



# Maintaining Customers and Vendors

Release 9.0.6



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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.

## Customer Maintenance Overview

Use Customer Maintenance to create and store records for customers, branches, and prospects. The customer record includes information about the following:

- Shipping, billing, and freight.
- Employee contacts.
- Individualized product and customer rank, including detail lots.
- Pricing classification lets you offer each customer the most reasonable price based on the customer's sales and reliability.
- The branches from which the customer can order products.

When you enter a customer's name on an order, on reports, or anywhere in the system, the search index accesses the customer's record, and uses the information it contains, as needed.

Set up each branch in your organization as an entity in Customer Maintenance before you set it up in Branch Maintenance.

## Creating Customer Records

Use the Customer Maintenance screen to create and maintain records for customers that identify customer-specific details such as freight, credit specifications, and detailed pricing information. If the customer has different billing and shipment addresses, create a separate record for each, and you must create the bill-to record first. For more information, see Defining Parent Companies and Dependents.

You can restrict access to fields and menu items on the Customer Maintenance window by setting the following control maintenance records and authorization keys:

- **Customer Maintenance Authorization Levels** - This control maintenance record assigns security levels to each field available for editing in Customer Maintenance.
- **Customer Maintenance Authorization Levels For New Customers BT/ST** - This control maintenance record restricts editing access to the **Bill To** and **Job** or **Ship To** fields in the Customer Maintenance window when creating new customers.
- **Respect User's Branch Authorization**- This control maintenance record to allow users full branch access to certain windows in the system, such as Terminal Setup.
- **Restrict Access to Customer Maint Based On User Authorized Branches** - This control maintenance record to indicate if you want to limit users to viewing only those records for customers whose branches are listed in the user's User Accessible Branches.
- **CUSTOMER.MAINT** - Assign Level 1 for view-only access, or Level 2 for editing access to Customer Maintenance.
- **CUSTOMER.MAINT.LEVEL** - If a user has CUSTOMER.MAINT Level 2, the system uses the levels assigned in control maintenance records listed above and the user's levels assigned in CUSTOMER.MAINT.LEVEL to determine whether the user can edit fields in Customer Maintenance. A user must have the same level or higher as assigned in the control maintenance records to edit the field in Customer Maintenance.

### To create a customer record:

1. From the **Maintenance** menu, select **Customer** to display the Customer Maintenance window.
2. Click the **New Customer** button and enter the customer's name in the **Name** field; or select **File > New Wizard** to quickly set up new customer information using the wizard.

The system generates a unique customer number, which displays in the lower-left corner of the window.

**Note:** To edit an existing customer record, enter that customer's name in the **Customer** field.

3. Complete the fields, as needed:

Field	Description
Name	Enter the customer's name as you want it to appear on documents. If this is the customer's bill-to record, use the customer's legal name.

Field	Description
<b>Address</b>	Do one of the following: <ul style="list-style-type: none"> <li>• If this is the bill-to address, enter the address to which to send correspondence.</li> <li>• If this is the ship-to address, enter the address to which to send product shipments.</li> </ul> <p><b>Note:</b> If you need additional lines to complete the address, select <b>Additional &gt; Additional Address</b> to enter the remainder of the address.</p>
<b>City</b>	Enter the name of the city that corresponds to the address entered above. The system displays a selection list. Select the state and zip code from the list and press <b>Enter</b> to populate the <b>Zip, State,</b> and <b>Country</b> fields.
<b>Sort by</b>	Enter alphanumeric characters of the most significant word in the customer name, or any combination of numbers or letters for the system to refer to when sorting customers in alphabetic order.
<b>Bill-To</b>	If this is a ship-to customer, enter the customer's bill-to record name. The bill-to customer record must already exist in the system.
<b>Index</b>	Enter additional words for the search index to use when searching for this customer. This field is required. The system uses the words in this field as tokens in the search index. You can add any information in this field that might be useful for a search. For example, If you know your customers by their customer number on your old system, enter that number in this field; or if the customer name is long, enter an abbreviation for the name.

4. Click the **Phones** tab, and enter the customer's primary phone and fax numbers. For example, in the **Type** column enter **Fax1** for the primary fax number, and **Main** for the main office number, and enter those numbers in the adjacent **Number** column.

If you do not enter the fax code, faxed invoices, statements, and memos go to the main fax number.

5. Click the **Contacts** tab and enter the name, title, and phone number of employees at the customer with which you regularly do business.

**Note:** Use these tabs as a quick-reference list. This information is not directly connected to the information entered through the **Create New Contact** button on the **Contacts** tab, where you can add detailed contact information in a Contact record. However, by enabling the **Validate Name In 'Ordered By' Field Against Customer Contact** control maintenance record, the system can use this list to check user authorization for taking credit card orders.

6. Click the **WWW** tab, and enter the customer's e-mail and internet information.
7. In the **Customer Type** area, check any of the options that apply to this customer record.

Select this option...	if...
<b>Bill-To</b>	this customer's name and address is the one used for billing purposes. You can flag the customer as both a bill-to and a ship-to.

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Select this option...	if...
<b>Ship-To</b>	<p>this customer's name and address is the one to which you ship product.</p> <p>You can flag the customer as both a bill-to and a ship-to. If the customer is a ship-to but not a bill-to, enter the bill-to customer associated with this ship-to in the <b>Bill</b> field.</p> <p><b>Note:</b> You can set a ship-to only customer's price class to null on the Customer Pricing/Printing screen, so that the ship-to inherits the bill to's price class.</p>
<b>Ship-To Address Changes Restricted</b>	<p>you want to limit who can change ship-to addresses on sales orders. Users with the SOE.ALLOWED.ADDR.CHANGE authorization key can change a ship-to address when this is selected.</p>
<b>Branch</b>	<p>the entity is a branch of your company, 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.</p>
<b>Branch Cash Account</b>	<p>you do not want A/R to accumulate in this account.</p> <p>When you flag this option, also flag the <b>Bill-To and Job</b> or <b>Ship-To</b> fields. Use this type of customer to:</p> <ul style="list-style-type: none"> <li>• Enter cash sales for people who are not regular customers</li> <li>• Create a <i>generic</i> customer record for cash sales.</li> </ul>
<b>Prospect</b>	<p>this is a prospective customer who has yet to place an order with you. Prospect customers do not require a bill-to or ship-to association.</p>
<b>Customer P/O Required</b>	<p>you want to require a purchase order number regardless of the transaction.</p>
<b>Auto-Delete</b>	<p>the system should delete this customer AFTER all associated history, open bids/orders and closed invoices are purged.</p> <p>You can delete a customer only if there are no ledger, PSUB, or A/R records associated with it.</p> <p><b>Note:</b> To keep the unused customer from displaying on reports, set the home branch to a dummy branch, and do not include that branch on the report.</p>
<b>Customer Release Number Required</b>	<p>Select from the following options:</p> <ul style="list-style-type: none"> <li>• <b>None</b> - Neither a purchase order number nor a release number is required.</li> <li>• <b>P/O</b> - A purchase order number is required.</li> <li>• <b>Release#</b> - A release number is required.</li> <li>• <b>Both</b> - Both purchase order number and release number are required.</li> </ul> <p><b>Note:</b> The system prompts for these numbers in order entry if you select any option except <b>None</b>.</p>

7. In the lower right area of the Customer Maintenance window, complete the fields, as needed.

Field	Descriptions
<b>Backorder Status</b>	<p>Do one of the following:</p> <ul style="list-style-type: none"> <li>• Enter a sales order entry default status for backordered items for this customer. Descriptions of statuses:</li> <li>• <b>L</b> - (Call When Available) The order is displayed in the Call When Complete Queue when any item on that generation (even a partial quantity of that line item) is available.</li> <li>• <b>A</b> - (Ship When Available) The System ships items on the generation of an order as they become available even if the total quantity of that line item is not available.</li> <li>• <b>C</b> - (Call When Complete) The order is displayed in the Call When Complete Queue when the entire generation of the order is available.</li> <li>• <b>H</b> - (Ship When Complete) The System ships the entire generation of the order when it is complete.</li> <li>• <b>M</b> - (Ship Item Complete) The System ships total line item quantities on the generation of an order as they become available. It does not ship partial quantities of line items.</li> <li>• <b>B</b> - (Bid) Bid status is assigned to the item, which does not commit inventory.</li> <li>• <b>X</b> - (Cancel) Indicates you do not want to allow any back orders to be placed.</li> <li>• Leave the field blank to use the setting in the <b>Customer B/O Action Default</b> control maintenance record. If that record is blank, then an order writer can decide the status at the time the order is taken.</li> </ul>
<b>Outside Salesperson</b>	<p>Enter the user ID of the default outside salesperson for this customer.</p> <p>If split commissions are in effect for this customer, and you enter a salesperson who is not included in the split commission percentage, the Salesperson Split Commission Percentage screen displays. You can then update the split commissions settings to reflect your change.</p> <p><b>Note:</b> If you change the outside salesperson, the system prompts you to ask if you want to change the salesperson in all open orders and/or bids. You must be assigned the SOE.SALESPERSON.EDIT authorization key to make these changes.</p>
<b>Inside Salesperson</b>	<p>Enter the user ID of the default inside salesperson for this customer.</p> <p>If split commissions are in effect for this customer, and you enter a salesperson who is not included in the split commission percentage, the Salesperson Split Commission Percentage screen displays. You can then update the split commissions settings to reflect your change.</p> <p><b>Note:</b> If you change the outside salesperson, the system prompts you to ask if you want to change the salesperson in all open orders and/or bids. You must be assigned the SOE.SALESPERSON.EDIT authorization key to make these changes.</p>
<b>Ship Via</b>	<p>Select the default method of shipment this customer uses.</p> <p>For more information, see Adding a Customer to a Ship Via Delivery List.</p>
<b>Freight In Exempt</b>	<p>To exempt the customer from incoming freight charges, enter <b>Yes</b>, otherwise leave <b>No</b> in the field.</p> <p>If you enter <b>Yes</b>, when you enter a freight charge on the Order Entry Total window or on the OE Freight Distribution window, a message displays confirming that this customer is exempt.</p>

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Field	Descriptions
<b>Freight Out Exempt</b>	To exempt the customer from outgoing freight charges, enter <b>Yes</b> , otherwise leave <b>No</b> in the field. If you enter <b>Yes</b> , when you enter a freight charge on the Order Entry Total window or on the OE Freight Distribution window, a message displays confirming that this customer is exempt.
<b>Export Only</b>	Select one of the following depending on how often this customer creates orders that are exported from the current country: <ul style="list-style-type: none"> <li>• <b>No</b> - Customer never exports material.</li> <li>• <b>Yes</b> - Customer <i>always</i> exports material.</li> <li>• <b>Prompt</b> - Customer exports material often enough that users should be prompted if the order is an export order or not.</li> </ul>

### More Options for Creating Customer Records

The following are some common options you might use while creating customer records.

To...	Select this menu option...
define criterion that affects options on sales orders for this customer.	<b>Orders</b>
define criteria for pricing and printing, such as rebates, credit, and taxes, and invoice printing for this customer or to set up parent customer information.	<b>Pricing</b>
set up classifications and groups for customers.	<b>File &gt; Classify &gt; Customer Groups</b> <b>File &gt; Additional &gt; Customer Groups</b>
view a summary of the balances on a bill-to customer's accounts without having to call up each account separately.	<b>Additional &gt; AR Summary</b>
create a record of a customer's certified employees who can buy regulated products.	<b>Additional &gt; Product Certification</b>
display a list of a bill-to customer's ship-to addresses. If you select this option from a ship-to only customer record, it displays the customer record of the bill-to address.	<b>Additional &gt; Entity Relations</b>
enter additional words for the system to use to search for this customer.	<b>Additional &gt; Keywords</b>
set up additional customer information.	<b>Additional &gt; Additional Customer Information</b>
set up an EDI trading partner profile for this customer.	<b>Additional &gt; Additional Customer Information</b>
enter notes, instructions, and prompts regarding this customer.	<b>Additional &gt; Customer Notes</b> <b>Additional &gt; Reminder Notes</b>
create a price line list for generating customer reports.	<b>Additional &gt; Price Lines</b>
override default branch settings for a customer or vendor.	<b>Additional &gt; Branch Overrides</b>
change the commissions earned by the writer, inside salesperson, or outside salesperson for sales to this customer without affecting that person's overall commission plan.	<b>Additional &gt; Commission Override</b>
split the commission between salespersons working with a customer account.	<b>Additional &gt; Split Commission Percentages</b>

To...	Select this menu option...
set activities to occur in response to customer-related events.	<b>Additional &gt; Activity Triggers</b>
identify product zones from which the customer is allowed to buy products. If no product zones are defined, the customer has access to all products.	<b>Additional &gt; Product Zone</b>
give your customers additional product information by linking to other web sites.	<b>Additional &gt; Reorder Pad Excluded Products</b>
validate a final staging location for the customer.	<b>Additional &gt; Customer Staging Location</b>
define products, vendors, and branches for use with the Virtual Supplier companion product.	<b>Additional &gt; Virtual Supplier</b>
enter one or multiple vendor pay-tos from which this customer is not allowed to buy product without authorization. The system places the P/O on hold if the customer attempts to purchase items from this vendor through your company. To release a hold, you must be assigned the POE.ASL.RELEASE authorization key.	<b>Additional &gt; Vendor Hold List</b>
attach all sales orders for the customer to a specific master job bid. See Master Job Bid Entry and Maintaining Job Bids for more information.	<b>Additional &gt; Master Job Bid Maintenance</b>
apply customer ranks.	<b>Additional &gt; Manual Ranks</b>
add more options to the toolbar for this type of record. For example, the Customer Maintenance window will display the selected menu items for all customer records.	<b>User Tools &gt; Customize Toolbar</b>
use the Eclipse Imaging tools.	<b>User Tools &gt; Imaging</b>

## Uploading Customer Information

Use the Customer File Update utility to upload customer data from a spreadsheet or text file to the system for existing customers and for prospective customers. The uploaded data creates a customer record for new customers and updates information on existing customer records. This method saves the time it would normally take to create and update individual customer records.

This topic contains the following procedures:

- Uploading customer part numbers.
- Changing the file format.

### To upload customer data:

1. Display the character-based system.  
**Note:** The process functionality is not available in Solar Eclipse as of this release.
2. Upload the file containing the part numbers, if necessary.
3. Select the file to process and use the **Process** hot key to display the User Defined Upload Processing screen.
4. In the **Processing Type** field, enter **Customer Update**.
5. Use the **Begin** hot key to display the Contact File Update screen.
6. In the **Work ID** field, do one of the following:
  - Leave the field blank - Does not save the template after this upload.
  - Enter a name that identifies the upload file - Creates a new template for use with future uploads.
  - Press **F10** and select an ID - Uses an existing template.
7. In the **Desc** field, enter a complete description for the upload.
8. In the **Update Index** field, enter an index to match the contact in the system to the customer on the spreadsheet.  
Use the CUS.NO Eclipse dictionary index to match the contact record ID using the @ID dictionary item. All other entries search on user-defined data.
9. Use the **Layout** hot key to prepare the system for the type of upload file.
10. In the **New Items Mode** field, enter one of the following:
  - **Prompt** - Selectively adds new customers to the file. The Update Matching screen displays every time the system encounters a new contact. This update may take several minutes if the update file contains many new contacts.
  - **Ignore** - Updates existing customers without adding new contacts. Unless the update contains new customers only, use Ignore mode the first time you run the update. Run it a second time for existing customers that were missed by the update, after correcting the records.
  - **Create** - Updates existing customers and creates records for any new customers in the update file. Run the update in Create mode only after you have updated the existing customers. If the file contains new customers only, you can select Create the first time you run the update.

We recommend running the update in Ignore mode the first time you run it.

New customers created using this process use the customer record specified in the New Customer Maintenance Template control maintenance record as a template for the home branch of the user running the customer update.

11. In the **Customer Data** field, press **F10** and select the data criteria to update, such as ADDRESS.
12. In the **Start** or **Elmt#** field, scroll down the list to find the data format to match in the update file.

The title of the first column in the **Data Format** section toggles depending on which format you are using for the update. In blocked format the column shows **Start**, in variable format it shows **Elmt #**. In either format, you point to the location of data in the update file.

For blocked records:

- **Start** - For each **Customer Data** item, enter the number for the starting position on the upload file.
- **Lngh** - For each **Customer Data** item, enter the number of characters needed for the data on the upload file.

For variable records:

- **Elmt#**- For each **Customer Data** item, enter the column number from the upload file.

13. In the **Dec#** field, enter one of the following for numeric data:

- The appropriate number of decimal places if the decimal point is not embedded, but the numeric data contains a defined number of decimal places.
- A zero if the decimal point is embedded.

14. Use the following hot keys as described below:

- **Begin** - Starts the upload. The system imports customer data into new or existing records.
- **Delete** - Deletes the upload template when you type **delete** at the prompt.
- **Fixed Value** - Hard-codes a value for the selected item in the **Customer Data** column. For example, to use the 80303 zip code for all updated customer records, select ZIP and enter 80303. This entry overrides the value in the **Elmt#** or **Start** field for the selected item.

**Note:** If the system finds errors in the report data, it generates a Failed Entries report and places it in your Hold file.

### Changing the file format:

1. From the Customer File Update screen, use the **Layout** hot key to display the Customer File Updating Record Layout screen.
2. In the **Record Type** field, enter one of the following formats for the upload file:

- **Blocked** - fixed-length.
- **Variable** - comma- or tab-delimited.

**Note:** Data elements in a blocked record may also be separated by a delimiter.

3. In the **Record Length** field, enter one of the following:

- Enter the number of characters necessary if specifying a record length.

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- Leave the field blank if not specifying a record length.

**Note:** This field is accessible only for blocked-type records.

4. In the **Delimiter Char** field, enter the character used between each field as a delimiter, such as a comma. This field is active only for variable record type files.
5. In the **ASCII Value** field, enter the ASCII value for the non printable delimiter. For example, the ASCII value for a comma is 044.
6. In the **Delete Chars** field, enter any characters you do not want read as data, such as quotation marks or the dollar sign.
7. Press **Esc** to save the format and return to the Customer File Update screen to complete the upload.

## Using the New Customer Wizard

The New Customer Wizard displays the required Customer Maintenance fields in sequence, so you can quickly set up customer records. The information you enter on the Wizard displays when you next access that customer's record and the customer's contact records.

### To create a customer using the New Customer Wizard:

1. From the **Maintenance** menu, select **Customer** to display the Customer Maintenance window.
2. Select **File > New Wizard** to display the New Customer Creation Wizard dialog box.
3. To use the new wizard as the default method of entering a customer, select the **Use new wizard by default** check box.
4. In the **Name** field, enter the customer's name as you want it to appear on documents. If this is the customer's pay-to record, use the customer's legal name.
5. In the **Address** field do one of the following:
  - If this is the bill-to address, enter the address to which to send correspondence.
  - If this is the ship-to address, enter the address to which to send product shipments.
6. In the **City** field, enter the name of the city that corresponds to the address entered above.

The system displays a selection list. Select the city, state, and zip code from the list to populate the **Zip**, **State**, and **Country** fields.

7. Click the **Next** button to display the **Customer Type** dialog box.
8. Select any of the listed descriptions that apply to this customer record.

Check this option...	if...
<b>Bill To</b>	this is a customer's bill-to name and address. You can flag the customer as both a bill-to and a ship-to.
<b>Job or Ship To</b>	the customer is a Job or Ship-To name and address. You can flag the customer as both a bill-to and a ship-to. If the customer is a ship-to but not a bill-to, enter the bill-to customer associated with this ship-to in the <b>Bill</b> field.
<b>Branch</b>	if the entity is a branch of your company.
<b>Branch Cash Account</b>	you do not want A/R to accumulate in this account. When you flag this option, also flag the <b>Bill-To</b> and <b>Job or Ship-To</b> fields. Use this type of customer to: <ul style="list-style-type: none"> <li>• Enter cash sales for people who are not regular customers</li> <li>• Create a <i>generic</i> customer record for cash sales.</li> </ul>
<b>Prospect</b>	this is a prospective customer who has yet to place an order with you. Prospect customers do not require a bill-to or ship-to association.
<b>Customer P/O</b>	a purchase number is required for orders that this customer places.

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Check this option...	if...
<b>Customer Release Number Required</b>	a release number is required for orders that this customer places.
<b>Auto-Delete</b>	the system should delete this customer <i>after</i> all associated history, open bids/orders and closed invoices are purged. You can delete a customer only if there are no ledger, PSUB, or A/R records associated with it.

8. Click the **Next** button to display the **Customer Database Information** dialog box.
9. In the **Sort by** field, enter the most significant word in the customer's name, or any combination of numbers or letters for the system to refer to when sorting customers in alphabetic order.
10. If you did not designate this customer as a bill-to, you must assign a bill-to customer in the **Bill-To** field.
11. In the **Index** field, enter additional words for the search index to use when searching for this customer.

The system uses the words in this field as tokens in the search index. You can add any information in this field that might be useful for a search. Some examples:

**Example 1:** If you know your customers by their customer number on your old system, enter that number in this field.

**Example 2:** If the customer name is long, enter an abbreviation for the name.

13. Click the **Next** button to display the **Customer Order Information** dialog box.
14. Complete the fields, as needed:

Field	Description
<b>Statement Type</b>	Defines which type of statement to print for this customer. Valid values are: <ul style="list-style-type: none"> <li>• <b>B</b> (balance forward) - Includes unpaid invoices from previous billing cycles.</li> <li>• <b>O</b> (open item) - Includes invoices from the current billing cycle only. this is the default value.</li> </ul>

Field	Description
<b>Backorder Status</b>	<p>Do one of the following:</p> <ul style="list-style-type: none"> <li>• Enter a Sales Order Entry default status for backordered items for this customer.</li> <li>• Leave the field blank to decide the status at the time of purchase. Descriptions of statuses: <ul style="list-style-type: none"> <li>• <b>L</b> - (Call When Available) - The order is displayed in the Call When Complete Queue when any item on that generation (even a partial quantity of that line item) is available.</li> <li>• <b>A</b> - (Ship When Available) - The System ships items on the generation of an order as they become available even if the total quantity of that line item is not available.</li> <li>• <b>C</b> - (Call When Complete) - The order is displayed in the Call When Complete Queue when the entire generation of the order is available.</li> <li>• <b>H</b> - (Ship When Complete) - The System ships the entire generation of the order when it is complete.</li> <li>• <b>M</b> - (Ship Item Complete) - The System ships total line item quantities on the generation of an order as they become available. It does not ship partial quantities of line items.</li> <li>• <b>B</b> - (Bid) - Bid status is assigned to the item, which does not commit inventory.</li> <li>• <b>X</b> - (Cancel) - Indicates you do not want to allow any back orders to be placed.</li> </ul> </li> </ul>
<b>Outside Salesperson</b>	Enter the user ID of the default outside salesperson for this customer.
<b>Inside Salesperson</b>	Enter the user ID of the default inside salesperson for this customer.
<b>Ship Via</b>	<p>Enter the default method of shipment this customer uses.</p> <p>For more information, see <a href="#">Adding Customers to Ship Via Delivery Lists</a>.</p>
<b>Freight In Exempt</b>	<p>To exempt the customer from incoming freight charges, enter <b>Yes</b>, otherwise leave <b>No</b> in the field.</p> <p>If you enter <b>Yes</b>, when you enter a freight charge on the Order Entry Total screen or on the OE Freight Distribution screen, a message displays confirming that this customer is exempt.</p>
<b>Freight Out Exempt</b>	<p>To exempt the customer from outgoing freight charges, enter <b>Yes</b>, otherwise leave <b>No</b> in the field.</p> <p>If you enter <b>Yes</b>, when you enter a freight charge on the Order Entry Total screen or on the OE Freight Distribution screen, a message displays confirming that this customer is exempt.</p>
<b>Export Only</b>	<p>Select one of the following depending on how often this customer creates orders that are exported from the current country:</p> <ul style="list-style-type: none"> <li>• <b>No</b> - Customer never exports material.</li> <li>• <b>Yes</b> - Customer <i>always</i> exports material.</li> <li>• <b>Prompt</b> - Customer exports material often enough that users should be prompted if the order is an export order or not.</li> </ul>

15. Click the **Next** button to display the **Customer Contact Information** dialog box.

16. On the **Phones** tab, enter the customer's primary phone and fax numbers, and list the type of each number. Follow the guidelines:

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**Type** - Enter the type of phone for this customer. For example, enter:

- FAX to identify the main fax number.
- INV.FAX for the fax number used for invoices
- STMT.FAX for the fax number used for statements.
- MEMO.FAX for the fax number used for memos.

**Number** - Enter the number corresponding to the **Type** entry.

17. Click the **Contacts** tab, and then click the **Create New Contact** button to display the **Contact Maintenance** dialog box, where you enter contact information for the customer.

**Note:** By activating the **Validate Name In 'Ordered By Field Against Customer Contact** control maintenance record, the system can use this list to check user authorization for taking credit card orders.

18. Click the **WWW** tab to enter internet and e-mail address information.

19. Click **Finish** when you are done entering customer and contact information.

## Changing Customer Statuses

As you add customers to the system, you need a way to distinguish between billing addresses and shipping addresses. You can also keep track of prospective customer information, so that when a prospect places an order, you can enter additional information in their record. Use the Customer Maintenance window to store this information.

When a customer status changes from ship-to to bill-to, you may need to change the status of other customers, vendors, or branches that are linked to that customer record.

### To change a customer's status:

1. From the **Maintenance** menu, select **Customer** to display the Customer Maintenance window.
2. In the **Customer** field, enter a customer's name to display the customer record.
3. In the **Customer Type** area, check any of the items that apply to this customer.
4. Select one or more of the following check boxes to indicate the customer type:
  - **Bill To** - See the following table for more information.
  - **Ship To** - See the following table for more information.
  - **Prospect** - You need the CONVERT.PROSPECT authorization key to change a status of Prospect. When you enter an order or bid for a prospect, the Prospect field is deselected in the customer record, and the Bill-To and Ship To fields are automatically selected. Prospect customers do not require a bill-to customer association.

The following table describes the results of changing a customer's status.

If you...	then...
change a prospect to a customer	the system selects the Bill To and Ship To check boxes in the customer record.
change a customer back to a prospect	ensure the customer has no history, open orders, or open bids, and select the <b>Prospect</b> check box.
change a bill-to and ship-to customer record to a bill-to only	the system displays a list of ship-tos pointing to that bill-to.
change a bill-to and ship-to customer record to a bill-to only, and there is only one ship-to pointing to that bill-to	you cannot remove the last ship-to.
move any A/R records from one ship-to to another, in order to correct the above changes	run the Overnight Maintenance Report to locate duplicate entries.

5. Save your changes and exit the window.

## Defining Parent Companies and Dependents

In many cases, you ship and bill customer orders to the same address. However, a customer may have parent/dependent relationships that require that the bill be sent to a different location than the shipping address. For this reason, a customer can have separate ship-to and bill-to records. In the upper right section of the Customer Maintenance window, set up the customer's bill-to and ship-to status as described in the table below.

**Note:** If you flag the ship-to as "Separate A/R from Bill To" the ship to invoices will not show up on the parent statements.

If a customer is flagged as a...	send the customer...	and, set up the customer record as...
<b>ship-to only</b>	only the product sold	a ship-to record with assigned bill-to customer.  <b>Note:</b> You can set a ship-to only customer's price class to null on the Customer Pricing/Printing window, so that the ship-to inherits the bill to's price class.
<b>bill-to only</b>	only the bill for the product sold	a bill-to record with assigned ship-to customer(s).
<b>bill-to and a ship-to</b>	both the product and the bill	one customer record.

In addition, you can assign parent customers to identify the customer that is financially responsible for the entities that fall underneath it. This parent customer can have multiple dependents linked to it. You must link the parent customer from the dependent customer file.

**Note:** A parent cannot be *unlinked* if there has been a cash receipt applied to it on behalf of the bill-to.

Establishing the parent level of the hierarchy allows you to combine accounts receivable and sales information from the child entities to a single parent entity. Linking dependents to a parent customer also allows you to assign credit controls for the parent customer and apply them to the dependent customers in the relationship, post cash receipts to a parent customer, and print a parent customer statement that includes information for billing for the dependent customers. You can also select the parent customer on all major reports.

Use the **Parent Statement Customer** field **Printing** tab on the **Pricing > Customer Pricing and Printing Options** menu from the Customer Maintenance program to assign a parent customer for the dependent customer. By identifying a parent customer, the system produces statements for the parent that includes all open items for all ship-to customers that point to the parent. This statement is broken down with subtotals by ship-to customer. In addition, if you select a parent customer on reports, the system displays information for the parent and all its dependents.

For information about printing parent statements, see *Setting Up Parent Statements Print Parameters* in the Accounts Receivable documentation.

### To assign a parent customer:

1. From the **Maintenance** menu, select **Customer** to display the Customer Maintenance window.
2. Enter that customer's name in the **Customer** field for which you want to assign a parent.

3. From the **Pricing** menu, select **Customer Pricing and Printing Options** and click the **Printing** tab.
4. In the **Parent Statement Customer** field, select the customer to be the parent customer.  
**Note:** After you assign a parent customer, the system records the relationship. When you view the parent customer record, the system displays **Parent Customer** in the status bar.
5. Save your changes and exit the window.

## Assigning SFA Access to Entities

Define user message groups who can access entity information, such as customer maintenance or Eclipse Dictionaries, using the Eclipse Sales Force Automation (SFA) companion product from a laptop or Palm computing device. You can set different levels of access granted to each ID, depending on your security needs. In addition, you can assign SFA classifications, to build mass e-mails.

### To assign access to an entity:

- From the **Maintenance** menu, select one of the following:
  - **Customer** - Displays Customer Maintenance.
  - **Vendor** - Displays Vendor Maintenance.
  - **Contact** - Displays Contact Maintenance.
  - **Eclipse Dictionary > Dictionary Maintenance > Access** - Displays the Dictionary Maintenance screen. If prompted, log on to the character-based system.
- Enter an entity or dictionary name to display the record.
- Select **File > Access List** to display the Access Control List dialog box
- Select the first blank row and enter the user or message group name.
- In the **Level** field, enter one of the following activity levels:

Activity Level	Description
<b>No Access</b>	You cannot download information from this record to your laptop or Palm device. If you have access to a message group ID, use this option to deny access to users within that group. This level overrides any other levels assigned to the individual user IDs.
<b>View Only</b>	You can download information from this record to your laptop or Palm device, but you cannot make changes to the information.
<b>Review</b>	You can download information from this record to your laptop or Palm device and make changes to the information, but you cannot update the Eclipse database. The system creates a tracker with the changes and sends it to the user ID entered in the <b>SFA Administrator</b> control maintenance record.
<b>Full Access</b>	You can download information from this record to your laptop or Palm device, update the information, and sync it with the Eclipse database.

**Note:** To delete a user or group, select the row to delete, right click, and select **Delete Row**.

- Save your changes and exit the dialog box.

### To create SFA Contact Classification e-mail list:

- From the **System > System Files** menu, select **Control Maintenance** to display the Control Record Maint window.
- In the **Keyword** field, enter **Valid SFA** and press **Enter**.
- Select Valid SFA Contact Classifications.

4. Enter the name of the list you are creating, such as *Sales Referrals*.
5. Save your changes and exit the window.
6. From the **Maintenance** window, select **Contact**.
7. For *each contact* you want in the new classification, open the contact file.
8. In the **Classification** field, select your list name, such as *Sales Referrals*.
9. Create your e-mail distribution list for your new classification.
10. Save your changes and exit the window.

## Copying Entity Records

If you have several entities, such as customers or vendors who all use the same setup and pricing/cost information, you can create one entity record, copy it, and then change the address, contact, and any other information for similar entities. Copying in this manner prevents you from having to enter the same information repeatedly.

**Note:** Copying a customer or contact record does not copy the credit card or the electronic funds transfer (EFT) information on file for that entity.

### To copy an entity record:

1. From the **Maintenance** menu, select **Customer** or **Vendor** to display the Customer or Vendor Maintenance window.
2. Enter a customer or vendor's name to display the record from which to copy.
3. Select **File > Copy** to display the **New Creation** prompt.

**Note:** In Customer Maintenance, the system may prompt to copy tax information. This prompt is activated in the **Prompt To Copy Tax Information From Bill-Tos to All Ship-Tos** control maintenance record.

4. If you want to include any branch-specific overrides for the customer or vendor, click **Yes** at the prompt. To copy the customer or vendor without the branch overrides, click **No**.
5. Enter the **Reason for Change** if necessary, and click **Yes**.
6. Change the name, address, and contact information as needed for the new entity.
7. Save your changes and exit the window.

## Entering User-Defined Data for Entities

Use the User Defined Data window to enter additional user-defined information about a customer, vendor, or contact. This information is usually detailed or personal data that you learn about the company or contact in the course of doing business.

Examples of user-defined customer data:

- Number of Employees
- Buying Group
- Association
- Competitors

Examples of user-defined contact data:

- Birthday
- Years employed at this company
- Spouse's name
- Hobbies

The system stores customer, vendor, and contact user-defined data in the following user-defined files:

- CUST.CLASS
- CUST.GROUP
- VEND.CLASS
- CONTACT.CLASS

To limit which user-defined fields display on the User-Defined Data windows, complete the following control maintenance records:

- Customer Classification Sort List
- Vendor Classification Sort List
- Contact Classification Sort List

For more information, see the Creating User-Defined Files.

### To enter user-defined customer, vendor or contact data:

1. From the **Maintenance** menu, select **Customer**, **Vendor**, or **Contact** to display the entity's maintenance window.
2. Enter the entity's name to display the entity record.
3. Select **File > Classify** to display the User Defined Data window.

The system populates the following fields and columns:

- **File Name** - The system file name containing the user-defined prompts listed on the window.
- **Desc ID** - The entity for which this window is displayed.

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- **Prompts** - The field names for which you enter data. If completed, the control maintenance records listed above determine the field order in which the prompts appear on the window.
  - **Category** - The SFA Category assigned to each prompt in Dictionary Maintenance. The system uses the category for selection and sorting purposes.
4. In the **Input** column for any of the prompts listed on the window, enter the value to store for this entry.
  5. Use the **Sort** hot key to change the order in the field name list. Enter one of the following sort options:
    - **Default** - Sorts the field names in the order defined in the control maintenance record listed above.
    - **By Attribute** - Sorts the prompts by the attribute number assigned in Dictionary Maintenance.
    - **By Category by Prompt** - Sorts the prompts alphabetically by category, then within each category, alphabetically by prompt name.
    - **By Category by Attribute** - Sorts the prompts alphabetically by category, then within each category, by attribute number.
    - **By Prompt** - Sorts the prompts alphabetically by prompt name.
  6. Select **File > Category** to filter the categories displayed in the list to only those associated with one or more SFA categories.
  7. Save your changes and exit the window.

## Applying Customer Ranking Methods to Customer Records

If the **Overwrite Manually Set Customer Ranks** option is set in Customer Ranking, the system allows users to override ranks set through Accounts Receivable. Regardless of what rank the customer may fall in to, you can override that rank to treat the customer's information differently.

### To override a customer ranking method:

1. From the **Customer Maintenance** menu, display the customer for which you want to override the customer ranks.
2. From the **Additional** menu, select **Customer Ranks** to display the Customer Rank Maint screen.
3. In each **Rank** field, enter the rank, such as A, to assign to the customer.  
The ranks correspond with the ranking methods selected in the customer ranking process.
4. Save your changes and exit the window.

## Adding Alternate Ship-To Addresses

Use Alternate Ship-To Address window to store alternate address for users to select through order entry when they do not have the SOE.ALLOW.ADDR.CHANGE authorization key assigned, but need to change the shipping address on a ship-to only customer.

You can store as many ship-to addresses, as needed, and then activate the ones you want your users to have access to.

**Note:** These alternate addresses are available for Job Management.

### To add an alternate ship-to address:

1. From the **Maintenance** menu, select **Customer Maintenance** to display the Customer Maintenance window.
  2. In the **Customer** field, enter the ship-to only customer that you want to add or activate alternate ship-to addresses for.
  3. From the **Orders** menu, select **Alternate Ship-To Addresses**.
  4. To add an address:
  5. Select **New**.
  6. Complete the address information and click **Activate** to make the address available for use.
  7. Click **OK**.
  8. Save your changes and exit the window.
-

## Entering Additional Customer Information

Use the Additional Customer Information dialog box to access a list of additional options for setting up detailed customer information.

