions.

To rebuild an authorized territory list:

1. From the **Files > Branch > Territory** menu, select **Rebuild Authorized Terrs** to display the Rebuild Authorized Territory Lists dialog box.
2. Use one of the following options:
 - **File > Begin** - Runs the rebuild. Run this utility only during non-business hours to avoid interfering with daily transactions. A message scrolls at the bottom of the screen when the system completes the process.
 - **File > Schedule** - Displays the Phantom Scheduler where you schedule a time to run the rebuild.

The system rebuilds the territory lists based on the changes made to the territories, and depending on your territory settings in User Maintenance, as follows:

For the...	The system updates...
Reporting List	all territories that include at least one branch accessible to the user.
Viewable List	any territory that has either an entity or product priority and that includes at least one branch accessible to the user. The entity or product priority setting means the user can set overrides at these levels for this territory.
Editable List	any territory that has either an entity or product priority and the user has all branches for a territory in their authorized branch list. The entity or product priority setting means the user can set overrides at these levels for this territory.

Setting Up New Branches Overview

As you grow your business, you must add new branches to Eclipse. The way you use the new branch determines how to configure the branch. Depending on your business structure and the reasons for adding the branch, you must decide if you are adding the branch as a part of your existing Eclipse system or as a separate company within your system. For example, you can set up branch strictly for pricing purposes that lives in your existing system or you could split some of your processes into a new business structure.

There are several questions you must address before adding a branch. The following checklists and questionnaires are provided to guide you through the setup process.

- New Branch Questionnaire
- New Branch Control Record Check List
- New Branch Setup Workflow - Step by step check list in setting up the branch.

After reviewing each of the above, you can create branch entities, assign users, and address territories, as needed.

New Branch Setup Workflow

Use the following check list to make sure each step has an owner. We recommend completing these in the order listed, however depending on the type of branch you are setting up, some steps may not apply.

The answers to the questionnaire help you decide how to handle steps that have multiple options. Read details carefully for each step to make sure all concerns are addressed.

Step	Description	Assigned To
1	Create the branch entity in Customer Maintenance. See <i>Creating New Branch Entities</i> .	
2	Create the branch in Branch Maintenance.	
3	Authorize your User ID for the new branch. Log off and back on to the system.	
4	Create and update territories and delete your cache records.	
5	Assigning customers for the new branch.	
6	Assigning vendors for the new branch.	
7	Assigning products and price lines for the new branch.	
8	Geographical price sheets and discount classes.	
	Geographical sell groups (optional)	
	Branch-specific and territory-specific settings.	
9	Update procurement groups for new branch.	
10	Update buy lines with targets and buyers for new branch.	
11	Update branch-specific control parameters.	
12	Add demand to new branch. (optional)	
13	Create transfer matrix cells to new branch.	
14	Copy or create matrix cells for new branch. (optional)	
15	Delete and recreate phantom processes.	
16	Create printer locations for new branch.	
17	Update terminal maintenance for terminals in new branch.	
18	Update fax settings for the new branch.	
19	Create new general ledger accounts for the new branch.	
20	Verify ship via records assigned to new branch.	
21	Authorize other users to access new branch / territories using mass load.	
22	Verify product families in new branch.	

New Branch Questionnaire

We recommend reviewing and answering each question to ensure a thorough and correct setup of your new branch.

Note: All references to "branch" refer to the new branch you are setting up.

- | | | |
|----|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------|
| 1. | Is the branch for pricing purposes only? | Yes or No |
| 2. | Is the branch part of the existing company already using the Eclipse system or are you setting up the branch as a separate company?
See additional questions on <i>Adding New Branches to the Current System</i> and <i>Branches as Separate CA</i> | Existing or Separate |
| 3. | Is the new branch being created because a current branch is moving to a new location? | Yes or No |
| 4. | Do your employees know about the branch? | Yes or No |
| 5. | Do you have all the hardware and licenses required for the branch? | Yes or No |
| 6. | Before the branch is added, are you a single branch establishment? | Yes or No |

Save these answers as you work through the check list.

New Branch Control Record Check List

The following represent control files that may be affected by the new branch addition. Review each to make sure the new branch handles the settings the same as your other branches, or how you want it to be incorporated into the system.

File Name	Description	Checked
CONTROL	The branch-specific control records need to be updated to the appropriate settings for the new branch. For information about branch hierarchies, see <i>Branch Hierarchy Details</i> .	
TERRITORY	The territory file stores the branch and territory information that exist within the Eclipse system. For more information about how territories work, see <i>Territory Priority Basics</i> .	
ENTITY	The system stores your customer and vendor records in the ENTITY file. When you create the new branch within the current Eclipse system setup you have, customer and vendors that do business with it need to be created and flagged to do business only with the new branch. Therefore, your customers will have separate statements from each company. If you are creating a separate company, and you have customers and vendors that will exist in both companies, you must duplicate and update these records so they only do business out of your current branches.	
PRODUCT	Your product file can be authenticated. Authenticating a product file restricts products you sell in your current system branches so they cannot be sold in the new branch.	
PROD.PRICE	Review geographical price sheets for the new branch. If your pricing for the new branch can be based on a current branch's demand, then you can skip reviewing price sheets.	
MATRIX	If you cannot use another branch's matrix setup for the new branch, you must add a matrix cell that is territory-specific needs for the branch.	
BUY.LINE	If you need new buy lines for the new branch you are creating, create them using vendor targets. You can also assign current buy lines to the branch.	
PRICE.LINE	If you create new price lines for the new branch, mark them as branch-specific. If possible, leverage current products in the new branch.	
INITIALS	New user profiles need to be added, if required, to work out of the new branch. Branch authorizations need to be updated for current employees who can operate in the new branch. These updates include printer locations, if current users can do business out of this branch.	
PROCURE.GROUP	If material can be transferred from a current branch to the new branch (existing Eclipse system setup only), the procurement groups need to be updated to make the new branch part of a purchasing network. This file needs to be updated regardless of methods allowed for suggested purchase orders to run.	
SYSTEM.QUEUE	Phantom processes need to be created or updated to reflect the new branch.	
TTY.DEFINE	New terminal configurations need to be created for terminals operating in the new branch's location. Current terminals that can also do business in the new branch also need to be reviewed.	
PRINTER.LOCS	Define new printer locations in the new branch and then assign users and terminal setup.	

Adding New Branches to the Current System

Questions to consider if you are adding the new branch to the current Eclipse system on your site:

	Question	Answer
	Are the branches close enough together physically that product demand would move to the new one?	
	If you answered no to the previous question, can the product demand of a current branch be used to copy to the new branch?	
	Will material be transferred from an current branch to the branch for stock replenishment?	
	Can your existing pricing matrix be used in the branch?	
	Will the list price on products be the same as current branches?	
	Will your current employees be able to sell material out of the branch?	
	Is it an empty warehouse or did you buy inventory from the previous owners?	

Adding New Branches as Separate Companies

Questions to consider if you are adding the new branch as a separate company from the current Eclipse system on your site:

	Question	Answer
	Is the branch a startup company or will data need to be converted for Eclipse?	
	Can your current customer purchase material from the branch?	
	Will you have the same vendors for this branch as the other branches in your system?	
	Can current products be sold out of the branch?	
	Is the warehouse empty or are you buying the inventory from the previous owners?	
	Will your current employees be able to sell material out of the branch?	
	If you have current products that can be sold, is there a current branch in your system that has demand you can be copy to the branch for use with suggested purchase orders?	
	Do you have special forms required for your documents, such as invoices, checks, statements and ship tickets?	

Creating New Branch Entities (Setting up a New Branch, Step 1)

When adding a **any** branch to your system, create a new record containing the name and address information for the new branch in Customer Maintenance. You need the branch record through Customer Maintenance to create an entity that represents the remit-to address for this new branch. If the remit-to address is the same as an existing branch you find it in Branch Maintenance. You then use Branch Maintenance to create the Branch ID itself (See, *Creating Branch IDs, Step 2*).

To create a new branch entity:

1. From **Customer Maintenance**, select **Customer** to display the Customer Maintenance window.
2. Enter the branch information.
3. In the **Customer Type** area, select **Bill-To**, **Ship-To**, and **Branch**.

Note: Selecting these prompts sets the entity record apart from the standard customer and vendor records.

Customer Maintenance - Epicor Eclipse Branch 1

File Edit Orders Pricing Additional User Tools Help

Customer: Epicor Eclipse Branch 1 [?] New Customer

Name: *Epicor Eclipse Branch 1

Address: 5340 Airport Blvd.

City: *BOULDER

Zip: 80301-2312 [?] State: CO Country: [?]

Sort by: *BRANCH 1

Bill-To: [?]

Index: *Branch 1

Type	Number

Phones Contacts WWW

Customer : 25096

Customer Type

- Bill-To
- Ship-To
- Branch
- Prospect
- Auto-Delete
- Ship-To Address Changes Restricted
- Branch Cash Account
- Customer P/O Required
- Customer Release Number Required

Statement Type: Open Item [?]

Backorder Status: Call When Complete [?]

Outside Salesperson: [?]

Inside Salesperson: [?]

Ship Via: [?]

Freight In Exempt: No [?]

Freight Out Exempt: No [?]

4. From the **Pricing** menu, select **Price Information** to display the Customer Pricing Information.
5. Set the **Default Price Class** field to a unique, branch-only class, such as 99.

Creating New Branch Entities
(Setting up a New Branch, Step 1)

Customer Pricing Information

File Edit User Tools Help

Main Additional Form Types Price Class Overrides

Customer Type

Invoice Select Code

Primary Currency

Invoice Print Copies

Invoice Fax Copies

Batch Statement 1 Copy

Default Price Class 99

Customer Statement Cycle

Fill Rate Measurement

Percent of Order to Fill Before Automatically Shipping

Disable FTP Billing

Grouping Method for Emailed Batch Invoices

Customer: 25096

Note: The internal ID number for your record displays on the main window at the bottom (25096 in the example above) to help in creating the branch ID. You need the branch record that represents the remit-to address for this new branch. If the remit-to address is the same as an existing branch you find it in Branch Maintenance.

6. Depending upon on how you are adding the branch, review the following:
 - **Existing** - If the branch is new to an existing company only one entity record is required.
 - **Separate** - If the branch is for a separate company, you will want to create two entity records. One for the branch where the inventory moves through and the other branch to define your remit-to address.
7. Save your changes and exit the window.

Creating Branch IDs (Setting up a New Branch, Step 2)

After creating the new branch's entity, create the new branch ID itself using Branch Maintenance.