### To enter additional customer information:

1. From the **Maintenance** menu, select **Customer** to display the Customer Maintenance window.
2. In the **Customer** field, enter the customer's name to display the customer record.
3. Select **Additional > Additional Customer Information** to display the Additional Customer Information dialog box.
4. On the **Order Information** tab, enter the information, such as lead times and overrides, as needed.

Field	Description
<b>Initial Status Override</b>	<p>The default order status the system uses for all orders for this customer.</p> <ul style="list-style-type: none"> <li>• If this field is blank, the system uses the default order status defined for this customer's ship via. If no order status is defined for the ship via, the system uses the default order status defined for the order taker's terminal. If no order status is defined for the terminal, the system assigns a status of <b>C</b> (Call When Complete) to the order.</li> <li>• If the entry in this field is <b>I</b> (Invoice), the initial status in the order will be <b>P</b> (Pick Up Now). With a status of <b>P</b>, the order is invoiced when the saves the information.</li> <li>• If the entry in this field is <b>P</b> (Pick Up Now), the system does not prompt for a required date in Sales Order Entry even if the <b>Prompt For Required Date In Sales Order Entry</b> control maintenance record is set to <b>Y</b> (always prompt) or <b>D</b> (user defined).</li> </ul>
<b>Sales Source Override</b>	The sales source entered here overrides the normal sales source assigned to an order for this customer.
<b>Shipping Branch Override</b>	The default shipping branch the system uses for this customer. Override this branch number in Sales Order Entry, if necessary.
<b>Pricing Branch Override</b>	The default pricing branch the system uses for this customer. Override this branch number in Sales Order Entry, if necessary.
<b>Required Date Lead Time</b>	<p>The number of days needed to deliver the product to the customer. In Sales Order Entry, the required date is today's date plus the number of days entered in this field.</p> <p>If you are using Web Commerce, this field overrides the setting in the <b>WOE Required Date Lead Time</b> control maintenance record.</p>
<b>Maximum Early Ship Days</b>	The number of days before the required date that an order can be shipped to this customer before the early shipment is classified as an <i>unquality event</i> and recorded by the Unquality Event Tracking Program.

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Field	Description
<b>Normal Delivery Time of Day</b>	<p>The time of day the delivery truck servicing this customer is scheduled to arrive at the customer's location. An on-the-hour time can be entered with a number including <i>a</i> for A.M. or <i>p</i> for P.M. Separate hours and minutes with a colon.</p> <p>When a manifest includes delivery to this customer, the time assigned here is displayed in the <b>DelTime</b> field for the customer on the Shipping Manifest Queue window. The system sorts stops using this time if multiple customers are on a route within the same zip code.</p>
<b>Eligible Ship Via Route Types</b>	<p>The ship via route types this customer is authorized for in sales order entry. Use this field to limit the customer to select routes that are defined for their zip code in Zip Code Maintenance. If this field is left blank, all the route types defined for the zip code are available for this customer in sales order entry.</p> <p>For more information about delivery route types, see Ship Via Route Types Overview in the Accounting Setup documentation.</p>
<b>Default Release Number</b>	<p>A control code that the customer can assign to an order for any purpose. Enter a default release number to assign to every order entered for this customer. If no default release number is entered in this field for a ship-to customer, the system uses the default release number entered for the associated bill-to customer.</p> <p>The default release number is assigned to the <b>Customer Rel #</b> field on the SOE Header window and it can be edited.</p>
<b>Commission Plan</b>	<p>Identifies the commission plan that will be used for sales made to this customer. This value overrides the commission plan assigned to the salesperson, but a commission plan entered on a sales order overrides this value.</p>

5. On the **Additional Information** tab, enter the information, such as select codes, UET parameters and demand information, as needed.

Field	Description
<b>SIC Code</b>	<p>This customer's four-digit Standard Industrial Classification (SIC) code. The Office of Management and Budget developed this code to facilitate statistical economic analysis and reporting of the state of the U.S. economy based on production, trade, and service enterprises. Use this code to group businesses with similar production processes, and with Report Writer to sort customers.</p>
<b>D &amp; B Number</b>	<p>The customer's Dun and Bradstreet number. Dun and Bradstreet provides commercial information and insight into business records.</p>
<b>Customer Select Code</b>	<p>A code that identifies in what kind of business the customer is involved, including whether they service commercial or residential customers. Use this information to filter customers for inclusion on some reports. One of the following options applies:</p> <ul style="list-style-type: none"> <li>• If no Customer Select Codes are defined, nothing displays.</li> <li>• If only one code is defined, that code is assigned.</li> <li>• If more than one code is defined, select one from the list that displays.</li> </ul>
<b>Time Zone</b>	<p>Indicates the time zone in which the customer resides.</p> <p>The time zone displays in the header of the Customer Activity Log Tracker Entry window of each tracker created for this customer.</p>

Field	Description
<b>Branch Demand Override</b>	<p>Assign the demand for shipments from a branch to this customer, regardless of from where the goods are shipped.</p> <p>When a branch is entered in this field, a record is written to the PSUB file for this branch in addition to the shipping branch for each invoice.</p> <p>This setting overrides the setting in the <b>Assign Demand Forecast To Price/Ship Branch Or By Zip Code</b> control maintenance record. Therefore, if a branch is specified in this field, the demand for all items for this customer are always applied to that branch.</p> <p><b>Note:</b> You must be assigned the CUST.DEMAND.BR.OVRD authorization key to access this field.</p>
<b>Exclude Demand Calc As Of</b>	<p>Enter the date on which the customer's orders should no longer be considered in the demand calculation. For more information, see <i>Excluding Product Demand by Customer</i> in this document.</p>
<b>UET Early Days Allowed</b>	<p>Set the number of days before and after the due date that a shipment can arrive from a vendor without creating an unquality event.</p>
<b>UET Late Days Allowed</b>	
<b>Acceptable QC Inspection Level</b>	<p>Enter the customer's requested quality control inspection level. Inspection personnel use Quality Control (Q/C) inspection levels to confirm that a detail lot is of the assigned quality rank. A Q/C inspection level relates to a product quality rank, for example, if a product has a low quality rank with a high inspection level, this indicates that the detail lot is of low quality.</p> <p>The rankings for this field are set up in the <b>Valid Detail Lot Q/C Inspection Levels</b> control maintenance records.</p>
<b>Acceptable Product Quality Rank</b>	<p>Enter the product quality ranking that this customer demands of a detail lot before accepting the finished items.</p> <p>The rankings for this field are set up in the <b>Valid Detail Lot Q/C Inspection Levels</b> control maintenance records.</p>

6. On the **Options** tab, define the information, such as excluding consignment credits, as needed:

Select the check box...	To...
<b>Accepts Substitutes</b>	allow substitute products on this customer's orders.
<b>Disable Duplicate PO # /Order Check</b>	<p>restrict the system from checking existing (open or invoiced) orders for duplicate orders or duplicate customer P/O numbers.</p> <p>If you leave this option unchecked, the <b>Duplicate Order Check</b> and the <b>Duplicate Customer P/O Number Check</b> control maintenance records operate as defined.</p> <p><b>Note:</b> We recommend you check this option for a generic customer, such as Retail Cash Sale, who might generate many orders for the same product or customer P/O number.</p>

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Select the check box...	To...
<b>Extra Handling Charge</b>	<p>charge the customer the auto-charge amounts set in Ship Via Maintenance.</p> <p>These charges apply only to the first generation of the order, regardless of the setting in the <b>Apply Extra Handling For Shipping To First Gen Only</b> control maintenance record.</p> <p><b>Note:</b> For orders using the StarShip companion product. To charge the customer the Auto-Charge amounts set in Ship Via Maintenance, enter <b>Yes</b>.</p>
<b>Exclude Consignment Credits</b>	<p>exclude credits from consignment billings.</p>
<b>TPCx Rationalized</b>	<p>The view-only <b>TPCx Rationalized</b> check box indicates that this customer is set up as a trading partner in Trading Partner Connect. For more information about setting up trading relationships and using Trading Partner Connect, see the Trading Partner Connect online help.</p>
<b>Exclude From Index</b>	<p>exclude this customer record from index searches.</p> <p>If the customer is a ship-to-only account, check this option, and set the <b>Exclude From Ship-To/Ship-From Selection If Excluded From Index</b> control maintenance record to <b>Y</b>. This ship-to account does not display in the ship-to selection list when creating a new sales order.</p>
<b>Requires Special Labels</b>	<p>indicate that you provide special labels on products or shipments for this customer. This field applies only to the Customer Profitability Analyzer. Creating and handling special labels for a customer costs you money, and can affect change how profitable it is to service the customer.</p>
<b>Requires Special Packaging</b>	<p>indicate that you provide special packaging for products or shipments for this customer. This field applies only to the Customer Profitability Analyzer Compiling to special packaging needs for a customer costs you money, and can change how profitable it is to service the customer.</p>
<b>Requires Customer P/O Line Number</b>	<p>requires users to enter line numbers for each line item on a purchase order. The line items print on forms, such as invoices. This line number corresponds to the line number on the customer's purchase order. This helps them identify the products they ordered by the line number that is entered on the sales order.</p> <p><b>Note:</b> P/O line numbers are not required on bids regardless of this setting.</p> <p>By selecting this check box, users are required to enter line items for all items on a purchase order before exiting the order. Users have the option to enter the numbers for each line immediately as they enter information or wait until they have completed entering items and enter all line numbers then. A prompt displays when exiting the sales order.</p> <p><b>Note:</b> We recommend testing your forms after upgrading (to Release 8.7.7 or higher) after implementing this feature. If you find your forms are not printing correctly, contact Eclipse Customer Support.</p>

Select the check box...	To...
<b>Requires Customer Part Number</b>	requires users to enter part numbers for each line item on a purchase order. The part number then prints on forms, such as invoices. By selecting this check box, users are required to enter part numbers for all items on a purchase order before exiting the order. The system provides an area to enter locations as well, but this is optional. Users have the option to enter the information immediate for each line item they enter, or wait until they have completed entering line items and enter all part numbers then. A prompt displays when exiting the sales order.
<b>Consignment Inventory</b>	allow the customer to maintain consigned inventory for usage or resale. Checking this option activates the <b>Under Ship-To</b> field, which defines the ship-to customer who is maintaining the consigned inventory. For example, if this is the customer record of a contractor working for a customer using consigned inventory. This contractor can use the consigned inventory of that ship-to customer. This contractor may be one of several crews working from a single parts trailer that is managed by the customer ship-to.

- In the **Detail Lot Information** area, set quality control inspection levels and quality product rankings that the customer requires for detail lot items purchased from you. If your customers have standards of quality control, you can assign a quality rank to detail lot items. More:

Inspection personnel use Quality Control (Q/C) inspection levels to confirm that a detail lot is of the assigned quality rank. A Q/C inspection level relates to a product quality rank, for example, if a product has a low quality rank with a high inspection level, this indicates that the detail lot is of low quality.

Enter the following information:

- **Acceptable Q/C Inspection Level** - Enter the customer's requested quality control (Q/C) inspection level.
- **Acceptable Product Quality Rank** - Enter the product quality ranking that this customer demands of a detail lot before accepting the finished items.

**Note:** The rankings for this feature are set up in the **Valid Detail Lot Product Quality Ranks** and **Valid Detail Lot Q/C Inspection Levels** control maintenance records.

- Save your changes and exit the dialog box.

## Identifying Customers Who Can Buy Regulated Products

Create a record of a customer's employees who are certified to buy regulated products, such as dangerous chemical compounds or compressed gases that require special handling.

You must have the CUST.CERTIFY.EDIT authorization key assigned to your user ID to edit the information on the Product Certification Maintenance screen.

### To identify a customer's employees who can buy regulated products:

1. From the **Maintenance** menu, select **Customer** to display the Customer Maintenance window.
2. In the **Customer** field, enter a customer's name to display the customer record.
3. Select **Additional > Product Certification** to display the Product Certification Maintenance dialog box.
4. In the **Cert Code** column, enter the product certification code that identifies employees who are authorized to purchase a particular type of regulated product. These user-defined codes are set up in the **Valid Product Certification Codes** control maintenance record.
5. In the **Certified Name** column, enter the name of the employee certified to buy the regulated product. This field is not validated.
6. In the **Certification #** column, enter the certification number assigned to the person who is authorized to buy the regulated product.

The testing agency that grants product purchase certification assigns the certification number to the individual. The customer provides the number, if required. This field is not validated.

7. Save your changes and exit the dialog box.

## Adding Keywords to Search for Entities

In an entity record, enter additional words for the system to use in the search index for a customer or vendor. For example, if you typically refer to a customer called Atlantic Baseline Systems as ABS, use ABS as an additional keyword.

### To add keywords to search for an entity:

1. From the **Maintenance** menu select one of the following:
  - **Customer** - Displays the Customer Maintenance window. Enter a customer's name to display the customer record.
  - **Vendor** - Displays the Vendor Maintenance window. Enter a vendor's name to display the vendor record.
  - **Contact** - Displays the Contact Maintenance window. Enter a contact's name to display the contact record.
2. Do one of the following:
  - For customers or vendors, select **Additional > Additional Keywords** to display the Additional Keywords dialog box.
  - For contacts, select **File > Keywords**.
3. Enter the keywords to use for searches for the entity.
4. Save your changes and exit the dialog box.

## Creating Price Line Lists for Customer Reports

If you attach price lines to your customers' maintenance records, you can then limit customer-related reports to the specific price lines they use.

### To create a price line list for customer reports:

1. From the **Maintenance** menu, select **Customer** to display the Customer Maintenance window.
2. In the **Customer** field, enter the customer's name to display the customer record.
3. Select **Additional > Price Lines** to display the Price Line Selection dialog box
4. In the **Price Line Code** column, enter each price line the customer uses.  
The **Price Line Description** column displays the full name of the price line.
5. To save this list for use with other customers, select **File > Save List**, enter a name for the list at the prompt, and click **OK**.
6. To save the list for this customer only, select **File > Save and Close**, and click **Yes** at the prompt.

### To edit a price line list:

1. From the **Maintenance** menu, select **Customer** to display the Customer Maintenance window.
2. In the **Customer** field, enter the customer's name to display the customer record.
3. Select **Additional > Price Lines** to display the Price Line Selection dialog box
4. If the list you want does not display, do one of the following:
  - Select **File > Recall** to display previously saved list. Select the price line from the list and click **OK**.
  - Select **File > Recall All** to display all price lines.
5. Edit or add to the list as needed:

To...	Do the following...
clear the price line list	select <b>File &gt; Clear</b> .
change an entry	select the row you want to change and then select a price line from the list.
find a price line in the list	right-click in the table and select <b>Search</b> . Enter the price line you want to find at the prompt, and click <b>OK</b> .
print the table	right-click in the table and select <b>Save Table</b> . Browse to the location to save the file, give the file a name, and click <b>Save</b> .
save the table as a file on your computer.	right-click in the table and select <b>Print Table</b>
create a graph of the data in this table	right-click in the table and select <b>Create Graph</b> .
add a price line within the table	right-click in the table and select <b>Insert Row</b> . A blank row displays above the row selected. Enter the price line.
delete a price line from the table	right-click in the table and select <b>Delete Row</b> .

6. Save your changes and exit the dialog box.

## Assigning Customers to Product Zones

Use product zones to restrict customer purchases to a selection of products. Customers with product zones are limited to buying only those products or only from price lines assigned to their zones. All products are available to customers for whom no product zones are assigned.

For example, if you have branches in Florida and Texas that stock the same products, you can restrict Florida customers to purchasing products only from price lines at your Florida branch. This saves money on shipping.

Before using product zones do the following:

1. Define product zones in the **Valid Product Zones** control maintenance record. Otherwise, all products are available for customer sales.
2. Set the **Display Products Within A Customer's Product Zones** control maintenance record to determine whether all products display in Sales Order Entry.
3. Assign the PRD.ZONE authorization key to users who need to view products outside the customer's product zone.
4. Assign product zones to customers.
5. Assign product zones to price lines.
6. Assign product zones to products, if necessary.

Product zone assignments at the product level override assignments at the price line level.

### To assign customers to product zones:

1. From the **Maintenance** menu, select **Customer** to display the Customer Maintenance window.
2. In the **Customer** field, enter a customer's name to display the customer record.
3. Select **Additional Product Zone** to display the Product Zones dialog box.
4. Do one of the following:
  - Select the product zones from the list for this customer.
  - Click **Recall List** to display a list of previously compiled lists, select a list, and click **OK**.
5. Save your changes and exit the dialog box.

## Applying Branch-Specific Overrides

Set the following defaults at the customer and vendor level that override settings at a branch or territory level:

- Inside and outside salesperson
- Ship via
- Order Entry message
- Terms code
- Price class

For example, if Dan Black is the default outside salesperson for all branches except for the NORT (northern) territory where Sam Vink is the salesperson you would enter Sam Vink's user ID in the **Value** field of the Branch-Specific Overrides dialog box for the NORT territory with an attribute of Outside Salesperson. In order entry, for all branches except the NORT territory Dan Black defaults as the outside salesperson, except when an order is entered for a branch in the NORT territory, in which case, Sam Vink defaults as the salesperson.

You must be assigned branch access in User Maintenance to override any attribute for a branch or territory.

### To apply a branch-specific override:

1. From the **Maintenance** menu, select **Customer** or **Vendor** to display the Customer Maintenance or Vendor Maintenance window.
2. In the **Customer** or **Vendor** field, enter a customer or vendor's name to display the entity's record.
3. Select **Additional > Branch Overrides** to display the Branch Specific Overrides dialog box. The **Entity** field displays the name of the Customer or Vendor from the Maintenance window.
4. In the **Branch/Terr** field, enter the branch or territory for which to apply an override. Enter **ALL** to apply the override to all branches.
5. In the **Attribute** column, select from the following attributes available to each branch.

For Customer Branches	For Vendor Branches
Outside Salesperson	OE Message
Inside Salesperson	Terms Code
Ship Via	
OE Message	
Terms Code	
Price Class	

6. In the **Value** column, select from a list of options relevant to the attribute selected in the **Attribute** field.
7. Save your changes and exit the dialog box.

## Validating Staging Locations for Customers

Use the Staging Locations screen to set up warehouse staging locations at each of your branches for specific customers. This feature provides a cross-reference to validate shipping locations.

### To validate a staging location for a customer:

1. From the **Maintenance** menu, select **Customer** to display the Customer Maintenance window.
2. In the **Customer** field, enter a customer's name to display the customer record.
3. Select **Additional > Customer Staging Location**, to display the Customer Staging Location dialog box

The system populates the **Customer** field with the current customer's name.

4. In the **Branch/Territory** field, enter a branch, or enter **All** to display all branches in the **Branches** field.
5. In the **Locations** field, enter the location at which this customer's shipments will be staged for each branch.
6. Save your changes and exit the dialog box.

## Entering Default Master Job Bids

If you have a customer who only orders from you against a master job bid, you can enter that master job bid on the Job Maintenance screen. When you do this, all orders entered for the customer are considered junior orders, and product quantities are entered against the quantities on the master job bid.

In addition, you can use this screen to identify that you want to combine all of the invoices entered each month against the master job bid into the invoice.

**Note:** To copy master job bids to regular orders, the master job bid cannot have items in **LotItem** status on any generation.

### To enter a default master job bid:

1. From the **Maintenance** menu, select **Customer** to display the Customer Maintenance window.
2. In the **Customer** field, enter a customer's name to display the customer record.
3. Select **Additional > Master Job Bid Maintenance** to display the Master Job Bid Maintenance window.
4. In the **Master Job Bid Order ID** field, enter the number that identifies the customer's master job bid.
5. In the **Consolidated Invoicing** field, enter one of the following as the customer's default setting:
  - **Yes** - Includes all the customer's orders in a consolidated invoice.
  - **No** - Does not include the customer's orders on a consolidated invoice. This setting displays in the **Consolidating Invoicing** field on the Job Maintenance dialog box in Sales Order Entry. You can change this setting in Sales Order Entry for any individual order to determine which orders to include on the customer's consolidated invoice.
6. Save your changes and exit the window.

## Defining Contract Buyer Fees for Customers

If you use a contract buyer for purchasing materials from vendors, and then directly ship the materials from the vendors to your customers or job sites, you can use Contract Rate Maintenance to set up the fees payable to the contract buyer.

You can set up a customer with Contract Rate Maintenance to charge the vendor a dollar amount or a percentage as a fee for contract buyer's services. When managing payments, the system looks at the rates specified for the ship-to customer first, then to the bill-to for this data.

### To define contract buyer fees for a customer:

1. From the **Maintenance** menu, select **Customer** to display the Customer Maintenance window.
2. In the **Customer** field, enter a customer's name to display the customer record.
3. Select **Additional > Commerce Fee**, to display the Contract Rate Maintenance dialog box  
The **Customer** field displays the customer name for the current customer record.
4. For the default vendor, set up the required default fee amounts and percentages for this customer as described in the table.

The **Default Portal Fee Amount** and **Default Portal Fee %** fields, on the left, represent bill-to vendors who use the default settings, and are not added to the vendor column.

5. In the **Vendor** column, list vendors that have exceptions to the default payment and commerce fees.
6. Enter one or both of the following values into the fee columns to charge the fee back to the vendor.

For the field...	enter...	for...
<b>Portal Fee</b>	<b>Amount</b> - A dollar amount to charge the customer for credit card payments.	the customer's portal fees for their Internet use.
	<b>%</b> - A percentage to charge for credit card payments.	
<b>Comm Fee</b>	<b>Amount</b> - A dollar amount to charge the customer for credit card payments	the customer's commerce fees for their Internet use.
	<b>%</b> - A percentage to charge for credit card payments.	
<b>Payment Fee</b>	<b>Amount</b> - A dollar amount to charge on each order.	general payment fees.
	<b>%</b> - A percentage of each order to charge.	

If you enter both dollar amount and percentage, and the customer makes partial payments on an order, the system charges the dollar amount and percentage for the first payment and the percentage for each consecutive payment.

7. Save your changes and exit the dialog box.

## Assigning Parent Customers to Customer Files

You can assign parent customers to customer files to identify the customer that is financially responsible. You can establish a parent customer that has one or more bill-to customers. Establishing the parent level of the hierarchy allows you to combine accounts receivable and sales information from the child entities to a single parent entity.

Linking dependents to a parent customer also allows you to assign credit controls for the parent customer and apply them to the dependent customers in the relationship, post cash receipts to a parent customer, and print a parent customer statement that includes information for billing for the dependent customers. You can also select the parent customer on all major reports.

Use the **Parent Statement Customer** field on the Pricing Options from Customer Maintenance to assign a parent customer for the dependent customer. By identifying a parent customer, the system produces statements for the parent that includes all open items for all ship-to customers that point to the parent. This statement is broken down with subtotals by ship-to customer. In addition, if you select a parent customer on reports, the system displays information for the parent and all its dependents.

**Note:** Selecting a parent in this field activates the **Use Parent** selection on the Credit Control Parameters window.

For more information about parent and dependent customer files, see *Defining Parent Companies and Dependents*.

## Excluding Product Demand by Customer

In order to manage how much inventory you are purchasing, you can exclude the demand of all sales to a customer. This exclusion can be set for a bill-to or ship-to customer. If set for a bill-to customer, the system applies the exclusion to all relate customers' orders. If set for a ship-to customer, then the exclusion only applies to that customer's orders. Using this exclusion feature helps reduce product demand on accounts that you are no longer selling to or for ship-to only jobs that have been completed.

The **Exclude From Demand Calc As Of** field in Customer Maintenance allows the user to set the date in the future on which the system will stop considering sales for that customer in the demand calculation. For example, if you have a job that concludes at the end of this year you set the date to 12/31/2012 on the ship-to only customer account for that job. On that date, when update demand runs, *all* sales history for that customer is excluded. If you want to exclude demand immediately, then enter today's date and the next run for Update Demand removes the demand of all products sold to the customer.

When the Update Demand program runs, the system excludes the selected customer's products. An indicator displays in the Inventory History Ledger that shows sales have been excluded, similar to an exceptional sale. The Demand Calculation Audit displays the demand quantity excluded.

---

**Important:** We recommend carefully setting up the customer for which you will be using the exclusion option. Using this option excludes *all* products for this customer from the beginning of time in the demand calculations regardless of the date entered. If you remove this date later, all products will be reconsidered.

---

In addition, users can report on this new date field using Eclipse Reports or Eterm Report Writer.

### To exclude product demand for a customer:

1. Make sure the customer has the job created as a ship-to-only Customer Type tied back to the bill-to customer so that you are only excluding those sales for that job.
2. Display the customer record for which you want to exclude product demand from your calculations.
3. From the **Additional** menu, select **Additional Customer Information** and click the **Additional Information** tab.
4. In the **Exclude Demand Calc As Of** field, enter the date on which you want to stop counting the products for this customer in the demand calculation.

**Note:** To exclude demand immediately, enter today's date.

5. Save your change and exit the window.

## Exclude Demand Example

For the example product below we focus on the demand audit for branch #4. Right now, there is no customer demand excluded. The new **Customer Demand Excluded** field in the Demand Calculation Audit displays the total amount of customer demand that was excluded.

## Excluding Product Demand by Customer

Primary Inventory Maintenance - 7-43-431 4" CTR LAV FAUCET W/POP-UP

Br	Stock	Buy Pkg (ea)	Div	PIL	OP/XP	Low Sale (ea)	EOQ	Monthly Demand	Monthly Hits	Leadtime XF Cycle	Safety LT Day
1C		10	No	1454	10	1.00	3	7.56	5.50	14	14
1	Auto	10	No	490	10	1.00	3m	4.53	4.58	14	14
2	Auto	10	No	186	15	1.00	0M	0.24	0.25	7	22
3	Auto	10	No	126	7	1.00	1m	0.09	0.08	7	22
4	Auto	10	No	652	3	1.00	2	2.70	0.58	7	16
6	Auto	10	No	498	1	2.00	1*	0.18	0.08	14	34

Demand Calculation Audit - Branch 4

Transaction Information		Demand Information	
Product Description (9542)		Date Last Calculated	
7-43-431 4" CTR LAV FAUCET W/POP-UP		09/05/2012	
Demand Pattern		NON-seasonal	
Demand Period Used		365 days	
Raw Hits for Period	7	Raw Demand for Period	33 ea
Number of Bill-To Customers	3	Exceptional Quantity to be Excluded	0 ea
Median Sale	2	Customer Demand Excluded	0 ea
Days out of Stock	0	Trend Information	
Lost Sale Factor Used	1.00	Trend Factor Used	
Largest Transaction	12 ea	Automatic Trend	N/A

After excluding the demand of (1) customer you can see the impact of the new calculation results:

- Order point was (3) is now (1)
- Monthly demand has dropped.
- Raw hits, largest transaction, etc.

When a customer is set to exclude the demand of all products they have purchased, it displays in the Demand Calculation Audit as if the sales never occurred.

Primary Inventory Maintenance - 7-43-431 4" CTR LAV FAUCET W/POP-UP

Br	Stock	Buy Pkg (ea)	Div	PIL	OP/XP	Low Sale (ea)	EOQ	Monthly Demand	Monthly Hits	Leadtime XF Cycle	Safety LT Day
1C		10	No	1454	10	1.00	4	5.34	5.08	14	14
1	Auto	10	No	490	10	1.00	4m	4.68	4.58	14	14
2	Auto	10	No	186	15	1.00	0M	0.24	0.25	7	22
3	Auto	10	No	126	7	1.00	1m	0.09	0.08	7	22
4	Auto	10	No	652	1	2.00	2*	0.33	0.17	7	22
6	Auto	10	No	498	1	2.00	1*	0.18	0.08	14	34

Demand Calculation Audit - Branch 4

Transaction Information		Demand Information	
Product Description (9542)		Date Last Calculated	
7-43-431 4" CTR LAV FAUCET W/POP-UP		09/05/2012	
Demand Pattern		NON-seasonal	
Demand Period Used		365 days	
Raw Hits for Period	2	Raw Demand for Period	33 ea
Number of Bill-To Customers	2	Exceptional Quantity to be Excluded	0 ea
Median Sale	2	Customer Demand Excluded	29 ea
Days out of Stock	0	Trend Information	
Lost Sale Factor Used	1.00	Trend Factor Used	
Largest Transaction	2 ea	Automatic Trend	N/A

## Defining Customer P/O Formats

Eclipse customer purchase order (P/O) numbers are free-form entries. However, if your customer has a system that generates purchase orders in a certain format for material purchases, you can define the format to use. You can define the format of a customer's P/O number, so that users entering the numbers are required to follow a specific format to keep all the customer P/O numbers consistent. Consistent P/O numbers help the Accounts Payable department match invoices and expedite the payment processes.

For example, if your customer uses an alphanumeric system with letters a dash and then numbers, such as AA-1234. Defining this format would allow users to enter SA-4579, but not S3-4579 or SA-45B6.

**Note:** If you want to limit the P/O numbers to a specific set, see Adding Valid P/O Numbers in this documentation.

### To define customer P/O formats:

1. From the **Maintenance** menu, select **Customer** and display the customer record you want to add purchase order formats to.
2. From the **Additional** menu, select **P/O Validation** to display the Customer PO Format Validation Layout window.
3. Click the **P/O Format Validation** tab, if not already selected.

The system displays the customer name in the **Entity** field.

4. (Optional) Use the **Default P/O Number** field to assign a purchase order number to every order entered for this customer. If no default P/O number is entered in this field for a ship-to customer, the system uses the default P/O number entered for the associated bill-to customer. The default P/O number is assigned to the **Customer PO #** field on the **SOE Header** tab and it can be edited.
5. Select the **Enable Customer PO Format Validation** check box to turn the P/O format functionality.

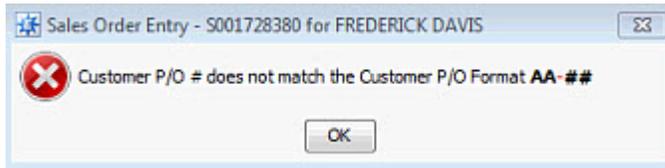
Selecting this check box ensures the system checks all purchase order format entries through Sales Order Entry conforms to the format indicated on this screen.

The screenshot shows a software interface for defining customer P/O formats. The 'Customer P/O #' field is highlighted with a red box and contains the value 'AA-1234'. A red arrow points from this field to the 'P/O Number' field, which also contains 'AA-1234'. Other fields include Branch # (1), Date Ordered (09/20/2013), Written by (DAWNM), Out Salesperson (HOUSE), In Salesperson (HOUSE), Sale Source (INSIDE SALES), Freight In Exempt (No), and Freight Out Exempt (No). The 'Ship Date' is 10/07/2013 and the 'Product Subtotal' is \$97.28.

6. In the **Format** field, select one of the following. You can use the selections in any order depending on your needs. See examples below.
  - **Constant** - Select to force the purchase order number to always have a specific value.
  - **Space** - Enter how many spaces you need in the purchase order number.
  - **Alphanumeric** - Enter the number of characters allowed for the purchase order number.

The status bar at the bottom of the window dynamically displays how the P/O number will look.

**Note:** If the format is mismatched, the user receives an error message.



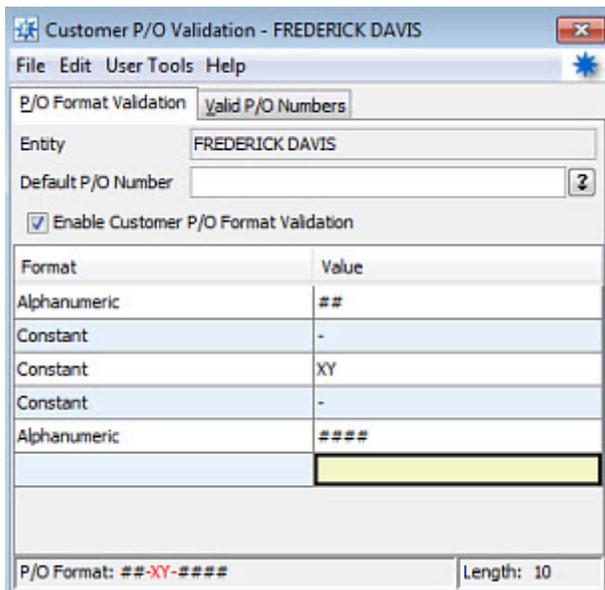
Any characters in red, bold text indicates a constant. In this example, the P/O number must contain a dash after the first two characters.

7. In the **Value** field, indicate which value you want to associate to the Format. For example, if you select **Space** as a Format, enter the number of spaces you want in the P/O Number. The default is 1.
8. Save your changes and exit the window.

## P/O Format Examples

The following are examples to help illustrate how the P/O formatting can work for you.

**Example 1:** You need the purchase order be formatted with an XY between two numbers on the right and four numbers on the left with dashes in between each piece, such as 67-XY-1234, where the XY does not ever change. Set your format like this:



**Example 2:** You need the purchase order to begin with two letters, a dash, and then four numbers, such as HD-5489. Set your format like this:

## Maintaining Customers and Vendors

The screenshot shows the 'Customer P/O Validation - FREDERICK DAVIS' window. The 'P/O Format Validation' tab is active, and the 'Valid P/O Numbers' button is visible. The 'Entity' field is set to 'FREDERICK DAVIS'. The 'Default P/O Number' field is empty. The 'Enable Customer P/O Format Validation' checkbox is checked. A table lists the format components:

Format	Value
Alphanumeric	AA
Constant	-
Alphanumeric	###

The summary at the bottom shows 'P/O Format: AA-###' and 'Length: 6'.

**Example 3:** You need the purchase order to begin with two numbers, a dash, then an alphanumeric combination with two letters and four numbers, such as 89-AB6789. Set your format like this:

The screenshot shows the 'Customer P/O Validation - FREDERICK DAVIS' window with the same settings as Example 3. The table lists the format components:

Format	Value
Alphanumeric	##
Constant	-
Alphanumeric	AA####

The summary at the bottom shows 'P/O Format: ##-AA####' and 'Length: 9'.

**Example 4:** You need the purchase order to start with the Vendor initials a space and four numbers, such as KJP 5637. Set your format like this:

## Defining Customer P/O Formats

The screenshot shows a software window titled "Customer P/O Validation - FREDERICK DAVIS". The window has a menu bar with "File", "Edit", "User Tools", and "Help". Below the menu bar, there are two tabs: "P/O Format Validation" and "Valid P/O Numbers". The "P/O Format Validation" tab is active. It contains the following fields and controls:

- Entity:** A text box containing "FREDERICK DAVIS".
- Default P/O Number:** An empty text box with a question mark icon to its right.
- Enable Customer P/O Format Validation:** A checked checkbox.
- Table:** A table with two columns: "Format" and "Value".

Format	Value
Alphanumeric	AAA
Space	1
Alphanumeric	###

At the bottom of the window, there is a summary bar with two fields:

- P/O Format:** AAA AA###
- Length:** 10

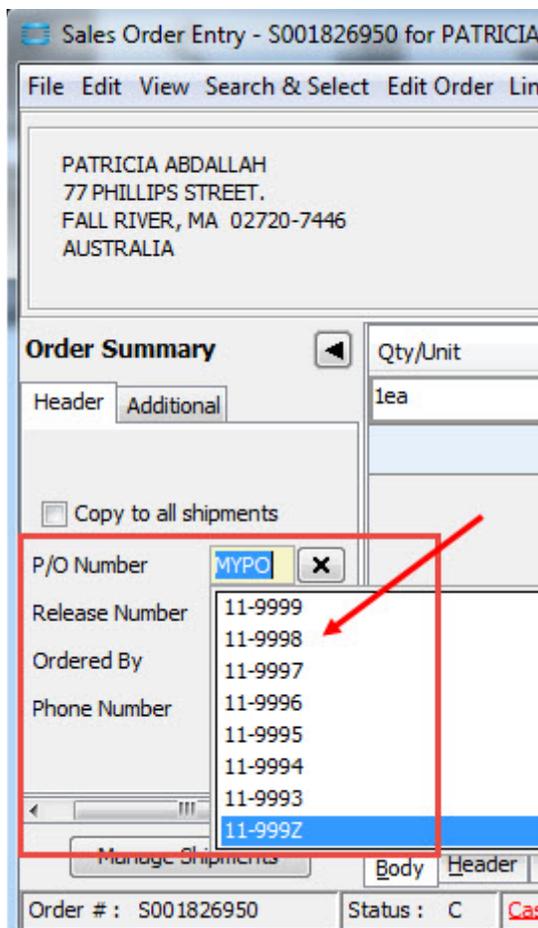
## Adding Valid P/O Numbers

Eclipse customer purchase order (P/O) numbers are free-form entries. However, if you need a set of specific purchase order numbers, such as on pre-printed P/Os, you can add valid P/O numbers by customer. This means, if a customer arrives with a pre-printed form and the purchase order number is not entered as a valid number, then the number cannot be used.