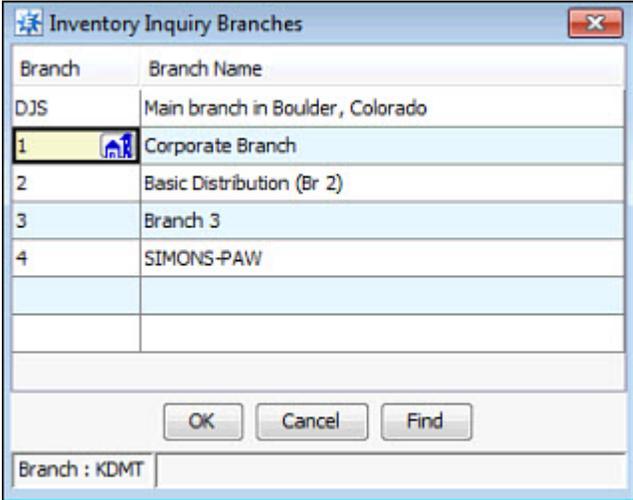
To create a new branch ID:

1. From **Maintenance > Branch** menu, select **Branch** to display the Branch Maintenance window.
2. Click **New Branch**.
3. Complete the branch fields for the new branch paying particular attention to how your current branches are configured.
4. For the **Branch Entity** and **Remit-To ID** fields, consider the following:
 - If you are creating a branch as part of the *existing company*, the remit-to ID may already exist and can be assigned to this new branch. Check another existing branch.
 - If you are creating a branch as a *separate company*, the remit-to ID may be the same as the Entity ID. If the remit-to address is different from the Entity ID, then create the entity record in Customer Maintenance and assign it in the new branch's **Remit-To ID** field.
5. Save your changes and exit the window.

Additional Considerations

The following should be noted when creating records for new branches:

Area	Description / Comment
Ship Via	When the branch record is updated, the system prompts you to load all valid ship-via records to the new branch record. Answer No at this prompt if your current ship-via records need to be reviewed before they are added to the new branch. For more information about how ship vias work, see <i>Creating Ship Vias</i> in Account Setup Maintenance in the online help documentation.

Area	Description / Comment
<p>Inventory Inquiry Branches</p>	<p>The system checks the user's home branch when the user logs in. The system then checks the branch record that matches the home branch to determine what inventory inquiry branches display.</p> <p>If the user's profile has an Inventory Inquiry Branch/Territory assigned at the user level, that assignment takes priority.</p>  <p>The order in which these branch numbers are listed is the order in which they display in the Inventory Inquiry screen.</p> <p>Note: Some companies create territories and assign Inventory Inquiry Branch/Territory settings to the user profile instead of using this functionality. The system always sorts the branches and territories in alphanumeric order regardless of how they are entered in Territory Maintenance. You can define which branches display in Inventory Inquiry.</p> <p>If you are creating the branch for an <i>existing company</i>, you need to update all the branches that have access to this new branch in Inventory Inquiry. If you followed the setup at the branch level as outlined in this document, then each branch record updates automatically. If your setup was done on a territory, then the territories need to be updated to include the new branch.</p> <p>If you are creating the branch as a <i>separate company</i> and the only inventory this new company should view is its own, only assign the stocking branch for the new branch on this screen.</p>
<p>Branch Matrix Hierarchy</p>	<p>The Matrix Hierarchy option off the Maintenance menu in Branch Maintenance is used to define territories that participate in the pricing hierarchy. If your company has pricing and your matrices are set up by territory for specific geographical locations, then you must need to list the territories that participate in the price check.</p> <p>Note: If all of your pricing is created and maintained at the DFLT branch level, then nothing is required here. If you plan to allow overwriting pricing in the new branch to use a territory, then review these settings after you have created your territories.</p> <p>You may want to revisit this record later to add or update information, such as Credit Card Processing and Check Verification.</p>

Authorizing Users for New Branches (Setting up a New Branch, Step 3)

Before enabling the new branch on your system for all users, you can limit access to a small number of users for testing. You can also limit some branches, such as branches you are only using for pricing purposes, to a small set of users. We recommend authorizing your own ID first.

To authorize a user for a branch:

1. From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance window.
2. In the **User ID** field, enter *your* User ID, such as HBOYLE.
3. From the **Maintenance** men, select **Branch** to display the User Accessible Branches window.
4. Assign the new branch to the user's list.

Note: You will need to log out and log back in to see the update for your user.

5. In the **Authorized** column, you can limit the job function for the user in the branch. Select one of the following:
 - **Only Inventory Inquiry** - Allows users to view available quantities on the main Inventory Inquiry. The user cannot access the History Ledger or the Future Ledger. We recommend using this for those who run two separate companies on one Eclipse account. The users can see limited information and cannot see pricing for the new branch's products.
 - **Sales Order/Inventory Inquiry** - Allows users the same access and restrictions as **Only Inventory Inquiry** and lets the user ship material out of the branch. We recommend using this option if the new branch is part of your existing company.
 - **Blank** - Normal, full access to the branch included in reports run for ALL territory.

Note: By selecting one **Only Inventory Inquiry** or **Sales Order/Inventory Inquiry**, you restrict users' branch access in other areas of the system, such as General Ledger.

6. Repeat steps 2-4 for additional users.
7. Save your changes and exit the window.

For more information about authorizing users for branches, see *Assigning Branches to Users* in the Application Maintenance online help documentation.

About Home Branches

The home branch usually represents the branch ID in which the user primarily works. The system uses the home branch throughout for things such as reports and prompts the user for the home branch if not set. However, because the home branch prompt exists on Customer and Vendor records, some companies set the home branch prompt to a corporate branch value and not the actual branch for the user.

Depending upon on how you are adding the branch, review the following:

- **Existing** - Verify how your current setup exists to determine whether new user profiles working in this branch should have the home branch assigned to the new branch or existing corporate branch ID.
- **Separate** - Verify how you currently setup your corporate / branch structure and follow that structure for the new company setup. Decide if you want the home branch as the new company's corporate branch ID or as the branch in which the user actually works.

About Home Territories

When running separate companies on one system, it is easier to run reports for all branches in a territory, then to list them individually on a report. Larger companies may only have one company running on Eclipse, but take advantage of the home territory setting for this reason. You can create territories to be geographical or industry-specific, depending on your needs.

Depending upon on how you are adding the branch, review the following:

- **Existing** - Add the new branch to the territory assigned as the home territory. This field is optional. If this field is blank, do nothing.
- **Separate** - You need to have two territories in the system. One that represents your existing company and all the branches and another that represents for the new company and all its branches. Each user should be assigned a home territory.

About the Inventory Inquiry Territory Field

On the User Accessible Branches window, the user profile generally defaults the Home Branch field to 1 and the territory settings are blank. When a user logs into the system, the system checks the Inventory Inquiry settings for Branch 1 to verify what branches the user should see. If Branch 1 has not been updated to include the new branch, then the user does *not* see it in inventory Inquiry, but will have the ability to create a sales order for that branch.

If the **Inv Inq Territory** prompt displays a territory, the new branch *will not* display on the Inventory Inquiry window until the territory is updated to include it.

Depending upon on how you are adding the branch, review the following:

- **Existing** - If you are using Inventory Inquiry Territory logic, add the new branch to the territory listed.
- **Separate** - If the company should not see the branches for your existing company in the Inventory Inquiry, then user the branch ID Inventory Inquiry logic and point the new user profile to the home branch representing the new company branch ID or setup a new territory and assign through the user profile.

Creating and Updating Territories for New Branches (Setting up a New Branch, Step 4)

After creating the new branch and authorizing the appropriate users, you must create or update any territories that may be used.

To view current territories:

1. From **Files > Branch** menu, select **Territory**.
2. In the **Territory Name** field, click **the Branches** button or press **F10**.

Note: If your valid territories is a long list, you can create a report through Report Writer using the TERRITORY file to report back the territories that exist and branches assigned. If Attribute 11 of this file is empty or blank, then it is a territory, otherwise it is a branch record.

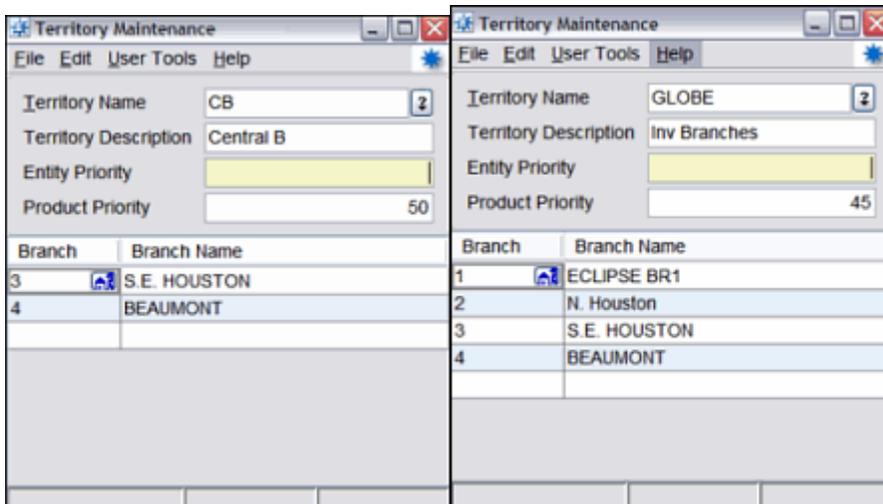
Reporting Territories

You can create a territory for reporting purposes only. For example, you create a territory named STHWST and add all your branches in the southwest region. Then, when running a report you can report on all the branches in your southwest region without having to add each branch individually.

You can also assign data to a territory name. All branches in that territory inherit that assignment. Since the same branch can exist in multiple territories, the branch hierarchy ensures the data is assigned accurately.

Assigning Priorities

When creating a territory for reporting purposes only, leave the priority level blank. If a priority level is set, the territory becomes part of a list of branches to assign data:



Using these examples, the CB territory has a product priority of 50 assigned while the GLOBE territory has a product priority of 45 assigned. Items such as buy line targets or emergency vendors can be assigned to both territories and applies equally to all branches within the territory. The priority number

Creating and Updating Territories for New Branches (Setting up a New Branch, Step 4)

assigned determines how the system sorts the territory when sorting in *descending* order. A higher number makes the territory a higher priority. For these two territories, CB would be listed *after* GLOBE.

For example, if different sell groups are assigned to both of these territories, when you create a sales order for branch 3, the system uses the sell group assigned to the CB territory because it has a higher priority, rather than the one assigned to the GLOBE territory. If you assign a sell group to the branch record, the system uses that sell group rather than those assigned to any territory.

Note: The matrix hierarchy on the branch record is *different* from this logic. the order for which territories are assigned to the branch ID is the order for which the system checks for a price. The product priority *does not* need to be set when managing matrix hierarchies in Branch Maintenance.

Depending upon on how you are adding the branch, review the following:

- **Existing** - Add this branch to your existing territories when appropriate.

Important: After creating or updating territories, the system prompts you to save your changes, but alerts you as follows: *All branch cache records must be deleted for changes to take effect. Delete now?* You must answer Yes to this prompt or the system does not respect the changes you made in Territory Maintenance.

If your company has geographical price sheets that point to a territory ID, you must also run the Rebuild Price Sheet/Discount Class Cache utility. When you run the utility, leave the **Price Line** field blank to capture all of your price lines. If you have a limited number of price lines that have territory-assigned price sheets, you can run it for those lines only.

Important: If this procedure is not completed, your pricing will not function properly. Both of these functions can be run during the day with no negative impact on the system.

- **Separate** - The existing territories remain the same and the new territories are added for the new company. Because no changes are being made to the existing territories you do not need to delete the cache records and you do not need to rebuild the price sheets.

Typically, separate companies may have different pricing on products because the multiplier may be different. Therefore your REP-COST is not the same. Eventually, a separate price sheet needs to be assigned to your products to keep the pricing separate from your current pricing. However, you can leverage your existing matrix discounts and your base values can be different for each item in the system.