### To add a valid P/O number:

1. From the **Maintenance** menu, select **Customer** and display the customer record you want to add purchase order formats to.
2. From the **Additional** menu, select **P/O Validation** to display the Customer PO Format Validation Layout window.
3. Click the **Valid P/O Numbers** tab.
4. From the **File** menu, select **Insert**.
5. On each new line, add the numbers you want to use as valid P/O numbers in the correct format.

These numbers become the selection list in the Sales Order Entry Order Summary pane:



6. Save your changes and exit the window.

## Creating Parameters for Validating Customer P/O Numbers

Use the Valid P/O Numbers Selection window to create parameters to use to validate purchase order numbers entered on a sales order. When a purchase order (P/O) number is entered for a customer in Sales Order Entry, the number is validated against the number you enter here.

### To create parameters for validating a customer P/O number:

1. From the **Maintenance** menu, select **Customer** to display the Customer Maintenance window.
2. In the **Customer** field, enter the customer's name to display the customer record.
3. Select **Orders > Valid P/O Numbers** to display the Valid P/O Numbers Selection dialog box.
4. Enter one or more of the following:
  - A P/O number.
  - A string of characters followed by a right square bracket, for example, **ABC]**. The P/O number must start with this string of characters.
  - A string of characters preceded by a left square bracket, for example, **[ABC**. The P/O number must end with this string of characters.
  - A string of characters preceded by a left square bracket and followed by a right square bracket, for example, **[ABC]**. The P/O number must contain this string of characters somewhere in the number.

**Note:** Purchase order numbers cannot contain a tilde (~).

5. Repeat the process to add additional P/O numbers or parameters.
6. To delete an item from the list, select the item and press **Alt-Delete**.
7. When you have finished adding P/O numbers or parameters, save your changes and exit the dialog box.

## Activating a Branch for Customer Purchases

When you create customer records, you must identify from which of your branches the customer can order products. For example, if the customer lives in Oregon, you may not, as a rule, want him to purchase product from your branch in Florida if you have a branch in Utah that carries the same items.

**Note:** If you would like to be able to bend this rule, ask Eclipse Support about the Virtual Supplier companion product.

Assign each customer a home branch, and assign as many branches as necessary to meet the customer's purchasing needs. A customer can purchase products from an active branch, either permanently or as a one-time authorization, in the customer record.

At your branch, when performing a search in Sales Order Entry or Cash Receipts, any customer that matches the search criteria and has your branch listed as active displays in the search list.

### To activate a branch for customer purchases:

1. From the **Maintenance** menu, select **Customer** to display the Customer Maintenance window.
2. In the **Customer** field, enter the customer's name to display the customer record.
3. Select **Orders > Accessible Branches** hot key to display the Accessible Branches dialog box.
4. In the **Home Branch** field, enter the primary branch for this customer. This branch can be a pricing branch, a shipping branch, or both and is the branch with which the customer makes most of their purchases.

If this field is left blank, the system sets the home branch to the home branch of the customer's bill-to record, if the ship-to customer is authorized for that branch.

5. In the **Home Territory** field, enter the home territory for this customer if you have created territories.
6. In the **Branch/Territory** column, enter any additional branches and territories that this customer may use, or enter **ALL** to include all branches and territories.
7. In the **Active** column, for each branch listed, enter **Yes** to allow the customer to buy products from this branch. This customer's name will display in a Sales Order Entry or Cash Receipts customer primary search list.

If left unchecked, the customer cannot buy products from the branch. This customer's name will not display in a Sales Order Entry or Cash Receipts customer primary search list.

You cannot override this setting in Sales Order Entry or Cash Receipts. If the branch is not listed in the **Branch/Territory** column, you can add it as an active branch from Sales Order Entry or Cash Receipts, as described in Setting Customer Branch Override Capabilities.

**Note:** Select **File > Find** to search for a branch if the list in the **Branch/Territory** column extends beyond one page.

8. Save your changes and exit the dialog box.

## Defining Customer Branch Override Capabilities

At your branch, when doing a search in Sales Order Entry or Cash Receipts, any customer that matches the search criteria and has your branch listed as active displays on the search list.

A customer's active branches setup determines which branches can create sales orders for that customer. Authorization keys assigned in User Maintenance and activation levels set up in the customer's branch records work together to determine if you can add a branch to a customer record. You can either add a branch to a customer record permanently, or use a branch for a single customer transaction without adding that branch to the customer's record.

To complete this task you must:

- Set the **Display Customers/Vendors Who Are Inactive At A Branch** control maintenance record to **Y** to activate the **Branch Activation Level** and **One-Time Activation Level** fields on the customer's Accessible Branches dialog box.
- Be assigned either the CUST.BR.AUTH.OVRD or the CUST.BR.AUTH.ONETIME authorization key.

You cannot use this method to activate SOE or Cash Receipts if branches are flagged as inactive on the Accessible Branches dialog box. Change the branch's active setting on the Accessible Branches dialog box to activate those branches.

### To set up branch override capabilities on a customer record:

1. Assign branch access to customers.
2. From the Files menu, select **Customer** to display the Customer Maintenance window
3. In the **Customer/New** field, enter the customer ID to display the customer record.
4. In the **Customer** field, enter the customer's name to display the customer record.
5. Select **Orders > Accessible Branches** hot key to display the Accessible Branches dialog box.
6. In the **Home Branch** field, enter the primary branch for this customer. This branch can be a pricing branch, a shipping branch, or both.
7. Assign branches to this customer as described in Activating a Branch for Customer Purchases.
8. In the **Branch Activation Level** field, do one of the following to allow customer branch overrides from SOE or Cash Receipts:
  - Enter an authorization level between 0 and 99 to allow users with the CUST.BR.AUTH.OVRD authorization key at that level or greater to add a branch to the customer record.  
For example, if you set the activation level at 50, any user with an authorization level of 50 or higher can activate a branch for the customer.
  - Leave this field blank to restrict users without the CUST.BR.AUTH.OVRD authorization key set to at least level 1 from assign branch authorization for the customer.
9. In the **One-Time Activation Level** field, do one of the following to allow a one-time vendor branch override from SOE or Cash Receipts:
  - Enter an authorization level between 0 and 99 to allow users working in SOE or Cash Receipts with the CUST.BR.AUTH.ONETIME authorization key at that level or greater to add a branch to the customer record for a transaction.

## Maintaining Customers and Vendors

For example, if you set the one-time activation level at 50, any user with an authorization level of 50 or higher can use an inactive branch for a single transaction.

- Leave this field blank to restrict users working in SOE or Cash Receipts without the CUST.BR.AUTH.ONETIME authorization key from adding a branch to the customer record for a transaction.

10. In the **Active** column for each branch listed in the **Branch/Territory** column, select the check box to allow the customer to buy products from this branch. Leave the option unchecked to restrict customer purchases at the branch.

**Note:** An authorized user can add a one-time activation to a branch not listed, depending on the user's authorization key settings.

You cannot override this setting in Sales Order Entry or Cash Receipts. If the branch is not listed in the **Branch/Territory** field, you can add it as an active branch from Sales Order Entry or Cash Receipts, as described above.

**Note:** Select **File > Find** to search for a branch if your branches list extends beyond one page.

11. Save your changes and exit the dialog box.

## Entering Alternate Billing Addresses

You can send invoices for a ship-to customer to an intermediate authority for purchase approval, either at the job site or off site before they are forwarded to the assigned bill-to customer for payment.

When assigning an alternate billing address to a ship-to customer, you can do the following:

- Define the job or ship-to customer's address as the billing address.
- Enter an unrelated name and address as the billing address.
- Assign the name and address of another customer to the alternate billing address in the customer file.

The system prints the alternate billing address on all of the ship-to customer's invoices. When you access that ship-to customer record, "Alternate Billing Address in Effect" displays.

- Assign an alternate billing address to a bill-to customer and copy it to all associated ship-to customers.

The system prints the alternate billing address on all invoices for the bill-to customer and all associated jobs and ship-to customers. When you access the customer record for the bill-to customer, or for any of the jobs or ship-to customers associated with that bill-to customer, a message informs you that an alternate billing address is in effect.

**Note:** The bill-to customer assigned to the ship-to customer still receives the monthly statement.

### To enter an alternate billing address:

1. From the **Maintenance** menu, select **Customer** to display the Customer Maintenance window.
2. In the **Customer** field, enter a customer's name to display the customer record.
3. Select **Orders > Alternate Billing Address** to display the Alternate Billing Address dialog box.
4. In the **Use Ship-To Address** field, enter one of the following:
  - **Yes** - Adds the ship-to customer's address as the address for invoices. The system populates the remaining address fields.
  - **No** - Adds a different name and address from that of the ship-to customer but not that of another customer in the customer file. You populate the remaining address fields.
5. To add the name and address of another customer from the customer file, Select **Edit > Find Customer**, and enter the customer's name.
6. In the **Name, Address, City, State, and Zip** fields, enter the name and address of the customer or vendor.

**Note:** Because the name and address do not have to be the name defined on the customer or vendor record, you cannot enter a customer or vendor number or search by entering part of a name.

7. In the **Fax** field, enter the fax number the customer uses to receive invoices.
8. In the **Sort by** field, enter the words associated with the alternate billing address to use to search for this address.

## Maintaining Customers and Vendors

**Note:** Custom programming and modification of your custom invoice printing program is required for printing an alternate billing address on an invoice.

9. For addresses that are longer than the number of lines allowed, select **Additional > Additional Address** to enter additional billing address information for this customer or vendor.
10. Save your changes and exit the dialog box.

## Adding Customers to Ship Via Delivery Lists

Define the customer's method for transporting products, known as a *ship via*, on the customer's record, and then add the customer's name to that ship via's delivery list. The system lists the deliveries in a logical sequence, saving you time and money.

To enable this feature, assign route delivery information in Ship Via Maintenance . If ship via delivery information is not set up, the system uses the setting in the customer's **Normal Delivery Time of Day** field as described in Entering Additional Customer Information.

### To add a customer's name to a ship via delivery list:

1. From the Files menu, select **Customer** to display the Customer Maintenance window.
2. In the **Customer** field enter a customer's name to display the customer record.
3. Select **Orders > Delivery** to display a list of possible ship vias for this customer. The system highlights the customer's assigned ship via.
4. Press **Enter** to display a list of customers who are scheduled for delivery for the selected ship via on the ShipVia dialog box.
5. Arrange the items in the list as required for deliveries.
6. Save your changes and exit the dialog box.

## Determining Customer Freight Carriers

Use the Default Freight Data dialog box to identify freight carriers with which customers have set up accounts for automatic billing. Shipping programs, such as StarShip, can then use this information during shipping procedures. The customer's freight carrier can then bill the freight charges directly to this customer.

### To determine a customer's freight carrier:

1. From the **Maintenance** menu, select **Customer** to display the Customer Maintenance window.
2. In the **Customer** field, enter a customer's name to display the customer record.
3. Select **Orders > Freight Data** to display the Default Freight Data dialog box.
4. Select the **Exempt for Handling** check box to add a handling charge to the customer's orders, regardless of the size of the order.
5. Select the **Insurance Required** check box to require insurance on the customer's shipments.
6. In the **Minimum Order Amount to Allow Freight** field, enter a dollar amount of **0** (zero) or more to identify the minimum dollar amount the distributor pays for freight for this customer.

The system combines the subtotals on all order generations before adding additional charges, such as handling, tax, and freight, to determine the minimum dollar amount of this order.

**Note:** Customers with a dollar amount in this field must have the **Freight Out Exempt** field on the Customer Maintenance window set to **No** for this setting to be effective.

If you leave the field blank, the system looks at the setting on the **Freight Out Exempt** field on the Customer Maintenance window to determine if freight is charged to this customer. If it is set to **Yes**, the customer does not pay freight regardless of the order amount. If it is set to **No**, all orders include a freight charge.

7. Select the **Residential Address** check box, to inform an automated shipping system such as StarShip to apply a residential shipping fee to the customer's freight charge.

The **Residential Shipping Address** field on the Additional Header Information window in Sales Order Entry reflects the entry in this field.

8. In the **Account Number** column, enter the account number for each carrier with which this customer has a shipping account. This account number is billed when items are shipped to the customer using the carrier entered in the **Carrier** column. The **Carrier** column is read-only and lists the major freight carriers defined in the system.
9. In the **Type** column, for each customer account number entered, enter one of the following account types to determine how to bill freight charges:
  - **Sender** - Billed to your company's account with the defined carrier.
  - **Recipient Billing** - Billed to the customer's account with the defined carrier.
  - **Consignee Billing** (for UPS) - Billed to a consignee's account with the defined carrier.
  - **Third Party Billing** (for UPS or FedEx) - Billed to a third party's account with the defined carrier.

- **Credit Card Billing** (for UPS or FedEx) - Billed to a credit card account with the defined carrier.

10. Save your changes and exit the dialog box.

## Defining Payment Terms and Credit Control Parameters

Unless a customer plans to pay for orders up front, or by COD, you need to set credit control parameters for them. Use the credit information when a customer places an order or when you want to inquire about a customer's credit standing with your company.

You must be assigned the CUST.CREDIT.EDIT and CUSTOMER.MAINT authorization keys to edit the Credit Control Maintenance window.

**Note:** If you have recently upgraded to Release 8.7.7 or higher and you have shortcut menus to the Credit Controls window parameters, you may need to reapply that shortcut as some options have moved. Your shortcut will be grayed out to indicate that you need to update it. For more information about what has been moved, see the Release 8.7.7 Feature Summary.

Additionally, use the **Number Of Days In Future For Credit Exposure In Open Orders** to exclude orders with a ship dates far into the future so as not to adversely impact customer's credit limits.

### To define payment terms and credit control parameters:

1. From the **Maintenance** menu, select **Customer** to display the Customer Maintenance window.
2. In the **Customer** field enter a customer's name to display the customer record.
3. Select **Pricing > Credit Controls** to display the Credit Control Parameters dialog box.
4. Use the **Total Credit Hold** check box to place the customer on complete credit hold.

This means users are prevented from entering new sales orders for the bill-to customer or the ship-to accounts tagged to it, *regardless* of their credit limit or current A/R balance. New quotes can be entered, but they cannot be converted to sales order until this credit hold is removed. New in Release 9.0.4. You can use the Credit Hold Report to determine which customers are currently on credit hold.

5. To speed customer order entry, you can check one of the following options to avoid setting specific credit control parameters:

**Note:** By default, the system by passes a credit check on orders with zero dollars (\$0.00).

Select this check box...	To use...
<b>Use Default</b>	the system default credit control parameters for either a ship-to or bill-to customer. Using this selection, deselects the remaining choices on the window.
<b>Use Parent</b>	a parent customer's credit control parameters instead of defining separate ones.  <b>Note:</b> This selection activates when a parent customer is listed in the <b>Parent Customer Statement</b> field on the <b>Additional</b> tab.
<b>Use Bill-To</b>	the credit control parameters set up for a ship-to customer's bill-to record.

6. If you did not check **Use Default** review the options to set up the customer information, as needed.

## Defining Payment Terms and Credit Control Parameters

For the area	Check the following check boxes, as needed...
<b>COD</b>	<ul style="list-style-type: none"> <li>• <b>Always</b> - Accepts only COD payments from this customer.</li> <li>• <b>When Credit Limit Exceeded</b> - Accepts only COD payments when this customer's credit limit has been exceeded.</li> </ul>
<b>Print Approval Required Message</b>	<ul style="list-style-type: none"> <li>• <b>On All Shipping Tickets</b> - Requires approval on all purchases by this customer, and print an approval required message on all shipping tickets.</li> <li>• <b>When Credit Limit Exceeded</b> - Requires approval on purchases and print an approval required message on shipping tickets only when this customer's credit limit is exceeded.</li> </ul> <p>This option works with a custom form modification to define a message to print on the shipping ticket that indicates that the purchase must be approved. This message can be any statement you want to use that indicates to your employees that they need to check for approval. For example, you could add the message, "r;Have a Nice Day" and your employees will understand that when they see that message, approval is required.</p> <p>If you flag this field without using the custom form, the Sales Order Entry screen displays the message, "See Credit Manager," and the system does not print a message on the shipping ticket. If you simply want to alert the salesperson on the Sales Order Entry screen to check for purchase approval when this customer places an order, we suggest using OE Messages instead.</p>
<b>No Printing of Shipping Ticket</b>	<ul style="list-style-type: none"> <li>• <b>When Credit Limit Exceeded, Unless Authorized</b> - Keeps a picking ticket from printing for the customer who has a credit infraction, unless approved by an authorized user.</li> <li>• <b>Regardless of Credit Limit, Unless Authorized</b> - Keeps a picking ticket from printing for the customer regardless of credit limits, unless approved by an authorized user.</li> </ul>
<b>Authorized Personnel</b>	<p><b>Only Customer's Authorized Personnel May Place Orders</b> - Ensures that only the customer's authorized personnel place orders.</p>
<b>Checks Accepted</b>	<ul style="list-style-type: none"> <li>• <b>Personal</b> - Accepts this customer's personal checks as payment. This information displays when orders are entered and payments are required.</li> <li>• <b>Company</b> - Accepts the customer's company checks as payment. This information displays when orders are entered and payments are required.</li> </ul>
<b>Apply Credits</b>	<p><b>To Oldest Bucket When Aging Account</b> - Shows the application of all credits to the oldest balances in the aging buckets for the customer, even when the activity at the bottom of the window indicates that credits are assigned to more recent aging buckets.</p> <p>The A/R Aging report and Aged Receivables by Salesman report display all credits as applied to the oldest aging bucket with a balance. It does not cause a cash receipts application of credits to open invoices. You must do that manually using the Cash Receipts program.</p> <p>This setting overrides the setting in the <b>Bucket to use for Aging</b> field on the <b>Valid Customer Invoice Status Codes</b> control maintenance record.</p>

## Maintaining Customers and Vendors

For the area	Check the following check boxes, as needed...
	<p><b>To Oldest Bucket for Past Due Limit Calculation</b> - Applies all credits to the oldest invoices that are past due according to system calculations.</p> <p>The system does not create cash receipts. You must create them manually through Cash Receipts. For more information, see Entering Cash Receipts.</p> <p>This is new in Release 8.7.9 and should be selected to ensure the system behaves as it did prior to this release.</p>
<b>No Order Entry</b>	<ul style="list-style-type: none"> <li>• <b>Always</b> - Accepts no orders for this customer. For example, set this option when you set up a branch as a customer, and you never anticipate creating transfer orders for that branch.</li> <li>• <b>When Credit Limit Exceeded, Unless Authorized</b> - Accepts line items added to a sales order up to the customer's credit limit. When an unauthorized user adds a line item to an order that causes the order to go over the customer's credit limit, the system does not add the item to the order.</li> <li>• <b>Regardless of Credit Limit, Unless Authorized</b> - Accepts no orders regardless of this customer's credit limit, unless approved by an authorized user.</li> </ul>

6. On the **Credit Limit** tab and complete the following fields as needed:

In the field...	Enter...
<b>Credit Limit</b>	the customer's maximum credit limit in dollars. Use this field if preceding parameters regarding credit limits have been selected.
<b>Past Due Limit</b>	the maximum amount that may be past due before the customer's credit limit is exceeded. This check is made in addition to the overall credit limit. The past due limit may be equal to the overall credit limit.
<b>Past Due Limit %</b>	<p>the percentage of open invoice amounts you are willing to let your customer be over before being put on credit hold. For example, if a Customer that has a Credit Limit of \$100,000 and has a current amount of \$20,000 in open invoices and has this new option set to 10%, the Past Due Limit dollar amount would be \$2,000.</p> <p>The past due percent allows a past due limit to be set as a percent of the total A/R or open invoices that are unpaid. This means if the total amount of invoices in past due for the customer is more than the specified percent of the total outstanding A/R amount, all the orders for that customer are put in Credit Hold. The system uses the lower value between the Past Due limit and this new Past Due Limit Percent.</p>
<b>Past Due Days</b>	<p>Number of days the customer is allowed to be past due and still have orders excluded from credit hold.</p> <p>This setting works in conjunction with the other credit limitations, such as credit limit exceptions by dollar amount and temporary credit limit settings.</p>
<b>Order Limit</b>	a dollar amount to limit the customer to orders below this amount. The credit check process begins with checking this dollar amount and then checking the remaining credit parameters set.
<b>Deposit % - Stock Item</b>	the percent deposit required at order entry on stock items for this customer. Zero percent (0%) means no deposit is required on stock items.

## Defining Payment Terms and Credit Control Parameters

In the field...	Enter...
<b>Deposit % - Nonstock Item</b>	the percent deposit required at order entry on non-stock items for this customer. Zero percent (0%) means no deposit is required on non-stock items. This setting can also affect lot items.
<b>Terms Code</b>	<p>a terms code, or payment term, for this customer's standard sales orders. Use the <b>Default Payment Terms</b> control maintenance record to select a global terms code. The system uses that setting if this <b>Terms Code</b> field is left blank.</p> <p><b>Note:</b> For split payment terms, enter a terms code to allow the customer to pay a percentage of the invoice over a defined payment period. For example, you can create a terms codes in Terms Maintenance where the customer is allowed to make payments of 25 percent over a defined billing period.</p>
<b>Direct Terms Code</b>	<p>a terms code, or payment term, for this customer's direct sales orders only. Use the <b>Default Payment Terms</b> control maintenance record to select a global terms codes for direct orders. The system uses that setting if this <b>Direct Terms Code</b> field is left blank. If both the control maintenance record and this <b>Direct Terms Code</b> field are blank, the system uses the Direct Terms code. If all three areas are blank, the system assumes a NET code.</p> <p>If <b>Use Default</b>, <b>Use Parent</b>, or <b>Use Bill-To</b> are selected, then the system uses those settings to determine the terms code. Otherwise, Eclipse <i>will not</i> look at the Bill-to settings for terms, terms must be loaded at the Ship-to level.</p> <p><b>Note:</b> For split payment terms, enter a terms code to allow the customer to pay a percentage of the invoice over a defined payment period. For example, you can create a terms code in Terms Maintenance where the customer is allowed to make payments of 25 percent over a defined billing period.</p>
<b>Override Invoice Terms</b>	Select the check box if you want the Post Service Charges program to use the terms code assigned to the customer in the <b>Terms Code</b> field instead of using the terms code on the transaction processed for a customer. The customer's current terms code overrides individual invoice terms when calculating service charges. Check this option if a customer's service charge terms change retroactively and apply to all outstanding invoices.
<b>Allow Credit Exceptions by Dollar Amount</b>	See Defining Credit Limit Exceptions by Dollar Amount or Defining Temporary Credit Limit Settings <i>Defining Credit Limit Exceptions by Dollar Amount</i> or <i>Defining Temporary Credit Limit Settings</i> in this documentation.
<b>Temporary Credit Limit Settings</b>	<p>For information overriding credit limits at the order level, see <i>Overriding Credit Holds or Denying Credit</i> <i>Overriding Credit Holds or Denying Credit</i> in Sales Management.</p> <p><b>Note:</b> If the order is automatically processed using these settings, the system logs that in the order's maintenance log to alert users why the order was system-released through the phantom process.</p>

**Note:** To define a job cost limit or adjust job information, see *Entering Job Information Details* in this document.

8. Save your changes and exit the dialog box.

## Maintaining Customers and Vendors

### More Options for Defining Payment Terms and Credit Control Parameters

The following are some common options you might use while defining payment terms and credit control parameters:

<b>To...</b>	<b>Select...</b>
add detailed information about a customer's credit.	the <b>Additional Info</b> tab
set up a credit limit for authorized personnel.	<b>Edit &gt; Authorized Personnel</b>
set up a default credit card that a customer can use for sales orders.	<b>Edit &gt; Default Credit Card Information</b>
set up automatic posting of funds for the customer account.	Click the <b>EFT</b> tab.

## Authorizing Customer Personnel to Place Orders

To ensure that only the customer's authorized personnel place orders, assign a name to a credit parameter and list the maximum dollar amount available to that individual.

You must be assigned the CUST.CREDIT.EDIT authorization key to edit the Credit Control Maintenance window and its sub-screens.

### To authorize customer personnel to place sales orders:

1. From the **Maintenance** menu, select **Customer** to display the Customer Maintenance window.
2. In the **Customer** field enter a customer's name to display the customer record.
3. Select **Pricing > Credit Controls** to display the Credit Control Parameters dialog box.
4. In the **Authorized Personnel** area, check the **Only Customer's Authorized Personnel May Place Orders** option.
5. Select **Edit > Authorized Personnel** to display the Customer Authorization Maintenance dialog box
6. In the **Authorized Personnel** column, enter one or more names of authorized purchasers.
7. In the **Amount** column for each purchaser, list the maximum dollar amount they may order.  
If the dollar amount is left blank, the system limits the individual to the customer's overall credit limit.
8. To delete a name from the list, select it and press **Alt-Delete**.
9. Save your changes and exit the dialog box.

## Entering Additional Customer Credit Data

Use the **Additional Info** tab in Credit Control Parameters to define how you want to manage credit data for your customer. You can set up detailed criteria for a customer's credit transactions to enter information used by system reports, override credit-related control maintenance records, and narrow searches for open orders in review queues. You can also activate the Anticipation Credit feature, exclude a customer from receiving service charges, or exclude open orders from credit checking processes.

### To enter additional customer credit data:

1. From the **Maintenance** menu, select **Customer** to display the Customer Maintenance window.
2. In the **Customer** field, enter a customer ID to display the customer record.
3. Select **Pricing > Credit Controls** to display the Credit Control Parameters dialog box.
4. Click the **Additional Info** tab to display additional options for setting credit criteria for the customer.
5. Populate the following fields as needed:

For the field...	Do the following...
<b>Max Collection Days</b>	Enter the maximum number of days in which an invoice can be paid and still be applied to a salesperson's commission.
<b>Credit Manager</b>	<p>Select the user or message group ID to use as the credit manager for this customer's account.</p> <p>You can use this information to view only the open orders with a credit status assigned to this credit manager on the Open Order Status Review Queue.</p> <p><b>Note:</b> The <b>Credit Manager</b> option must be flagged for the person or message group in User Maintenance. If they are not activated in User Maintenance, they are not options to select from in this field.</p> <p>You can use activity triggers and the SEND@CREDIT email address to automatically notify your credit manager defined here when certain activities occur. For more information about this trigger option, see Activity Trigger Automatic Emails in the Outbound Email documentation. For more information about setting up activity triggers, see Assigning Activity Triggers</p>
<b>Credit Card Information</b>	<p>For <i>cash required</i> orders, enter one of the following:</p> <ul style="list-style-type: none"> <li>• <b>None</b> - No credit card information is needed from this customer.</li> <li>• <b>Prompt</b> - Prompts for credit card information when taking a credit card as payment from this customer.</li> <li>• <b>Required</b> - Requires credit card information when taking a payment from this customer.</li> </ul>

For the field...	Do the following...
<p><b>Credit Exposure Days In Future</b></p>	<p>Use to exclude orders with a ship dates far into the future so as not to adversely impact customer's credit limits. Enter the number of days beyond which open orders with ship dates exceeding the number of days are omitted from the credit checking process. For example, if you enter 7 and today is May 5, the system includes orders with a ship date from May 5 to May 12.</p> <p>This setting is useful when you have customers that routinely plan in advance for large orders, but you do not want those advance orders to force the customer into credit hold. You can set this field to 60 and any orders that are over sixty days out are not considered when making credit calculations.</p> <p>This setting overrides any setting in the <b>Number Of Days In Future For Credit Exposure In Open Orders</b> control maintenance record. This value displays in bold if you are overriding the control maintenance record.</p> <p><b>Important:</b> If this field is left blank, the system uses the global setting in the <b>Number Of Days In Future For Credit Exposure In Open Orders</b> control maintenance record.</p> <p><b>Note:</b> You can display the open orders through A/R Inquiry with the <b>Future Open Orders</b> view.</p>
<p><b>Credit Release Percentage Override</b></p>	<p>Enter one of the following to allow this customer to exceed the pre-defined credit limit by a percentage of that credit limit:</p> <ul style="list-style-type: none"> <li>• <b>0</b> - Allows no credit release over the customer's defined limit, unless approved by an authorized user.</li> <li>• A number between <b>1</b> and <b>998</b> - Defines the percentage, between 1 percent and 998 percent, which the customer is allowed to go over their defined credit limit.</li> <li>• <b>999</b> - Allows the customer to exceed the credit limit by an infinite amount.</li> </ul> <p>If you leave this field blank, the customer can exceed the credit limit by the percentage assigned to the user in the SOE.CREDIT.RELEASE authorization key.</p> <p><b>Note:</b> If there is a defined percentage in this field and the SOE.CREDIT.RELEASE key is assigned to the user, the system restricts the user to the lower of the two percentages.</p>
<p><b>Pass-Along Disc, Holdback Percentage</b></p>	<p>Enter one of the following to define a percentage discount passed along from the vendor to your customer:</p> <ul style="list-style-type: none"> <li>• <b>0</b> (zero) - Uses the setting in the <b>Pass-Along Discount Holdback Percent</b> control maintenance record.</li> <li>• <b>The percentage d from 01.00 to 99.00 to use for pass-along holdbacks</b> - Assigns a holdback discount percent to subtract from a vendor pass-along discount due the customer on an order, and overrides the setting in the Pass-Along Discount Holdback Percent <b>Pass-Along Discount Holdback Percent</b> control maintenance record.</li> </ul> <p>The holdback percent is an absolute value, not a percent of the pass-along discount percent. For example, if a pass-along discount due to a customer is 2% and the holdback percent is .5%, the system reduces the pass-along discount percent to 1.5%.</p> <p><b>Note:</b> The system does not allow a holdback percent to make a pass-along discount negative so that a customer receives a credit.</p>

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For the field...	Do the following...
<b>Anticipation Credit Invoice</b>	Enter <b>Yes</b> to activate the Anticipation Credit program for this customer, otherwise, enter <b>No</b> .  <b>Note:</b> The Anticipation Credit feature must be fully implemented for this setting to be effective.
<b>Include S/C Invoice in S/C Calculation</b>	Enter <b>Yes</b> to include previously assessed unpaid service charges in the current service charge calculation when printing statements, otherwise enter <b>No</b> . This setting overrides the setting in the <b>Include Service Charges In Service Charge Calculation</b> control maintenance record.

6. Flag the following options as needed:

For the Option...	Select the check box to...
<b>Exclude from Collection Invoices</b>	prevent this customer's overdue invoices from being printed or faxed from the collection queue. The system prompts you that this customer is excluded from collection invoices, but you can override this setting, if necessary. If left unchecked, the system prints or faxes this customer's overdue invoices from the collection queue.
<b>Exclude Customer Service Charges</b>	exclude this customer from service charge calculation, regardless of the service charge settings on an order.
<b>Require Check Verification</b>	require the order writer to verify the customer's checks.  <b>Note:</b> The system uses this field when you enter a payment in the <b>Check</b> field on the Sales Order Entry Totals window.
<b>Allow Sending Credit Card Level 3 Data for Customer</b>	Enter one of the following to determine whether to send Level 3 data to your credit card processor: <ul style="list-style-type: none"> <li>• <b>Yes</b> - The system sends Level 3 data, such as freight amounts and tax amounts. This is the default.</li> <li>• <b>No</b> - The system does not send Level 3 data for this customer. Deselecting this option provides a cost savings if your company does not use the Level 3 information.</li> </ul> This setting overrides the setting in the <b>Allow Sending Credit Card Level 3 Data</b> control maintenance record for this customer.
<b>Do NOT allow Credit Cards to be saved to this account</b>	disallow credit card information to be entered for this customer in Customer Maintenance. Selecting this check box also disables the ability to save credit card information for the customer in Sales Order Entry. Select this check box for generic customers you use on sales orders for customers that are not in your system or for those customers who do not want to provide their information to a customer record.
<b>Allow Payment of Multiple Orders with a Credit Card</b>	allow payment by credit card of more than one order at a time. For more information about payment by credit card see <i>Quickly Closing Counter Orders</i> in Sales Management.
<b>Exclude from Automatic Write Off of Cash Receipts</b>	exclude the customer from any cash amount write off utility run. For more information about the utility, see <i>Automatically Writing Off Cash Amounts</i> in the Accounts Receivable documentation.

For the Option...	Select the check box to...
<b>Exclude from Automatic Write Off of Invoice</b>	exclude the customer from any invoice amount write off utility run. For more information about the utility, see Automatically Writing Off Invoice Amounts <i>Automatically Writing Off Invoice Amounts</i> in the Accounts Receivable documentation.

- 7. Save your changes and exit the dialog box.

## Defining Customer Maximum Collection Days

You can enter a maximum number of collection days in the Commissions Report to determine if an invoice has been paid within the required amount of time when calculating a salesperson's commission, if commissions are based on paid invoices. This setting works with an order's invoice or due date, depending on the setting on the **Maximum Collection Days Date** control maintenance record.

For example, if the Maximum Collection Days Date control maintenance record is set to *Invoice*, the **Max Collection Days** field is set to *60*, and an invoice for this customer is paid on or before the 60th day after the invoice date, then the invoice is included when calculating the commission. However, if the invoice is paid on day 61 or later, the salesperson loses the commission.

**Note:** This entry can be overridden by the number assigned in the **Max Collection Days** field on the Additional Header Data dialog box off of the Sales Order Entry Header window.

### To define a customer's maximum collection days:

1. From the **Maintenance** menu, select **Customer** to display the Customer Maintenance window.
2. In the **Customer** field, enter a customer's name to display the customer record.
3. Select **Pricing > Credit Controls** to display the Credit Control Parameters dialog box.
4. Click the **Additional Info** tab to display additional options for setting credit criteria for the customer.
5. In the **Max Collection Days** field, enter the maximum number of days in which an invoice can be paid and still be applied to a salesperson's commission.
6. Save your changes and exit the dialog box.

## Defining Credit Limit Exceptions by Dollar Amount

To help customers who have good payment history and prefer to maximize their credit limit, you can set customer parameters to allow order processing for small amounts without requiring the order to be placed on credit hold and waiting for credit manager approval. This credit limit exception improves your better customers' order transaction experience.

Set your customer's parameters for a maximum order amount allowed over their set credit limit without approval and limit the amount allowed on a daily basis. These restrictions help keep your customers in good standing and let you manage the ordering process allowing your better customers a quick ordering experience.

Use the **Credit Limit** tab in the **Credit Control** options in Customer Maintenance to activate and define your dollar amount exceptions. All changes are kept in the customer change log to make sure the company can audit changes to the information and avoid exposure to fraud.

For information about overriding credit holds and denying credit on sales orders, see *Overriding Credit Holds or Denying Credit* in the Sales Management documentation.

To make sure that only customer's authorized personnel are allowed to place orders, you can assign a name to a credit parameter and list the maximum dollar amount available to that individual. The system checks this maximum limit when handling all credit exceptions. For more information, see *Authorizing Customer Personnel to Place Orders*.

**Note:** The system tracks credit limit changes in the maintenance log of the customer's record. Credit limit approvals are tracked in the sales order change log.

### Example Assumptions:

You customer's current standings are:

<b>Credit Limit field</b>	\$10,000
Customer's current A/R	\$9,000
Customer's Past Due amount	\$0
Current Credit Available	\$1,000
New Order Limit	\$999

You have the credit exceptions for this customer set as follows:

Maximum Order Limit	\$100
Maximum Daily Limit	\$500
Maximum % Over Credit Limit	15%

### Example 1 - Standard Order Processing

Based on these settings, the following will be true:

An order for \$1000.01...	The system puts on hold for order limit overage.
An order for \$1000 or less, plus an order for \$100.00 or less...	The system processes the order as usual with a note that the additional order was automatically released using Credit Exceptions by Dollar Amount settings.