Authorizing Customers and Vendors (Setting up a New Branch, Step 5)

Some companies have set their branch authorization to *all* branches on the entity records.

Depending upon on how you are adding the branch, review the following:

- **Existing** - If you want to allow all customers and vendors to do business in the new branch, then no further settings are required.
- **Separate** - Consider whether to authorize them for the new branch. In order for an existing customer to do business in a separate company, the record must be duplicated and new branch only authorized for the new company's home branch and distribution branches. You cannot have the same Accounts Receivable account for two separate companies.

Setting Active/Inactive Customers and Vendors

The Accessible Branches window contains prompts related to the activation of the customer or vendor within the branch. Use the **Display Customers/Vendors Who Are Inactive At a Branch** control maintenance record to activate this functionality.

In addition, review the following authorization keys and the levels associated with these prompts.

- CUST.BR.AUTH.OVRD - Level 0-99. When a user enters a transaction from a branch not listed on the customer's Accessible Branches, the system displays the following prompts: Don't Activate, Activate for Branch, and Activate for Onetime Use.

Users assigned an authorization level greater than or equal to the level entered in the **Branch Activation Level** field on the customer's Accessible Branches screen can activate the customer. When a user activates a customer, the system adds the branch to the customer's Accessible Branches and sets the **Active** field to **Yes**.

- CUST.BR.AUTH.ONETIME - Level 0-99. The system verifies the user has this authorization key assigned with the appropriate level. If yes, then the user can activate a customer for a one-time-only transaction in Sales Order Entry or Cash Receipts Entry, if the customer is not set up being active or inactive for the sales branch.

The same two authorization keys exist for the vendor activation:

- VEN.BR.AUTH.OVRD
- VEN.BR.AUTH.ONETIME

Mass Loading Authorized Branches to Entity File

Use the Mass Load utility to enter authorized branches for an entity files all at one time. Your Mass Load settings should be very selective. For example, you have the entity record with access to branch 4 and access to branch 20. If all the entity records can have access then you can select *out* all customers and add the new branch to the list.

Before you set up your mass load, display Dictionary Maintenance and verify that you have the following dictionary items in place:

- File Name: ENTITY, DICT ID: AUTH_BR

Eclipse Dictionary Maintenance View Only										
File Name	:	ENTITY	Version #	:						
Dict ID	:	AUTH_BR	Version #	:						
Dict Type	:	D	Attr#	:	_24	Val#	:	1	Subval#	:
Description	:	List of Branches								
Prompt	:	Auth. Branches								
Data Format										
Justify (L/R)	:	L	()	Date	Year	:		Negs:		
Maximum Width	:	4	()	Numeric	Decim	:		Negs:		
Multi-Valued (Y/N)	:	N	()	Y/N Only						
Sub-Valued (Y/N)	:	Y	()	'*' Only						
Required (Y/N)	:	N	()	Time						
Allow Update (Y/N)	:	Y	()	Word Wrap Disp Lines:	Max Lines	:		Indexed (Y/N)	:	N
Case Mapping	:		(*)	Eclipse Dictionary	Indexed (Y/N)	:				
SFA Category	:		()	Archived						
Format (Output)	:									
Update Subroutine	:	DICT.ADD.ENTITY.BR								
Copy	Delete	Valid	I-Desc	Expand	Prompt	Log	Test	Access	Key	
Undo	Close	Program	SQL	Reporting						

- File Name: ENTITY, Dict ID: AUTH_BR_FLAG

New Item Eclipse Dictionary Maintenance										
File Name	:	ENTITY	Version #	:						
Dict ID	:	AUTH_BR_FLAG	Version #	:						
Dict Type	:	D	Attr#	:	24	Val#	:	2	Subval#	:
Description	:	Authorized Br Flag								
Prompt	:	Auth. Branches								
Data Format										
Justify (L/R)	:	L	()	Date	Year	:		Negs:		
Maximum Width	:	4	()	Numeric	Decim	:		Negs:		
Multi-Valued (Y/N)	:	N	(*)	Y/N Only						
Sub-Valued (Y/N)	:	Y	(-)	'-' Only						
Required (Y/N)	:	N	()	Time						
Allow Update (Y/N)	:	Y	()	Word Wrap Disp Lines:	Max Lines	:		Indexed (Y/N)	:	N
Case Mapping	:		()	Eclipse Dictionary	Indexed (Y/N)	:				
SFA Category	:		()	Archived						
Format (Output)	:									
Update Subroutine	:	DICT.ADD.ENTITY.BR								
Copy	Delete	Valid	I-Desc	Expand	Prompt	Log	Test	Access	Key	
Undo	Close	Program	SQL	Reporting						

Below are examples of 6 methods for mass loading. When this mass load is run, the load must use **Set**, not **Update**. To test the load, select one record, run the load and verify the record updated as you expected.

- Method 1 - Add Branch

Using dictionary AUTH_BR, set value to "BRANCH" and that branch will be appended to the end of the current branch list with the ACTIVE flag set to "Y".

Example using branch 1:

Creating and Maintaining Branches and Territories

Report Writer/Mass Load Design																					
Design ID : AUTH_BR_ENTITY		Created : 12/09/10		By : Nicole Dursi																	
File Name : ENTITY				Total Width : 13																	
Title : Authorize Entity Records for New Branch																					
Col	Dict Item/Formula	Width	Typ	Default/Set Value																	
1	VIEWER_ID	8	D*																		
2	AUTH_BR	4	S	"20"																	
-																					
Sel Build		Adv SelectIon		Ecl Dct		Col Data		CopY		Del		Hdg		3 of 3							
Run Rpt		Dict SUM		Label		Opt		Notes		View		Begin Load		Set VAL		LoG		Files		Path	

- Method 2 - Add Branch Setting ACTIVE Flag to No

Using dictionary AUTH_BR, set value to "BRANCH~N" and that branch will be appended to the end of the current list with the ACTIVE flag set to "N".

Example using branch 1:

AUTH_BR S "1~N"

Report Writer/Mass Load Design																					
Design ID : AUTH_BR_ENTITY		Created : 12/09/10		By : Nicole Dursi																	
File Name : ENTITY				Total Width : 13																	
Title : Authorize Entity Records for New Branch																					
Col	Dict Item/Formula	Width	Typ	Default/Set Value																	
1	VIEWER_ID	8	D-																		
2	AUTH_BR	4	S	"20~N"																	
-																					
Sel Build		Adv SelectIon		Ecl Dct		Col Data		CopY		Del		Hdg		3 of 3							
Run Rpt		Dict SUM		Label		Opt		Notes		View		Begin Load		Set VAL		LoG		Files		Path	

- Method 3 - Delete Branch

Using dictionary AUTH_BR, set value to "BRANCH~DEL" and that branch will be deleted from the list if it exists.

Example using branch 1:

AUTH_BR S "1~DEL"

Authorizing Customers and Vendors
(Setting up a New Branch, Step 5)

Report Writer/Mass Load Design													
Design ID : AUTH_BR_ENTITY		Created : 12/09/10 By : Nicole Dursi											
File Name : ENTITY		Total Width : 13											
Title : Authorize Entity Records for New Branch													
Col	Dict Item/Formula	Width	Typ	Default/Set Value									
1	VIEWER_ID	8	D*										
2	AUTH_BR	4	S	"3~DEL"									
	-												
Sel Build		Adv SelectIon		Ecl Dct		Col Data		CopY		Del	Hdg	3 of 3	AnalyZer
Run Rpt	Dict SUM	Label	Opt	Notes	View	Begin Load	Set VAL	LoG	Files	Path			

- Method 4 - Change ACTIVE Flag

You must to create a dictionary item for Attribute 24, Value 2 calling the same update routine AUTH_BR uses: DICT.ADD.ENTITY.BR. Set the value to "BRANCH~Y" or "BRANCH~N" and the ACTIVE flag changes for that branch.

Example using branch 1 which will change ACTIVE flag from "Y" to "N":

AUTH_BR_FLAG S "1~N"

Report Writer/Mass Load Design													
Design ID : AUTH_BR_ENTITY		Created : 12/09/10 By : Nicole Dursi											
File Name : ENTITY		Total Width : 18											
Title : Authorize Entity Records for New Branch													
Col	Dict Item/Formula	Width	Typ	Default/Set Value									
1	VIEWER_ID	8	D*										
2	AUTH_BR	4	D										
3	AUTH_BR_FLAG	4	S	"1~N"									
Sel Build		Adv SelectIon		Ecl Dct		Col Data		CopY		Del	Hdg	3 of 3	AnalyZer
Run Rpt	Dict SUM	Label	Opt	Notes	View	Begin Load	Set VAL	LoG	Files	Path			

- Method 5 - Delete ALL Branches

Using dictionary AUTH_BR, set value to "" (null) and the entire branch list will be removed.

Creating and Maintaining Branches and Territories

Report Writer/Mass Load Design									
Design ID : AUTH_BR_ENTITY		Created : 12/09/10		By : Nicole Dursi					
File Name : ENTITY				Total Width : 13					
Title : Authorize Entity Records for New Branch									
Col	Dict Item/Formula	Width	Typ	Default/Set Value					
1	VIEWER_ID	8	D*						
2	AUTH_BR	4	S	""					

Sel Build	Adv SelectIon	Ecl Dct	Col Data	CopY	Del	Hdg	2 of 2		AnalyZer	
Run Rpt	Dict SUM	Label	Opt	Notes	View	Begin Load	Set VAL	LoG	Files	Path

- Method 6 - Add ALL Territory

Using dictionary AUTH_BR, set value to “ALL” and the ALL territory will be added to the list with ACTIVE flag set to “Y”. You could add “ALL~N” if you wanted to add the ALL territory but with the active flag set to “N”.

Note: With this method you would do the following to make sure to clear out any branches that may exist in the list.

AUTH_BR S ""

AUTH_BR S “ALL”

Report Writer/Mass Load Design									
Design ID : AUTH_BR_ENTITY		Created : 12/09/10		By : Nicole Dursi					
File Name : ENTITY				Total Width : 18					
Title : Authorize Entity Records for New Branch									
Col	Dict Item/Formula	Width	Typ	Default/Set Value					
1	VIEWER_ID	8	D*						
2	AUTH_BR	4	S	""					
3	AUTH_BR	4	S	"ALL"					

Sel Build	Adv SelectIon	Ecl Dct	Col Data	CopY	Del	Hdg	4 of 4		AnalyZer	
Run Rpt	Dict SUM	Label	Opt	Notes	View	Begin Load	Set VAL	LoG	Files	Path

Depending upon on how you are adding the branch, review the following:

- **Existing** - None of the above tasks or settings apply.

Authorizing Customers and Vendors
(Setting up a New Branch, Step 5)

- **Separate** - The entity records must be added only to the new company setting. The system uses the control parameters related to the Customer Template when creating a new customer for a given branch.

Create a template-only customer to be used as your template that has the proper branch authorization and assign it to the correct branch with the control parameters your company uses.

If the new company is a “Start Up,” then typically customers are created on-the-fly through Sales Order Entry at the time of sale.

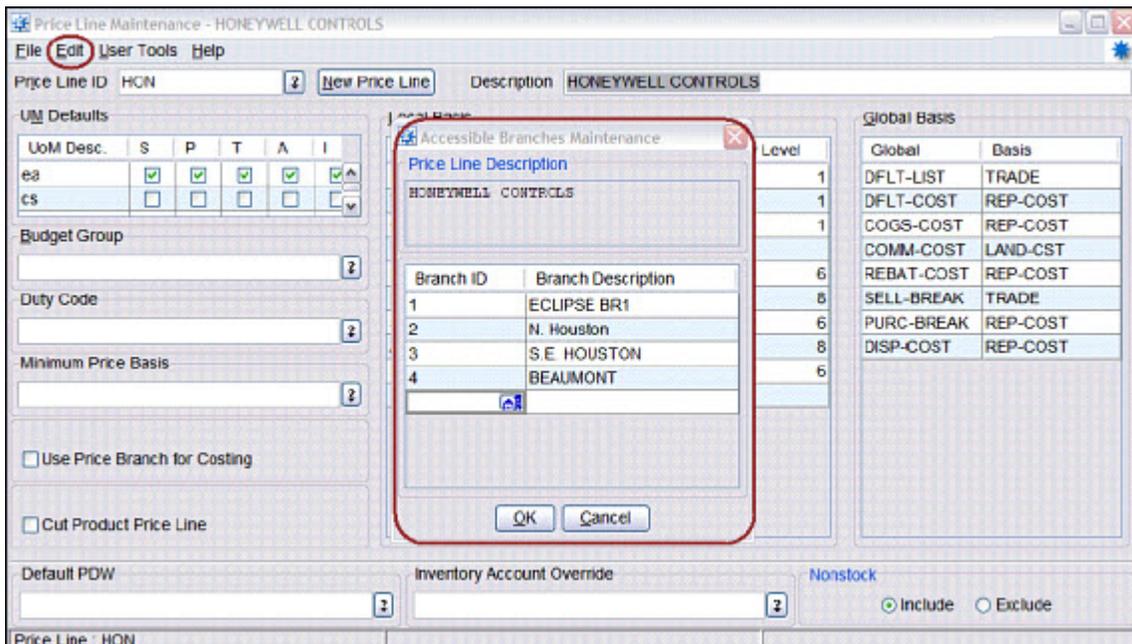
If you have a list of customers that need to be added, then you can use the Customer Import functionality within your hold file. However, we recommend caution when using the customer upload functionality. It is immediate and permanent. If an error occurs it is difficult to undo or go back without restoring from a backup. There is no vendor update (import) utility in the system.

Authorizing Products and Price Lines (Setting up a New Branch, Step 6)

Eclipse Release 8.0 and higher allows you to authorize products or price lines to display in a branch:

- Disable Branch Specific Product Authorization In PDW Catalog Search **Disable Branch Specific Product Authorization In PDW Catalog Search** - Decide whether to override the settings in the **Enable Branch Specific Products For** control maintenance record.
- Enable Branch Specific Products For **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.

After setting this control maintenance record, price lines and products can be assigned to the appropriate branches. Territories *cannot* be assigned. For example, the new branch is a separate company that provides a service. You create a price line for the service items and the authorized branch assigned is the service company you created. The service items do not display to anyone in the exiting company. Only staff members who create orders for the service company would see the service items.

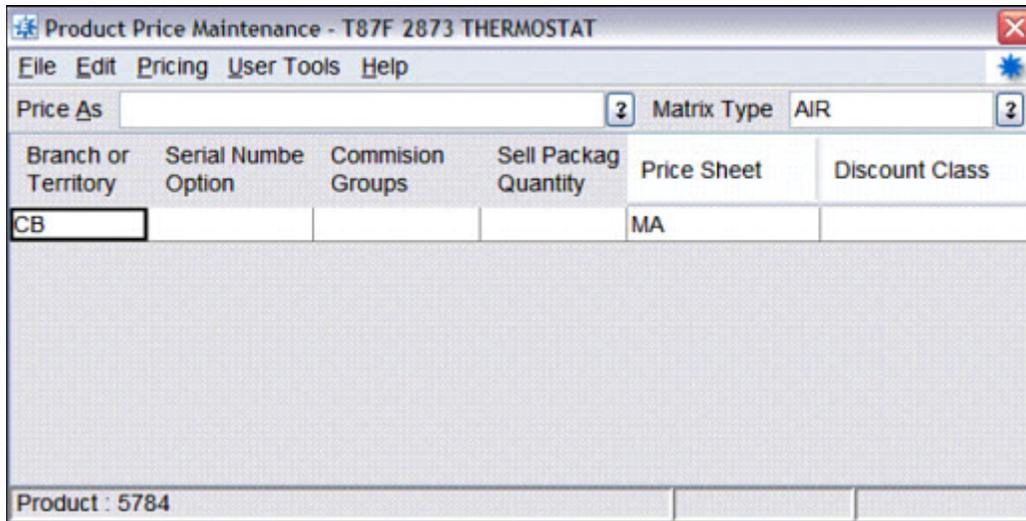


Note: If your company does not utilize this functionality and all products can be sold in all branches regardless if you have a separate company setup, then this function can remain disabled.

Geographical Price Sheets and Discount Classes (Setting up a New Branch, Step 7)

You can assign geographical price sheets and discount classes by branch at the product level. The pricing on products can be different in the new branch you are setting up, if you are adding branches for a separate company. If you want the new branch to have separate LIST prices on products, then you must assign price sheets or discount classes at this level.

Use the product file's Product Price Maintenance window to assign a price sheet to a branch or territory:



Note: To view this window, from the Product window, use the **Pricing** menu and select **Product Price Maintenance**.

In the figure above, branches in the MASS territory use the price sheet called MA to determine the costs: LIST, REP-COST, STD-COST, etc. These basis values are used to formulate your customer discounts when applying the matrix formula. Display the Product Price Sheet Maintenance (from the **Pricing** menu, select **Price Sheet**) for the item above. The system prompts to choose the price sheet to view or edit. You must be assigned the PRICE.SHEET.ENTRY authorization key, level 2 or 3 to edit price sheets.

For example, the default price sheet may have a LIST price of \$10.00 for the item, but the MA sheet may have a list price of \$10.78. In addition, one price sheet may have more effective dates than another.

	UOM	Per Qty	LIST	TRADE	OTH.LIST	LAND-CST	REP-COST
Currency							
04/01/2012			53.168	70.714	72.946	36.064	
04/01/2011			52.125	42.245	45.375	28.304	
04/01/2010			50.607	41.015	44.054	27.480	
04/01/2009			50.607	41.015	68.107	27.480	

Product : 5784 Per UM : ea Per Qty : 1

Creating and Maintaining Branches and Territories

	UOM	Per Qty	LIST	TRADE	OTH.LIST	LAND-CST	REP-COST
Currency							
04/01/2012	ea	1	54.120	79.000			36

Consider this setup like having two separate products for two different companies with separate pricing, but the system maintains everything on the same record.

Mass Loading a Price Sheet to Products

If your business requires separate pricing, you must mass load a price sheet to the territory for branches that will use the pricing. This mass load creates a blank price sheet. The system populates the pricing data when the territory information is completed with pricing information.

Below is an example of a mass load for a price sheet within the product file. The selection is especially important if this mass load should only be assigned to certain product lines within the system. You must make sure you have pricing to populate to the sheet you are creating, otherwise transactions are not priced.

Report Writer/Mass Load Design										
Design ID : UPD_PRICE_SHEET		Created : 12/09/10		By : Nicole Dursi						
File Name : PRODUCT		Total Width : 26								
Title : Set Price Sheet to New Territory										
Col	Dict Item/Formula	Width	Typ	Default/Set Value						
1	VIEWER_ID	10	D*							
2*	PRICE_SHEET	15	S	"MA"						
	-									
Sel Build		Adv SelectIon		Ecl Dct	Col Data	CopY	Del	Hdg	3 of 3	AnalyZer
Run Rpt	Dict SUM	Label	Opt	Notes	View	Begin Load	Set VAL	LoG	Files	Path
Column Data										
Col	Column Heading	Prompt		Data						
2*	Price Sheet	Enter Br/Tr/All Ignore Branch Hierarchy		MASS Y						

Important: After the mass load runs, from the **Tools** menu, select **Rebuild Price Sheet/Discount Class Cache** to make sure your price sheets are up to date.

Discount Class

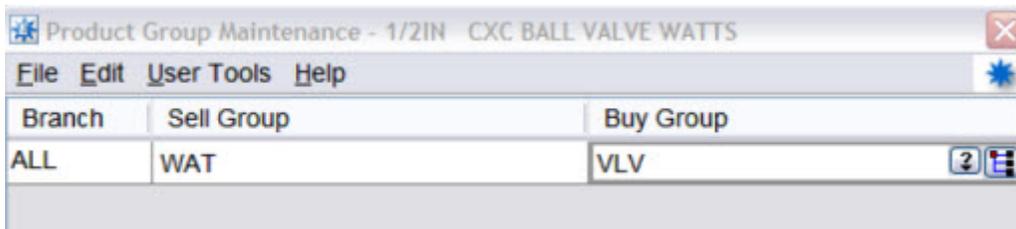
Discount classes are sheet specific, not branch specific. That means that a discount class on a different sheet will not automatically move to the new sheet you create.

The dictionary item to use when updating discount classes on the product file is DISCOUNT_CLASS. When the system prompts you for a branch, remember that it pertains to the sheet assigned to the branch you enter. That is why this dictionary item will not prompt to Ignore the Branch Hierarchy.

Geographical Sell Groups/Buy Groups (Setting up a New Branch, Step 7b - Optional)

Use buy groups and sell groups to group similar products together for customer discounting purposes. The Pricing Matrix options in Eclipse help you set up these discounts. While customers are assigned to a price class, products are assigned sell groups. Formulas are created to discount costs based upon the sell group information.

For example, a Price Class 6 customer may receive a 10% discount on your Watts Regulator items, whereas a Price Class 4 customer may only receive an 8% discount. The sell group assigned to products determines the group of items eligible for the discount to these types of customers.



If sell groups are assigned to the ALL territory, the new branches added to the system automatically use the existing sell group. This auto-assignment saves maintenance, because discounts as outlined above are managed using the correct price sheet for each branch. A 10% discount in Branch 1 may use a \$10.00 list price whereas a 10% discount in branch 20 may use a \$12.00 list price.

Most companies leverage existing matrix setups for use in the new branch regardless if it considered is a separate company or an existing company. Even if a new matrix cells need to be created for your new territory, the sell groups and price classes for customers are already in place.

Note: If your sell groups are currently branch-specific, you can mass load sell groups onto the new branch or territory. If you have upgraded from Release 7.x.x to Release 8.0 or higher, then some items may be branch-specific and need to be addressed.

If the sell group is the same in all branches, we recommend mass loading the sell group to the ALL territory so ongoing maintenance is not required.

Branch-Specific and Territory-Specific Product Settings (Setting up a New Branch, Step 7c)

After considering price settings for the new branch you are creating, you must consider specific product settings.

There may be branch overrides on items that could be copied to the new branch. For example, the default demand setting for an item in a branch is non-seasonal. If the item should be flagged as a seasonal product in the branch, then use a mass load to set these items. You can save time by copying the settings from an existing branch into the new branch.