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An order for \$1000.01...	The system puts on hold for order limit overage.
An order for \$1000.00 or less, plus an order for \$100.01...	The system puts the order on hold. The available credit was exceeded with the extra order by the Maximum Order Limit setting.
An order for \$1000.00 or less, plus two orders for \$100.00 or less each...	The system processes as usual with a note that the additional orders were automatically released using the Credit Exceptions by Dollar Amount settings.
An order for \$1000.00 or less, plus six orders for \$100.00 or greater each...	Since the Maximum Daily Limit was exceeded with the additional sixth order, the system releases the first five orders, but the sixth order is sent to credit hold for addressing.
An order for \$1000.00 or less, plus an order for 1500.01 or greater...	The system puts the order on hold. The available credit was not exceeded, but the percentage over credit limit was. The second order is sent to credit hold for addressing.

### Example 2 - By Daily Accumulation

Consider how these settings effect the order processing over a period of days:

Day 1	An order for \$999, plus four orders at \$100 each...	The \$999 order is within the credit limits and processes normally. The additional orders are cumulatively over the credit limit at \$400, but within credit limit exceptions. These orders process normally with a note that the order was automatically released using the Credit Exceptions by Dollar Amount settings.
Day 2	Five orders for \$100 each...	The cumulative order amount of \$500 is over the credit limit, but within credit limit exceptions and processes normally with a note that the order was automatically released using the Credit Exceptions by Dollar Amount settings.
Day 3	Three orders for \$100 each...	The cumulative order amount at \$300 is over credit limits, but within credit limit exceptions and processes normally with a note that the order was automatically released using the Credit Exceptions by Dollar Amount settings.
Day 4	Two orders for \$100 each...	The system processes as usual with a note that the orders were automatically released using the Credit Exceptions by Dollar Amount settings.
	Two additional orders for \$100 each...	The first order process normally with a note that the order was automatically released using the Credit Exceptions by Dollar Amount settings. However, the system puts the second order on hold since the Maximum Daily Limit of \$500 was not exceeded, but the Maximum % over the credit limit. The second order is sent to credit hold for addressing.

The system performs credit checks in the following order before applying any of the above exceptions:

- If a customer balance is past due or there is not enough credit available or a valid temporary credit available to allocate the order amount, the order is set to Credit Hold.

- If order exceeds the **Credit Exceptions by Amount** values (below) *and* the order is set to Credit Hold, then the order processes normally with a note that it was system-released. If the order is within specified parameters for credit exception, the order is kept on credit hold.
- The order is also sent to Credit Hold if the authorized personnel is over the personal limit amount as set in Authorizing Customer Personnel to Place Orders.
- The order is sent to Credit Hold if it is over the order limit and it is not past due, but there is enough available credit.
- If a credit override exists and it is greater than the order total, then the order is removed from credit hold and processed normally.

**To set credit limit exceptions:**

1. From the **Maintenance** menu, select **Customer** to display Customer Maintenance window.
2. Display the customer record for which you need to apply credit limit exceptions.
3. From the **Pricing** menu, select **Credit Controls** and click the Credit Limit tab if not already selected.
4. Select the **Allow Credit Exceptions by Dollar Amount** check box.  
This selection enables the credit exception process in Sales Order Entry and the automatic ship ticket printing process.
5. Use the credit exception options to define the parameters within which you are willing to let your customer order material over their credit limit.

**Note:** Users receive an error warning them of the parameters set, if the customer is within their credit limit settings in the **Credit Limit** tab in the **Credit Control** options in Customer Maintenance.

Option	Description
<b>Maximum Order Limit</b>	Enter the dollar amount over the credit limit by which you are willing to let orders process for the customer. For example, if your customer is already over the credit limit, but you want to let him go over the credit limit by any amount below \$100, enter 100.
<b>Maximum Daily Limit</b>	Enter the maximum dollar amount you are willing to let the customer order in a single day. For example, if your customer can process as many orders as they want, but only up to a maximum of \$1000.00 per day, enter 1000. This amount resets each day.  <b>Note:</b> When Credit Exceptions are applied, an order is invoiced manually or automatically. The amount of the processed generation is added to the this total daily limit. Orders that are cancelled or returned to order are removed from this daily limit. Credit and negative purchase orders do not effect the daily limit.

Option	Description
<b>Maximum % Over Credit Limit</b>	<p>Enter the percentage over the credit limit you are willing to let orders process for the customer, such as 3% over the credit limit. This field accepts whole numbers only. For example having a credit limit of 10,000 with a Maximum % over credit limit of 3%, the customer can process as many orders as they want, but only up to a maximum of 3% of the credit limit. Which is \$10,300.</p> <p>Users receive an error if the customer is within their credit limit warning them of the parameters set if either the <b>Warn User If Customer X% Of Credit Limit</b> or <b>Warn User If Customer Within X% Of Past Due Limit</b> control maintenance records are set.</p>

**Note:** In Sales Order Entry, the status bar may display the message **Shipping Ticket on Hold**. You can double-click this message and check which of these options are keeping the sales order on hold.

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**Important:** If the **Maximum Order Limit** or **Maximum Daily Limit** are *not* set, the system defaults to 0.00 and causes any orders for any dollar amount to be put on hold for being above the order limit. If you do not want to set a Maximum Order Limit or Maximum Daily Limit (meaning you only want to use the **Maximum % Over Credit Limit** field), but you want to avoid putting orders on hold, make sure to set each field to be the same as the original credit limit.

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6. To apply an expiration date to credit limits, see Defining Temporary Credit Limit Settings.
7. Save your changes and exit the window.

## Defining Temporary Credit Limit Settings

When working with credit limit exceptions, you can define exceptions by dollar amount or you can apply a temporary credit limit with an expiration date indicating for how long the credit exception is good. This date displays in A/R Inquiry to indicate to the user when the credit exception amount expires.

**Note:** The system tracks temporary credit limit changes in the maintenance log of the customer's record. Credit limit approvals for temporary credit limits are tracked in the sales order change log.

### To set temporary credit limit exceptions:

1. From the **Maintenance** menu, select **Customer** to display Customer Maintenance window.
2. Display the customer record for which you need to apply credit limit exceptions.
3. From the **Pricing** menu, select **Credit Controls** and click the **Credit Limit** tab if not already selected.
4. Select the **Temporary Credit Limit Settings** check box.
5. In the **Temporary Credit Limit** field, enter the dollar amount by which you are *temporarily replacing* the current credit limit defined until the expiration date.
6. In the **Expiration Date** field, enter the date until which the temporary credit limit is effective.

**Note:** The system checks the **Max Days In Future Before Warning In Temporary Credit Limit** control maintenance record to make sure the date is within the set allowed parameters. If not, the system displays the date you entered and asks for confirmation to continue.

7. Save your changes and exit the window.

## Configuring Customers for Electronic Funds Transfers

For your bill-to customers, you can set up the system to receive payment directly from a customer's bank account. The system draws funds from multiple customer accounts, creates cash receipts, and posts them in the Cash Receipts program.

Before setting up a customer's EFT (electronic funds transfer) account information, set up the following control maintenance records:

- Auto C/R Default Customer If Not Found
- Cash Over/Short Maximum Parameters
- Valid Cash Sources

### To configure a customer for electric funds transfer:

1. From the **Maintenance** menu, select **Customer** to display the Customer Maintenance window
2. In the **Customer** field, enter the customer's name to display the customer record.
3. Select **Pricing > Credit Controls** to display the Credit Control Parameters dialog box.
4. Click the **EFT** tab to display the electronic funds transfer options for the customer.
5. In the **Bank Account #** column, enter the customer's bank account number from which to draw funds.

**Note:** The combination of the numbers entered in the **EFT** and **Bank Account #** fields must be unique for each customer. For example, all of your customers could have the same EFT number, but each would need their own bank account number.

6. In the **Customer ABA #** column, enter the customer's ABA number to identify the customer in Cash Receipts.
7. Use the **Active** column to select which account to apply all cash receipts to for this customer.

**Note:** If you do not select an Active account, when the system processes cash receipt electronically, it applies cash to the first match located based on normal matching rules. In a bill-to and ship-to relationship, only one customer can have Active accounts.

8. Save your changes and exit the dialog box.

## Defining Default Credit Card Information

Depending on account and credit setup, use Customer Maintenance to outline the default credit information for a customer. Unless a customer plans to pay for orders up front, or by COD, you need to set credit control parameters for them. Use the credit information when a customer places an order or when you want to inquire about a customer's credit standing with your company.

### To define default credit card information:

1. From the **Maintenance** menu, select **Customer** and display the customer for which you need to setup credit information.
2. From the **Pricing** menu select **Credit Controls** and setup the payment terms and credit controls as required.
3. From the **Edit** menu, select **Default Credit Card Information** to display the Default Credit Card Information window.
4. At the prompt, select **New**.  
You can also select a current credit card to edit information, as needed.
5. Depending on your customer's credit card needs, do one of the following for the card the customer wants to identify as their default payment method.
  - **Standard cards** - For cards such as Visa® or MasterCard®, if not using Element Payment Services complete each required field for the card.

Field	Description
<b>Card Number</b>	The credit card number as printed on the card.
<b>Card Type</b>	The type of card, such as Visa® or MasterCard®.
<b>Expire Date</b>	Enter the credit card's expiration date in the MMY format. For example, if the card expires September 2014, enter 0914.
<b>Cardholder</b>	Enter the name of the card holder, exactly as printed on the credit card.
<b>Zip Code</b>	Enter the ZIP Code that corresponds with the cardholders billing address.
<b>Street Address</b>	Enter the billing address for the cardholder.

Field	Description
<b>Authorization Method</b>	<p>Enter one of the following authorization methods. This method appears in sales order entry when the card is selected for payment.</p> <ul style="list-style-type: none"> <li>• <b>Pre-Authorize Before Shipment</b> - Sets money aside from the credit card, guaranteeing funds for the order total plus any freight charges, without transferring the money to your account. After the order is final, either the Credit Card Authorization Phantom or the automated shipping program collects the payment.</li> </ul> <p>Potential charges from your credit card processor may apply if you pre-authorize payment from a customer.</p> <ul style="list-style-type: none"> <li>• <b>Authorize Before Shipment</b> - Authorizes and transfers the order amount before shipping to your account. The pick ticket is printed upon authorization.</li> <li>• <b>Reference only</b> - Uses information in the Credit Card Authorization window for reference only at the order level.</li> <li>• <b>Authorization After Review</b> - Authorizes and Transfers payment to your account for the order amount after the invoice is sent through batch printing and the shipping ticket is printed. The pick ticket prints upon authorization.</li> </ul> <p><b>Note:</b> The authorization method for new cards defaults to the setting stored in the <b>Default Auth Method for New Cards</b> control maintenance record.</p>
<b>Terms Override</b>	Enter the terms code, if any, that applies to the cardholder.
<b>Default Reference Number</b>	Enter any reference number as defined in the <b>Credit Card: Default Reference Number</b> control maintenance record.
<b>Charge Tax</b>	Select this check box if this customer is charged tax when using this method of payment.

- **Element Payment Services** - Use the Element interface to setup credit cards.
- **Pro Power card setup** - From the **File** menu, select **Pro Power**. Complete each field with the Pro-Power information, as required. This must be completed for a Pro Power card to display in the sales order entry credit card selection list.
- To setup hosted payments with Vantiv and triPOS, use the **File > Swipe** option to set credit card information.

6. Enter additional customer data, such as maximum collection days, if needed.
7. Save your changes and exit the window.

## Entering Job Information Details

The **Job Information** tab from the Credit Controls window allows you enter common contacts, define the job sales limit, the lien days, and other details. After the information is set, you can track the Job Information from A/R Inquiry either through the bill-to customer or from the job account customer. A/R Inquiry labels the account as a Job Account on the window when the information displays. For more information, see *Inquiring About A/R Job Information* in the Accounts Payable documentation.

If your customer has more than one job, create a separate job account to track those job details. That account would be marked as ship-to only. For example, you could have one customer with three ship-to accounts to cover the three jobs he is currently handling. Each job has individual primary contacts and an independent job limit.

### To enter job information for a customer:

1. From the **Maintenance** menu, select **Customer** and display the customer for which you want to enter Job Information details.
2. From the **Pricing** menu, select **Credit Controls** to display the Credit Control Parameters dialog box.
3. Click the **Job Information** tab.
4. Use the available fields to enter specific job-related information.

You must be assigned the CUST.CREDIT.EDIT authorization key to edit the Job Information fields.

Field...	Description
<b>General Contractor</b>	The main contractor managing the job.
<b>Property Owner</b>	The person who owns the property where the job is being handled.
<b>Primary Contact</b>	The first point of contact for the job. The system uses the primary contact listed in Customer Maintenance in the <b>Contacts</b> tab.
<b>Secondary Contact</b>	The next point of contact for the job. The system uses the secondary contact listed in Customer Maintenance in the <b>Contacts</b> tab.
<b>Job Limit</b>	<p>Enter a sales dollar limit on a job. This job limit works with the combined value of the total sales (paid or unpaid) from the date the job was started plus any open orders.</p> <p>If the quantity ordered exceeds the job limit, a message to that affects displays on the Sales Order Entry Body window, and normal credit control parameters go into affects to prevent the order from being printed or processed. For more information, see <i>Reviewing Customers' Credit Standing</i>.</p> <p><b>Note:</b> This job limit directly affects jobs created and managed in the Job Management application.</p>
<b>Job Type</b>	The job type for the project, such as Private or Public. For example, in order to know whether to file a lien or make a bond claim you need to know if it's public (bond claim) or private (lien). These job types are defined in the <b>Valid Job Types</b> control maintenance record.

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Field...	Description
<b>Nature of Project</b>	The type of project, such as residential or government. Use the select button for a list of valid project nature types. These are defined in the <b>Valid Job Nature Types</b> control maintenance record.
<b>Lien Days</b>	The number of days past the shipment days for the customer job that triggers a lien procedure if no value is entered for a state. If not overridden, shows default lien Days based on customer's state, uses the <b>Job Lien Days By State</b> control maintenance record.
<b>Lien Filed</b>	Select the check box if a lien has been filed for the customer. Selecting this check box activates the <b>Lien Filing Date</b> field and causes the <b>Lien Filed</b> field in the A/R Job Information window in Accounts Receivable to be set to <b>Yes</b> . In addition, this populates the <b>Lien Filed</b> column on the Credit Lien Report.
<b>Lien Filing Date</b>	The last date a lien was filed on the customer. This date displays in the A/R Job Information window in Accounts Receivable. In addition, this populates the <b>Lien Filing Date</b> column on the Credit Lien Report.  <b>Note:</b> If the <b>Lien Filed</b> check box is selected, this field is required. If the <b>Lien Filed</b> check box is not selected, this field is view-only.

5. Save your changes and exit the window.

## Copying Bill-To Account Information to Ship-To Accounts

Use the Customer Credit Controls parameters to copy bill-to account information to your ship-to accounts. This feature makes it easier when you have a bill-to customer who has several ship-to accounts attached and you want to make sure that the settings on the bill-to are the same for all the subsequent ship-to accounts. You can copy specific settings to all the ship-to accounts at once, or you can select to copy only to specific ship-to accounts. You can also save changes as a template and use that template later to copy other bill-to customer credit settings to their corresponding ship-to accounts.

For example, you need to put a bill-to customer on credit hold, but the customer has twelve ship-to accounts associated with it. You need to mark all the associated ship-to accounts for credit hold as well. Eclipse provides a utility to manage copying the same information (field values) from a bill-to account to all associated ship-to accounts.

**Note:** You can also create templates for the updates so you can use the utility updates at a later time or for another account.

### To copy bill-to account information to ship-to accounts:

1. From the **Maintenance** menu, select **Customer** and display the customer from which you want to copy field values.
2. From the **Pricing** menu, select **Credit Controls** to display the Credit Control Parameters dialog box.
3. Review the Credit Control Parameter settings and review the settings and update those that you need to copy to a ship-to account that is not already selected. For example, if this customer will now be on credit hold, select **Regardless of Credit Limit, Unless Authorized** in the No Order Entry area.

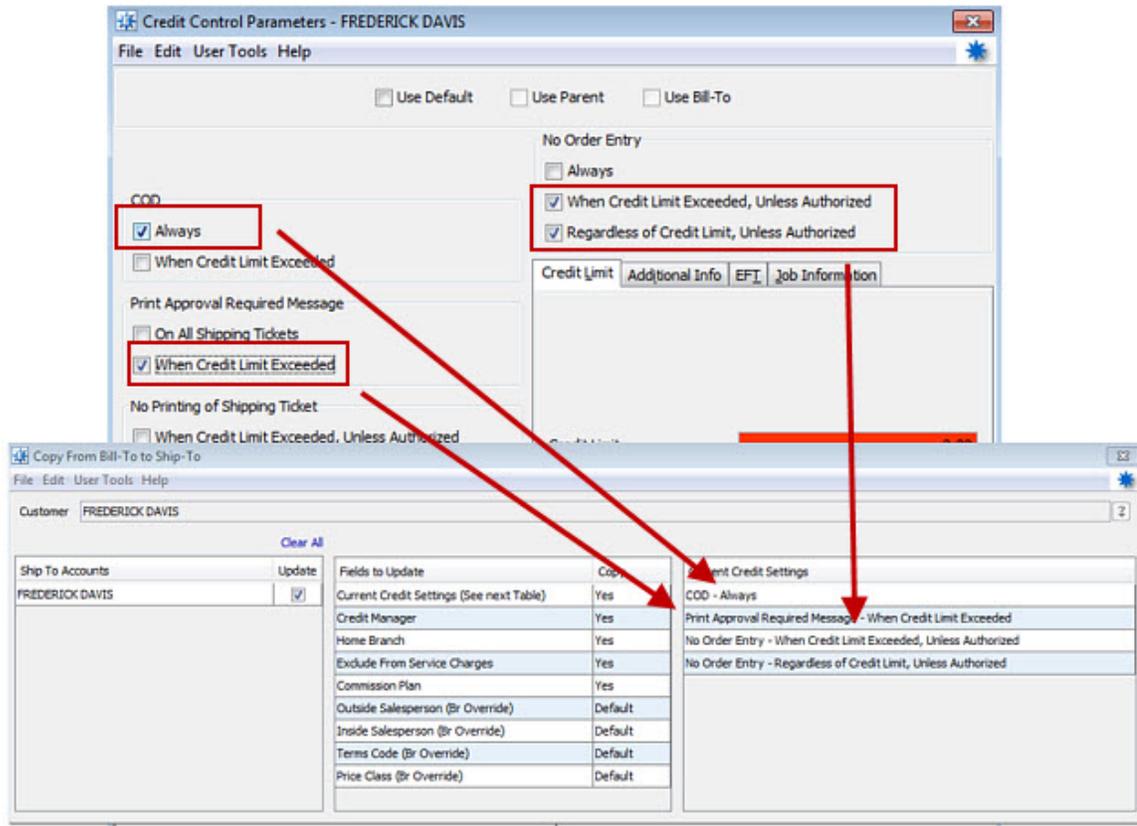
**Note:** Note all settings are available to push to other accounts.

4. From the **File** menu, select **Copy from Bill-To to Ship-To** to display the Copy from Bill-To to Ship-To window.
5. In the **Ship To Accounts** column, use the **Update** check boxes to select which accounts you want to update with the changed information.

**Note:** Use the **Clear All** link to clear all the check boxes and begin selecting the accounts again.

6. For each selection in the Fields **to Update** column, use the **Copy** column to change or add the field values you want to push to the ship-to accounts. By default, the system populates the values with the customer's current settings.
7. For the **Current Credit Settings** field, use the table to the right to address the credit settings, such as COD - When Credit is Limited. If no values are set, the system displays **None** in the field. This table is used *only* for Current Credit Setting values. These values that display for the Current Credit Settings are determined by the left side of the Credit Control Parameters window.

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8. From the **File** menu, select **Save** and exit the window.

**Note:** To save the settings as a template, right-click on the Fields to Update table and select **Save as Template** and enter a Template name. You can access it later. For more information about templates, see *Using Templates for Copying Bill-To Account Information* below.

9. At the **Copy Setting from this Bill-to to the Ship-to's now?** prompt, select **Yes** to copy all updates to the ship-to accounts.

## Using Templates for Copying Bill-To Account Information

If you find that you are updating the same information for multiple customers, you can create a template to save yourself time. Load the template with all the appropriate settings and save it. Then, you can access each bill-to customer account and use the template to copy the field values.

### To create a template for copying bill-to account information:

1. Display the Copy From Bill-To to Ship-To window.
2. Set the field values you want to copy.
3. Right-click on the Fields to Update table and select **Save as Template**.
4. At the **Enter new template ID** prompt, enter the name for the template you want to save.
5. Review and adjust the Credit Control Parameter settings.
6. From the **File** menu, select **Save** and exit the window..

7. At the **Copy Setting from this Bill-to to the Ship-to's now?** prompt, select **Yes** to copy all updates to the ship-to accounts.

**To load a template and copy bill-to account information:**

1. Display the Copy From Bill-To to Ship-To window.
  2. Set the field values you want to copy.
  3. Right-click on the Fields to Update table and select **Load Template**.
  4. Review and adjust the Credit Control Parameter settings.
  5. From the **File** menu, select **Save** and exit the window.
  6. At the **Copy Setting from this Bill-to to the Ship-to's now?** prompt, select **Yes** to copy all updates to the ship-to accounts.
-

## Credit Checking Change Log Examples

Eclipse records detailed information in the change log of orders when customer are placed on or release from credit hold.

Each entry displays the parameter that caused the customer to be placed on credit hold. Immediately below the parameter alert, the log displays details about how the parameter was outside the limits defined.

The following are examples of what may display:

Credit Hold Reason	Log Entry Example
A/R balance past the Past Due Limit	Balance Past Limit of \$1134.32 exceeds the Past Due Limit of \$1000.00.
A/R balance past the Past Due Limit%	Balance Past Limit of \$1134.32 exceeds the Past Due Limit of \$1000.00 which is 30% of the A/R Balance.
A/R balance exceeds Credit Limit	A/R balance of \$1000.00 exceeds Credit Limit of \$900.00
A/R balance exceeds Temporary Credit Limit	A/R balance of \$1000.00 exceeds Temporary Credit Limit of \$999.00
Order over the Authorized Personnel's Order Limit	Order of \$200.00 is over the Authorized Personnel's Order Limit of \$150.00
Not Assigned Personnel Limit	User in the Ordered By field (JACKJ) is not on the Authorized Personnel list .

For more information about Credit Hold Reasons, see Credit Hold Reasons in the Accounts Receivable online documentation.

## Defining Customer Pricing Options

Some pricing options can be set up as customer specific to offer the best customer service and provide the highest profitability for your company.

Doing business with customers from a different country may require you to trade in a currency other than your base currency. You can assign the customer's currency for these customers, so the system can calculate the exchange rates for each transaction.

A price class is a method of classifying customers for pricing purposes. Customers can be assigned several different price classes, depending on what products the customers buy and at which branch they buy them. When you create a new customer record, the system assigns the price class defined in one of the following control maintenance records:

- New Customer Maintenance Template
- New SOE Customer Template
- Default Customer Price Class - The system uses the entry in this record if no template is set up.

To change a customer price class for any branch to which the customer has access, you must be assigned the CUSTOMER.MAINT and CUST.PRICING.EDIT authorization keys and have access to those branches.

### To define customer pricing options:

1. From the **Maintenance** menu, select **Customer** to display the Customer Maintenance window.
2. In the **Customer** field, enter a customer's name to display the customer record.
3. Select **Pricing > Customer Pricing and Printing** to display the Customer Pricing Information dialog box.
4. Click the **Pricing** tab.
5. For each field, enter the information you need for this customer's pricing needs.

Field	Description
<b>Default Price Class</b>	Enter the default price class to use for this customer. Price classes are defined in the <b>Valid Customer Price Classes</b> control maintenance record.
<b>Customer Type</b>	Enter one or more customer promotional type to make promotions more available to customers who deal in specific business areas, for example, plumbing and HVAC. The types entered apply to all branches. Customer types are defined in the Valid Customer Types control maintenance record. For more information, see Assigning Multiple Promotional Types to Customers.
<b>Use Last Price/Cost Logic</b>	Specify if a customer's last price and cost for a product determines the current price and cost for that product. See guidelines, below, if necessary. Your entry in this field overrides the setting in the <b>Use Last Price/Cost Logic</b> control maintenance record:
	<b>Prompt</b> - Displays the Last Price Verification dialog box for the customer in Sales Order Entry when a product is placed on an order. The last price displayed in this dialog box is the last price paid for the item over all branches. The customer is not affected by the setting in the <b>Use Last Price/Cost Logic</b> control maintenance record.

Field	Description
	<p><b>Price Only</b> - uses the last price as the current price of an item. To determine the current cost, it uses the normal costing calculation.</p> <p><b>Note:</b> Setting this record to <b>Price Only</b> overrides promotional pricing, if last price pricing is found, and thus overrides standard best-price-check logic. Typically, only companies whose business type dictates it will activate last price pricing.</p> <hr/> <p><b>Cost Only</b> - The system uses the last cost as the current cost of an item. To determine the current price, it uses the normal pricing calculation.</p> <hr/> <p><b>Both</b> - The system uses the last price and last cost of an item as the current price or cost of an item.</p> <hr/> <p><b>None</b> - Checks the <b>Use Last Price/Cost Logic</b> control maintenance record to determine if last price pricing is enabled for the customer.</p> <p>The following guidelines apply to last price pricing:</p> <ul style="list-style-type: none"> <li>• Last price pricing disregards all other pricing or matrix cells with the exception of contract pricing and customer-specific matrix cells (ship-to or bill-to) and generates an order entry price based on the percentage markup from the last sale of the item to that customer. When a contract price or customer specific matrix cell is not in effect, the system prices an item at the COGS cost multiplied by the gross margin of the selling price from the customer's most recent shipment for the same item. The pricing audit displays the basis as "LP" and the formula as the percentage of difference between the last price and the calculated new price. The formula for margin is: <b>Price - Cost / Price</b>.</li> </ul> <p>For example, if the customer's price for the item on the most recent invoice was \$1.25, the cost was \$1.00 (a margin of 20%), and the current cost is \$1.10, then the new price will be \$1.375 and the audit displays LP+.10.</p> <ul style="list-style-type: none"> <li>• You can activate last price pricing during system implementation, based on your business requirements.</li> <li>• For this customer at each branch, you can define a threshold in the <b>Minimum Variance Before Last Price Reduction</b> control maintenance record, and a cost reduction factor to use to reduce a price if the current cost is less than the previous cost and the difference exceeds the threshold.</li> </ul>
<p><b>Restrict Price Changes in SOE</b></p>	<p>Enter one of the following to determine if a sales order writer can change prices for this customer:</p> <ul style="list-style-type: none"> <li>• <b>Yes</b> - Prevents sales order writers from changing prices in Sales Order Entry for this customer.</li> <li>• <b>No</b> - Allows the sales order writer to change prices in Sales Order Entry for this customer, based on user authorization.</li> </ul>
<p><b>Decimal Places for Pricing</b></p>	<p>Enter the number of decimal places to display for prices on this customer's invoices. For example, to display prices with two decimal places, such as 10.53, enter 2. The number of decimals that you set here also determines how prices display for the customer on your web commerce site.</p> <p><b>Note:</b> A setting in this field overrides the <b>Number Of Digits Of Accuracy For Pricing</b> control maintenance record for the customer.</p>

Field	Description
<b>Strategic Pricing Category</b>	Select the category, such as contractor or OEM, to assign to the customer if you are using Strategic Pricing. Customers without a category assigned are not included in the Strategic Pricing analysis. For more information, see Strategic Pricing Overview in the Strategic Pricing documentation.
<b>Primary Currency</b>	<p>Select a currency if this customer's primary currency is not the same as your company's base currency. Leave this field blank to use your base currency for this customer's transactions.</p> <p>If a customer is based in a foreign country, the customer's primary currency does not have to be the currency of that country.</p> <p><b>Note:</b> Foreign currencies are defined in the <b>Valid Foreign Currencies</b> control maintenance record. After you define valid currencies, you can establish a base currency for your company using the <b>Base Currency For Exchange Rates</b> control maintenance record, and then create a table of exchange rates for each foreign currency in Exchange Rate Maintenance.</p>

5. Save your changes and exit the window.

### More Options for Defining Customer Pricing Options

The following are some common options you might use while defining customer pricing options:

Use this option...	To...
<b>Edit &gt; Contracts</b>	set up customer pricing for multiple customers. For more information, see Using Contract Pricing With Customer Records.
<b>Click the Price Class Override tab</b>	associate a matrix type with a customer price class to base price discounts on customer class.

## Defining Customer Invoice Printing Options

Your customers may have different invoice format requirements. You can manage invoices for items such as adjusting invoice printing, the information the invoice contains, how to include pricing, and what is passed on to the customer. For example:

- A customer might want a packing list printed in a specific format. You call packing lists ship tickets. You can modify your ship tickets for this customer to print in the format they need.
- A residential contractor wants products listed without prices, so it contains information available to the homeowner, but not the cost of the products.
- A customer wants prices included on the shipping ticket in order to verify prices before getting an invoice.
- A customer wants list prices printed on the shipping ticket, which is then passed to the customer as an invoice.

To define customer invoice printing option, you must be assigned the CUSTOMER.MAINT authorization key, Level 2 and the CUST.PRICING.EDIT authorization key. You can view a customer's options if you are assigned level 1 of the CUSTOMER.MAINT authorization key.

If you are using Eclipse Forms, see *Changing Default Form Types* in the Eclipse Forms documentation for information about setting up invoice printing.

Use the Customer Pricing and Printing Information window to assign invoice select codes to use to group customers according to how often they receive invoices via the Print Invoices program. You can also sort special reports for use with Report Writer, rename an item for printing, and limit the amount of information printed on an item.

### To define customer invoice printing options:

1. From the **Maintenance** menu, select **Customer** to display the Customer Maintenance window.
2. In the **Customer** field, enter a customer's name to display the customer record.
3. Select **Pricing > Customer Pricing and Printing** to display the Customer Pricing Information dialog box.
4. Click the **Printing** tab.
5. In the **Invoices** area, review the invoicing options.
6. In the **Pick/Ship Tickets** area, review the pick and ship ticket options.
7. In the **Statements** area, review statement print options.
8. In the **User Defined Options** area, review any user-defined print details.
9. Use the **Additional** tab for additional customer options.

8.

Field	Description
<b>Fill Rate Measurement</b>	<p>Enter one of the following units of measure to use with the percentage in the <b>Percent of Order to Fill Before Automatically Shipping</b> field:</p> <ul style="list-style-type: none"> <li>• Pieces</li> <li>• Weight</li> <li>• Dollars</li> <li>• Leave the field blank - The system uses the setting in the <b>Percent Of Order To Fill Before Automatically Shipping</b> control maintenance record.</li> </ul> <p>The system rounds up when a unit of measure cannot be divided, such as with pieces. For example, if the percentage is set to 67 percent and there are 9 pieces on an order, then 6.03 pieces are required to meet 67 percent (<math>9 \times 0.67 = 6.03</math>). Because you cannot ship a portion of a piece, the system rounds up. In this example, the system rounds up to 7.</p>
<b>Percent of Order to Fill Before Automatically Shipping</b>	<p>Enter a percentage of the order that needs to be complete before the phantom processes the ship ticket for orders with a Ship When Available status.</p> <p>To limit the number of partial shipments the system sends for an order with the Ship When Avail status, enter a minimum percentage of the order that must be filled before making a shipment.</p> <p>When an order has a status of Ship When Avail, the system waits until the designated percentage of the order is available before creating a partial shipment, and then backorders the remaining quantity. The Default B/O Status defined in Customer Maintenance or Control Maintenance determines the status of the newly created backordered generation.</p> <p>This field works with the <b>Fill Rate Measure</b> field, where you enter the units of measure to fill for the order, pieces, weight, or dollars.</p>
<b>Disable FTP Billing</b>	<p>Select this check box to make this customer exempt from third-party billing by way of FTP. This setting overrides the settings for third-party billing in the <b>Default Settings For Batch Invoices And Statements</b> control maintenance record.</p>

9. Use the **Form Types** tab and enter the print, e-mail, or fax style for each form listed.

**Note:** Before the system sends an e-mail, it checks the order and the customer record for print style overrides. If it does not find an override, it uses the print style setting in the **Default E-mail Print Styles** control maintenance record.

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**Important:** If Eclipse Forms is not turned on for your company, this **Forms Types** tab does not display. Instead, use the **Print Styles** tab to assign printing parameters.

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11. Save your changes and exit the window.

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**See Also:**

Defining Customer Pricing Options

## Invoicing Options on the Customer Pricing and Printing Information Window

The follow options are available from the Customer Pricing and Printing Information window to manage how you want invoices to print for the selected customer.

The screenshot shows the 'Customer Pricing and Printing Information' window with the 'Printing' tab selected. The 'Invoices' section is highlighted with a red border. It contains the following fields and options:

- Invoice Select Code: WPLY
- Invoice Print Copies: 1
- Invoice Fax Copies: (empty)
- Grouping Method for Emailed Batch Invoices: (empty)
- Remit-To Override: (empty)
- Single Invoicing:
- Exclude from Minimum Dollars to Print:
- Consolidated Invoicing:
- Consolidate By: (empty)
- Consolidate Ship-To: (empty)
- Pick/Ship Tickets: (empty)
- Back Order Printing: (empty)
- Print Kit Component Override: (empty)
- Statements: (empty)
- Separate AR From Bill-To:
- Batch Statement: 1 Copy
- Statement Type: Balance Forward
- Print 1 copy

### Invoice Select Code

Select a user-defined code that defines how often a customer receives invoices. Typical invoice select codes are Daily, Weekly, and Monthly.

These codes are defined in the **Valid Invoice Select Codes** control maintenance record.

**Note:** Use the attribute name SEL.CODE when using Mass Load to update this file.

### Invoice Print Copies

This value applies only to batch printing of invoices using the Print Invoices program. The entry in this field determines the number of invoices to print, and if the invoices go to the Invoice Preview Queue.

Enter one of the following:

- A number between 1 and 9 - Indicates the number of copies to print of each invoice. Each invoice will automatically go to the Invoice Preview Queue.

If you enter a positive number in this field and either a 1, 2, or E in the Invoice Fax Copies field, the system prints and either faxes or sends invoices via EDI (Electric Data Interchange). If you flag invoices only for faxing or for sending by EDI, the invoices still go to the Invoice Preview Queue.

If you print or send more than one copy of a statement, all copies after the first are labeled as "Reprint."

## Invoicing Options on the Customer Pricing and Printing Information Window

- **0** (zero) - No invoices are printed, but print output depends on the setting in the Invoice Print Copies = 0, Q Status Invoices To Invoice Preview Queue Invoice Print Copies = 0, Q Status Invoices To Invoice Preview Queue control maintenance record, as follows:
- **Yes** - Invoices are sent to the Invoice Preview Queue if the print status is Q.
- **No** - Invoices are not sent to the Invoice Preview Queue, regardless of the print status.
- **-1** (minus 1) to prevent invoices from printing, but to still send them to the Invoice Preview Queue. Select this option only if you are not printing, faxing, or sending invoices via EDI.
- **Blank** - If you leave this field blank, the system prints only one copy of each invoice, and all invoices go to the Invoice Preview Queue.

**Note:** If this field is blank for the ship-to customer in a bill-to/ship-to relationship, the system uses the setting in the bill-to account and displays Bill-To in this field. If the bill-to customer's field is also blank, the system uses the setting in the **Default Setting For Branch Invoices and Statements** control maintenance record and displays Control in this field.

### Invoice Fax Copies

This field applies only to batch faxing of invoices, and sending of invoices through EDI using the Print Invoices Program.

Enter one of the following:

- **0** (zero) - Prevents printing, faxing, or processing of invoices.
- **1** or **2** - Defines the number of copies of each invoice to fax to customers. The system sends invoices to the Invoice Preview Queue. The customer record must include a contact name of either INV.FAX, with a corresponding fax phone number, if the recipient has a special fax number for invoices, or FAX with a corresponding fax phone number for a main fax machine.

If you print or send more than one copy of an invoice, all copies after the first are labeled as "Reprint."

- **E** - Sends each invoice to the customer through EDI, if the customer is set up for EDI. The system sends invoices the Invoice Preview Queue.
- **Blank** - If you leave this field blank, the system uses the bill-to customer's setup for printing invoices.

**Note:** If you enter a positive number in the **Invoice Print Copies** field and a **1**, **2**, or **E** in this field, the system prints and either faxes or sends invoices via EDI.

If this field is blank for the ship-to customer in a bill-to/ship-to relationship, the system uses the setting in the bill-to account and displays Bill-To in this field. If the bill-to customer's field is also blank, the system uses the setting in the **Default Setting For Branch Invoices and Statements** control maintenance record and displays Control in this field.

### Grouping Method for Emailed Batch Invoices

Select how to send batch invoices to your e-mail. This may override the setting at the global level set using the **Eclipse Forms - Grouping Method For Emailed Batch Invoices** control maintenance record.

- **Single** - Receive individual e-mails for each invoice.

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- **Multiple** - Receive a single e-mail with multiple invoices attached in a single attachment.
- **Blank** - Uses the global setting for the **Eclipse Forms - Grouping Method For Emailed Batch Invoices** control maintenance record.

### Remit-To Override

Enter a remit-to override entity to send this customer's payments to an address other than the one assigned to the branch from which the customer orders product.

For more information, see *Remit-to Hierarchy Workflow* and *Creating Customer Remit-Tos*.

### Single Invoicing

Select to bill the customer for the full order amount after the first shipment is made. The system bills for the entire order, even if the invoice contains a backorder. If left unchecked, the customer receives an invoice with each shipment on the order.

### Exclude from Minimum Dollars to Print

Select to ignore the setting for **Minimum Dollars to Print** field in the **Default Settings For Batch Invoices And Statements** control maintenance record.

### Consolidated Invoicing Area

Select to combine orders on one invoice. and use the following options:

- **Consolidate By** - Indicate which of the following you want to use to consolidate invoices. All items that match the selection are combined on one invoice: **Bill-To**, **Ship-To**, **Parent**, **Master Job Bid**, or **Purchase Order**. You can only select one. If you select **Ship-To**, the **Consolidate Ship To** field is deactivated.
- **Consolidate Ship-To** - If you select **Bill-To** or **Parent** in the **Consolidate By** field, use this field to indicate where the **A/R** balance for the consolidated invoices should be applied. If you select **Ship-To** in the **Consolidate By** field, this field is uneditable.

For more information, see *Setting Up Consolidated Invoicing* in the *Sales Management* documentation.

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## Pick and Ship Tickets Options on the Customer Pricing and Printing Information Window

The follow options are available from the Customer Pricing and Printing Information window to manage how you want picking and shipping tickets to print for the selected customer.

The screenshot shows the 'Customer Pricing and Printing Information' window. The 'Pick/Ship Tickets' section is highlighted with a red box. It contains two dropdown menus: 'Back Order Printing' and 'Print Kit Component Override'. Other sections include 'Invoices' and 'Statements'.

### Back Order Printing

Enter one of the following to manage how you want to print back order information:

- **No Backorder Printing** - No backordered items print on the ship ticket.
- **Print on First Generation Only** - All backordered items print on the first generation ship ticket only.
- **Print Backorders** - Backordered items print on all ship tickets printed for this order.

### Print Kit Component Override

Enter one of the following:

- **Yes** - Prints the kit components as well as a kit description, regardless of the setting in the Print Components field in Product Kit Maintenance.
- **No** - Prints only the kit description.
- **Default** - Uses the setting in the Print Components field on the Product Kit Maintenance dialog box.

**Note:** For any of these selections to apply, you may need to modify your forms program to honor the selection.

## Statement Options on the Customer Pricing and Printing Information Window

The follow options are available from the Customer Pricing and Printing Information window to manage statements to print for the selected customer.

### Separate AR From Bill-To

Select to keep your records for this customer separate from the other ship-to or bill-to information regardless of who is financially responsible. If you make this selection, the invoices do not display with the parent statements.

If you select this field, the following occurs:

- The bill-to customer's statement does not include the ship-to customer's invoices, even if you flag the ship-to customer's **Batch Statement** field on the ship-to customer's record.
- The A/R Inquiry Report for the bill-to includes the ship-to customer's invoices.

If you select this option, you must also set the **Batch Statement** field on the ship-to customer's record to **1 Copy**, **2 Copies**, or **FAX**, so the ship-to customer's invoices are included on a statement.

**Note:** This selection activates if the customer is Ship-To only.

### Statement Type

Enter one of the following to define which type of statement to print for this customer:

- **B** (balance forward) - Includes invoices from the current billing cycle only.
- **O** (open item) - Includes unpaid invoices from previous billing cycles. This is the default value.

### Batch Statement

Enter one of the following so that this customer's month-end statement is included in batch statement printing when using the Print Statements program:

- **0 Copies** - No statement copies print for this customer.

- **1 Copy** - One statement copy prints.
- **2 Copies** - Two statement copies print.
- **F Fax** - One statement copy is faxed. All faxed statements are sent as a group after printed statements are finished.

The customer record must include a contact name of either STMT.FAX, with a fax number, if the customer has a special fax number for statements, or FAX, with a fax number for a main fax machine.

If you print or send more than one copy of a statement, all copies after the first are labeled as "Reprint."

If **Entity** displays in this field, the settings are coming from the entity you are reviewing, not the bill-to customer in a bill-to/ship-to relationship.

## Entity

(View Only) Indicates the **Batch Statement** selection choice and the delivery method, such as Print 1 Copy or Fax 2 Copies.

## Customer Statement Cycle

Select a statement cycle code, which determines which customer statements print based on your selection when running the Print Statement program and the Post Service Charges Program. Statement cycle codes are defined in the **Valid Customer Statement Cycles** control maintenance record.

For example, if you enter **EOM** (end of month) in this field for this customer, the system includes the customer's statement when you run the Print Statements program for customers that want their statements printed only at the end of the month.

## Parent Statement Customer

Enter the customer to include on a parent statement. Typically, this is the bill-to customer.

## Print Parent Statements

Select one of the following: **Parent, Child, Both**. The system sets this to **Use Default** if no setting is selected.\*

## Subtotal On

Select one of the following for how you want to subtotal statements during printing: Bill-To, Ship-To, Bill-To/Ship-To, or None. The system sets this to Use Default if no setting is selected.

## Page Break On

Select one of the following for how you want to break up the statement reports during printing: Bill-To, Bill-To/Ship-To, or None. The system sets this to Use Default if no setting is selected.

## User-Defined Options on the Customer Pricing and Printing Information Window

The follow options are available from the Customer Pricing and Printing Information window to manage statements to print for the selected customer.

The screenshot shows the 'Customer Pricing and Printing Information' window with the 'Printing' tab selected. The window contains several configuration options for printing statements. The 'User Defined Options' section is highlighted with a red box. The options include:

- Separate AR From Bill-To:
- Statement Type: Balance Forward
- Batch Statement: 1 Copy
- Entity: Print 1 copy
- Customer Statement Cycle: [Dropdown]
- Parent Statement Customer: [Dropdown]
- Print Parent Statments: Use Default
- Subtotal on: Use Default
- Page Break on: Use Default
- User Defined Options: [Dropdown]
- SOE User Defined Document: [Dropdown]

### SOE User Defined Document

Select the print routine to run when an order for this customer prints. Typically, this is used to print labels.

- If you enter a document in this field, the system sets the **Requires Special Labels** check box in the Additional Customer Information window.
- If you clear a document from this field, the system deselects the **Requires Special Labels** check box. However, the **Requires Special Labels** check box can be selected without entering document in this field.

## Assigning Pricing by Customer Price Class

Customers who buy a broad range of products may require more than one customer price class assignment. You can give different discounts to customers based on the types of products they buy most often. When you assign a customer a price class, you can set up pricing matrix cells for this customer according to the price class rating. Set up and assign price class ratings in the Valid Customer Price Classes control maintenance record.

For example, a customer has earned a class 1 rating through sales of electrical supplies, but if class had been rated through sales of wire, the customer would have a class 4 rating. If this customer retains a class 1 rating while buying wire, the discounts remain the same for wire and electrical supplies for this customer.

Setting the price class/product matrix type feature changes the pricing hierarchy as follows:

- Normally, the hierarchy checks the matrix beginning with the standard matrix cells.
- Hierarchy is set in order of: ship-to branch-specific price class overrides, and then ship-to default price class overrides.
- Pairing the customer price class with a product matrix type sets the hierarchy as: ship-to branch-specific price class overrides, and next ship-to price class, and then ship-to default price class overrides.

### To assign pricing by customer price class:

1. From the **Maintenance** menu, select **Customer** to display the Customer Maintenance window
2. In the **Customer** field, enter a customer's name to display the customer record.
3. Select **Pricing > Price Information** to display the Customer Pricing Information dialog box.
4. Click the **Price Class Override** tab to display the Price Class Override options.
5. In the **Matrix Type** field, enter the product matrix type for the discount. Product matrix types are defined in the **Valid Product Matrix Types** control maintenance record, and each product is assigned a matrix type in Product Maintenance.

**Note:** Product matrix types are defined in the **Valid Product Matrix Types** control maintenance record, and each product is assigned a matrix type in Product Maintenance.

6. In the **Price Class** field, enter the customer price class for the discount. Correct discounts are applied when this price class and its corresponding matrix type are on the matrix cell.

**Note:** Set up and assign price class ratings in the **Valid Customer Price Classes** control maintenance record, and assign default customer price classes on the Customer Pricing Information screen.

7. Save your changes and exit the dialog box.

### To disable the product matrix type functionality:

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

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2. In the **Keyword** field, enter **Valid Product Matrix Types**, and press **Enter** to display the Prod Matrix Types screen.
3. Delete all entries on this screen.
4. From the **Reports** menu, select **Report Writer** to display the Report Writer/Mass Load Design screen.
5. Replace the entry in the **Matrix Type** field in all product records by mass loading a null entry for that field.

**Note:** Product matrix types are defined in the **Valid Product Matrix Types** control maintenance record, and each product is assigned a matrix type in Product Maintenance.

6. Replace the entry in the **Prc Class** field on the Customer Prc Class Ovrdr screen in all customer records by mass loading a null entry for that field.

**Note:** Set up and assign price class ratings in the **Valid Customer Price Classes** control maintenance record, and assign default customer price classes on the Customer Pricing Information screen.

## Defining Customer Print Styles

Print styles are assigned to a customer's account using the **Customer Pricing and Printing** window. The system uses print styles assigned for the customer on that customer's orders on the Order Entry **Header** tab during order entry.

Things to keep in mind when assigning print styles at the customer level:

- A ship-to customer's print style overrides a bill-to customer's print style.
- A manual change to the print style on the Order Entry Header window overrides the default print style assigned on Customer Pricing Information dialog box.
- An entry in the **Print Style** field on the Order Reprinting Options window (**Orders > Printing > Reprint Picking Ticket**) overrides the print style assigned on the Order Entry Header window.

**To define a customer's print style:**

1. From the **Maintenance** menu, select **Customer** to display the Customer Maintenance window.
2. In the **Customer** field, enter a customer's name to display the customer record.
3. Select **Pricing > Customer Pricing and Printing** to display the Customer Pricing Information dialog box.
4. Click the **Print Styles** tab.

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**Important:** If Eclipse Forms is turned **on** for your company, this **Forms Types** tab displays instead. Use the **Form Types** tab to assign printing parameters.

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5. Use the **General** area to define form print styles and options.

Field	Description
<b>Print Style</b>	<p>Enter a user-defined print style to use for this customer's shipping tickets. The print style specified here is assigned to this customer's order through the Order Entry <b>Header</b> tab, and includes column number and heading, character format, start position, and so forth.</p> <p>The following are some commonly used print styles:</p> <ul style="list-style-type: none"> <li>• NET - Shows the customer unit price extensions.</li> <li>• BLIND - Does not print pricing or totals.</li> <li>• BLIND.TOT - Does not print pricing on the detail lines, but prints subtotals and order totals. This option is used for lot pricing.</li> </ul>
	<p>Keep the following criteria in mind when setting up print styles:</p> <ul style="list-style-type: none"> <li>• A ship-to customer's print style overrides a bill-to customer's print style.</li> <li>• A manual change to the print style on the Order Entry <b>Header</b> tab overrides the default print style assigned on Customer Pricing and Printing window.</li> <li>• An entry in the <b>Print Style</b> field on the Order Reprinting Options window overrides the print style assigned on the Order Entry <b>Header</b> tab.</li> </ul> <p><b>Note:</b> If your company has customized versions of order document printing programs, these print styles can override the order print style.</p>

Field	Description
<b>Invoice Print Style</b>	<p>Do one of the following:</p> <ul style="list-style-type: none"> <li>• Enter a user-defined print style to use for this customer's invoices. Print styles include column number and heading, character format, start position, and so forth.</li> <li>• Perform the following procedure to print consolidated invoices that display a description, such as <b>**Consolidated Invoices **</b>, instead of printing a list of all items from each invoice: <ol style="list-style-type: none"> <li>1. In Product Maintenance, define a product with the description <b>"** Consolidated Invoices **"</b>.</li> <li>2. In the <b>Consolidated Invoicing Product</b> control maintenance record, enter that product description.</li> </ol> </li> </ul>
<b>SO / TO Tiff / PDF Options</b>	<p>Overrides the setting in the <b>E-mail Attachment Settings</b> control maintenance record for this customer for all sales order and purchase order documents generated and sent using e-mail. If the customer has an associated ship-to customer, the system uses the setting for that customer. If both the ship-to and the bill-to are blank, the system uses the setting in the E-mail Attachment Settings control maintenance record. Select from the following options:</p> <ul style="list-style-type: none"> <li>• Tiff of Print Form - Creates a .tiff image file using the Print form.</li> <li>• Tiff of Fax Form - Creates a .tiff image file using the Fax form.</li> <li>• PDF of Print Form - Creates a .pdf file using the Print form.</li> <li>• PDF of Fax Form - Creates a .pdf file using the Fax form.</li> </ul>
<b>Statement Tiff / PDF Options</b>	<p>Overrides the setting in the <b>E-mail Attachment Settings</b> control maintenance record for this customer for all statements generated and sent using e-mail. If the customer has an associated ship-to customer, the system uses the setting for that customer. If both the ship-to and the bill-to are blank, the system uses the setting in the E-mail Attachment Settings control maintenance record. Select from the following options:</p> <ul style="list-style-type: none"> <li>• Tiff of Print Form - Creates a .tiff image file using the Print form.</li> <li>• Tiff of Fax Form - Creates a .tiff image file using the Fax form.</li> <li>• PDF of Print Form - Creates a .pdf file using the Print form.</li> <li>• PDF of Fax Form - Creates a .pdf file using the Fax form.</li> </ul>

6. Use the **Email Print Styles** area to define how you want e-mail forms to print.

Field	Description
<b>Invoices</b>	Enter the print style to use for this customer's invoices. Before the system sends an e-mail, it checks the order and the customer record for print style overrides. If it does not find an override, it uses the print style setting in the <b>Default E-mail Print Styles</b> control maintenance record.
<b>Bids</b>	Select the print style to use for this customer's bids. Before the system sends an e-mail, it checks the order and the customer record for print style overrides. If it does not find an override, it uses the print style setting in the <b>Default E-mail Print Styles</b> control maintenance record.
<b>Ship Tickets</b>	Enter the print style to use for this customer's ship tickets. Before the system e-mails a ship ticket, it checks the order and the customer record for print style overrides. If it does not find an override, it uses the print style setting in the <b>Default E-mail Print Styles</b> maintenance record.

Field	Description
<b>Acknowledgements</b>	Select the e-mail print style to use for this customer's acknowledgements. Before the system sends an e-mail, it checks the order and the customer record for print style overrides. If it does not find an override, it uses the print style setting in the <b>Default E-mail Print Styles</b> control maintenance record.

7. From the **File** menu, select **Save** and exit the window.
-

## Entering Customer Rebate Information

Record products, price lines, or price groups in Customer Rebate Maintenance that qualify your customers for a vendor rebate.

### To enter customer rebate information:

1. From the **Maintenance** menu, select **Customer** to display the Customer Maintenance window.
2. In the **Customer** field, enter the customer's name to display the customer record.
3. Select **Pricing > Rebate** to display the Customer Rebate Maintenance dialog box
4. In the **Prod Description, /Price Line, !Group** column, enter a product, a price line, or a price group as follows:

To enter a...	enter...	The rebate applies to...
<b>Product</b>	a period (.) followed by the part number or part of the product description, and press <b>Enter</b> to display a list of products from which to select.	the products entered only.
<b>Price Line</b>	a forward slash (/) followed by the price line ID or part of the price line description, and press <b>Enter</b> to display a list of price lines from which to select.	all products in the price line entered.
<b>Price Group</b>	an exclamation point (!) followed by the price group ID, or enter part of the price group description, and press <b>Enter</b> to display a list of price groups from which to select.	all products in the price group entered.

5. In the **Contract Number** column, enter the number that identifies the contract, if any, associated with the rebate offer. The vendor typically supplies this number. This number displays on the Customer Sales Rebates report.
6. In the **Rebate Vendor** column, enter the name of the vendor who is offering the rebate. When you complete this field, you can run the Customer Sales Rebates report specific to this vendor and submit it for payment.
7. In the **Effective Date** field, enter the date the rebate goes into effect.
8. In the **Expire Date** column, enter the date the rebate offer is no longer effective. If you leave this field blank, the rebate offer is good indefinitely. The system compares the expiration date to the generation ship date to determine whether a rebate offer is still in effect.
9. Save your changes and exit the dialog box.

## Creating Contracts for Customers and EDI Trading Partners

You can determine if the EDI 845 Contract Upload program should create cost only overrides or both cost and price overrides for rebates set up for a customer's EDI trading partners.

### To create contracts for a customer and EDI trading partner:

1. From the **Maintenance** menu, select **Customer** to display the Customer Maintenance window.
2. In the **Customer** field, enter the customer ID to display the customer record.
3. Select **Additional > EDI** to display the EDI Trading Partner screen.

**Note:** If prompted, log on to the character-based system.

4. Use the **Contract Upload** hot key to display the Contract Upload Setting screen.

All customers display the **Cost Only** flag for all trading partners that have 845 documents defined.

5. In the **Cost Only** column, enter **Y** if you want the EDI 845 Contract Upload program to create cost-only overrides rather than both cost and sell overrides. Leave **N** as the entry to create both cost and sell overrides.
6. In the **Mark Up** column, enter the percentage of markup that applies to each vendor.

**Note:** This markup percentage is used only when new groups or items are added to the updated contract, or a when a contract is set up for the first time.

## Using Contract Pricing With Customer Records

Contract pricing uses a *generic* customer to apply rebates, overrides and other special pricing to multiple customers' records. This eliminates the need to create pricing criteria for each customer. You can also set up multiple customers in a home branch, and apply contract pricing to that branch to avoid entering pricing information for each customer.

This topic contains the following procedures:

- Creating a contract customer.
- Assigning contract pricing to an existing customer.
- Copying contracts to a group of customers.

### To create a contract customer:

1. From the **Maintenance** menu, select **Customer** to display the Customer Maintenance window.
2. In the **Customer** field, do one of the following:
  - Enter a customer's name to display the customer record that you want to use as the contract customer.
  - Enter a generic customer name to use as a contract customer. A generic customer name can be a description of the pricing rules or override represented in the pricing rules.
3. In Sell Matrix Maintenance, create a sell matrix cell for this customer that includes the pricing rules that you want to apply to this special pricing circumstance.

### To use contract pricing for an existing customer:

1. From the **Maintenance** menu, select **Customer** to display the Customer Maintenance window.
2. In the **Customer** field, enter a customer for which to apply the contract pricing rules.
3. Select **Pricing > Price Information** to display the Customer Pricing Information dialog box.
4. Select **Edit > Contracts** to display the Contract Pricing dialog box.
5. Enter the name of the customer associated with the contract you want to use. This can be a generic customer you created or an actual customer. You can assign multiple customer names.

The settings in the **Search Contract Pricing In Order Listed** and the **Best Price Check Through Matrix Cells** control maintenance records affect how the system searches for the correct price. The example in the following table assumes that the system has at least two contracts set up:

Search Contract Pricing In Order Listed	Best Price Check Through Matrix Cells	Search Results
Y	N	Searches first contract product and then group and then searches each consecutive contract, as follows: <ol style="list-style-type: none"> <li>1. Contract 1/Product</li> <li>2. Contract 1/Groups</li> <li>3. Contract 2/Product</li> <li>4. Contract 2/Groups</li> </ol>

Search Contract Pricing In Order Listed	Best Price Check Through Matrix Cells	Search Results
N	N	Searches the first contract for product and then each consecutive contract for product before searching contracts for groups, as follows: 1. Contract 1/Product 2. Contract 2/Product 3. Contract 1/Groups 4. Contract 2/Groups
Y or N	A or C	All Contract cells will always be searched for the best price.

6. Save your changes and exit the dialog box.

This customer record refers to the contract sell matrix only when the customer orders products assigned to the matrix cell. You can point to a contract to include some items ordered by the customer, and you can define different pricing rules for other items by having a separate price matrix for this customer.

#### To copy contracts to a group of customers:

1. From the **Maintenance > Price Maintenance** menu, select **Customer Contract Copy Utility**.  
**Note:** If prompted, log on to the character-based system.
2. In the **Customer To Copy From** field, enter the customer ID from which information is copied.
3. In the **Home Branch** field, enter the home branch from which to select the customer. The system copies the contract information to customers who have this branch assigned as their home branch.
4. In the **Customer Type** field, enter the customer type from which to select the customer. The system copies the contract information to customers who are assigned this type. Use the **Multi** hot key to include multiple types.  
**Note:** Customer types are assigned on the Customer Pricing Information screen.
5. In the **Price Class** field, enter the customer price class from which to select the customer. The system copies the contract information to customers who are assigned this class. Use the **Multi** hot key to include multiple price classes.  
**Note:** Set up and assign price class ratings in the Valid Customer Price Classes control maintenance record, and assign default customer price classes on the Customer Pricing information window.
6. In the **Customers to Copy To** field, enter the customer to which to copy the information. Use the **Multi** hot key to include multiple customers. If you entry a customer here, the system ignores the **Home Branch**, **Customer Type**, and **Price Class** fields and copies the contract information to this customer or set of customers.
7. Use the **Begin** hot key to copy the information to the selected customer.

## Defining Customer Sales Tax

You normally tax a consumer in the district where the consumer takes ownership of the product, but you can enter, change, and override a customer's sales tax. Tax jurisdictions are assigned by zip code.

Use the Sales Tax screen to complete the following tasks:

- Add a tax exception group to a customer record.
- Assign a tax jurisdiction override to a customer.
- Enable line item taxability for a customer.
- Adding a tax exempt number to a customer record

## Customer Points Overview

You can promote products by rewarding customers for purchasing a target dollar amount of a product. The customer *earns points* based on dollars of merchandise purchased, and for all products purchased, individual products, products in price lines, or products in price groups.

You can pre-set the ratio of points per dollar purchased at the product, branch, customer, or product price line level, for both stock and direct sales.

## Assigning Points Programs to Customers

After you define the products, price lines, or price groups for which a customer can earn points and the periods during which the points can be earned, you can set up customers to earn points each time they purchase the affected products. You can also save a customer's data as a template and reuse it for other customer records.

The customer points program's names are defined in the **Valid Customer Points Programs** control maintenance record. Assign the CUST.POINTS authorization key to users who will access and edit the Points Maintenance dialog box and print the Customer Points Report.

The following procedures are described in this topic:

- Setting up customer points
- Editing the customer's product list in Customer Points

### To assign points programs to a customer:

1. From the **Maintenance** menu, select **Customer** to display the Customer Maintenance window.
2. In the **Customer** field, enter the bill-to customer ID for whom points will accrue to display the customer record. If you assign points programs to ship-to only customers, those points will accrue only for the associated bill-to customers.
3. Select **Orders > Points Maintenance** to display the Customer Point Maintenance dialog box.

Field	Description
<b>Program</b>	Select a points program. You can assign as many points programs to a customer as you want, but each points program is maintained on its own Customer Point Maintenance dialog box. Points programs are defined in the Valid Customer Points Programs control maintenance record.
<b>Minimum Target</b>	<p>Enter the lowest number of points that the customer needs to accumulate to qualify for a reward. The customer earns points based on a dollar amount spent for any products in the customer's points program, as listed in the body of this screen.</p> <p>When you enter a value in the <b>Qualifying Target</b> field, the customer must accumulate points for both the minimum target and the qualifying target before they can receive a reward.</p> <p>Set products as qualifying products by entering <b>Y</b> in the <b>Qual</b> column for those products.</p> <p><b>Note:</b> If you save this customer points setup as a template and later change a dollar value of the target, the new value is not saved in the original template. Select <b>Edit &gt; Save Template</b> to save the information on a new template to reuse the target value.</p>
<b>Qualifying Target</b>	Enter the minimum number of points the customer needs to accumulate to receive a reward. Use this field only if you also use the <b>Minimum Target</b> field. See <i>Setting Up Levels of Qualifying Points</i> for more information.

Field	Description
<b>ALL, DESC, /Price Line, !Group</b>	<p>Enter products, as follows:</p> <ul style="list-style-type: none"> <li>• <b>All</b> - Enter <b>ALL</b> if you allow the customer to earn points for all products.</li> <li>• <b>Desc</b> - Enter a product description if you allow the customer to earn points for purchasing.</li> <li>• <b>/Prc Line</b> - Enter a price line to allow the customer to earn points for purchasing products in that price line. Type a slash ( / ) or a slash followed by a partial name to display a list of price lines.</li> <li>• <b>!Group</b> - Enter a price group to allow the customer to earn points for purchasing products in that price group. Type an exclamation point ( ! ), or an exclamation point followed by a partial name to display a list of price groups.</li> </ul> <p>If a product is associated with more than one line on the dialog box:</p> <ul style="list-style-type: none"> <li>• The line for a product overrides the line for a price line to which that product belongs.</li> <li>• The line for a price line overrides the line for a price group to which that price line belongs.</li> <li>• The line for a price group overrides the line for ALL.</li> </ul> <p>If you enter two lines for the same product, price line, or price group, the system uses the line whose effective date is closest to the current date and has not expired.</p>
<b>Type</b>	<p>Select one of the following:</p> <ul style="list-style-type: none"> <li>• <b>* Multiplier</b> - The numbers entered in the <b>Stock Sale</b> and <b>Direct Sale</b> fields are calculated as multipliers.</li> <li>• <b>% Percentage</b> - The numbers entered in the <b>Stock Sale</b> and <b>Direct Sale</b> fields are calculated as percentages.</li> </ul>
<b>Stock Sale</b>	<p>Enter a multiplier or percentage for a stock sale of this product. The system multiplies this value times the dollar amount of the product sold to determine points earned.</p>
<b>Direct Sale</b>	<p>Enter a multiplier or percentage for a direct sale of this product. The system multiplies this value times the dollar amount of the product sold to determine points earned.</p> <p><b>Note:</b> For the <b>Stock Sale</b> and <b>Direct Sale</b> fields, multipliers can use a single decimal place. Percentages must be whole numbers. The entry in the <b>Type</b> field determines the placement of the decimal point.</p>
<b>Effective Date</b>	<p>Enter the date the customer can begin accumulating points for buying the products on this line item.</p>
<b>Expire Date</b>	<p>Enter the date past which the customer can no longer accumulate points for buying the products on this line item.</p>

4. Select the **Override** check box for each line item for the system to use the multiplier or percentage on this dialog box, regardless of whether multipliers or percentages were entered at the product or price line level.

If left unchecked, the system uses the multiplier or percentage entered at the product level:

- If one was entered at the product or price line level the system ignores multipliers or percentages entered on this dialog box.

## Maintaining Customers and Vendors

- If the product level has no multiplier or percentage, the system uses the multiplier or percentage entered at the price line level.
  - If the price line has no multiplier or percentage, the system uses the multiplier or percentage entered on this dialog box.
  - If there is no multiplier or percentage on this dialog box, the customer does not earn points.
5. Select the **Qualify** check box if the line item contributes to this point program's qualifying points. If not, leave the option unchecked.
  6. To save the list of products, price lines, and price groups as a template, select **File > Save Template**. At the Enter Save ID prompt, enter a name for the template and click **OK**. You can then apply this template to other points programs by entering that name in the **Template** field.
  7. Save the settings and exit the dialog box.

### To edit the product list in Customer Points:

1. From the **Maintenance** menu, select **Customer** to display the Customer Maintenance window.
2. In the **Customer** field, enter the customer's name to display the customer record.
3. Select **Orders > Points Maintenance** to display the Customer Point Maintenance dialog box.
4. Do one of the following to edit the product list:
  - If products, price lines, price groups, or All display without a template name in the **Template** field, you can edit the body of the dialog box.
  - If a template was used, delete the template name from the **Template** field.
  - If nothing displays in the list, enter products, price lines, or price groups in the body of the dialog box and enter date ranges and multipliers, if necessary. When finished editing the data, do one of the following:
    - Select **File > Save Template** to save the data as a template that you can use to create a points program for other customer records.
    - Exit this dialog box and save the data for this customer only.
    - In the **Template** field, select a previously saved template. Exit this dialog box and use the displayed data for this customer.
5. Select **Edit > Find Product** to enter a product description and search for a product in the list. If the product is found, the cursor displays on that line.
6. Select **Edit > Copy Line** to copy the current line to the following line.
7. Save your changes and exit the dialog box.

## Defining Points Qualification Levels

Set up varying levels of points qualifications to promote product sales. Customers receive better rewards for each level reached.

For example, encourage customers to qualify for a chance to earn a bonus gift when they accumulate 10,000 points in purchases of your ABC price line. To receive the bonus gift, the points accumulated for the ABC price line must include purchases worth 2,500 points of your ABC/125 product.

### To define points qualification levels:

1. From the **Maintenance** menu, select **Customer** to display the Customer Maintenance window.
2. In the **Customer** field, enter the customer's name to display the customer record.
3. Select **Orders > Points Maintenance** to display the Customer Point Maintenance dialog box.
4. In the **Program** field, enter a points program.
5. In the **Minimum Target** field, enter the number of points the customer must accumulate to qualify for a possible reward from the points program.
6. In the **Qualifying Target** field, enter the number of points the customer must accumulate to receive a reward.
7. Check the box in the **Qualify** column in the body of the dialog box for each line item that contributes to the customer's points.
8. In the **Effective Date** and **Expire Date** columns, enter an effective date and expiration date for each line item included in the points program.
9. Save your changes and exit the dialog box.

## Viewing and Editing Customer Points

Accumulated, redeemed, and adjusted customer points are maintained within individual customer accounts. With the proper authorization, you can view and edit these points.

### To view and edit customer points:

1. From the **Maintenance** menu, select **Customer** to display the Customer Maintenance window.
2. In the **Customer** field, enter the customer's name to display the customer record.
3. Select **Orders > Points Maintenance** to display the Customer Point Maintenance dialog box.
4. Select **Edit > Edit Points** to display the Points Maintenance dialog box.

Points data for the current year display as the default. Click the < button to display the previous year's points and click the > button to display the next year.

The **Year** column displays the following:

- The year for the displayed data.
- The balance forward from the previous year.
- Each month of the current year.
- A year-to-date total.
- The overall balance.

The view-only **Accrued** column displays the points accrued by the system for each month of the year.

5. In the **Redeemed** column, enter one of the following, if necessary:
  - The number of points *redeemed* as a positive number when a customer uses a defined number of points for a reward.
  - The number of points as a negative number if a customer *returns* previously redeemed but unused points.
6. To adjust the accrued points for a given month, in the **Adjustments** column, enter the number of points, which can be positive or negative.
7. The **Balance** row displays the total accrued points that have not been redeemed. The formula is:  
$$\text{Balance} = \text{Accrued} - \text{Redeemed} + \text{Adjustments}$$
8. Save your changes and exit the dialog box.

## Printing Points Statements and Reports

Run the Customer Points Report and the Customer Points by Price Line Report for all customers, for all customers in a branch or territory, or for a single customer. The report lists the monthly accrued, redeemed and adjusted points for a year and the balance for a year and the previous year.

- Use the Customer Points Report to list the accumulated, redeemed and adjusted points for a given year for one or more customers.
- Use the Customer Points by Price Line Report to list the month-to-date and year-to-date accumulated points and purchase amounts as of a given date for each price line purchased by each customer, or use Report Writer to create your own custom reports.
- Use the Customer Points Statement Report to update your customers on their points program status for customers participating in the Customer Points program.

In addition to using the system's prepared reports, dictionary items, defined in the entity file, can be used to create reports. For information about using the Eclipse Dictionary, see Eclipse Dictionary Overview.

## Splitting Commissions

You can split the commission between sales representatives working with one customer account. For example, one of your outside salespeople and one of your inside salespeople share in a commission. The outside sales person who is the on-site contact receives 80 percent of the commission and the inside salesperson receives 20percent. Use split commission percentage to divide the commission between the two.

### To split a commission:

1. From the **Maintenance** menu, select **Customer** to display the Customer Maintenance window
2. In the **Customer** field, enter a customer's name to display the customer record.
3. Select **Additional > Split Commission Percentages**, to display the Salesperson Split Commission Percentage dialog box.

The Salesperson Split Commission Percentage dialog box displays for the selected type and any split commissions in effect.

If split commissions have not been assigned, the dialog box shows the salesperson's ID and the percentage set to 100.

4. Click the **Inside** and **Outside** tabs to set up split commissions for your inside and outside salespeople.
5. In the **Branch** field, enter the branch for which the split commission applies. To apply a split commission for all branches, leave this field blank.
6. In the **CommGrp** field, enter the commission group to which the salesperson at the branch belongs. If left blank, all commission groups are assigned to the salesperson at the branch.

**Note:** **DLFT** is a valid commission group for this field. The system uses the default commission group when a product is not assigned to a commission group.

7. In the **Salesperson** column, enter the names of the salespeople who are splitting the commission. The system populates this column with the default inside or outside salesperson set in Customer Maintenance.

**Note:** The system uses the following hierarchy when determining split commissions for salespeople:

1. Commission Split on the Ship-To
  2. Default Outside Salesperson on the Ship-To
  3. Commission Split on the Bill-To
  4. Default Outside Salesperson on the Bill-To
8. In the **Percentage** column, enter the percentage of the commission each salesperson receives. The percentage total must equal 100 and can have up to two decimal places. For example, enter 55.37 for 55.37%.
  9. Save your changes and exit the dialog box.

## Changing the Sales Commissions Earned

You can change the commissions earned by the order writer, inside sales representative, or outside sales representative without changing their standard commission plans. Use this feature to encourage sales to new customers, or to offer a higher commission during promotions.

### To change the sales commission earned:

1. From the **Maintenance** menu, select **Customer** to display the Customer Maintenance window
2. In the **Customer** field, enter a customer's name to display the customer record.
3. **Select Additional > Commission Override** to display the Customer Commission Overrides dialog box
4. In the **Writer**, **Inside**, and **Outside** fields, enter percentages of increased or decreased commission for each salesperson.

The system changes the salesperson's commission for sales to this customer by multiplying the salesperson's standard commission percentage by the percentage entered on this field. For example: To double the commission earned, enter 200%; or to reduce the commission earned by half, enter 50%.

5. In the **Review Date** field, enter the date to review the percentages set on this dialog box, as needed. Use this information to create a report using Report Writer that lists all customers with commission overrides in effect and their corresponding review dates.
6. In the **Reason** area, enter an explanation of the commission overrides you just entered.
7. Save your changes and exit the window.

## Vendor Maintenance Overview

Use Vendor Maintenance to create vendor records that store location, transaction, and shipping information for all of the vendors from which you buy products.

When you enter a vendor's name on a purchase order, on reports, or anywhere else in the system vendor data is used, the system refers to the vendor record.

You can use Vendor Maintenance for the following types of tasks:

- Assign branch accessibility to determine which branches can purchase products from a vendor. You can assign as many branches as necessary to a vendor to meet your company's purchasing needs.
- Create vendor expense distribution codes to pre-define the distribution of a vendor's invoice to G/L accounts based on a percentage.
- Monitor a vendor's shipping practices by setting a number of days before and after a purchase order's due date that a shipment can arrive from a vendor without creating an unquality event. The system posts an unquality event when these standards are missed.
- Enter the minimum amount your vendors require you to buy of a target type to prevent the release of purchase orders before those target amounts are met.
- Determine the branch to serve as the default drop point for central purchasing purchase orders submitted to each vendor.
- Set parameters for outsourcing accounts payable checks for vendors to determine when and under what circumstances a vendor gets a check.