Review the branch-specific, purchasing prompts first using the **Forecast Parameters for Demand Calculation** control maintenance record.

Consider the following purchasing prompts:

- Forecast Method
- Seasonal flag and settings
- Lost Sale setting
- Exceptional Sales %
- Trend %
- EOQ \$
- EOQ %

After checking the other purchasing prompts, use the Primary Inventory Maintenance to review the setting for the Backorder Tolerance Quantity.

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(*1*) Control Forecast Parameters Maintenance

Branch: 3

Forecast Method: S

Lost Sale: 20

Exceptional %: 90

Trend %:

EOQ \$: 1.00

EOQ %: 28

Auto-Trend

Max Decrease%: 50

Max Increase%: 100

Include Directs Seasonal

Regular		Seasonal	
Hits	25	Hits	10
Min Days	91	Min Days	42
Max Days	365	Max Days	122

Days Out Calculation Parameters

Exclude Ship From Different Branch

OK Cancel

If this control maintenance record's parameters are set for the branch, the system uses the settings without requiring additional mass-loading of data. However, if there are certain products that have overrides to the default setting at the control maintenance record level, it is important that these settings are copied into the new branch and you will need to run a mass load to populate the data.

Using Report Writer to Verify Data

Information that does not copy or get automatically populated from the control file should be verified by creating a report through Report Writer that can be used as a mass load.

Note: Report Writer is only available in the Eterm application as of Release 8.7.5.

The data elements to review are:

- BUY_PKG – Buy Package Quantity
- BUY_PKG_DIVISIBLE – Buy Package divisibility setting
- SELL_QTY – Minimum sales quantity
- QTY_BRK_QTY - Multiple value quantity break quantities
- QTY_BRK_UOM - Quantity Break UOM
- COMM_GROUP – Commission Group
- SERIAL – Serial Number Tracking Control
- FREIGHT_CHG – Freight Charge
- FREIGHT_FACTOR_PCT – Freight Factor Percentage

Branch-Specific and Territory-Specific Product Settings
(Setting up a New Branch, Step 7c)

- PASS_DISC – Percentage for Pass Long Vendor Discount
- LABEL_PER – Number of Labels to print
- PRICE_SHEET_PRT – Price Sheet Print Flag
- RESTRICT_PRICE_CHNG – Restrict Price changes in SOE

Create report in Report Writer on the product file with these dictionary items and run it for a branch that will be similar to the new branch you created. Scan the report to determine if overrides exist. If so, set the data in the new branch to match the existing branch you want to copy.

Below is an example of a Mass Load copying branch 2's information into branch 20:

Report Writer/Mass Load Design											
Design ID : UPD_PROD_ADDL			Created : 12/09/10			By : Nicole Dursi					
File Name : PRODUCT			Total Width : 44								
Title : Update Branch Specific Settings on Product											
Col	Dict Item/Formula	Width	Typ	Default/Set Value							
1	VIEWER_ID	10	D*								
2*	BUY_PKG	6	S	BUY_PKG,2							
3*	BUY_PKG_DIVISIBLE	1	S	BUY_PKG_DIVISIBLE,2							
4*	SELL_QTY	8	S	SELL_QTY,2							
5*	PRICE_SHEET_PRT	15	S	PRICE_SHEET_PRT,2							
							6 of 6				
Sel Build		Adv SelectIon		Ecl Dct		Col Data		CopY	Del	Hdg	AnalyZer
Run Rpt	Dict SUM	Label	Opt	Notes	View	Begin Load	Set VAL	LoG	Files	Path	

The column data will be structured as follows:

Column Data			
Col	Column Heading	Prompt	Data
2*	Buy Package Quantity	Enter Br/Tr/All Ignore Branch Hierarchy	20 Y
3*	Buy Pack Div.	Enter Br/Tr/All Ignore Branch Hierarchy	20 Y
4*	Sell Pack. Qty.	Enter Br/Tr/All Ignore Branch Hierarchy	20 Y
5*	Price Sheet Prt	Enter Br/Tr/All Ignore Branch Hierarchy	20 Y

Updating Procurement Groups (Setting up a New Branch, Step 8)

Procurement groups control how products are replenished. Your company may have one or more procurement groups depending on how your system was set up. Consider reviewing and cleaning up duplications to make the procurement paths more manageable to maintain before continuing. We recommend consulting the purchasing department before making any changes to procurement group to ensure there are no adverse affects on how your inventory is purchased and transferred.

Depending on your purchasing needs, procurement group setups can be very different.

Example 1:

Branch 1 buys and warehouses material for all other branches in the company. Branch 1 replenishes material to those branches using transfers.

Sales Branch/Territory	Warehouse Branch/Territory	Buy Branch/Territory	Transfer Branches	Emergency Procure Vendors	Default Lead Time
ALL	1	1	2,3,4,BOS,CAPE	BUYER LOCATE UPS RED BUYER PLEASE LOCATE Mueller Corp. *BUYLINE*	1 5 10

When adding a new branch to the system, you want to also update the procurement groups to include the new branch as part of the replenishment.

For more information about procurement groups, see the following:

- Replenishing Child Branches
- Procurement Confirmation
- Creating and Deleting Procurement Groups
- Setting Up Transfer Branches for Procurement Groups
- Product Procurement Details

Note: In addition, you can refer to the Inventory Management Workbook materials available with the Inventory Management Eclipse University class. For more information, go to <http://epicor.com/distribution/>, click **Customer Login** at the top of the page and click **Eclipse**.

Existing Company

If Branch 20 is added to an existing company and Branch 1 is buying and warehousing for Branch 20 as it does for the other branches, then use the setup above. The ALL territory includes Branch 20 and, therefore, Branch 20 is automatically added to the network. The only updates to consider further would be for the Transfer Branches for emergency procurements.

Separate Company

When adding a new branch that is a separate company, then the material must be assigned as distributed for that company.

Sales Branch/Territory	Warehouse Branch/Territory	Buy Branch/Territory	Transfer Branches	Emergency Procure Vendors	Default Lead Time
BOS	BOS	BOS	BOS	*BUYLINE*	5
ALL	1	1	2,3,4,BOS,CAPE	BUYER LOCATE UPS RED BUYER PLEASE LOCATE Mueller Corp. *BUYLINE*	1 5 10

As shown above, the new branch buys and warehouses for itself and cannot procure material by way of transfers from the existing company. Use the Procurement Group Branch Copy utility (**Purchasing > Maintenance**) to add this type of setup quickly and without the need of a mass load.

Procure Group Branch Copy			
Procure Group : *Multi*			
New Branch : 20			
Xfer Brs for New Br	:	20	
Add New Br to Xfer Brs for	:	20	
Whse Br for New Br	:	20	
Buy Br for New Br	:	20	
Begin	PGroups		F12-Abort

If your company has a separate procurement group for every buy line for the purpose of posting the emergency procurement vendor to each group, then you may be able to eliminate the maintenance. Assigning *BUYLINE* to the emergency procure vendors screen alerts the system to look to the buy line record for the vendor. We recommend that using this feature and eliminating all the extra groups that are duplications.

Adding Targets and Buyers to Buy Lines (Setting up a New Branch, Step 9)

Targets and buyers are purchasing-branch specific. Meaning, the system uses the buyer assigned to the **Buy Br** column in the Procurement Group set up.

Existing Company

If Branch 20 was added to an existing company and it becomes part of an existing central warehouse network, then Buy Line Maintenance does not need to be updated. All the framework exists on the buying branch and the new branch inherits the targets and buyers assigned. If Branch 20 was added to an existing company, but it will buy and warehouse inventory for itself, then the branch must be assigned a target and buyer in Buy Line Maintenance.

Note: We recommend reviewing your procurement group setup and replenishment paths before reviewing the buy lines settings.

Separate Company

If the new branch is a separate company, then the branch buys and warehouses its own inventory. The target and buyer information in Buy Line Maintenance. For example, in the example above, Branch 20 is a distributive on the CW procurement group, because the branch will buy and warehouse its own inventory. Therefore, buy lines that point to the CW procurement group need to have at least a target and buyer assigned.

Branch or Territory	Buyer	Tar...	Type	Line Bu Cycle	Default Lead Tir	Override Lead Ti	Transfe Grace	Minimur Cycle	Default Lead Fac	Minimur Sample	Suggest On All
BOS	NICOLE	2000	Dollars	18	10	10	999	14	5	2	Yes
ALL	SCOTTR	10000	Dollars	18		10		14			Yes

The buyer SCOTTR handles buying for the existing company and NICOLE is the buyer for the new company. Each buyer has his own suggested purchase order for the company for which they work.

If procurement groups are assigned to your buy lines, then you can use mass load to remove the buy lines using the procurement group. This narrows your selection to those buy lines you need to update. In the example above, Branch 20 was added as a new branch and it was made a distributive branch for the CW procurement group. Therefore the mass load (shown below) updates Branch 20 for only buy lines assigned to the procurement group called CW.

Adding Targets and Buyers to Buy Lines
(Setting up a New Branch, Step 9)

Report Writer/Mass Load Design								
Design ID : UPD.BUY.LINE		Created : 12/10/10 By : Nicole Dursi						
File Name : BUY.LINE		Total Width : 55						
Title : Update Buy line Target and buyer								
Col	Dict Item/Formula	Width	Typ	Default/Set Value				
1	@ID	10	D*					
2*	TARGET_TYPE	6	S	"Dollars"				
3*	TARGET_VALUE	4	U					
4*	TARGET_PRICE_BASIS	16	S	"DFLT-COST"				
5*	BUYER	15	S	"NICOLE"				
Sel Build		Adv SelectIon	Ecl Dct	Col Data	CopY	Del	Hdg	5 of 5
Run Rpt	Dict SUM	Label	Opt	Notes	View	Begin Load	Set VAL	LoG Files Path

In the figure above, all dictionary items have a Set Value with the exception of the TARGET_VALUE dictionary item. While the value is blank, the **Type** column is set to U for Update. This allows the user to type in the value for each buy line.

Column Data			
Col	Column Heading	Prompt	Data
2*	Target Type	Enter Br/Tr/All	20
		Ignore Branch Hierarchy	Y
3*	TARGET_VALUE	Enter Br/Tr/All	20
		Ignore Branch Hierarchy	Y
4*	Target Price Basis	Enter Br/Tr/All	20
		Ignore Branch Hierarchy	Y
5*	Buyer	Enter Br/Tr/All	20
		Ignore Branch Hierarchy	Y

Report Writer/Mass Load Selection			
File Name : BUY.LINE		Sample :	
Select Number : 1		Count : 20	
		Reselect (Y/N) : Y	
Conj	Dictionary Name	Op	Compare To
***	PROCURE_GROUP	=	"CN"

When the mass load is run, users can enter the dollar amount for each buy line.