## Creating Vendor Records

Use the Vendor Maintenance window to create and maintain vendor records. The vendor record identifies details such as shipment schedules and consignment specifications. If the vendor has different payment and shipment addresses, you need to create separate records for each, and you must create the pay-to record first.

**Note:** For information about creating vendors for customer refunds and other one-time transactions, see *Creating Vendor Records for Customer Refunds and Other One-Type Payments*.

You can restrict access to fields and menu items in Vendor Maintenance by setting the following control maintenance records and authorization keys:

- Vendor Maintenance Authorization Level - This control maintenance records assigns security levels to each field available for editing in Vendor Maintenance.
- VENDOR.MAINT - Assign Level 1 for view-only access, or Level 2 for editing access to Vendor Maintenance.
- VENDOR.MAINT.LEVEL - If a user has VENDOR.MAINT Level 2, the system uses the levels assigned in the **Vendor Maintenance Authorization Level** control maintenance record and the user's levels assigned in VENDOR.MAINT.LEVEL to determine whether the user can edit fields in Vendor Maintenance. A user must have the same level or higher as assigned in the control maintenance record to edit the field in Vendor Maintenance.

### To create a vendor record:

1. From the **Maintenance** menu, select **Vendor** to display the Vendor Maintenance window.
2. Click the **New Vendor** button.

The system assigns a vendor ID number that displays in the lower-left corner of the window.

**Note:** To display an existing vendor record, enter the vendor's name in the **Vendor** field.

3. In the **Name** field, enter the vendor's name as you want it to appear on documents. If this is a pay-to record, use the vendor's legal name.
4. In the **Address** field, do one of the following:
  - If this is the pay-to address, enter the address to which to send correspondence.
  - If this is the ship-from address, enter the address from which products will ship.

**Note:** If you need additional lines to complete the address, select **Additional > Additional Address** to enter the remainder of the address.

5. In the **City** field, enter the name of the city that corresponds to the address entered above.

The system displays a list of matching cities. Select the city and state to populate the **ZIP**, **ST**, and **Country** fields.

**Note:** Select **Additional > Additional Address** to enter additional vendor address information if necessary.

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6. In the **Sort By** field, enter the most significant word in the vendor name or any combination of numbers or letters for which the system to refer when sorting vendors in alphabetical order.
7. If this is a ship-from vendor, in the **Pay To** field, enter the vendor' pay-to record name.
8. In the **Index** field, enter additional words for the search index to use when searching for this vendor.

The system uses the words in this field as tokens in the search index. You can add any information in this field that might be useful for a search. Some examples:

- Example 1: If you know your vendor by their vendor number on your old system, enter that number in this field.
  - Example 2: If the vendor name is Alan Clawson Plumbing, enter the abbreviation ACP.
9. On the **Phones** tab, enter the vendor's primary phone and fax numbers. For example, in the **Type** column enter **Fax1** for the primary fax number, and **Main** for the main office number, and enter those numbers in the adjacent **Number** column.

If you do not enter the fax code, faxed invoices, statements, and memos go to the main fax number.

**Note:** Use these tabs as a quick-reference list. This information is not directly connected to the information entered through the **Create New Contacts** button on the **Contacts** tab, where you can add or edit detailed contact information.

10. Click the **WWW** tab, and enter the entity's e-mail and internet information.
11. In the **Vendor Type** area, check any of the options that pertain to this vendor:

Check the option...	if...
<b>Pay To</b>	this is a vendor's pay-to name and address. You can flag the vendor as both pay-to and a ship-from.
<b>Ship From</b>	this is a vendor's ship-from name and address. You can flag the vendor as both a pay-to and a ship-from. If the vendor is a ship-from but not a pay-to, enter the pay-to vendor associated with this ship-from in the <b>Pay-To</b> field. If there is not ship from identified in the vendor record, the vendor is not available for purchase order creation.
<b>Auto Delete</b>	you want this vendor deleted from the system after all history and open transactions for this vendor are purged. A vendor can be deleted only if there is no ledger, PSUB, or A/P record associated with it.
<b>Freight Vendor</b>	the vendor provides and charges for freight. A freight vendor must be flagged as pay-to and ship-from to be entered on a P/O totals window. <b>Note:</b> If you flag this option, you cannot change the freight vendor status after the vendor has transaction history.
<b>Manufacturer</b>	the vendor is a manufacturer.

12. In the lower right area of the window, complete the fields, as needed:

Field	Description
<b>Ship Via</b>	Select the default method of product shipment this vendor uses.
<b>Vendor Type</b>	<p>Select a value that identifies how you use the vendor's services, for example, FREIGHT, or SERVICE. Control user access to vendor types by assigning the VALID.VEN.TYPES or INVALID.VEN.TYPES authorization key.</p> <p>Vendor types are stored in the <b>Valid Vendor Types</b> control maintenance record.</p>
<b>Over/Short Percentage and Over/Short Dollars</b>	<p>Enter the following information in each field:</p> <ul style="list-style-type: none"> <li>• <b>Over/Short percentage</b> - The percentage a purchase order amount is allowed to be greater or less than the invoice amount when reconciling P/Os in A/P.</li> <li>• <b>Over/Short dollars</b> - The dollar amount a purchase order amount is allowed to be greater or less than when reconciling P/Os in A/P.</li> </ul> <p>For example, if the settings are 1percent and \$5, and the vendor invoice is \$100, and the reconciled P/O's total is \$96, then the system does not approve the invoice because the difference exceeds 1percent.</p> <p><b>Note:</b> Use these fields only for exceptions to the default settings in the <b>A/P Over/Short Maximum</b> control maintenance record.</p>
<b>Payment Terms</b>	Select a payment terms code to use for this vendor's invoices. You can override this setting in Purchase Order Entry.
<b>Direct Terms</b>	<p>Define the pay terms (purchasing terms) you want to use for this vendor for direct sales orders.</p> <p>The system uses the following hierarchy for applying a terms code for a vendor:</p> <ul style="list-style-type: none"> <li>• When vendor terms are set, the system uses this <b>Direct Terms Code</b> field.</li> <li>• If the <b>Direct Terms Code</b> field blank, the system uses the <b>Default Payment Terms</b> control maintenance record setting for direct orders.</li> <li>• If the control maintenance record is blank, the system uses the value set in the <b>Payment Terms</b> field of the vendor record.</li> </ul> <p>Eclipse checks the ship-from vendor account record and will not check the pay-to vendor for terms codes.</p>
<b>Freight</b>	<p>Enter a freight term to restrict entry of freight on a purchase order, to require a specific freight vendor, to notify the user that the vendor is freight allowed, to require the user to enter a freight amount when the purchase order is received, or to prohibit the user from entering a freight vendor on the <b>Totals</b> window of the purchase order.</p> <p>In A/P Entry, the system displays a warning message if a user enters a freight amount on a P/O for a vendor and this field is flagged. Freight terms for vendors are set up in the <b>Vendor Freight Terms</b> control maintenance record.</p>
<b>Backorder Days</b>	<p>Enter one of the following to determine how to handle backorders:</p> <ul style="list-style-type: none"> <li>• <b>Review</b> - Adds backordered items to the Review P/O Backorders queue, usually found on the Purchasing menu.</li> <li>• <b>Cancel</b> - Cancels any backordered items from this vendor.</li> <li>• <b>A number</b> - Enter the number of days to be added to the receiving date to set the anticipated receiving date for backordered items.</li> <li>• <b>Leave the field blank</b> - Uses the entry in the <b>Default B/O Days For Purchase Orders</b> control maintenance record. If no value is entered for the control record, the system adds three days to the receiving date for backorders.</li> </ul>

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Field	Description
<b>Primary Currency</b>	<p>If this vendor's primary currency is not the same as your company's base currency, Select a currency from the list, otherwise, leave this field blank.</p> <p><b>Note:</b> Even if a vendor is based in a foreign country, the vendor's primary currency does not have to be the currency of that country.</p>

13. Save your changes and exit the window.

The system verifies that a vendor with the same address and zip code combination does not exist. If you created a duplicate the system warns you and displays a list of vendors containing the same information.

### More Options when Creating Vendor Records

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

To...	Select...
set up vendor-specific part numbers.	<b>File &gt; Vendor Part Numbers</b>
assign vendor-specific part numbers to this vendor.	<b>File &gt; Vendor Part #</b>
display the User Defined Data window for this vendor.	<b>File &gt; Classify</b>
assign access to this vendor for those using Eclipse Sales Force Automation.	<b>File &gt; Access List</b>
Copy the information from the currently displayed record to create a new vendor record.	<b>File &gt; Copy</b>
delete this vendor record.	<p><b>File &gt; Delete</b></p> <p>The system prompts for conformation before deleting. If this vendor has open orders or payables, this option is not available.</p>
enter criteria for creating purchase orders for a vendor.	<b>Orders</b>
view a summary of a pay-to vendor's account balances, without calling up each account separately. You must be assigned Level 2 of the VENDOR.MAINT authorization key to view A/P Summary information for a vendor.	<b>Additional &gt; A/P Summary</b>
set up parameters for a vendor for outsourcing and printing accounts payable checks.	<b>Additional &gt; Vendor Check Information</b>
display a complete list of a pay-to vendor's ship-from records. If you select this option from a ship-from only vendor record, it displays the pay-to vendor record.	<b>Additional &gt; Entity Relations</b>
add more detailed information to the vendor record.	<b>Additional &gt; Additional Vendor Information</b>
set parameters that determine unquality events (UET) for this vendor.	<b>Additional &gt; Additional Vendor Information</b>
add words to the search index for the system to use when searching for a vendor.	<b>Additional &gt; Additional Keywords</b>

To...	Select...
create vendor expense distribution codes to pre-define the distribution of a vendor's invoice to G/L accounts based on a percentage.	<b>Additional &gt; Expense Distribution</b>
create an EDI trading partner profile for this vendor.	<b>Additional &gt; EDI</b> <b>Note:</b> If prompted, log on to the character-based system.
write user-defined notes for this vendor record.	<b>Additional &gt; Vendor Notes</b> <b>Additional &gt; Reminder Notes</b>
set defaults at the vendor level to override settings at the branch or territory level.	<b>Additional &gt; Branch Overrides</b>
assign triggers to activities such as order entry, shipment confirmation, or purchase order entry for a fax, email, or EDI transmission.	<b>Additional &gt; Activity Trigger</b>
determine which branch serves as the default drop point if your company uses central purchasing.	<b>Additional &gt; Drop Point</b>
set up credit card payment types for your vendor.	<b>Additional &gt; Vendor Payment Information</b>

## Using the New Vendor Wizard

The New Vendor Wizard displays the required Vendor Maintenance fields in sequence, so you can quickly set up vendor records. The information you enter on the Wizard displays when you next access that vendor's record and the vendor's contact records.

### To create a vendor using the New Wizard:

1. From the **Maintenance** menu, select **Vendor** to display the Vendor Maintenance window.
2. Select **File > New Wizard** to display the New Vendor Creation Wizard dialog box.
3. To use the new wizard as the default method of entering a vendor, select the **Use new wizard by default** check box.
4. In the **Name** field, enter the vendor's name as you want it to appear on documents. If this is the vendor's pay-to record, use the vendor's legal name.
5. In the **Address** field do one of the following:
  - If this is the pay-to address, enter the address to which to send correspondence.
  - If this is the ship-from address, enter the address from which products will ship.
6. In the **City** field, enter the name of the city that corresponds to the address entered above.

The system displays a selection list. Select the city, state, and zip code from the list to populate the **Zip**, **State**, and **Country** fields.

7. Click the **Next** button to display the **Vendor Type** dialog box.
8. Select any of the listed descriptions that apply to this vendor record.

Check the option...	if...
<b>Pay To</b>	this is a vendor's pay-to name and address. You can flag the vendor as both pay-to and a ship-from.
<b>Ship From</b>	this is a vendor's ship-from name and address. You can flag the vendor as both a pay-to and a ship-from. If the vendor is a ship-from but not a pay-to, enter the pay-to vendor associated with this ship-from in the <b>Pay-To</b> field.
<b>Auto Delete</b>	you want this vendor deleted from the system after all history and open transactions for this vendor are purged. A vendor can be deleted only if there are no ledger, PSUB, or A/P records associated with it.
<b>Freight Vendor</b>	the vendor provides and charges for freight. <b>Note:</b> If you flag this option, you cannot change the freight vendor status after the vendor has transaction history.
<b>Manufacturer</b>	the vendor is a manufacturer.

9. Click the **Next** button to display the **Vendor Database Information** dialog box.
10. In the **Sort by** field, enter the most significant word in the vendor's name, or any combination of numbers or letters for the system to refer to when sorting vendors in alphabetic order.

11. If you did not designate this vendor as a pay-to, you must assign a pay-to vendor in the **Pay-To** field.
12. In the **Index** field, enter additional words for the search index to use when searching for this vendor.

The system uses the words in this field as tokens in the search index. You can add any information in this field that might be useful for a search. Some examples:

**Example 1:** If you know your vendors by their vendor number on your old system, enter that number in this field.

**Example 2:** If the vendor name is long, enter an abbreviation for the name.

13. Click the **Next** button to display the **Vendor Order Information** dialog box.
14. Populate the fields, as needed:

<b>Field</b>	<b>Description</b>
<b>Ship Via</b>	Select the default method of product shipment this vendor uses.
<b>Vendor Type</b>	Select a value that identifies how you use the vendor's services, for example, FREIGHT, or SERVICE. Control user access to vendor types by assigning the VALID.VEN.TYPES or INVALID.VEN.TYPES authorization key. Vendor types are stored in the <b>Valid Vendor Types</b> control maintenance record.
<b>Over/Short Percentage and Over/Short Dollars</b>	Enter the following information in each field: <b>Over/Short percentage</b> - The percentage a purchase order amount is allowed to be greater or less than the invoice amount when reconciling P/Os in A/P. <b>Over/Short dollars</b> - The dollar amount a purchase order amount is allowed to be greater or less than when reconciling P/Os in A/P. For example, if the settings are 1 percent and \$5, and the vendor invoice is \$100, and the reconciled P/O's total is \$96, then the system does not approve the invoice because the difference exceeds 1 percent.  <b>Note:</b> Use these fields only for exceptions to the default settings in the <b>A/P Over/Short Maximum</b> control maintenance record.
<b>Payment Terms</b>	Select a payment terms code to use for this vendor's invoices. You can override this setting in Purchase Order Entry.
<b>Freight</b>	Enter a freight term to restrict entry of freight on a purchase order, to require a specific freight vendor, to notify the user that the vendor is freight allowed, to require the user to enter a freight amount when the purchase order is received, or to prohibit the user from entering a freight vendor on the <b>Totals</b> window of the purchase order. In A/P Entry, the system displays a warning message if a user enters a freight amount on a P/O for a vendor that does not agree with this field. Freight terms for vendors are set up in the <b>Vendor Freight Terms</b> control maintenance record.

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Field	Description
<b>Backorder Days</b>	Do one of the following to determine how to handle backorders: <ul style="list-style-type: none"> <li>• Enter <b>R</b> - Adds backordered items to the Review P/O Backorders queue, usually found on the Purchasing menu.</li> <li>• Enter <b>C</b> - Cancels any backordered items from this vendor.</li> <li>• <b>#</b> - Enter the number of days to be added to the receiving date to set the anticipated receiving date for backordered items.</li> <li>• <b>Leave the field blank</b> - Uses the entry in the <b>Default B/O Days For Purchase Orders</b> control maintenance record. If no value is entered for the control record, the system adds three days to the receiving date for backorders.</li> </ul>
<b>Primary Currency</b>	If this vendor's primary currency is not the same as your company's base currency, select a currency from the list, otherwise, leave this field blank.  <b>Note:</b> Even if a vendor is based in a foreign country, the vendor's primary currency does not have to be the currency of that country.

15. Click the **Next** button to display the **Vendor Contact Information** dialog box.
16. In the **Phones** tab, enter the vendor's primary phone and fax numbers. Some guidelines:
  - Type** - Enter the type of phone for this vendor. For example, enter:
    - FAX to identify the main fax number.
    - INV.FAX for the fax number used for invoices
    - STMT.FAX for the fax number used for statements.
    - MEMO.FAX for the fax number used for memos.
  - Number** - Enter the number corresponding to the **Type** entry.
17. Click the **Contacts** tab, and then click the **Create New Contact** button to display the **Contact Maintenance** dialog box, where you enter contact information for the vendor.
18. Click the **WWW** tab to enter internet and e-mail address information.
19. Click the **Finish** button when done entering vendor and contact information.

## Defining Vendor Payment Information

Based on your service agreements and any other contractual agreements, you can define the parameters by which you pay your vendors. You can set EFT and ACH information, define how to sent remit-to information, and auto-approve accounts payable transactions.

### To define vendor payment information:

1. From the **Maintenance** menu, select **Vendor** and display the vendor for which you want to define payment information.
2. From the **Additional** menu, select **Vendor Payment Information**.
3. Use the fields on the **Payment Info** tab to indicate how you are handling payment information:

Field	Description
<b>Vendor Requires Separate Checks</b>	<p>Select one of the following:</p> <ul style="list-style-type: none"> <li>• <b>Yes</b> - Prints a separate check for each approved payable for the vendor. You cannot print negative or zero value checks if you use this setting.</li> <li>• <b>No</b> - Prints one check that includes the total amount of all the approved payables for the vendor.</li> </ul> <p><b>Note:</b> If the vendor is a generic vendor that you plan to use for customer refund checks or other one-time payments, set this field to <b>Yes</b>.</p>
<b>Is This a Generic Vendor?</b>	<p>Select one of the following:</p> <ul style="list-style-type: none"> <li>• <b>Yes</b> - This vendor is used for creating refund checks to your customers or for other one-time payments. This setting allows users with the AP.GEN.VDR.INFO.EDIT authorization key to change the remit-to name and address for the vendor in A/P entry. If you set this field to Yes, you should also set the Vendor Requires Separate Checks field to Yes to print a single check for each payable created for the vendor.</li> <li>• <b>No</b> - This is not a generic vendor. You can only set a vendor to be a generic vendor if no payables exist or have ever been created for the vendor.</li> </ul>
<b>Minimum Check Amount</b>	<p>(Optional) Enter a minimum amount for which you will cut a check to the vendor. You can also set a minimum check amount for a branch in the <b>Minimum Check Disbursement Amount</b> control maintenance record. The amount entered in this field overrides the amount set in the control record.</p> <p><b>Note:</b> The <b>Minimum Check Amount</b> and <b>Maximum Days Since Posted</b> fields work in conjunction with one another. If one is defined at the vendor level then both are respected.</p>

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Field	Description
<b>Maximum Days Since Posted</b>	<p>Enter a maximum day since approved posted value for a vendor. This is A maximum number of days since the last unpaid invoice date can be entered for a branch in the <b>Minimum Check Disbursement Amount</b> control maintenance record. The amount entered here overrides the amount on the control maintenance record.</p> <p><b>Note:</b> The <b>Minimum Check Amount</b> and <b>Maximum Days Since Posted</b> fields work in conjunction with one another. If one is defined at the vendor level then both are respected.</p>
<b>Pull Code</b>	<p>Select one of the following to determine how checks are sent to the remit-to address entered for the payable:</p> <ul style="list-style-type: none"> <li>• <b>E</b> - Mails checks in a single UPS envelope unfolded and un-stuffed using UPS for delivery the next day to an address.</li> <li>• <b>D</b> - Mails checks using first class domestic mail to the vendor address.</li> <li>• <b>Z</b> - Mails checks using first class foreign mail to the vendor address.</li> <li>• <b>R</b> - Prints checks and returns to the client.</li> <li>• <b>X</b> - Prints and sends the checks to the client using FedEx.</li> </ul>
<b>Payment Via EFT</b>	<p>Enter one of the following to determine how an electronic funds transfer (EFT) payment is sent for the vendor:</p> <ul style="list-style-type: none"> <li>• <b>Yes</b> - Sends the vendor payment using electronic funds transfer when the payment is included in a check run from the Print Checks screen. Check information for this vendor then goes to an EFT staging file and the funds are transmitted using the EFT Transmission Release program.</li> <li>• <b>No</b> - Sends the vendor a printed check when payment is included in a check run from the Print Checks screen. If you set this field to No, you do not need to complete the remaining fields in the Check Information window.</li> </ul>
<b>Auto A/P Approve</b>	<p>Set this field to Yes to set this vendor to have payables auto-approved if a received invoice matches the received amount on an order generation within the variance set in the <b>Over/Short Percentage</b> or <b>Over/Short Dollars</b> fields in Vendor Maintenance. If over short parameters are not defined in Vendor Maintenance, the system uses the parameters set in the <b>A/P Over/Short Maximum Parameters</b> control maintenance record.</p> <p>When you run the Auto Approve P/O Variances utility in the A/P Preview Queue, the system searches for invoices that match purchase orders with a single generation. If it finds a match that falls between the over/short parameters and this field is set to <b>Yes</b>, the system reconciles the invoice to the purchase order and approves the payable.</p>
<b>Payment Transfer Method</b>	<p>Select one of the following:</p> <ul style="list-style-type: none"> <li>• <b>Check</b> - Indicates that you are cutting a check to the vendor and sending it through the mail. you do not need to set the remaining fields in the window.</li> <li>• <b>ACH</b> - Transfers funds electronically using Automated Clearing House (ACH). Use the ACH method to make corporate payment (CCD) or a consumer/payroll payment (PPD).</li> </ul> <p>This field activates when <b>Payment Via EFT</b> field is set to <b>Yes</b>.</p>

Field	Description
<b>ACH Format</b>	Select the Automated Clearing House (ACH) format for this vendor. ACH formats are defined in the <b>Valid ACH Formats</b> control maintenance record. This field activates when <b>Payment Transfer Method</b> field is set to <b>ACH</b> .
<b>ACH Vendor Routing Transit #</b>	Enter the nine-digit American Banking Association number of the vendor's bank.
<b>ACH Vendor Account #</b>	Enter the vendor's Automatic Clearing House (ACH) account number for electronic funds transfers.
<b>ACH Vendor Account Type</b>	Select the type of account, checking or savings, to which to deposit the electronic funds transfer payment.

- Use the **Credit Card Payment Types** area to select credit cards you want to authorize users to pay multiple orders by credit card.

You must have credit cards set up in the **Valid Vendor Credit Card Types** control maintenance record.

- Use the **Default in A/P Entry** check box to make the selected credit the default credit card payment type when creating A/P Entry records.
- Use the **Wells Fargo Payment Manager** tab to indicate how you handle Wells Fargo payment information.

Field	Description
<b>Default Payment Type Code</b>	The type of payment preferred by the vendor, such as Check or Credit Card. This selection determines the active fields on the rest of the window. The payment type is provided by Wells Fargo and is dependent on the payment type codes enabled in the <b>Wells Fargo Payment Manager</b> control maintenance record and may not be changed. Only those payment types are available.
<b>CCER AP Control Contact*</b>	Primary contact person for all Commercial Card Expense Reporting (CCER) AP payments to be processed. Contact selections are determined by the contact listed in the <b>Contact</b> tab in the main Vendor Maintenance window.
<b>CCER AP Control Contact Email*</b>	Email for contact person for CCER AP payments.
<b>Contact Phone Number*</b>	Phone number for contact person listed for CCER AP payments.
<b>Vendor PIN Number</b>	Four-digit personal identification number (PIN) for the contact person. The is generated by the system. This number is used to process CCER payments.
<b>Maximum Payment Limit</b>	The highest dollar amount the vendor allows to be charged using the CCER system.

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Field	Description
<b>Preferred Payment Type Per Branch</b> area	<ul style="list-style-type: none"><li>• <b>Branch or Territory</b> - Enter the branch or territory for which you want to specify a payment type.</li><li>• <b>Preferred Payment Type Code</b> - Select the payment you want to allow at the selected branch or territory. The payment type is provided by Wells Fargo and is dependent on the payment type codes enabled in the <b>Wells Fargo Payment Manager</b> control maintenance record and may not be changed. Only those payment types are available.</li></ul>

\* **Must be edited from the main Vendor Maintenance window Contacts tab.**

**Note:** The Wells Fargo module is not intended to be used in conjunction with the Outbound EDI Payment Order/Remittance Advice (820) transactions. Wells Fargo Payment Manager is a companion product. Contact your Eclipse Inside Salesperson for more information.

7. Save your changes and exit the window.

## Entering User-Defined Data for Entities

Use the User Defined Data window to enter additional user-defined information about a customer, vendor, or contact. This information is usually detailed or personal data that you learn about the company or contact in the course of doing business.

Examples of user-defined customer data:

- Number of Employees
- Buying Group
- Association
- Competitors

Examples of user-defined contact data:

- Birthday
- Years employed at this company
- Spouse's name
- Hobbies

The system stores customer, vendor, and contact user-defined data in the following user-defined files:

- CUST.CLASS
- CUST.GROUP
- VEND.CLASS
- CONTACT.CLASS

To limit which user-defined fields display on the User-Defined Data windows, complete the following control maintenance records:

- Customer Classification Sort List
- Vendor Classification Sort List
- Contact Classification Sort List

For more information, see the Creating User-Defined Files.

### To enter user-defined customer, vendor or contact data:

1. From the **Maintenance** menu, select **Customer**, **Vendor**, or **Contact** to display the entity's maintenance window.
2. Enter the entity's name to display the entity record.
3. Select **File > Classify** to display the User Defined Data window.

The system populates the following fields and columns:

- **File Name** - The system file name containing the user-defined prompts listed on the window.
- **Desc ID** - The entity for which this window is displayed.

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- **Prompts** - The field names for which you enter data. If completed, the control maintenance records listed above determine the field order in which the prompts appear on the window.
  - **Category** - The SFA Category assigned to each prompt in Dictionary Maintenance. The system uses the category for selection and sorting purposes.
4. In the **Input** column for any of the prompts listed on the window, enter the value to store for this entry.
  5. Use the **Sort** hot key to change the order in the field name list. Enter one of the following sort options:
    - **Default** - Sorts the field names in the order defined in the control maintenance record listed above.
    - **By Attribute** - Sorts the prompts by the attribute number assigned in Dictionary Maintenance.
    - **By Category by Prompt** - Sorts the prompts alphabetically by category, then within each category, alphabetically by prompt name.
    - **By Category by Attribute** - Sorts the prompts alphabetically by category, then within each category, by attribute number.
    - **By Prompt** - Sorts the prompts alphabetically by prompt name.
  6. Select **File > Category** to filter the categories displayed in the list to only those associated with one or more SFA categories.
  7. Save your changes and exit the window.

## Assigning SFA Access to Entities

Define user message groups who can access entity information, such as customer maintenance or Eclipse Dictionaries, using the Eclipse Sales Force Automation (SFA) companion product from a laptop or Palm computing device. You can set different levels of access granted to each ID, depending on your security needs. In addition, you can assign SFA classifications, to build mass e-mails.

### To assign access to an entity:

- From the **Maintenance** menu, select one of the following:
  - **Customer** - Displays Customer Maintenance.
  - **Vendor** - Displays Vendor Maintenance.
  - **Contact** - Displays Contact Maintenance.
  - **Eclipse Dictionary > Dictionary Maintenance > Access** - Displays the Dictionary Maintenance screen. If prompted, log on to the character-based system.
- Enter an entity or dictionary name to display the record.
- Select **File > Access List** to display the Access Control List dialog box
- Select the first blank row and enter the user or message group name.
- In the **Level** field, enter one of the following activity levels:

Activity Level	Description
<b>No Access</b>	You cannot download information from this record to your laptop or Palm device. If you have access to a message group ID, use this option to deny access to users within that group. This level overrides any other levels assigned to the individual user IDs.
<b>View Only</b>	You can download information from this record to your laptop or Palm device, but you cannot make changes to the information.
<b>Review</b>	You can download information from this record to your laptop or Palm device and make changes to the information, but you cannot update the Eclipse database. The system creates a tracker with the changes and sends it to the user ID entered in the <b>SFA Administrator</b> control maintenance record.
<b>Full Access</b>	You can download information from this record to your laptop or Palm device, update the information, and sync it with the Eclipse database.

**Note:** To delete a user or group, select the row to delete, right click, and select **Delete Row**.

- Save your changes and exit the dialog box.

### To create SFA Contact Classification e-mail list:

- From the **System > System Files** menu, select **Control Maintenance** to display the Control Record Maint window.
- In the **Keyword** field, enter **Valid SFA** and press **Enter**.
- Select Valid SFA Contact Classifications.

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4. Enter the name of the list you are creating, such as *Sales Referrals*.
5. Save your changes and exit the window.
6. From the **Maintenance** window, select **Contact**.
7. For *each contact* you want in the new classification, open the contact file.
8. In the **Classification** field, select your list name, such as *Sales Referrals*.
9. Create your e-mail distribution list for your new classification.
10. Save your changes and exit the window.

## Copying Entity Records

If you have several entities, such as customers or vendors who all use the same setup and pricing/cost information, you can create one entity record, copy it, and then change the address, contact, and any other information for similar entities. Copying in this manner prevents you from having to enter the same information repeatedly.

**Note:** Copying a customer or contact record does not copy the credit card or the electronic funds transfer (EFT) information on file for that entity.

### To copy an entity record:

1. From the **Maintenance** menu, select **Customer** or **Vendor** to display the Customer or Vendor Maintenance window.
2. Enter a customer or vendor's name to display the record from which to copy.
3. Select **File > Copy** to display the **New Creation** prompt.

**Note:** In Customer Maintenance, the system may prompt to copy tax information. This prompt is activated in the **Prompt To Copy Tax Information From Bill-Tos to All Ship-Tos** control maintenance record.

4. If you want to include any branch-specific overrides for the customer or vendor, click **Yes** at the prompt. To copy the customer or vendor without the branch overrides, click **No**.
5. Enter the **Reason for Change** if necessary, and click **Yes**.
6. Change the name, address, and contact information as needed for the new entity.
7. Save your changes and exit the window.

## Assigning Purchase Order Criteria to Vendors

You can assign criteria specific to your purchase orders for a vendor by selecting the following options:

To...	Select...
enter a message to appear each time this vendor is displayed in Purchase Order Entry.	<b>Orders &gt; Vendor Order Entry Instructions</b>
enter a message to display each time the vendor is displayed in Purchase Order Entry.	<b>Orders &gt; Order Entry Message</b>
assign branch access to vendors. This information is required before the vendor displays in the primary index search.	<b>Orders &gt; Accessible Branches</b>
create a vendor record for each of your internal and external service-work vendors.	<b>Orders &gt; Work Order Processing Maintenance</b>

## Assigning Branch Access to Vendors

When you create vendor records, you must identify which branches can order products from this vendor. If your company is located in Massachusetts, for example, you may not want your purchasing agent to buy materials from a vendor located in California if you can get the same materials from a vendor in Connecticut.

You can assign each vendor a home branch, and then assign as many other branches as necessary to meet your company's purchasing needs.

At your branch, when performing a search in Purchase Order Entry or A/P Entry, any vendor that matches the search criteria and has your branch listed as active displays in the search list. If you do not assign accessible branch information for a vendor, the vendor does not display in the primary index search.

### To assign branch access to a vendor:

1. From the **Maintenance** menu, select **Vendor** to display the Vendor Maintenance window.
2. In the **Vendor** field, enter the vendor name to display the vendor record.
3. Select **Orders > Accessible Branches** to display the Accessible Branches dialog box.
4. In the **Home Branch** field, enter the name of the primary branch for this vendor.
5. In the **Home Territory** field, enter the name of the primary territory to the vendor if you have created territories.
6. In the **Branch/Territory** column, enter any additional branches and territories that require access to this vendor, or enter **All** to include all branches and territories.
7. In the **Active** column, for each branch and territory listed in the **Branch/Territory** column, check the box to authorize the branch to create P/Os for this vendor.

You cannot override this setting in Purchase Order Entry or A/P Entry. If the branch is not listed in the **Branch/Territory** column, you can add it as an active branch, as described in Applying Branch-Specific Overrides.

8. Save your changes and exit the dialog box.

## Defining Vendor Branch Override Capabilities

At your branch, when doing a search in Purchase Order Entry or A/P Entry, any vendor that matches the search criteria and has your branch listed as active displays on the search list.

A vendor's active branches setup determines which branches can create purchase orders for that vendor. Authorization keys assigned in User Maintenance and activation levels set up in the vendor's branches record work together to determine if a user in Purchase Order Entry or A/P Entry can add a branch to a vendor record. The user can either add a branch to a vendor record permanently, or use a branch for a single vendor transaction without adding that branch to the vendor's record.

To complete this task, you must:

- Set the **Display Customers/Vendors Who Are Inactive At A Branch** control maintenance record to **Yes** to activate the **Branch Activation Level** and **One-Time Activation Level** fields on the vendor's Accessible Branches dialog box.
- Assign either the VEN.BR.AUTH.OVRD and/or the VEN.BR.AUTH.ONETIME authorization key to required users.

If branches are listed and set up as inactive on the Accessible Branches dialog box, they may not be activated through POE or A/P Entry by this method. You must change the branch's active setting on the Accessible Branches dialog box to activate those branches.

### To set vendor branch override capabilities:

1. Set up branch access to vendors.
2. From the **Maintenance** menu, select **Vendor** to display the Vendor Maintenance window.
3. In the **Vendor** field, enter the vendor's name to display the vendor record.
4. Select **Orders > Accessible Branches** to display the Accessible Branches dialog box.
5. Assign branches to the vendor.
6. In the **Branch Activation Level** field, do one of the following to allow vendor branch overrides from Purchase Order Entry or A/P Entry:
  - Enter an authorization level between 0 and 99 to allow users with the VEN.BR.AUTH.OVRD authorization key at that level or greater to add a branch to this vendor record.  
  
For example, if you set the branch activation level to 50, any user working in Purchase Order Entry or A/P Entry with an authorization level set to 50 or higher can add a branch to this vendor record.
  - Leave this field blank to restrict all users without the VEN.BR.AUTH.OVRD working in Purchase Order Entry or A/P Entry from adding branches to this vendor record.
7. In the **One-Time Activation Level** field, do one of the following to allow a one-time vendor branch override from Purchase Order Entry or A/P Entry:
  - Enter an authorization level between 0 and 99 to allow users with the VEN.BR.AUTH.ONETIME authorization key at that level or greater to use an inactive branch for a single transaction from Purchase Order Entry or A/P Entry.

For example, if you set the one-time activation level to 50, any user working in Purchase Order Entry or A/P Entry with an authorization level of 50 or higher can use an inactive branch for a single transaction.

- Leave this field blank to restrict all users without the VEN.BR.AUTH.ONETIME authorization key working in Purchase Order Entry or A/P Entry from adding branches to this vendor record.

8. In the **Active** column, check the box for each branch listed in the **Branch/Territory** column that you want to activate for the vendor.

You cannot override this setting in Purchase Order Entry or A/P Entry, but if the branch is not listed in the **Branch/Territory** field, you can add it as an active branch from Purchase Order Entry or A/P Entry.

Leave the boxes unchecked to enable an authorized user to add a one-time activation to a branch not listed (see step 7).

9. Save your changes and exit the dialog box.

## Outsourcing A/P Checks

Set up parameters for a vendor for outsourcing accounts payable checks. These parameters determine when and under what circumstances a vendor gets a check from the SunTrust Bank.

Outsourcing checks through SunTrust Bank requires the following setup in Eclipse:

- Define information in the **Minimum Check Disbursement Amount** control maintenance records:
- Define vendor check information on the Vendor Maintenance Check Information dialog box.
- Run the Print Checks program in Accounts Payable to construct a check information file to send to the bank.
- Run the EFT Transmission program in Accounts Payable to electronically send the file to the bank.

### To outsource A/P checks:

1. From the **Maintenance** menu, select **Vendor** to display the Vendor Maintenance window.
2. In the **Vendor** field, enter the vendor's name to display the vendor record.
3. Select **Additional > Vendor Check Information** to display the Check Information dialog box.
4. In the **Vendor Requires Separate Checks** field, enter one of the following to determine the result when running the Print Checks program:
  - **Yes** - Prints a check for each payable. You cannot print negative or zero value checks with this setting.
  - **No** - Prints a single check that includes the total amount payable.
5. In the **Is This a Generic Vendor** field, select **Yes** to indicate that this vendor is used for created customer refund checks or other one-time payments.