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Mass Load Update					Recall	Expand
File Name: BUY.LINE	Target	TARGET	Target	Price Bas	Buyer	
BUY.LINE	Dollar	1000		DFLT-COST	NICOLE	
GPK	Dollar	6000		DFLT-COST	NICOLE	
MULTIFTG	Dollar	500		DFLT-COST	NICOLE	
PERINE	Dollar	30		DFLT-COST	NICOLE	
HWHARD	Dollar	1		DFLT-COST	NICOLE	
YORK	Dollar	1		DFLT-COST	NICOLE	
EBAA	Dollar	1		DFLT-COST	NICOLE	
ACE004	Dollar	1		DFLT-COST	NICOLE	
GRINNELL	Dollar	10000		DFLT-COST	NICOLE	
USPIPE	Dollar	10000		DFLT-COST	NICOLE	
RLS	Dollar	0		DFLT-COST	NICOLE	
ATHENS		0				
WUNS		0				
PWPIPE		0				
NUELLER		0				
TYLER		0				
SMITHB		0				
01-SH		0				
OAKSQU		0				
FIT&NIP		0				
PHILLIPS		0				

10 of 20

For more information about column types, see *Designing Mass Load Layouts* in Report Writer and Mass Load online documentation.

Updating Branch-Specific Control Parameters (Setting up a New Branch, Step 10)

The Eclipse system uses control maintenance records to turn on and off different parts of the system based on your business needs. You should review the control maintenance records and set them up to be branch-specific parameters. To identify the control maintenance records in your system that are branch specific, you can use Report Writer/Mass Load to narrow down the search.

First, run a report to locate the control maintenance records:

Report Writer/Mass Load Design												
Design ID : BRCH_SPEC_CONTROL		Created : 12/10/10		By : Nicole Dursi								
File Name : CMP				Total Width : 76								
Title : Branch Specific Control Parameters												
Col	Dict Item/Formula	Width	Column Heading	Brk	Tot	Format						
1	CATEGORY	12	Category	N	*							
2	AREA	12	Area	N	*							
3	PROMPT	50	Prompt	N	*							
						1 of 3						
Sel Build		Adv SelectIon		Ecl Dct		Col Data		CopY		Del	Hdg	AnalyZer
Run Rpt	Dict SUM	Label	Opt	Notes	View	Begin Load	Set VAL	LoG	Files	Path		

The example above produces a report displaying the Category, Area, and Prompt. The results contain over 200 branch-specific control settings to review. You must further define the report using sorting criteria defined for the report. Use the **Begin Select** hot key to display the following:

Report Writer/Mass Load Selection											
File Name : CMP		Sample :		Count : 238							
Select Number : 1				Reselect (Y/N) : Y							
Conj	Dictionary Name	Op	Value	Compare To							
***	BRANCH.SPEC	=	"Yes"								
Select Preview											
1) WITH BRANCH.SPEC = "Yes"											
2) BY CATEGORY BY AREA											

The branch-specific control maintenance records display. Use this report address the control maintenance record parameters you need to review. The system automatically includes control maintenance records that pertain to RF. Depending on your warehouse setup, you may be able to skip those control maintenance records. We recommend reviewing the list with those who have expertise in the category and area defined.

The remainder control maintenance record settings are for ALL branches regardless if you have a separate company running on the same Eclipse account.

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To review a complete list of control maintenance records, see *Control Maintenance Overview* in the Control Maintenance Record online help. The records are separated by system areas.

Adding Demand to New Branches (Setting up a New Branch, Step 11 - Optional)

When you create a new branch, there is no history attached to the branch and therefore no way to calculate demand for purchasing purposes. You can wait for the system to have enough history to calculate demand, or you can do one of the following:

- Use manual minimum and maximum values and set them to expire after six months. The system calculates the demand based on these values.
- Add the demand from an existing branch that you know will be similar to the new branch. You can have this value expire after 90 days and then let the branch calculate on its own after the expiration.

If you are acquiring a new company or branch that includes inventory, then the on-hand values need to be updated for the new branch. Or you can conduct a Year End Physical Count to update the on-hand values. When the Update Demand program runs for the counts entered, the values should point to a G/L Account named **Inventory**. These counts will not affect G/L because you are debiting and crediting the same inventory account.

A journal entry is made for the entire acquisition including the inventory you purchased. When the first, month-end process completes and you create your journal entry to tie your inventory back to your G/L account, any differences are updated.

If you decide to copy demand from an existing branch you need to setup a mass load to run and verify that the data elements are accurately set within your system.

Mass Loading Add Demand to Items to a New Branch from an Existing Branch

If the new branch you are adding already has information in the Add Demand window, use the following procedure to keep the system from overwriting those values.

To mass load add demand values to items:

1. Create a dictionary item named **COUNT_ADDDEM_PNS**.

```
I-Descriptor Program Maintenance
File Name : PRODUCT
Dict ID   : COUNT_ADDDEM_PNS
COUNT(@RECORD<64>, @VM)
```

This dictionary item counts the multi-valued list that exists in Attribute 64 of the Product file. This number indicates what multi-value number needs to be updated to when adding to the list. This dictionary must be marked as numeric so you can use it as part of your selection criteria.

Creating and Maintaining Branches and Territories

Eclipse Dictionary Maintenance										
File Name		: PRODUCT		Dict ID		: COUNT_ADDDEM_PNS		Version #		: 0.0001
Dict Type		: I		Attr#		: Val#		Subval#		:
Description		: COUNT_ADDDEM_PNS		Prompt		: COUNT_ADDDEM_PNS				
				Data Format						
Justify (L/R)		: R		()		Date		Year		:
Maximum Width		: 5		(*)		Numeric		Decim		: 0 Negs: N
Multi-Valued (Y/N)		: N		()		Y/N Only				
Sub-Valued (Y/N)		: N		()		'*' Only				
Required (Y/N)		: N		()		Time				
Allow Update (Y/N)		: N		()		Word Wrap Disp Lines:		Max Lines		:
Case Mapping		:		()		Eclipse Dictionary		Indexed (Y/N)		: N
SFA Category		:		()		Archived				
Format (Output)		:								
Update Subroutine		:								
Copy	Delete	Valid	I-Desc	Expand	Prompt	Log	Test	Access	Key	
Undo	Close	Program	SQL	Reporting						

- Verify that the **From Br** and **To Br** dictionaries are defined.

Eclipse Dictionary Maintenance										
File Name		: PRODUCT		Dict ID		: ADD_DEMAND_PNS_FBRS		Version #		: 0.0001
Dict Type		: D		Attr#		: 110		Val#		Subval#
Description		: Add Demand 'From' Branch		Prompt		: Add Dmd 'From' Br				
				Data Format						
Justify (L/R)		: L		()		Date		Year		:
Maximum Width		: 25		()		Numeric		Decim		: Negs:
Multi-Valued (Y/N)		: Y		()		Y/N Only				
Sub-Valued (Y/N)		: N		()		'*' Only				
Required (Y/N)		: N		()		Time				
Allow Update (Y/N)		: Y		()		Word Wrap Disp Lines:		Max Lines		:
Case Mapping		:		()		Eclipse Dictionary		Indexed (Y/N)		: N
SFA Category		:		()		Archived				
Format (Output)		:								
Update Subroutine		:								
Copy	Delete	Valid	I-Desc	Expand	Prompt	Log	Test	Access	Key	
Undo	Close	Program	SQL	Reporting						

Eclipse Dictionary Maintenance										
File Name		: PRODUCT		Dict ID		: ADD_DEMAND_PNS_TBRS		Version #		: 0.0001
Dict Type		: D		Attr#		: 112		Val#		Subval#
Description		: Add Demand 'To' Branch		Prompt		: Add Dmd 'To' Br				
				Data Format						
Justify (L/R)		: L		()		Date		Year		:
Maximum Width		: 25		()		Numeric		Decim		: Negs:
Multi-Valued (Y/N)		: Y		()		Y/N Only				
Sub-Valued (Y/N)		: N		()		'*' Only				
Required (Y/N)		: N		()		Time				
Allow Update (Y/N)		: Y		()		Word Wrap Disp Lines:		Max Lines		:
Case Mapping		:		(*)		Eclipse Dictionary		Indexed (Y/N)		: N
SFA Category		:		()		Archived				
Format (Output)		:								
Update Subroutine		:								
Copy	Delete	Valid	I-Desc	Expand	Prompt	Log	Test	Access	Key	
Undo	Close	Program	SQL	Reporting						

Adding Demand to New Branches
(Setting up a New Branch, Step 11 - Optional)

After you have all of your dictionaries setup and verified, create your mass load.

- Use the following parameters to create the mass load:

Report Writer/Mass Load Design				
Design ID : ADDDEMAND		Created : 09/09/09 By : ECLIPSE, INC.		
File Name : PRODUCT		Total Width : 48		
Title : Add Demand from Branch 2 to 4				
Col	Dict Item/Formula	Width	Typ	Default/Set Value
1	VIEWER_ID	10	D=	
2*	ADD_DEMAND_PNS	10	S	@ID
3*	ADD_DEMAND_EXP_DTS	10	S	"12/16/2009"
4*	ADD_DEMAND_PNS_FBRS	4	S	"Riverhead": "%SVM%": "2"
5*	ADD_DEMAND_PNS_TBRS	4	S	"Southold": "%SVM%": "4"
6	COUNT_ADDDEM_PNS	5	D=	

Sel Build	Adv Selection	Ecl Dct	Col Data	CopY	Del	Hdg	1 of 6	AnalyZer
Run Rpt	Dict SUn	Label Opt	Notes View	Begin Load	Set Val	LoG	Files	Path

- Make sure the ADD_DEMAND items have the **Typ** column set to **S**.
- Use the Phantom (scheduling) to run this mass load. Do not use the continue option.
- Test one product before running this for a group of items.
- Use the following select statement to narrow your list based upon the position that you will be updating in the product file.

Report Writer/Mass Load Selection			
File Name : PRODUCT		Sample :	
Select Number : 1		Count : 1186	
		Reselect (Y/N) : Y	
Conj	Dictionary Name	Op	Compare To
***	RANK#3	=	"A""B"
AND	COUNT_ADDDEM_PNS	=	"1"
AND	STATUS	=	"1"

For example, the above selection parameters selects all A and B ranked items in Branch 2 that have one item already listed on the Add Demand screen in the product file. In order to add to the list without overriding what is already listed, the system updates value 2:

Col	Column Heading	Column Data	Prompt	Data
2*	Add Dmd ID's	Multi Value Pos		2
3*	ADD_DEMAND_EXP_DTS	Multi Value Pos		2
4*	Add Dmd 'From' Br	Multi Value Pos		2
5*	Add Dmd 'To' Br	Multi Value Pos		2

- Run the mass load report in summary mode set to break on the COUNT_ADDDEM_PNS.

This format provides the number of add-demand values tied to your products and displays the largest number tied to an item. If the highest count is 6, then your first pass with the mass load should be to select items with the COUNT_ADDDEM_PNS = "6" to narrow your list. When updating, set your Column data to update Multi Value Pos = 7.

- With each pass, decrease the number on the Select and the Column Data by one (1).

For more information about how demand works, see *Adding Demand History to Products* or *How the System Calculates Demand per Day* in the Forecasting online help documentation.

Creating and Maintaining Branches and Territories

For more information about how report writer works, see *Designing Mass Load Layouts* in Report Writer and Mass Load online documentation.

Creating Transfer Matrix Cells (Setting up a New Branch, Step 12)

You can create matrix cells for existing company parameters or separate company parameters. If you are planning to transfer material between branches, the system uses transfer order entry, suggested transfers, suggested transfer returns and surplus transfer returns. Matrix cells need to be in place to make sure that the system is transferring the material at the correct cost value.

Existing Company

Customer-specific matrix cells are higher on the matrix hierarchy than a Class / Group matrix cell. We recommend creating the matrix cell as customer-specific with your branch Customer ID and Group set to All.

Sell Matrix Maintenance	
File	Edit User Tools Help
Customer	Eclipse Distribution
Group	ALL
Branch/Territory	DFLT
Effective Date	01/01/1980
Expire Date	12/31/9999
Matrix Type	N
Different Matrix	
Branch	
Class	
Expire Quantities	
Original	
Remaining	

Note: The Customer ID for your branch is displayed in Branch Maintenance.

Separate Company

If you plan to ship material between two separate companies running on the same system, customer and vendor records need to be created for each company. The customer record is a bill-to / ship-to record and is different from the branch in the Customer Maintenance record.

If company A needs to purchase material from Company B, a purchase order is generated in Company A. Company B, in turn creates a sales order to ship the material to Company A. Company B issues an Invoice to Company A, for which Company A pays for the invoice through A/P Entry. If special pricing must exist between the two companies, these are created through sell matrices and buy matrices so the purchase orders and the sales orders price accordingly.

Copying or Creating Matrix Cells (Setting up a New Branch, Step 13 - Optional)

Note: If all of the matrix cells in the system can be used for the new branch and are set to the Default branch this process is not required and you can move to *Deleting and Recreating Phantom Processes*.

The system uses the pricing branch's price sheet to apply the formula it finds on a matrix cell. If all the formulas are different, then the existing matrix cell can be copied to the new branch or territory and the formulas can be adjusted accordingly. If you plan on using a *territory* then make sure the territory is listed on the Branch Maintenance screen for hierarchy purposes, otherwise the system has no source for pricing information.

To copy a matrix cell:

1. From the **Maintenance > Price Maintenance** menu, select **Quick Sell Matrix**.
2. In the **Class** field, select the class you need to copy.
3. From the **File** menu, select **Copy**.
4. Adjust the formulas, if needed. For more information, see *Adjusting Formulas in Quick Matrix Maintenance* in Pricing Maintenance.
5. Save your changes and exit the window.

Important: Perform this procedure for each price class that is used in the new branch/company.

Matrix files contain hierarchies and expiration capabilities and therefore cannot be mass-loaded into the system.

However, if you wanted to start from scratch you can use the Matrix Upload Utility to load your matrix cells into the system. For more information on the Matrix Upload program see, *Creating User-Defined Matrix Cells During Price Updates* in the Pricing Management online help. There is also web-based training class available.

Deleting and Recreating Phantom Processes (Setting up a New Branch, Step 14)

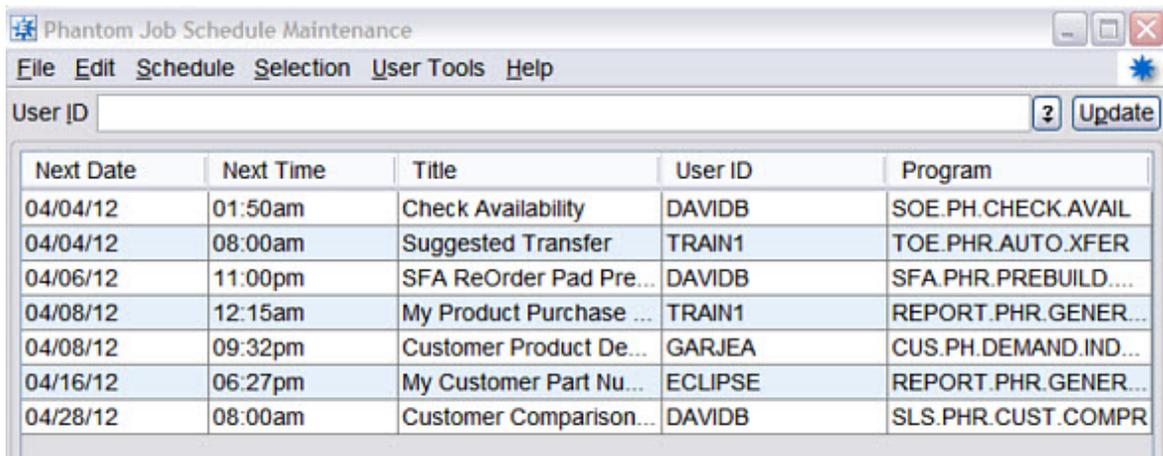
The system picks up any changes to territories by evaluating the territory when the report runs as opposed to when it is scheduled. Some reports can be edited directly from the phantom schedule without the cause for deletion. For example, the Inventory Valuation report can be edited and the driver can be updated from within the Phantom Job Scheduler. Therefore, before deleting the report, first access the edit function to determine if the branch can be added to the driver without the need of deleting.

Note: This feature is available only after Release 8.7.2. While currently scheduled reports will still work, to use this feature the reports must be rescheduled once after taking the Release 8.7.2 upgrade.

To display the scheduled phantom processes:

1. From the **System > Phantom Status** to display the current phantoms.
2. From the **File** menu, select **Edit Schedule** to display the Phantom Job Schedule Maintenance information.
3. In the **User ID** field, enter the user ID for whose phantoms you need to delete, edit, or reschedule. Leave blank to view all phantoms currently scheduled.

Note: If you are addressing phantoms for the entire branch, leave the field blank to make sure you do not miss any phantoms that should be rescheduled.



The screenshot shows a window titled "Phantom Job Schedule Maintenance" with a menu bar (File, Edit, Schedule, Selection, User Tools, Help) and a "User ID" input field. Below the input field is a table with the following data:

Next Date	Next Time	Title	User ID	Program
04/04/12	01:50am	Check Availability	DAVIDB	SOE.PH.CHECK.AVAIL
04/04/12	08:00am	Suggested Transfer	TRAIN1	TOE.PHR.AUTO.XFER
04/06/12	11:00pm	SFA ReOrder Pad Pre...	DAVIDB	SFA.PHR.PREBUILD....
04/08/12	12:15am	My Product Purchase ...	TRAIN1	REPORT.PHR.GENER...
04/08/12	09:32pm	Customer Product De...	GARJEA	CUS.PH.DEMAND.IND...
04/16/12	06:27pm	My Customer Part Nu...	ECLIPSE	REPORT.PHR.GENER...
04/28/12	08:00am	Customer Comparison...	DAVIDB	SLS.PHR.CUST.COMPR

4. Do one of the following:
 - From the **Schedule** menu, select **Delete** to delete the phantom altogether.
 - From the **File** menu, select **Adjust** to select a new date and time only.
 - From the **Edit** menu, select **Copy** to recreate the phantom.

For more information about how phantoms work and what you can do with them, see *Editing Phantom Process Schedules* in the System Maintenance online help documentation.

If a new phantom process must be initiated for the new branch, find the driver on your menu and schedule accordingly. For example, if your company does daily cycle counting and the new branch should follow the same procedures as your existing branches, this phantom would be its own separate scheduled event.

Creating Printer Locations (Setting up a New Branch, Step 15)

You must have your printers set up and connected before assigning the printer a location in Eclipse. Printer locations are assigned to user profiles as well as terminals. The new printers created for the new branch require printer locations. When the user logs into the system, the system may default to a printer location based upon the terminal setup, or prompt the user upon login to choose a location. The location selected determines where Eclipse prints its forms.

Use the following to help you setup your printer locations:

For more information about...	See...
setting up printer locations for your new branch	<i>Defining Printer Locations</i> in the Printers online help documentation.
printer locations	How Eclipse Determines Print Locations in the Printers online help documentation.
assigning your printers in the system	<i>Assigning Printers to the System</i> in the Printers online help documentation.
print styles	<i>Maintaining Print Styles</i> in the Printers online help documentation.
terminal printer locations	<i>Changing a Terminal's Printer Location</i> in the Printers online help documentation.

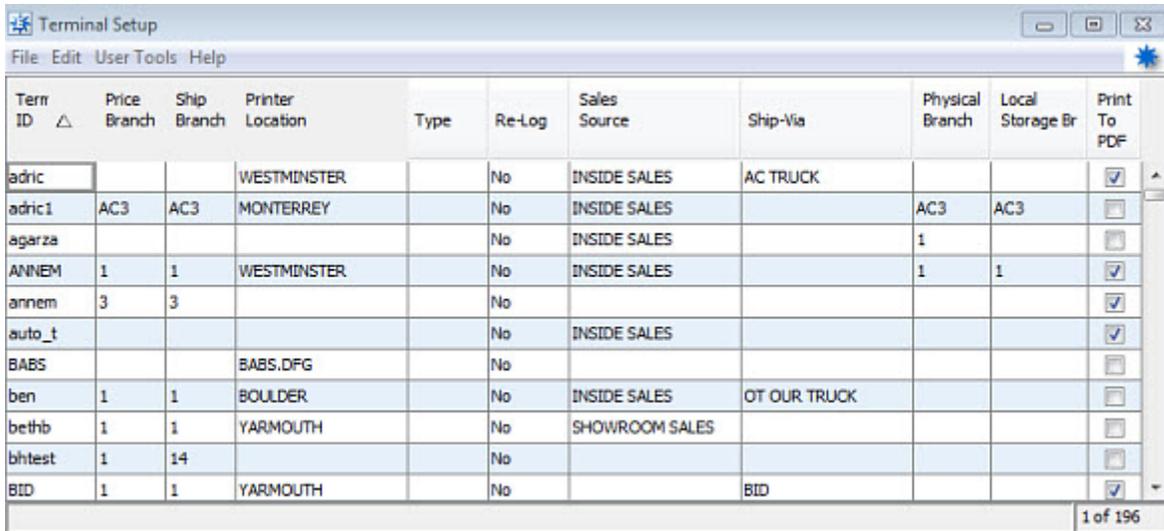
Note: Printer locations can be assigned to the ship via record for each branch, the branch assigned to the printer location, the default printer location control file and the terminal setup.

To check and update fax settings, see *Fax System Overview* in the Fax online help documentation.

Checking Terminal Settings (Setting up a New Branch, Step 16)

Both Solar and Eterm must have a terminal ID assigned in either the preferences or configuration. The terminal ID is used to set defaults in the system for the user to eliminate key strokes during processes, such as order entry.

To display the Terminal Setup information, from the **System > System Files** menu, select **Terminal Setup**.