For more information about generic vendors, see *Creating Vendor Records for Customer Refunds and Other One-Time Payments*.

6. In the **Minimum Check Amount** field, enter the lowest amount you will pay on one check to this vendor.

A setting in this field overrides the setting in the **Minimum Check Disbursement Amount** control maintenance record. If you enter zero (0) in this field, the system uses the value entered in the control maintenance record.

7. In the **Maximum Days Since Posted** field, enter a maximum time in days since the oldest approved unpaid payable for the vendor was posted to the general ledger.

A setting in this field overrides the setting in the **Minimum Check Disbursement Amount** control maintenance record. If you enter zero (0) in this field, the system uses the value entered in the control maintenance record.

**Note:** The **Minimum Check Amount** and **Maximum Days Since Posted** fields work together. Entries in both fields are respected if one is defined at the vendor level.

8. In the **Pull Code** field, enter one of the following options to determine how checks are sent:
  - **E** - Mails checks in a single UPS envelope, unfolded and un-stuffed, by UPS for delivery the next day to an address, for example, to your Accounts Payable department.

- **D** - Mails checks by first class domestic mail to the vendor address.
- **Z** - Mails checks by first class foreign mail to the vendor address.
- **R** - Prints checks and returns to the client.
- **X** - Prints and sends the checks to the client by FedEx.

9. In the **Payment via EFT** field, enter one of the following:

- **Yes** - Sends the vendor payment via electronic funds transfer when the payment is included in a check run from the Print Checks dialog box. Check information for this vendor then goes to an EFT Staging file and the funds are transmitted using the EFT Transmission Release program.

Entering **Yes** in this field activates the **Payment Transfer Method** field.

- **No** - Sends the vendor a printed check when payment is included in a check run from the Print Checks program. This setting makes remaining fields on this window inaccessible.

To print a check for a vendor from the...	and that vendor...	then...
A/P Entry window	is flagged to receive payment via EFT	the system prompts to generate the check via EFT.
A/P Preview Queue window	is flagged to receive payment via EFT	the <b>Next EFT Check #</b> field on the Single Check Printing dialog box displays an Eclipse-generated number. When you select the <b>Print</b> option from that window, the system sends the check information to the EFT Staging file for transmission to the outsourcing bank.
	is not flagged to receive payment via EFT	the <b>Next Check #</b> field on the Single Check Printing dialog box displays an Eclipse-generated number. When you select the <b>Print</b> option from that window, the system prints a check for the vendor.

10. In the **Payment Transfer Method** field, enter one of the following to determine how to pay this vendor:

- **Check** - The bank will send the vendor a check. Renders the remaining fields on this dialog box inaccessible.
- **ACH** - The bank will transfer funds electronically by ACH (Automated Clearing House).  
Use the ACH method to make a corporate payment (CCD) or a consumer/payroll payment (PPD).

11. In the **ACH Format** field, select the ACH format to use for this vendor's EFT transmissions. ACH formats are defined in the **Valid ACH Formats** control maintenance record.

12. In the **ACH Vendor Routing Transit #** field, enter the nine-digit American Banking Association number of the vendor's bank.

13. In the **ACH Vendor Account #** field, enter the vendor's ACH account number.

14. In the **ACH Vendor Account Type** field, enter the type of account in which to deposit the payment:

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- **Checking**
- **Savings**

15. Save your changes and exit the window.

## Creating Vendor Records for Customer Refunds and Other One-Time Payments

As you conduct business, you might find it necessary to provide customers refunds for products or services, or to make a one-time payment to a third party. Create refunds and one-time payments as payables in the system using A/P entry. Because A/P entry requires a vendor name and address to which to remit payment to, you need a vendor record to use for the refund or payment, however, each time you create these types of payments, the remit-to information is likely different.

Create a generic vendor record that allows users with the AP.GEN.VDR.INFO.EDIT authorization key to override the remit-to name and address in A/P entry each time you create that payable for the vendor. Using a generic vendor allows you to have a single vendor record for such one-time payments instead of having to create a miscellaneous vendor record each time you need to refund a customer or create a one time payment.

You cannot change an existing vendor record to a generic vendor if any payables have ever been created using the vendor. You also cannot change a generic vendor to a non-generic vendor.

### To create a vendor record for customer refunds and other one-time payments:

1. Create a vendor record with the **Pay-To** field selected.  
**Note:** If your generic vendors have the Ship-From field in the Vendor Maintenance screen selected, they are available for purchase orders. All of the override functionality described in Printing Customer Refund Checks Or Making One Time Payments is available in the Purchase Order Entry screen.
2. From the **Additional** menu, select **Vendor Check Information** to display the Vendor Check Information window.
3. In the **Vendor Requires Separate Checks** field, select **Yes** to indicate that payables for the vendor should always print on separate checks.
4. In the **Is This a Generic Vendor** field, select **Yes** to indicate that this vendor is used for creating customer refund checks or other one-time payments.
5. Save your changes and return to the Vendor Maintenance window.
6. Save the vendor record and close the window.

## Entering Additional Vendor Information

Enter additional details into a vendor record that can be used for reporting or sorting purposes on the Miscellaneous Vendor Information screen.

For information about overriding forms at the vendor level, see Changing Default Form Types in Eclipse Forms in the Eclipse Forms documentation.

### To enter additional vendor information:

1. From the **Maintenance** menu, select **Vendor** to display the Vendor Maintenance window.
2. In the **Vendor** field, enter the vendor's name to display the customer record.
3. Select **Additional > Additional Vendor Information** to display the Additional Vendor Information dialog box.
4. On the **Main** tab, enter data in the following fields, as needed.

Field	Description
<b>Initial Status Override</b>	<p>Enter one of the following to override the default P/O entry status for this vendor:</p> <ul style="list-style-type: none"> <li>• <b>O - Open Purchase Order</b> - Returns the setting to the default setting of Open.</li> <li>• <b>B - Request for Bid</b> - Enters the P/O as a bid.</li> <li>• <b>X - Canceled</b> - Sets the status to Canceled. For example, if you have a fictitious vendor for training or testing purposes, set the status to <b>X</b>, so settings and transactions for this vendor do not enter the system.</li> <li>• <b>V - Vendor Shipment Notification</b> - The vendor confirms the shipment.</li> </ul>
<b>Override GL Account Number</b>	<p>Enter the GL account number for which to post a received purchase order. This prevents it from posting to Un-billed Accounts Payable.</p> <p>Typically when a purchase order is received, the amount of the order is posted to UBAP (un-billed Accounts Payable). Then the purchase order displays in A/P Entry and a payable is created for an equal amount that offsets the entry in UBAP.</p> <p>When you enter an override general ledger account in this field and a purchase order is received, the amount of the order is posted to the override general ledger account, but not to the UBAP. In turn, this order does not show up in A/P Entry and no payable is made for the purchase order.</p>

Field	Description
<b>Print Status Override</b>	<p>Enter one of the following to determine how to generate documents for vendor transactions:</p> <ul style="list-style-type: none"> <li>• <b>Y</b> - Prints the item immediately.</li> <li>• <b>N</b> - Does not print the item.</li> <li>• <b>F</b> - Faxes the item.</li> <li>• <b>A</b> - E-mails the item.</li> <li>• <b>H</b> - Sends the item to your Hold file.</li> <li>• <b>E</b> - Sends the item via EDI.</li> </ul> <p>If this field is left blank, the system uses the setting defined in the <b>Default Print Status To "E" For All EDI Vendors</b> control maintenance record. However, if the system sent an 850 for the original order generation, the system will not populate any new generations created for that order during receiving with <b>E</b>, even if the <b>Print Status Override</b> field and/or this control maintenance record are set to <b>Yes</b>.</p>
<b>Time Zone</b>	<p>Enter the vendor's time zone. The time zone displays in the header of the Vendor Activity Log Tracker Entry dialog box of each tracker created for this vendor.</p>
<b>Procurement Priority</b>	<p>Define a color, which corresponds to the vendor's procurement priority number, to display in the Procurement Confirmation queue (<b>Purchase -&gt; Queues -&gt; Procurement Confirmation</b>).</p>
<b>Freight Days</b>	<p>Used for EDI transactions only. Enter the number of days to add to the vendor's ship date to determine the expected receive date for a purchase order.</p> <p>The system uses the following logic to determine the correct ship date on the purchase order:</p> <ul style="list-style-type: none"> <li>• For the EDI 856 Advance Ship Notice, the system adds freight days to the ship date.</li> <li>• For an 855 VMI P/O Acknowledgement, the system adds the number of days entered here to the ship date on the purchase order.</li> </ul>
<b>Freight G/L Override</b>	<p>Active for freight vendors only. Select the vendor's G/L account to use for freight.</p>
<b>ASL Vendor Type</b>	<p>Enter the ASL type for this vendor. ASL types are defined in the <b>Valid Vendor ASL Types</b> control maintenance record.</p>
<b>Vendor Minimum Target Warning Level</b>	<p>Enter the minimum for a target type after which a warning displays to the user defining the vendor minimum target required for ordering products from this vendor.</p>
<b>Vendor Target for Prepaid Freight</b>	<p>Sets the display for the <b>Vendor Minimum \$</b> column in Line Item Sourcing. Since a vendor may have a minimum purchase order value that must be placed as well as a minimum for freight prepaid costs, use this field to specify the vendor minimum for prepaid freight in the vendor file. This value and the vendor minimum target assist salespeople when expediting orders.</p>
<b>E-mail Print Style Override for P/O</b>	<p>Override a vendor's default print style set in printer maintenance..</p>
<b>E-mail Print Style Override for Direct P/O</b>	<p>Override a vendor's default print style for direct orders set in printer maintenance.</p>

Field	Description
<b>Tiff/PDF Options</b>	<p>Overrides the setting in the <b>E-mail Attachment Settings</b> control maintenance record for this vendor for all purchase order documents generated and sent using e-mail.</p> <p>Select from the following options:</p> <ul style="list-style-type: none"> <li>• <b>Tiff of Print Form</b> - Creates a .tiff image file using the Print form.</li> <li>• <b>Tiff of Fax Form</b> - Creates a .tiff image file using the Fax form.</li> <li>• <b>PDF of Print Form</b> - Creates a .pdf file using the Print form.</li> <li>• <b>PDF of Fax Form</b> - Creates a .pdf file using the Fax form.</li> </ul> <p><b>Note:</b> This setting is only available if you are not running Eclipse Forms.</p>

The view-only **TPCx Rationalized** check box indicates that this vendor is set up as a trading partner in Trading Partner Connect. For more information about setting up trading relationships and using Trading Partner Connect, see the Trading Partner Connect online help.

5. Select the **Consigned Inventory** check box to set up this vendor for vendor consignment inventory. This setting activates the **Consignment Transfers** field, where you enter one of the following to determine what happens to consignment items on a transfer order:
  - **Leave the field blank** - The system uses the setting in the **Default Vendor Consignment On Transfers** control maintenance record.
  - **Consigned to Inventory** - The system adds the item to regular inventory in the receiving branch.
  - **Consigned to Consigned** - The system adds the item to consignment inventory in the receiving branch.
  
6. In the **Allow Pricing Variance** field, enter the variance percentage or dollar amount the system uses when evaluating inbound 810s and 855s.
  - For 810s, the variance is the percentage or dollar amount by which the discount amount on an inbound EDI 810 invoice can vary from the discount amount on the EDI 850 P/O to which it is being matched without the system flagging the transaction for review. If the invoice discount amount is within the variance specified, then the invoice will match. The system checks the Allowed Pricing Variance% field only when an invoice (810) comes in and matches against a P/O (850) and the only difference is between the invoice discount amount and the P/O discount amount.
  - For 855s, the variance is the percentage or dollar amount by which a price on the 855 can vary from the corresponding price on the P/O to which it is being matched without the system flagging the transaction for review due to a pricing discrepancy. If all pricing discrepancies fall within the pricing variance, the system treats the 855 as a perfect match.

Select one of the following:

- **Dollar Amount** - The system flags the transaction for review when the difference is greater than the dollar amount you specify in this field.
- **Percentage** - The system flags the transaction for review when the difference is greater than the dollar amount you specify in this field.
- **None** - The system flags the transaction for review when the difference is greater than the dollar amount you specify in this field.

7. In the **Ordered With/Order ID Required** field, Determine the requirement for entry in the **Ordered With** field or **Order ID** field on the Purchase Order Entry Header window for this vendor by entering one of the following:
  - **N - None** - Neither the **Ordered With** field or the **Order ID** field is required.
  - **W - Ordered With** - Only the **Ordered With** field is required.
  - **I - Order ID** - Only the **Order ID** field is required.
  - **B - Both** - Both the **Ordered With** and **Order ID** fields are required.
8. Select the **No Order Entry** check box to restrict the creation of purchase orders for this vendor. For example, you would never create purchase orders for pay-to only vendors.
 

**Note:** Selecting this check box makes the vendor unavailable for display in A/P Entry.
9. To exclude the vendor from the search index and emergency procurement list, select the **Exclude from Index** check box. Select this option if:
  - This vendor is a ship-from-only account.
  - The Exclude From Ship-To/Ship-From Selection If Excluded From Index control maintenance record is set to Yes.
  - This ship-from account does not display in the ship-from selection list when creating a new purchase order.

If this vendor is a ship-from-only account, this field is checked, and the **Exclude From Ship-To/Ship-From Selection If Excluded From Index** control maintenance record is set to **Yes**, this ship-from account does not display in the ship-from selection list when creating a purchase order or when querying for emergency procurement vendors.
10. In the **Create A/P Invoice When Booking Rebate Letter of Credit** field, do one of the following: to determine whether the system should also create a credit accounts payable invoice, known as a vendor debit when a letter of credit is created:
  - **Deselected** - The system creates a letter of credit for this vendor. This is the default.
  - **Selected** - The system creates a credit accounts payable invoice for the amount of the rebate, automatically reconciles the letter of credit, and creates letters of credit depending on the entry in the **P/O Creation (Single/Split)** field in the Customer Sales Rebate Report for booking letters of credit:
    - **Single** - The system creates one credit purchase order for the branch entered in the Posting Branch field on the Booking Letter of Credit screen.
    - **Split** - The system creates one credit purchase order for each branch requesting a rebate claim.

**Note:** This field applies only to pay-to vendors

11. In the **Cage Code** field, enter a cage code if your company buys parts for military (milspec) projects.

You are legally required to identify authorized suppliers to the military. If your company buys parts for military projects, you may need a vendor or manufacturer's default quality rating required by the government. The system uses this *cage code* in the Detail Lot Maintenance programs.

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12. In the **Tax Information** area, enter the following as needed:

To...	Do this...
include this vendor in the 1099 Summary report.	enter the vendor's 1099 tax number in the <b>Vendor 1099 Tax ID</b> field. For report information, see Vendor 1099 Summary Report.
not allow tax capitalization for this vendor. Tax capitalization distributes tax evenly for items on a purchase order when calculating landed average cost for this vendor.	select the Disallow Tax Capitalization check box. <b>Note:</b> The <b>Capitalize Tax on Purchase Orders</b> control maintenance record must be set to <b>Yes</b> to enable this functionality.

13. In the **Received Dates** area, enter the following as needed. These forms assist A/P with maintaining vendor records:

To...	Do this...
create tracking tools for W-9 forms that you receive annually from each vendor	the date you receive W-9 forms in the <b>W-9 Forms Received Date</b> field.
create tracking tools for Certificates of Insurance that you receive annually from each vendor	the date you receive the Certificate of Insurance in the <b>Certificate of Insurance Received Date</b> field.

14. In the **UET Early Days Allowed** and **UET Late Days Allowed** fields, set the number of days before and after the due date that a shipment can arrive from a vendor without creating an unquality event.

15. Save your changes and exit the window.

## Assigning Vendor Targets

Because transporting small shipments is not cost effective, you may want to define a specific dollar amount, total shipment weight, number of pieces, or total shipment volume that your purchasing agents must purchase from a vendor. Then when a purchasing agent enters a purchase order that does not meet the required amount, the system will not release the purchase order.

Only a user assigned the FREIGHT.TARGET.OVERRIDE authorization key can release purchase orders for which the defined target has not been met.

The **Include Directs In Vendor Target Check When Printing a P/O** control maintenance record controls the target check for vendor minimums on purchase orders and direct sales orders.

### To assign vendor types:

1. From the **Maintenance** menu, select **Vendor** to display the Vendor Maintenance window.
2. In the **Vendor** field, enter the vendor's name to display the vendor record.
3. Select **Additional Vendor Information** to display the Additional Vendor Information dialog box.
4. For the **Vendor Minimum** and **Vendor Prepaid Freight Amount** fields, define the vendor target types in the corresponding **Target Type** field, enter one of the following target types:

Target Type	Description
<b>\$ - Dollars</b>	The dollar amount. Enter up to nine digits, a decimal point and two more digits, such as 3225.50.
<b># - Weight</b>	The value assigned to a product in the <b>LBS/</b> field on the Product Maintenance window. Enter up to four digits, decimal point, and as many additional digits as are defined in the <b>Number Of Digits Of Accuracy For Product Weight</b> control maintenance record.
<b>P - Pieces</b>	Any of the units of measure defined for a product or buy line. Enter up to twelve digits with no decimal point. Use whole numbers only.
<b>L - Load Factor</b>	The cubic dimensions of a product or the point value of a product, as displayed on a vendor specification sheet. Enter up to seven digits, a decimal point, and up to four more digits, such as 2321.4500.

6. Advance to the next field, or save your changes and exit the dialog box.

## Adding Keywords to Search for Entities

In an entity record, enter additional words for the system to use in the search index for a customer or vendor. For example, if you typically refer to a customer called Atlantic Baseline Systems as ABS, use ABS as an additional keyword.

### To add keywords to search for an entity:

1. From the **Maintenance** menu select one of the following:
  - **Customer** - Displays the Customer Maintenance window. Enter a customer's name to display the customer record.
  - **Vendor** - Displays the Vendor Maintenance window. Enter a vendor's name to display the vendor record.
  - **Contact** - Displays the Contact Maintenance window. Enter a contact's name to display the contact record.
2. Do one of the following:
  - For customers or vendors, select **Additional > Additional Keywords** to display the Additional Keywords dialog box.
  - For contacts, select **File > Keywords**.
3. Enter the keywords to use for searches for the entity.
4. Save your changes and exit the dialog box.

## Creating Vendor Expense Distribution Codes

Create vendor expense distribution codes to pre-define the distribution of a vendor's invoice to G/L accounts based on a determined percentage for that vendor. Codes created for a vendor are available for the vendor in A/P Entry.

Codes set up for one vendor are unique to that vendor and are not available for other vendors.

### To create a vendor expense distribution code:

1. From the **Maintenance** menu, select **Vendor** to display the Vendor Maintenance window.
2. In the **Vendor** field, enter the vendor's name to display the vendor record.
3. Select **Additional Expense Distribution** and select **NEW** from the list to display the Vendor Expense Distribution dialog box.

**Note:** To view or edit an existing expense distribution code, select it when prompted to display the information for that code.

4. In the **Expense Distribution Code** field, enter a name to use for the expense distribution code.
5. In the **Branch** field, enter the branch to which to apply a percentage of the vendor's invoice.
6. In the **G/L Account** field, enter the G/L account to which to apply a percentage of the vendor's invoice. Enter a partial account name and press **Enter** and select from a list of accounts.
7. In the **Distribution Percentage** field, enter the percentage of the invoice to apply to the G/L account. Use the format xx.x. The sum of the percentages for the entries listed on this screen does not need to equal 100 percent.

**Note:** The A/P program prompts you to distribute any amount that is not distributed by these entries.

8. Add all applicable branches, accounts, and percentages as needed to the list.

**Note:** To delete this vendor expense distribution code from the list, select **File > Delete**. The system prompts for confirmation.

9. Save your changes and exit the window.

## Applying Branch-Specific Overrides

Set the following defaults at the customer and vendor level that override settings at a branch or territory level:

- Inside and outside salesperson
- Ship via
- Order Entry message
- Terms code
- Price class

For example, if Dan Black is the default outside salesperson for all branches except for the NORT (northern) territory where Sam Vink is the salesperson you would enter Sam Vink's user ID in the **Value** field of the Branch-Specific Overrides dialog box for the NORT territory with an attribute of Outside Salesperson. In order entry, for all branches except the NORT territory Dan Black defaults as the outside salesperson, except when an order is entered for a branch in the NORT territory, in which case, Sam Vink defaults as the salesperson.

You must be assigned branch access in User Maintenance to override any attribute for a branch or territory.

### To apply a branch-specific override:

1. From the **Maintenance** menu, select **Customer** or **Vendor** to display the Customer Maintenance or Vendor Maintenance window.
2. In the **Customer** or **Vendor** field, enter a customer or vendor's name to display the entity's record.
3. Select **Additional > Branch Overrides** to display the Branch Specific Overrides dialog box. The **Entity** field displays the name of the Customer or Vendor from the Maintenance window.
4. In the **Branch/Terr** field, enter the branch or territory for which to apply an override. Enter **ALL** to apply the override to all branches.
5. In the **Attribute** column, select from the following attributes available to each branch.

For Customer Branches	For Vendor Branches
Outside Salesperson	OE Message
Inside Salesperson	Terms Code
Ship Via	
OE Message	
Terms Code	
Price Class	

6. In the **Value** column, select from a list of options relevant to the attribute selected in the **Attribute** field.
7. Save your changes and exit the dialog box.

## Defining Drop Points for Vendors

If your company uses central purchasing, you need to determine which branches will serve as the default drop points for purchase orders submitted to this vendor from central purchasing. You can define multiple drop points for this vendor, but only one drop point can be defined or edited at a time.

You cannot assign a branch to more than one drop point. Any branch not assigned to a drop point serves as its own drop point.

### To define a drop point:

1. From the **Maintenance** menu, select **Vendor** to display the Vendor Maintenance window.
2. In the **Vendor** field, enter the vendor's name to display the vendor record.
3. Select **Additional > Drop Point** to display the Drop Point Maintenance dialog box.
4. In the **Drop Point Branch** field, select the branch to which this vendor will ship all materials.  
The company's branches display in the **Branches** field.
5. In the **Branch ID** field, enter each branch for which the assigned drop point branch will receive materials from this vendor.  
The system uses these settings for the initial drop points, but you can override them through Purchase Order Entry if necessary.
6. To delete the displayed drop point, select **File > Delete**. The system prompts to confirm the deletion.
7. Save the settings. You can then assign another drop point.

## Vendor Volume Rebates Overview

Unlike traditional rebates in which rebates are received on a per-line-item basis, some vendors provide a greater rebate when buying in bulk or volume quantities during a specific time frame. The Vendor Volume Rebates Program helps you set up the vendor record with the rebate information. You can define the program's active dates or expiration time frame, indicate what purchase order types can be included and what the rebate tiers should be. Additionally, you can indicate if certain products are not allowed on the rebate even if they may fall into the right category.

Use the Vendor Volume Rebate tools to track your open programs and where you are in meeting the vendor target required for each one.

### Required Authorization

Users must have the `VEND.REBATE.VIEW` authorization key to display the Vendor Volume Rebate information in view-only mode or the `VEND.REBATE.EDIT` authorization level to enter and adjust Vendor Volume Rebate programs and build the Vendor Volume Rebate data. In addition, users must be assigned the `VENDOR.MAINT` authorization key at Level 1 or higher.

Review the following to make the most of your volume rebate programs:

- Adding Vendor Volume Rebate Programs
- Reviewing Vendor Volume Rebates
- Drilling into Vendor Volume Rebate Details
- Building, Scheduling, and Purging Vendor Volume Rebate Data
- Example Rebate Programs

### Example Rebate Programs

The following examples are provided to further clarify how the Vendor Volume Rebate program can be used.

#### Example 1

Your vendor offers a rebate program based on total purchases for the year as an incremental rebate program. If you purchase up to \$100,000.00 of selected material from the OAT buy line, you receive a 3.0% rebate (\$3,000.00). If you purchase between \$250,000.00, you receive a 3.0% rebate on the first \$100,000.00 and 5.0% rebate on the \$149,999.99 purchased (\$7,500.00). This makes your total rebate \$10,500.00. Your program set up would look like this:

Vendor Volume Rebate Program Setup - OATEY COMPANY

File Edit User Tools Help

Program Name: 2014 OATEY REBATE [?] [New Program]

Program Start Date: 01/01/2014 [?] Program End Date: 12/31/2014 [?]

Branch/Terr/All: 1 [?]

Based On: Dollars [?] Tier Type: Incremental [?]

**Purchases**

PO Type	Exclude	Include
Credits	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Directs	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Misc Charges	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**Rebate Tiers**

Tier Name	Dollars Start	Dollars End	Rebate %
Level 1	0.00	100,000.00	3.000
Level 2	100,000.01	500,000.00	5.000
Level 3	500,000.01	999,999,99...	8.000

**Include in Program**

Type	Value
Buy Line	OAT

**Exclude from Program**

Type	Value
------	-------

Vendor : 20443

**Example 2**

Your vendor offers a rebate program based on total purchases for the year and includes all purchases in the rebate program. If your purchases for the OAT buy line fall into Tier Level 2, you receive a 10.0% rebate on *all* purchases. Your program set up would look like this:

## Maintaining Customers and Vendors

Vendor Volume Rebate Program Setup - OATEY COMPANY

File Edit User Tools Help

Program Name: 2014 OATEY REBATE New Program

Program Start Date: 01/01/2014 Program End Date: 12/31/2014

Branch/Terr/All: 1

Based On: Dollars Tier Type: Include All

**Purchases**

PO Type	Exclude	Include
Credits	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Directs	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Misc Charges	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**Rebate Tiers**

Tier Name	Dollars Start	Dollars End	Rebate %
Level 1	0.00	100,000.00	3.000
Level 2	100,000.01	500,000.00	10.000
Level 3	500000.01		

**Include in Program**

Type	Value
Buy Line	OAT

**Exclude from Program**

Type	Value
------	-------

Vendor : 20443

## Adding Vendor Volume Rebate Programs

Some vendors provide a greater rebate when buying in bulk or volume quantities during a specific time frame. After you have details from your vendor for the program being offered, you can enter that program and its details through the vendor's record. Use the Vendor Volume Rebate Program window to create, define, monitor, and delete vendor programs, as needed.

You can enter as many programs for a vendor as are needed. The system saves the program information for review at a later date in the Rebate Summary window. Programs can run simultaneously. A single order can apply to multiple rebate programs.

**Note:** Users must be authorized to view and edit this window.

### To add a vendor volume rebate program:

1. From the **Maintenance** menu, select **Vendor** to display the Vendor Maintenance window.
2. In the **Vendor** field, enter the vendor name for the vendor to which you want to add a vendor volume rebate program.
3. From the **Additional** menu, select **Vendor Volume Rebate Programs** to display the Vendor Volume Rebate Program Setup window.
4. Click **New Program**. At the prompt, enter the new program name, such as Lighting Over 100K.

**Note:** To edit an existing program, enter the program name you want to edit in the **Program Name** field and press **Enter**.

5. Use the header fields and tables to define and adjust the program terms:

Field	Description
<b>Program Start Date</b>	Define the time parameters for when the rebate program is active.
<b>Program End Date</b>	Orders within the time frame and with the correct criteria apply to the rebate. Check the rebate summary to see how close to the vendor target you are for the program.
<b>Branch/Terr/All</b>	Select which branches or territories are eligible for the rebate program.
<b>Based On</b>	Select the vendor target on which the rebate program is based: <b>Dollars</b> , <b>Weight</b> , <b>Pieces</b> , or <b>Load Factor</b> .
<b>Tier Type</b>	<p>Indicate whether you can include all orders toward the vendor target or if the program requires increments based on order totals:</p> <ul style="list-style-type: none"> <li>• <b>Include All</b> - If you reach the defined dollars for Tier 2, all orders that apply to the rebate program are included at the Tier 2 rebate percentage.</li> <li>• <b>Incremental</b> - If you reach the defined dollars for Tier 2 only those purchase amounts above Level 2 use the Tier 2 rebate percentage. Those at Level 1 use the Level 1 rebate percentage. The system will split line items if the value falls between two rebate tiers.</li> </ul> <p>For more information, see the examples outline on the Vendor Volume Rebate Overview.</p>

## Maintaining Customers and Vendors

Field	Description																				
<b>Purchases area</b>	<p>For each PO Type indicate if you are including or excluding the type from the rebate order.</p> <p><b>Note:</b> If you excluding a specific customer in the <b>Exclude from Program</b> area to exclude the customer from the rebate program, Directs must be set to <b>Include</b>.</p>																				
<b>Rebate Tiers area</b>	<p>For each tier define the start and end dollar amounts and the associated rebate for that dollar range. For example:</p> <table border="1"> <thead> <tr> <th>Tiers</th> <th>Dollars Start</th> <th>Dollars End</th> <th>Rebate %</th> </tr> </thead> <tbody> <tr> <td>Tier 1</td> <td>0.00</td> <td>100000.00</td> <td>10.000</td> </tr> <tr> <td>Tier 2</td> <td>100001.00</td> <td>150000.00</td> <td>15.000</td> </tr> <tr> <td>Tier 3</td> <td>150001.00</td> <td>200000.00</td> <td>20.000</td> </tr> <tr> <td>Tier 4</td> <td>200001.00</td> <td>250000.00</td> <td>25.000</td> </tr> </tbody> </table>	Tiers	Dollars Start	Dollars End	Rebate %	Tier 1	0.00	100000.00	10.000	Tier 2	100001.00	150000.00	15.000	Tier 3	150001.00	200000.00	20.000	Tier 4	200001.00	250000.00	25.000
Tiers	Dollars Start	Dollars End	Rebate %																		
Tier 1	0.00	100000.00	10.000																		
Tier 2	100001.00	150000.00	15.000																		
Tier 3	150001.00	200000.00	20.000																		
Tier 4	200001.00	250000.00	25.000																		
<b>Include in Program</b>	<p>Select which types to include in the rebate program: <b>Price Line, Sell Group, Buy Line, Buy Group, and Product</b>. Set the <b>Type</b> field to <b>All</b> to include all lines, groups, and types.</p> <p>For each type you include, use the <b>Value</b> field to limit the program to specific lines, groups, or products.</p>																				
<b>Exclude in Program</b>	<p>Enter the customers to exclude from the rebate program. For example, the vendor may not allow direct shipments to national accounts to count towards the rebate program.</p> <p>Select which types to exclude in the rebate program: <b>Purchase Order, Price Line, Sell Group, Buy Line, Buy Group, Product, Parent Customer, Bill-To Customer, and Ship-To Customer</b>. Set the <b>Type</b> field to <b>All</b> to include all lines, groups, and types.</p> <p>For each type you include, use the <b>Value</b> field to limit the program to specific lines, groups, products, or customers.</p>																				

5. Review rebate summaries, if needed.
6. Review rebate detail, if needed.

**Note:** Use the **File > Copy** option to copy your program to create another program based on the parameters defined in this program, if needed.

5. Save your changes and exit the window.

## Reviewing Vendor Volume Rebates

After creating a volume rebate program, use both Rebate Summary and Rebate Detail to see how the program is working and where in the process you are to reach the target.

The **Rebate Summary** window displays the current programs progress. You can see at-a-glance how close you are to meeting the tiers for the selected vendor program and whether or not you are projected to reach that tier.

**Note:** You can add a shortcut widget (**User Tools > Add Shortcut Widget**) if you are managing vendor rebates on a daily basis.

### To view rebate summaries:

1. From the **Maintenance** window, select **Vendor** to display the Vendor Maintenance window.
2. Display the vendor to which you want to attach a vendor volume rebate program.
3. From the **Additional > Vendor Volume Rebates** menu, select **Vendor Volume Rebate Summary** to display the summary window.

**Note:** Users must be authorized to view and edit this window.

The system displays the program information:

Column	Description
<b>Program Name</b>	The current program name.
<b>Start Date</b>	The time frame in which the program is active and when it expires.
<b>End Date</b>	
<b>Based On</b>	The vendor target on which the program is based, such as Weight or Dollars.
<b>Next Target</b>	The next target required for the next rebate increment.
<b>% to Target</b>	The amount accumulated toward reaching the next target.
<b>Current Rebate Value</b>	The current dollar value the system has calculated as an earned rebate.
<b>Current Base Total</b>	The current total by vendor target of received purchase orders.
<b>Open Rebate Value</b>	Additional rebates expected on open purchase order values.
<b>Open Base Total</b>	Values by vendor target on open purchase orders, such as the total weight.
<b>Status Bar</b>	Indicates when the highlighted program's build was last run and by whom along with the vendor ID and the program name.

**Note:** When a rebate is set up for a pay-to vendor, the system includes ship-from vendors in the rebate calculation.

4. Save your changes and exit the window.

## Drilling into Vendor Volume Rebate Details

The Rebate Detail display provides the individual product purchase data by line item that make up the summary for the Rebate Summary window.

**Note:** Users must be authorized to view and edit this window.

### To view rebate details:

1. From the **Maintenance** window, select **Vendor** to display the Vendor Maintenance window.
2. Display the vendor to which you want to attach a vendor volume rebate program.
3. From the **Additional Menu > Vendor Volume Rebates** menu, select Vendor Volume Rebate Summary.
4. Highlight the line you want more detail on, right-click and select **Rebate Detail** to display the Rebate Detail information.
5. Use the **Start Date** and **End Date** fields to define a date range to display more detail about.
6. Use the **Branch/Terr/All** field to limit the display to one or more branches or territories.
7. Use the **Purchase Order ID** field to limit the display to one purchase order.
8. Use the **Product Description** field to limit the display to a product description.
9. Click **Get Detail**.

The system displays the program information:

Column	Description
<b>Branch</b>	The receiving branch for the program's orders.
<b>Purchase Order ID</b>	The system-assigned purchase order number on which the product was received.
<b>Product Description</b>	The product description based on the full description in Product Maintenance.
<b>Received Date</b>	The date the item was received into stock.
<b>Based On</b>	The vendor target on which the program is based, such as Weight or Dollars.
<b>Base Total</b>	Values by vendor target on open purchase orders, such as the total weight.

5. Save your changes and exit the window.
-

## Building, Scheduling, and Purging Vendor Volume Rebate Data

You must run the Vendor Volume Rebate Build to retrieve the latest information about your vendor volume rebates, including your percent to target and total dollars.

Run the build based on your business needs. If you do not have many volume rebates available, you may run this build once a week. If you frequently take advantage of vendor rebates, you can run the build nightly to ensure you have the most current data each morning.

Depending on how long it takes for your rebate data to process, you may want to run the build during off-hours. You can also run during normal hours, but tell the system to pause or sleep during specific times. For example, if you run the build for all your vendors, you may choose to run that overnight. If you run the build for a single vendor program, you may run that during lunch because the time impact is minimal.

You can purge the data after a certain number of months, as needed. Most companies traditionally keep 36 months worth of information to track the success of the rebate programs.

**Note:** Users must be authorized to view and edit this window.

### To build and schedule the vendor volume rebate data:

1. From the **Purchase > Vendor Volume Rebate** menu, select **Vendor Volume Rebate Build** to display the build options.
2. In the **Branch/Terr/All** field indicate the branch or branches for which you want to build the data.

**Note:** If your Vendor Volume Rebate Program is set for multiple branches, the build always runs for all associated branches. For example, if your Lighting program is set for Br 1 and Br 2 and you run the build with only Br 1 in the **Branch** field, the system runs the build for both branches anyway. This ensures that your data is always accurate for the defined branches in the program.

3. In the **As of Date** field, indicate the ending date from which you want to gather vendor volume information. Any program active on or before this date are included in the build.
4. In the **Vendor** field, select the vendor for which to run the build. Leave it blank to run for all vendors, however running for all vendors will take more time depending on how many active programs you are running.
5. In the **Program Name** field, identify which specific program you want to run the build for. Leave it blank to run for all programs associated with the selected vendor.

**Note:** This field only activates if a vendor is selected.

6. Use the **Include Inactive Rebates** check box to include any rebates older (prior to) the selected **As of Date** in Step 3.
7. Use the **Sleep During Business Hours** area to enter the times of day when, if you are running a time-consuming build, you want to suspend the build so as not to impact the day-to-day system processes.
8. Run or schedule the build.