Terr ID	Price Branch	Ship Branch	Printer Location	Type	Re-Log	Sales Source	Ship-Via	Physical Branch	Local Storage Br	Print To PDF
adric			WESTMINSTER		No	INSIDE SALES	AC TRUCK			<input checked="" type="checkbox"/>
adric1	AC3	AC3	MONTERREY		No	INSIDE SALES		AC3	AC3	<input type="checkbox"/>
agarza					No	INSIDE SALES		1		<input type="checkbox"/>
ANNEM	1	1	WESTMINSTER		No	INSIDE SALES		1	1	<input checked="" type="checkbox"/>
annem	3	3			No					<input checked="" type="checkbox"/>
auto_t					No	INSIDE SALES				<input checked="" type="checkbox"/>
BABS			BABS.DFG		No					<input type="checkbox"/>
ben	1	1	BOULDER		No	INSIDE SALES	OT OUR TRUCK			<input type="checkbox"/>
bethb	1	1	YARMOUTH		No	SHOWROOM SALES				<input type="checkbox"/>
bhtest	1	14			No					<input type="checkbox"/>
BID	1	1	YARMOUTH		No		BID			<input checked="" type="checkbox"/>

To view more information about the fields displayed, press **F9** when your cursor is on any of the columns. Following are several fields we recommend reviewing:

- **Terminal ID** - Verify the terminal IDs you need. It is not necessary for each workstation to have a unique ID. For example, if your sales counter has three workstations and they use the same defaults, they can all use the same ID. To find a specific ID, right-click, select **Search**, and enter the terminal ID. You can also click the column header and sort the terminals alphabetically. Use the blank line at the bottom of the window to type a new terminal ID.
- **Printer Location** - Select the printer location associated with this terminal ID. If you set a location in the **Location** column, it is the default printer location for the terminal when a user logs on to the terminal, accesses Sales Order Entry or Purchase Order Entry, or uses the change location function. If you leave the **Location** column blank for a terminal, the system prompts the user at log in and when they access order entry to select a location. If a physical branch is defined for the location using the **Physical** column, when you search, the list displays the locations within the physical branch first. Press **F10** again to display a list of all locations you are authorized to use in User Maintenance.
- **Ship Via** - Select the default method for transferring products ordered from this terminal to the customer. Ship vias are defined on the Ship Via Maintenance screen. If a customer does not have a default ship via assigned in Customer Maintenance and you leave this field blank, the system prompts the order taker at this terminal to enter a ship via for the customer's order.
- **Print to PDF** - Select the check box if you want the user to be able to print documents and forms to PDF. Meaning, when you print, the system displays the form or document as a PDF on your computer. You can then decide if and how to print it.

Creating New G/L Accounts (Setting up a New Branch, Step 17)

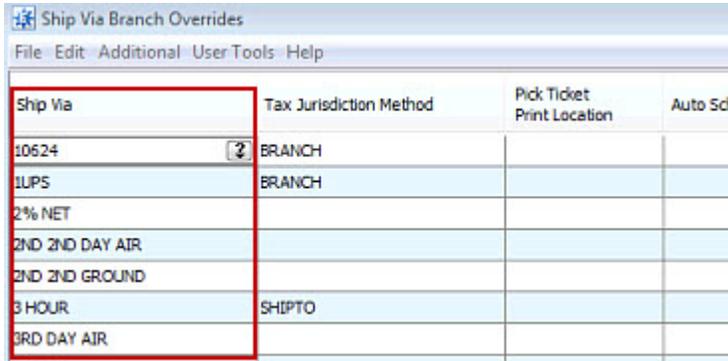
If the new branch requires additional G/L Accounts for posting, create the accounts in G/L Maintenance.

The Profit & Loss and other General Ledger reports can all be run based upon branches. Therefore, if you have two separate companies running on the same system, each company would run their own report using their branch territory or branch numbers. For example, if the new branch has a sales source that is different or new, you will need the Sales and Cost General Ledger accounts to point to the new auto postings related to the new sales source.

For more information about setting up general ledger reports, see *Customized G/L Reports* in the General Ledger online help documentation.

Verifying Ship Via Records Assigned (Setting up a New Branch, Step 18)

After building the branch file, you must assign the ship via records to the new branch. Use Ship Via Branch Overrides from Branch Maintenance to assign the ship vias to the new branch record. You can also delete ship via records from the list that are not relevant to the branch. The system checks the shipping branch to determine what list of ship via records are available for use.



The screenshot shows a window titled "Ship Via Branch Overrides" with a menu bar (File, Edit, Additional, User Tools, Help) and a table. The table has four columns: "Ship Via", "Tax Jurisdiction Method", "Pick Ticket Print Location", and "Auto Sc". The "Ship Via" column is highlighted with a red box. The table contains the following data:

Ship Via	Tax Jurisdiction Method	Pick Ticket Print Location	Auto Sc
10624	BRANCH		
1LPS	BRANCH		
2% NET			
2ND 2ND DAY AIR			
2ND 2ND GROUND			
3 HOUR	SHIPTO		
3RD DAY AIR			

You can also set the pick ticket printer location so that the system knows where the phantom should print these tickets. If you need unique ship vias for this new branch, first create the ship via in Ship Via Maintenance and then you can add it to the branch.

For more information about branch records, see *Creating Branch Records* in this documentation.

Authorizing Users Using Mass Load (Setting up a New Branch, Step 19)

After assigning ship vias and terminal settings, you need to authorize those users, who need to do business out of that branch, access to the branch. In other words, in order for the user to create transactions within the new branch, the user must be authorized to do so. If your user list is small, you can edit each user record accordingly through User Accessible Branches in User Maintenance.

However if you have a large list to deal with you can need to create a mass load to update all the users' records:

Note: Make sure that the AUTH_BR dictionary has the multi-value prompt set to **No**. If it is set to **Yes** and you have view-only access, copy the dictionary to a new name and set the multi-value prompt to **No**. Use the new dictionary item you created for your load.

In the following figure, the mass load is setting all the branches the user will have access to. Model your mass load along these lines. If your company has too many branches, and you cannot list them in this format you can add the new branch you want to the end of the list.

For example:

Report Writer/Mass Load Design				
Design ID : USER_AUTH_BR		Created : 04/03/12 By : Nicole Dursi		
File Name : INITIALS		Total Width : 28		
Title : User Auth Br				
Col	Dict Item/Formula	Width	Typ	Default/Set Value
1	@ID	12	D*	
2	AUTH_BRCH	15	S	"112131415161718"

The system adds a value marker to the existing data on the Authorized Branch list, and then adds the new branch to the end of the list with a mass load like the one shown here:

Report Writer/Mass Load Design				
Design ID : USER_AUTH_BR		Created : 04/03/12 By : Nicole Dursi		
File Name : INITIALS		Total Width : 28		
Title : User Auth Br				
Col	Dict Item/Formula	Width	Typ	Default/Set Value
1	@ID	12	D*	
2	AUTH_BRCH	15	S	:"%VM%": "CAPE"

This process keeps the integrity of the data and branches that are already authorized in place and simply adds the new branch to the end.

Setting Territory Flags

If users should have reporting, editing, viewing authority associated with territories that exist in the system, review the following example.

Authorizing Users Using Mass Load
(Setting up a New Branch, Step 19)

Report Writer/Mass Load Design				
Design ID : USER_AUTH_BR		Created : 10/30/07 By : Eclipse, Inc.		
File Name : INITIALS		Total Width : 39		
Title : USER AUTH BR				
Col	Dict Item/Formula	Width	Typ	Default/Set Value
1	@ID	12	D*	
2	EDIT_TERRS	8	D	
3	ALL_TERRS_FLAGS	8	S	"11111"
4	TERRITORY_FLAGS	8	S	"11111"

Enter Y on the **Override Automatic Build** and **Authorized for All Terrs** prompt for all three settings.

Authorized Territories	
Type: Editable	
Override Automatic Build: Y	
Authorized for All Terrs: Y	

However, if users should only be assigned these rights to a list of territories, the mass load would look like the one shown here:

Report Writer/Mass Load Design				
Design ID : USER_AUTH_BR		Created : 04/03/12 By : Nicole Dursi		
File Name : INITIALS		Total Width : 75		
Title : User Auth Br				
Col	Dict Item/Formula	Width	Typ	Default/Set Value
1	@ID	12	D*	
2	AUTH_BRCH	15	D	
3	VIEW_TERRS	8	S	"CB1EP1GLOBE"
4	REPORT_TERRS	8	S	"CB1EP1GLOBE"
5	EDIT_TERRS	8	S	"CB1EP1GLOBE"
6*	OVERRIDE_AUTO_BUILD	10	S	""
7*	ALL_TERRS_FLAGS	8	S	""

The end result display on the user file as follows:

Creating and Maintaining Branches and Territories

Authorized Territories	
Type: Reporting Override Automatic Build: N Authorized for All Terrs: N	
CB EP GLOBE	C.B. SCOTT COMPANY EASTERN PA SUPPLY COMPANY ALL REAL BRANCHES

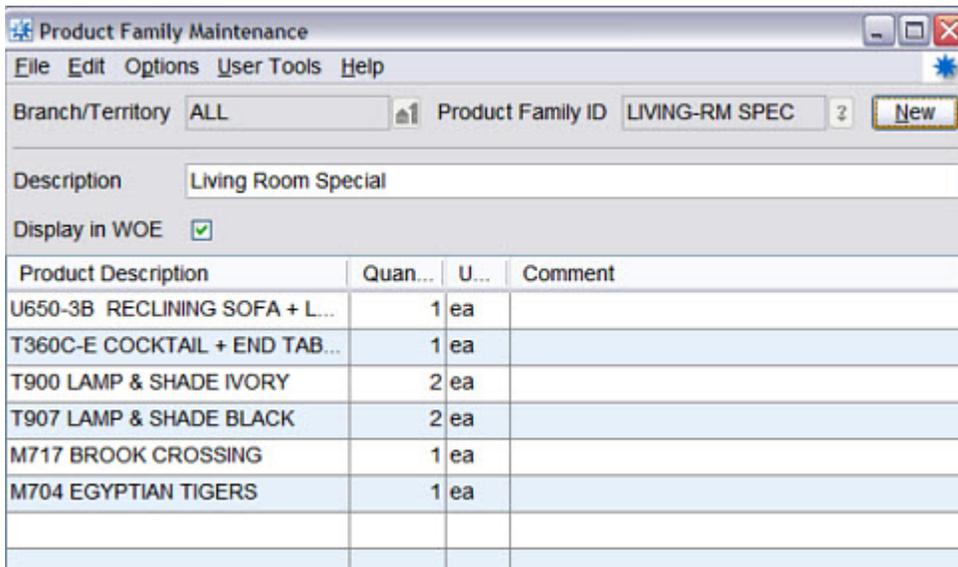
We recommend testing your mass load on a single record before setting all values for your employees.

Verifying Product Families (Setting up a New Branch, Step 20)

Product Families are a list of products that are frequently sold together. Verify the **Multiply Product Family Quantities By The Order Quantity** control maintenance record is set to **Yes**.

If your existing product families can be used in the new branch, there is nothing that you need to do. However, if you have unique families that should only display in the new branch, specify the branch for which it pertains when setting up the family.

Review Product Family Maintenance as follows:



The screenshot shows a software window titled "Product Family Maintenance". It has a menu bar with "File", "Edit", "Options", "User Tools", and "Help". Below the menu bar, there are two input fields: "Branch/Territory" with the value "ALL" and "Product Family ID" with the value "LIVING-RM SPEC". To the right of the "Product Family ID" field is a "New" button. Below these fields is a "Description" field containing "Living Room Special" and a "Display in WOE" checkbox which is checked. At the bottom of the window is a table with the following data:

Product Description	Quan...	U...	Comment
U650-3B RECLINING SOFA + L...	1	ea	
T360C-E COCKTAIL + END TAB...	1	ea	
T900 LAMP & SHADE IVORY	2	ea	
T907 LAMP & SHADE BLACK	2	ea	
M717 BROOK CROSSING	1	ea	
M704 EGYPTIAN TIGERS	1	ea	

Product Families may display in Web Order Entry. For more information, see *Web Commerce Overview* in the Web Commerce online help documentation.

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