A message is sent to your Eclipse user when the build completes.

## Purging Vendor Volume Rebate Data

Use Purge Maintenance to purge outdated, unneeded rebate data from your files. By default, the system keeps 36 months of data.

### To setup the purge process:

1. From the **Maintenance > Merge/Purge** menu, select **Purge Maintenance**.
  2. In the **Purge File** column, select **VENDOR.VOL.REBATES**.  
The system defaults to the recommended number of months in the Keep Months column.
  3. Adjust the **Keep Months** field value, as needed.
  4. Save your changes.
-

## Assigning Activity Triggers

To improve efficiency and accuracy, you can set up your system to automate activities when specific trigger parameters are met. For example, set up a trigger so the system sends an e-mail message to your customer when an order is placed through the web. You can also set up these activity triggers to respect the e-mail address of the contact attached to the order. To do this, you must set the **Validate Name In "Ordered By" Field Against Customer Contact** control maintenance record.

**Note:** When using any email activity trigger, consider using the SEND@ options to let the system determine which user receives the email. For more information about how these work, see Activity Trigger Automatic Emails in the Outbound Email online help documentation.

### To assign activity triggers:

1. From the **Maintenance** menu, select **Customer** or **Vendor** to display the Customer Maintenance or Vendor Maintenance window.
2. In the **Customer** or **Vendor** field, enter the entity's name to display the entity record.
3. Select **Additional > Activity Trigger** to display the Activity Trigger Maintenance dialog box.  
The system populates the **Entity Name** field from the previous window.
4. In the **Inherit** field, enter **Yes** if the entity can inherit triggers from another entity in the corporate hierarchy. This setting overrides the setting in the **Activity Trigger Default Inherit** control maintenance record.
5. In the **Trigger Description** column, select one of the following triggers:

This value...	Triggers an event...
<b>Backorder Acknowledgement</b>	when an order is closed from an RF branch. A backorder acknowledgement is faxed or printed depending on the customer's setup. A backorder acknowledgement is a ship ticket that lists only backordered items.
<b>Batch Invs in Lieu of Prt</b>	when the batch invoice printing program is run. Instead of printing the invoices, however, the program sends them to the customer using e-mail.
<b>Bid to New Order</b>	when an existing bid is changed to an actual sales order. Once the bid is changed to an order, it acts as a new order in the system, thus triggering any new order events.
<b>Calling Queue - All Orders</b>	when the Calling Queue - All Orders Report runs, the system checks for customers with the activity trigger set and pulls all the orders in the Customer Calling Queue for that customer that have a Call status and are open as of the run date. These orders include backorders, new orders not yet available, and available orders as of the run date. <b>Note:</b> To set up the report to run when you want and in the format you want, see Sending Customers Calling Queue Data in the Sales Management documentation.

## Maintaining Customers and Vendors

This value...	Triggers an event...
<b>Calling Queue - Available Orders</b>	<p>when the Calling Queue - Available Orders Report runs, the system checks for customers with the activity trigger set and pulls all the orders in the Customer Calling Queue for that customer that have a Call status and are complete (available) as of the run date.</p> <p><b>Note:</b> To set up the report to run when you want and in the format you want, see Sending Customers Calling Queue Data in the Sales Management documentation.</p>
<b>Carton Packing Labels</b>	after a carton is handled in one of the following ways: Carton Created, Item Packed, Carton Packed, or Order Packed. You can then indicate if you want the user to confirm, cancel, or always process the label creation.
<b>Cons Invs in Lieu of Prt</b>	<p>when the <b>Print Consolidated Invoices</b> option is selected through Sales Order Entry (<b>Orders &gt; Printing</b> and <b>File &gt; Begin</b>). Invoices are consolidated and sent to the indicated user ID in a spreadsheet format to the user's Your Hold Entries.</p> <p>For more information about invoice consolidation, see Printing Consolidated Invoices in the Sales Management online help.</p>
<b>EDI Order Entry</b>	when an EDI order is received. This option requires the Eclipse Electronic Data Interchange companion product.
<b>ECC Submit Order</b>	when the system detects a sales order created through Epicor Commerce Connect companion product.
<b>EFT Remittance Advice</b>	after a successful electronic funds transmission.
<b>E-mail Stmt in lieu of Prt</b>	when the batch statement printing program is run. Instead of printing the statements, however, the program sends them to the customer using e-mail.
<b>E-mail Stmt-Invs lieu of Prt</b>	<p>when the batch statement program is run. Instead of printing the statements and invoices, the program sends them to the customer using e-mail. The system uses the order print status to manage when to send the transactions.</p> <p>This trigger works only if you set the <b>Also Print Invoices</b> field on the Print Statements window (<b>A/R &gt; Print Statements</b>) to anything but <b>No</b>. If you set the print statements program to also print invoices and have this trigger set for the customer, the system sends both the statement and the invoice to the customer through e-mail.</p> <p>This trigger requires the Eclipse Outbound E-mail companion product.</p>
<b>Invoice Order</b>	when an order is invoiced.
<b>Invoice Print</b>	when an invoice is printed.
<b>Manifest Lock</b>	when a manifest is locked on the manifest queue.
<b>New Direct Order</b>	<p>when a new direct order is completed. Use this trigger to route sales orders to another vendor, or to source sales orders through another branch.</p> <p>This trigger requires the Eclipse Outbound E-mail companion product.</p>
<b>New Purchase Order</b>	when a new purchase order is completed. This trigger requires the Eclipse Outbound E-mail companion product .
<b>New Purchase Order Bid</b>	upon exiting a purchase order bid.
<b>New Sales Order</b>	when a new sales order is completed. This means the order has been completely written and closed. This trigger requires the Eclipse Outbound E-mail companion product.

This value...	Triggers an event...
<b>New Sales Order Bid</b>	upon exiting a sales order bid.
<b>Order in Calling Queue</b>	<p>when the Order in Calling Queue Notification runs, the system checks for customers with the activity trigger set, and pulls copies of the sales acknowledgements for all the orders in the Customer Calling Queue that meet the criteria you have set up in the trigger. For example, you can set up the system to send a notification when orders with a specific ship via are added to the queue. The system sends the sales acknowledgement per the information set up in the customer's activity trigger.</p> <ul style="list-style-type: none"> <li>• Select the type of notification to send. After you select the description, the remaining fields populate for you. <ul style="list-style-type: none"> <li>• E-mail standard sales document</li> <li>• E-mail standard message</li> <li>• E-mail HTML sales document</li> <li>• Fax sales document</li> </ul> </li> <li>• Use the <b>File &gt; Trigger Properties</b> selection to display the Calling Queue Notification Trigger window to further narrow the selections the system makes for the information on your notification, such as who wrote the orders or a specific ship via.</li> </ul> <p><b>Note:</b> To set up the report to run when you want and in the format you want, see the Running the Order In Calling Queue Notification Report.</p>
<b>Order in Trouble</b>	when the Trouble Order Notify process runs, the system checks for orders for this customer that have a ship date that has slips and sends an updated sales document by e-mail or by fax.
<b>Overdue Invoices</b>	<p>when the number of days an invoice is overdue is reached. This number is determined by the number entered by selecting <b>File &gt; Trigger Properties</b>. This activity trigger notifies the system to send an e-mail notification once per generation. Multi-generation orders get a notification per generation. If a process is re-run and an e-mail has already been sent for a generation, the system <i>does not</i> send a second e-mail.</p> <p>To enable this trigger, schedule the Overdue Invoice Notification utility in AR.</p> <p><b>Note:</b> To set triggers for additional numbers of late days, assign the number of days overdue to additional triggers.</p>
<b>Pick Ticket Print</b>	when a pick ticket prints. This trigger requires the Eclipse Outbound E-mail companion product .
<b>PO Ack Received on Direct</b>	when a purchase order on a direct order is received. This trigger requires the Eclipse Outbound E-mail and the EDI companion products.
<b>Proof of Delivery Photo Attachment</b>	<p>when a photo is attached through the POD companion tool, the system e-mails the photo to the designated recipient. This is useful when a driver leaves a package at the customer's door or shipping dock prior to a worker being there. The driver can take a photo and send it to the shipping department to show that the item has been delivered.</p> <p>Double-click the line item to access the e-mail options.</p>
<b>RDC Order Entry</b>	when an RDC order is received. This trigger requires the Eclipse Remote Data Collection companion product.

This value...	Triggers an event...
<b>Received Purchase Order</b>	when a purchase order is received.
<b>RF Order Close</b>	after an entire order has been picked using RF and is ready to ship. This trigger requires the Eclipse RF Sales Order Entry companion product.
<b>Shipment Notification</b>	when StarShip sends shipping information back to the system. This trigger requires the Eclipse Electronic Shipping with StarShip companion product.
	Use the Shipment Notification - View Order URL control maintenance record to build a link back to your store front when the shipment is sent.
	Use the E-mail HTML Logo and Branch-Specific E-mail HTML Logos control maintenance records to set the HTML e-mail shipment notifications. Without these set, the shipment notification displays as text only.
	Use the Shipping URL Maintenance to make sure your Track Order buttons function correctly in the e-mails sent.
<b>Ship Ticket Print</b>	when a ship ticket prints.
<b>Transfer Received</b>	when a transfer is received.
<b>Web Order Entry Submit Order</b>	when an order is submitted through Web Commerce. This trigger requires the Eclipse Web Commerce companion product.

6. From the **Activity Description** column, enter one of the following activities to occur as a result of the event selected in the **Trigger Description** field. Selections vary depending on your entry in the **Trigger Description** field:

**Note:** When using any email activity trigger, consider using the SEND@ options to let the system determine which user receives the email. For more information about how these work, see Activity Trigger Automatic Emails in the Outbound Email online help documentation.

Activity	Description
<b>B2B Adv Ship Notice</b>	Sends an advanced shipping notice in XML format by way of B2B Commerce or Business Connect XML.
<b>B2B Purchasing Document</b>	Sends a purchase order in XML format by way of B2B Commerce or Business Connect XML.
<b>B2B Sales Doc</b>	Sends a sales document in XML format by way of B2B Commerce or Business Connect XML.
<b>Carton Created</b>	Carton packing label prints when it is created on the Carton Packing screen. This option is available with the Carton Packing Labels trigger.
<b>Carton Packed</b>	Carton packing label prints when the packer indicates on the Carton Packing screen that the carton is completely packed. This option is available with the Carton Packing Labels trigger.
<b>Create ASN and Product Labels</b>	Creates and prints advanced shipment notification product labels for each item on an order.
<b>EDI Adv Shipping Notification</b>	Sends an EDI 856 advanced shipping notice.
<b>EDI Doc for Remit Advice</b>	Generates an EDI 820 document on the EDI outgoing status queue.
<b>EDI Purchasing Document</b>	Generates an EDI 850 document on the EDI outgoing status queue.

Activity	Description
<b>EDI Sales Document</b>	Generates the selected EDI document based on the EDI outgoing status queue.
<b>EDI Single Adv Shipping Not</b>	Generates an EDI document for each stop on a manifest.
<b>E-mail Message</b>	Sends an e-mail containing only a message.
<b>E-mail Purchasing Doc</b>	E-mails a purchasing document.
<b>E-mail Purchasing Doc HTML</b>	E-mails a purchasing document in HTML format.
<b>E-mail Remittance Advice</b>	Sends email with remittance advice.
<b>E-mail Remittance Advice HTML</b>	Sends email of remittance advice in HTML format.
<b>E-Mail Sales Doc HTML</b>	Sends an e-mail containing a message and the sales document in HTML format.
<b>E-mail Sales Document</b>	Sends an e-mail containing a message and the sales document.
<b>E-mail Shipment Tracking Info</b>	E-mails order shipment information, such as order shipment numbers and ship vias.
<b>E-mail Statement</b>	Sends an e-mail containing a message and the statement associated with the trigger event.  <b>Note:</b> If a statement has a zero balance, the system does not send an email.
<b>E-mail Statement HTML</b>	Sends an e-mail in HTML format.  <b>Note:</b> If a statement has a zero balance, the system does not send an email.
<b>Fax Purchasing Doc</b>	Faxes a purchasing document.
<b>Fax Remittance Advice</b>	Sends fax with remittance advice.
<b>Fax Sales Document</b>	Sends a message and sales document by fax.
<b>Fax SOE Report</b>	Faxes a Sales Order Entry report.
<b>FTP Tibersoft Adv Ship Notice</b>	Creates and sends the advanced shipment header information to Tibersoft by FTP (file transfer protocol).
<b>FTP Tradepowers PO Ack</b>	Adds order to a Tradepowers purchase order acknowledgement that will be sent by FTP at a future date.
<b>Item Packed</b>	Carton packing label prints when each item is packed into the carton on the Carton Packing screen.
<b>New Sales Order</b>	Creates a new sales order.
<b>Order Packed</b>	Carton packing label prints when the packer indicates the order is completely packed on the Carton Packing screen.
<b>Order Summary</b>	A snap shot of the order document prints when you create a new sales order, pick ticket, ship ticket, or when an bid is converted into an order. This option is only available if you are running Eclipse Forms. For more information about creating order summaries , see Creating Order Summary Snapshots in the Eclipse Forms documentation.

Activity	Description
<b>Single ASN and Product Labels</b>	Creates and prints advanced shipping notification product labels for each stop on a manifest.

The **Type** field displays the type of activity assigned, such as Fax or E-mail.

7. In the **Foreground** column, enter one of the following to determine how the system performs the activity when the event that triggers the activity occurs as a result of a program running in the system's foreground:
  - **P Always Process** - The system performs the process.
  - **C Confirm** - The system prompts the user for confirmation before performing the activity.
  - **X Cancel, DO NOT Process** - The system does not perform the activity.
  - **Q Queue** - The system transfers the activity to a queue, from which it will be performed after being reviewed. This option is currently not implemented.
8. In the **Background** column, enter one of the following to determine how the system responds to the trigger as a result of a program being scheduled to run in the Phantom processor in the system's background:
  - **P Always Process** - Performs the activity.
  - **X Cancel, DO NOT Process** - Does not perform the activity.
  - **Q Queue** - Transfers the activity to a queue from which it will be performed after being reviewed. This option is currently not implemented.
9. In the **Disable** column, select the check box to disable this activity trigger for this customer or vendor. This activity will not take place for the entity, even if inherited triggers in branches above it in the hierarchy would have executed that activity. After an activity is disabled, it may not be executed by any inherited triggers.

For example, **Email Sales Doc HTML** on a new order is enabled at the ship-to level, disabled at the bill-to level, and enabled at the branch level. The ship-to executes the e-mail, the bill-to will not because it is flagged as disabled. The branch will not execute the e-mail because the lower, bill-to, entity has disabled it.

10. Save your changes and exit the dialog box.

### More Options for Assigning Activity Triggers

The following are some common options you might use while assigning activity triggers:

To...	Select...
set activity trigger inheritance to affect branches at various levels, or affect only single branches, bill-tos, or ship-tos for customers and vendors.	the <b>Inherit</b> check box
set specific criteria for the trigger selected in the <b>Trigger Description</b> field. The dialog box that displays depends on your trigger selection. For more information on these options, see the following: <ul style="list-style-type: none"> <li>• Calling Queue Notification</li> <li>• Sending E-Mail</li> <li>• Sending a Fax</li> </ul>	<b>File &gt; Trigger Properties</b>

To...	Select...
<p>set specific criteria for the activity selected in the <b>Activity Description</b> field. The screen that displays depends on your activity selection. For more information on these options, see the following:</p> <ul style="list-style-type: none"> <li>• Sending E-Mail</li> <li>• Sending a Fax</li> </ul>	<p><b>File &gt; Activity Properties</b></p>
<p>duplicate these triggers for the bill-to customer. This option is active if you assign triggers to a ship-to only customer.</p>	<p><b>File &gt; Dollar Entity Triggers</b></p>
<p>select a routine to override an activity assigned to a trigger.</p>	<p><b>File &gt; Subroutine</b></p>

## Overriding Activities Assigned to Triggers

Instead of using the standard Eclipse activities to respond to triggers, you may want to set up your own subroutines as activities that respond to triggers.

For example, when an order is submitted through E-mail Order Entry, instead of triggering the default activity, you can trigger a replacement activity. The replacement activity can be a subroutine that you write, or it can be a system-defined subroutine.

A system administrator can program subroutines into your system for any activity required. You can then assign the subroutines in the **Activity Trigger Subroutine Overrides** control maintenance record. Activity trigger subroutines set up in customer or vendor maintenance override these subroutines.

### To override an activity:

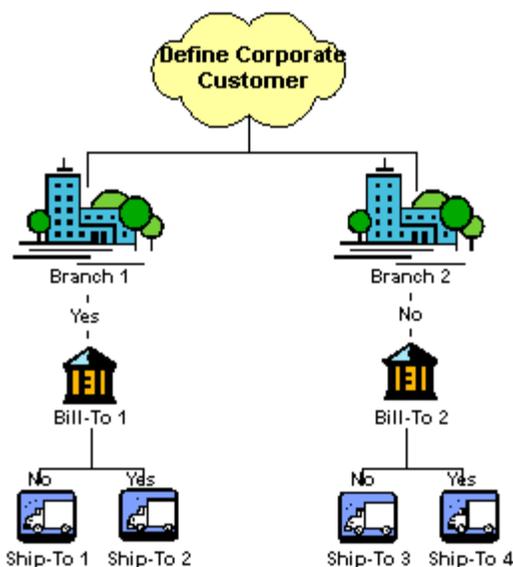
1. From the **Maintenance** menu, select **Customer** or **Vendor** to display the Customer Maintenance or Vendor Maintenance window.
2. In the **Customer** or **Vendor** field, enter the entity's name to display the entity record.
3. Select **Additional > Activity Trigger** to display the Activity Trigger Maintenance dialog box.  
This customer's current activity triggers display.
4. Select the activity trigger to override, and the select **File > Subroutine Override** to display the Activity Trigger Override Maintenance dialog box.  
The read-only **Setting Level** field displays the current level at which the subroutine is set: Customer, Control, or Default.
5. In the **Subroutine** field, enter a replacement activity.

## Flagging Entities to Inherit Triggers

In a single or multiple branch company, you may want to set activity triggers to affect all of your branches, bill-tos or ship-tos, identically, or you may want to specify triggers for each branch, bill-to or ship-to. For any customer or vendor, you can set activity trigger inheritance to affect branches from the corporate customer to the last ship-to, or set triggers that affect only single branches, bill-tos, or ship-tos.

Create a corporate customer in Customer Maintenance, and then define the corporate customer for the system in the Corporate Customer control maintenance record. This setup allows you to define activity triggers that you can set to disseminate throughout your company's hierarchy. Inheritance can start at any level, from the corporate customer, until you reach the ship-to level. The corporate customer is used solely for activity triggers, and nowhere else in the system.

The diagram below shows a hierarchy setup with a variety of inherited triggers, from the corporate customer to several bill-to and ship-to branches. "Yes" represents an entity set to inherit triggers, and "No" represents an entity set not to inherit triggers.



In this diagram, Branch 1 and Branch 2 are both set Yes to inherit triggers.

Bill-tos set to Yes inherit triggers from branches above it in the hierarchy.

Bill-tos set to No must have their own triggers set up for themselves. These triggers can be inherited by any entity below the bill-to in the hierarchy.

According to this scenario, the following is true:

- Bill-to 1 and Ship-to 2 inherit triggers from Branch 1.
- Ship-to 1 requires its own triggers.

**Note:** If no triggers are defined, the system uses triggers defined for the bill-to, but no inherited triggers.

- No branches inherit triggers from Branch 2.
- Ship-to 4 inherits triggers from Bill-to 2.
- Ship-to 3 requires its own triggers.

**Note:** If no triggers are defined, the system uses triggers defined for the bill-to, but no inherited triggers.

## Maintaining Customers and Vendors

If you disable an activity, it may not be inherited by any lower entities. For example, if a bill-to and ship-to are set to inherit from a branch that has ten triggers defined, and the bill-to disables one trigger, the ship-to inherits nine triggers from the branch.

**Note:** When the **Ship-To** inherit flag is set to **Yes**, all of the activity triggers are active from both the ship-to and the bill-to record. If you have an identical trigger, then the trigger is activated twice. There is no comparing or hierarchy used.

### To flag entities to inherit activity triggers:

1. In Customer Maintenance, set up a placeholder customer that represents the corporate customer.
2. In the **Corporate Customer** control maintenance record, enter the name of the corporate customer you created in step 1.
3. From the **Maintenance** menu, select **Customer** to display the Customer Maintenance window or select **Vendor** to display the Vendor Maintenance window.
4. Enter the customer or vendor's name to display the entity record.
5. Select **Additional > Activity Trigger** to display the Activity Trigger Maintenance dialog box.

The system populates the **Entity Name** field with the customer or vendor name.

6. Assign triggers and activities, as needed.
7. In the **Inherit** field, select one of the following.
  - **Default** - The system uses the setting in the **Activity Trigger Default Inherit** control maintenance record.
  - **Yes** - The system overrides the setting in the **Activity Trigger Default Inherit** control maintenance record. This entity inherits triggers from the entity above it in the corporate branch hierarchy
  - **No** - The system does not inherit triggers from any other entity.

If left unchecked, the entity uses the setting in the **Activity Trigger Default Inherit** control maintenance record.

8. Save your changes and exit the dialog box.

## Customer/Vendor Specific Part Numbers Overview

When you add a product to the product file, the system assigns it an internal part number. The system uses this number to identify the product for all system operations. Your customers and vendors may use their own part numbers for the products they order from you. If you assign these part numbers to your products, the customer can then use them to request the products they need, and you can use the vendor's part numbers when you order product from them, as a means to speed the order entry process.

You can also enter the customer or vendor's sell price and comments to further personalize their part numbers. You can also generate auto-replenish numbers for entering orders by way of Remote Data Collection (RDC) from customer/vendor-specific part numbers.

Each customer can create bar code labels with their own customer part number for each product that they order from you. You set up the parameters for printing custom labels, then print custom retail price labels.

Complete the following tasks to set up your customers and vendors to use their part numbers:

- Display the Customer or Vendor Specific Part Numbers Window.
- Enter customer or vendor specific part numbers for a customer or vendor.
- Limit the list of customer or vendor specific part numbers to specific criteria.
- Create customer or vendor specific part numbers from existing part numbers.
- Create a template for customer vendor specific part numbers.
- Create and Edit customer or vendor specific part numbers.
- Create auto-replenish numbers for RDC.
- Set up criteria for creating auto replenish numbers for RDC.
- Print custom labels for customers.

## Displaying the Customer/Vendor Specific Part Numbers Window

You can access customer/vendor part numbers from multiple locations in the system. However, you must be assigned the ENTITY.PN.EDIT authorization key to view, edit, or delete the items on the Customer or Vendor Specific Part Number window.

Access the Customer or Vendor Specific Part Numbers window from the following paths:

- From the **Maintenance** menu, select **Customer** to display the Customer Maintenance window, and then select **File > Customer Part #**.
- From the **Maintenance** menu, select **Vendor** to display the Vendor Maintenance window, and then select **File > Vendor Part #**.
- From the **Orders** menu, select **Sales Order Entry**, and enter the required information to display the Sales Order Entry window. Then select **Maintenance > Customer Part #**.
- From the **Purchase** menu, select **Purchase Order Entry**, and enter the required information to display the Purchase Order Entry window. Then select **Maintenance > Vendor Part #**.

**Note:** This window is view-only if accessed from Remote Order Entry.

## Entering Customer or Vendor Specific Part Numbers

Enter customer or vendor specific part numbers to cross-reference the customer's product numbering scheme with part numbers assigned on your system. The customer/vendor-specific part number retains the product's original part number while matching part numbers for customers. You can assign more than one customer or vendor-specific part number to a product and each product can have its own sell price and comments.

**Note:** If the **Allow Multiple Products To Be Associated With One Customer Part #** control maintenance record is set to **Yes**, you create a single customer part number and associate multiple products to it.

### To enter customer or vendor specific part numbers:

1. Display the Customer or Vendor Specific Part Numbers window.

The **Customer** or **Vendor** field displays the customer or vendor name from the previous window.

2. To enter an alternate source for customer or vendor-specific part numbers for this entity, enter the name of the alternate customer or vendor in the **Alternate Customer** or **Alternate Vendor** field.  
Example

For example, when you enter a customer-specific part number on an order, the system searches the customer-specific part numbers defined for the primary customer, but if it does not find the product, it searches the customer-specific part numbers defined for the alternate customer.

3. In the **Product Description** column, enter a description of the product.
4. In the **Customer PN** or **Vendor PN** column, enter the customer or vendor part number for this product.
5. In the **Location** column, enter the location code if the entity stores inventory parts using location codes.

Enter a code for every product on this window, if you use location codes. The scanned item must match this location code to create an order. If you change a product location, the system warns that you will update all consignment locations in Location Maintenance. Select whether to update locations for this customer only, or for all locations.

**Note:** You can create bar code labels for locations that you can scan with the PDT 310.

6. To add all the products in a price line ID to the **Product Description** column, select **File > Add Price Line** and do the following:
  - At the **Select Price Line** prompt, enter the price line ID and click **OK**.
  - At the next prompt, if you want to use the product ID as the specific part number, type @. The system precedes the part number with an @ symbol in the **Customer PN** or **Vendor PN** columns. When you add these products to an order, the "Your Part #" note does not display with the line item on the order.

For more information about how the @ is used in Customer Product Ranking, see the explanation for the **Products Without Customer Part Number** field in *Ranking Customer Products* in Accounts Receivable utilities.

- Enter the cost code that identifies the phase in a project for which the products within this price line are used, or click **Cancel** to continue.

## Maintaining Customers and Vendors

7. Use the **Item > Change View** option to change column views. For each product listed, enter the information for any of the columns within the listed views:

In the column...	Do the following...
<b>Basis</b>	Select the pricing or costing basis name to use with the entry in the <b>Formula</b> column. The system uses these entries to calculate the price on printed custom retail price labels for the product. This entry does not affect product pricing.
<b>Formula</b>	Enter the pricing or costing formula to use with the entry in the <b>Basis</b> column. The system uses these entries to calculate the price on printed custom retail price labels for the product. This entry does not affect product pricing.
<b>Customer/Vendor Part # Comment</b>	Enter comments to attach to the product description. These comments print with the description when the product is ordered.
<b>Min</b>	Enter the minimum quantity of this product to maintain in inventory. If the inventory quantity falls below this number, the system adds the product to the order.
<b>Max</b>	Enter the maximum quantity of this product to maintain in inventory. When the inventory falls below the minimum level specified in the previous column, the system calculates how much product to order to bring the current inventory quantity up to this amount.
<b>Level</b>	<p>Enter the level at which the system is triggered to replenish this product. For example, if the <b>Min</b> is set to 30 and the <b>Max</b> is set to 45, and the <b>Level</b> is set at 35, when inventory drops to 35, the system notifies the Warehouse Operation Queue to generate replenishment tasks.</p> <p>This value can also be entered through RDC.</p> <p><b>Note:</b> You must have the <b>Allow Users To Modify Product Level On Entity Part Numbers</b> control maintenance record set to yes to edit this field. This is new in Release 9.0.5.</p>
<b>Line Tax</b>	<p>Check the box to charge tax on the product:</p> <p>If you leave the box unchecked, the system uses tax rules set up on the Customer Sales Tax dialog box, and the system checks the bill-to, if applicable.</p> <p>See Creating Tax Jurisdiction Codes for more information.</p>
<b>Tax Code</b>	Select the tax code to use for this line item.
<b>Print Override</b>	<p>Substitute a system-generated replenishment ID in place of a customer-defined part number assigned to this product to print on orders, shipping tickets, and invoices.</p> <p>Select a pre-defined customer/vendor-specific part number.</p>
<b>Cost Code</b>	<p>Enter the cost code number as follows:</p> <ul style="list-style-type: none"> <li>• To the left of the decimal point enter a number for the job phase. For example, phase 1425 of a job might be rough-in, phase 1450 build-out, and phase 1490 might be finish work.</li> <li>• To the right of the decimal point, enter a number representing the type of products used in this phase of the job. For example, 1425.1 might be rough-in electrical products, while 1425.2 might be rough-in plumbing products.</li> </ul>

In the column...	Do the following...
<b>Release Number</b>	<p>Enter the customer's release number to assign to orders the system generates for this product.</p> <p>This column applies to the use of the replenishment number (!), assigned to products for use with Remote Data Collection. When you use RDC to order a product, the system uses this number to recall the customer name and billing information, Eclipse part number, location, and minimum and maximum values.</p>
<b>Purchase Order</b>	<p>Enter the customer's purchase order number. The system assigns this number to any order it generates for this product.</p> <p>This column applies to the use of the replenishment number (!), assigned to products for use with Remote Data Collection. When you use RDC to order a product, the system uses this number to recall the customer name and billing information, Eclipse part number, location, and minimum and maximum values.</p>
<b>Break Point</b>	<p>Enter the customer-defined code, or break point. The system assigns this break point to orders it generates for this product.</p> <p>Use break points to generate multiple orders that are delivered to different locations. When RDC generates an order and encounters a product with a different break point, a new order is started.</p> <p>This column applies to the use of the replenishment number (!), assigned to products for use with Remote Data Collection. When you use RDC to order a product, the system uses this number to recall the customer name and billing information, Eclipse part number, location, and minimum and maximum values.</p>

- Min/Max/Level
- Basis/Formula/Comment
- PO/Break Point/Release/Print Override
- Line Item Taxability
- Cost Code

8. Save your changes and exit the window.

### More Options for Entering Customer or Vendor Specific Part Numbers

The following are some common options you might use while entering customer or vendor specific part numbers:

To...	Do the following...
add products from a price line with system-generated part numbers.	<p>Select <b>File &gt; Add Price Line</b>, enter the price line ID, and click <b>OK</b>.</p> <p>The system prompts to use the product ID as the part number. If you select <b>Yes</b>, the system precedes the part number with an @ symbol in the <b>Customer PN</b> or <b>Vendor PN</b> columns. When you add these products to an order, the "Your Part #" note does not display with the line item on the order.</p>

## Maintaining Customers and Vendors

To...	Do the following...
copy one or all customer/vendor-specific part numbers from one customer or vendor record to another customer or vendor record.	Select the part numbers to copy and select <b>File &gt; Copy</b> .
set parameters for printing custom labels for customers or vendors.	Select <b>File &gt; Print Labels</b> .
see more detail about one part number.	Select the product to view and select <b>Edit &gt; Detail</b> .
create default values for fields on a Part Number record.	Select <b>Edit &gt; Template</b> .
import or export part numbers using Windows Excel.	Select <b>Edit &gt; Export to Excel</b> or <b>Edit &gt; Import from Excel</b> .
substitute products.	Select <b>Edit &gt; Substitute Products</b> to create the list of products to use as substitutes, and then select <b>Edit &gt; Change Primary Products</b> to substitute the product.

## Selecting Customer/Vendor Specific Part Numbers

Limit the number of products in the customer or vendor specific part numbers list by displaying a subset of customer or vendor specific part numbers. This makes the list easier to work with because you display only the items of immediate interest.

### To select customer/vendor specific part numbers:

1. Display the Customer or Vendor Specific Part Numbers window.
2. Select **Item > Select Criteria** to display the Selection Criteria dialog box.
3. In the **Product description** field, enter a partial description to display a list of products matching that description, and select one.
4. In the **Customer PN Pattern** field, enter all or part of a customer or vendor specific part # to display all customer or vendor-specific part numbers that match that number.
5. In the Enter **Price Line** field, select a price line to display all customer or vendor specific part numbers for products in that price line.
6. In the **Location** field, enter a product location to display all the customer or vendor specific part numbers within that location.
7. In the **Purchase Order** field, enter a purchase order number to display all the customer or vendor specific part numbers associated with that purchase order number.
8. In the **Break Point** field, enter a customer- or vendor-defined break point to display all the customer- or vendor-specific part numbers associated with that break point.
9. In the **Release** field, enter all or part of a customer or vendor release number to display all the customer- or vendor-specific part numbers associated with that release number.
10. In the **Comment** field, enter all or part of the customer or vendor specific part number comment to display a list of products that contain that comment.
11. Click **OK** to return to the previous window. Only those products that match these criteria display.

## Viewing Customer/Vendor Specific Part Number Details

Display a detailed account of a customer or vendor specific part number to:

- View or edit the customer or vendor specific part number.
- Enter RDC replenishment minimum and maximum values.
- View service stock levels, pricing information, comments, and other information.
- Set up replenishment contracts with customers.
- Create sell matrix cells for a product with a customer specific part number.

You must be assigned the ENTITY.PN.EDIT authorization key to view, edit, or delete items on Customer or Vendor Part Number Detail dialog box.

### To view customer/vendor specific part number details:

1. Display the Customer or Vendor Specific Part Numbers window.
2. Select **Edit > Detail** to display the Customer or Vendor Part Number Detail dialog box.
3. Enter or view values in the following fields, as needed:

Field	Description
<b>Customer or Vendor</b>	The customer or vendor for whom this customer- or vendor-specific part number is defined.
<b>Description</b>	The product description for the customer/vendor-specific part number you are viewing.
<b>Customer or Vend Part Number</b>	The customer/vendor-specific part number for this product. For more information, see Creating, Editing, and Deleting Customer or Vendor Specific Part Numbers.
<b>Rank #1-3</b>	The product rank assigned to rank numbers 1-3 for this customer. This rank is re-calculated when you run the Customer Product Ranking program.
<b>Minimum Level</b>	Enter the minimum quantity of this product to always remain in inventory. If the inventory quantity falls below this number the system adds the product to the purchase order.
<b>Maximum Level</b>	Enter the maximum quantity of this product to always remain in inventory. When the system adds this product to an order, it selects the amount necessary to bring the current inventory quantity up to this number.
<b>Service Stock Quantity</b>	The service stock quantity for this customer or vendor, up to five digits.
<b>Service Stock Branch</b>	The branch associated with the service stock quantity, if one was entered for this customer or vendor.
<b>Service Stock Effective Date</b> <b>Service Stock Expire Date</b>	The service stock quantity effective date and expiration date, if one was entered for this customer or vendor.
<b>Contract Stock Quantity</b>	The contract stock quantity for this customer or vendor.

## Viewing Customer/Vendor Specific Part Number Details

Field	Description
<b>Contract Stock Effective Date</b> <b>Contract Stock Expire Date</b>	The contract stock quantity effective date and expiration date, if one was entered for this customer or vendor.
<b>Customer Price</b>	The product price calculated by the sell matrix in the system. This field is view-only. To change this information, select <b>Inquiries &gt; Matrix Maintenance</b> .
<b>G/P Percentage</b>	The product gross profit percentage calculated by the sell matrix. This field is view-only. To change this information, select <b>Inquiries &gt; Matrix Maintenance</b> . A value displays in this field only if you have been assigned the COGS.VIEW authorization key.
<b>Source CC</b>	The class, customer or Typ/Qte on the sell matrix. This field is view-only. To change this information, select <b>Inquiries &gt; Matrix Maintenance</b> .
<b>Source PP</b>	The group or product on the sell matrix. This field is view-only. To change this information, select <b>Inquiries &gt; Matrix Maintenance</b> .
<b>Effective Date</b> <b>Expire Date</b>	The sell matrix effective and expiration dates for this product. This field is view-only. To change this information, select <b>Inquiries &gt; Matrix Maintenance</b> .

4. Edit or view entries in the **Replenishment Information** area, as needed:

Field	Description
<b>Purchase Order</b>	Enter the customer's purchase order number. The system assigns this number to any order it generates for this product. This field applies to the use of the replenishment number (!), assigned to products for use with Remote Data Collection. When you use RDC to order a product, the system uses this number to recall the customer name and billing information, Eclipse part number, location, and minimum and maximum values.
<b>Release</b>	Enter the customer's release number to assign to orders the system generates for this product. This field applies to the use of the replenishment number (!), assigned to products for use with Remote Data Collection. When you use RDC to order a product, the system uses this number to recall the customer name and billing information, Eclipse part number, location, and minimum and maximum values.
<b>Break</b>	Enter the customer-defined code, or break point. The system assigns this break point to orders it generates for this product. Use break points to generate multiple orders that are delivered to different locations. When RDC generates an order and encounters a product with a different break point, a new order is started. This field applies to the use of the replenishment number (!), assigned to products for use with Remote Data Collection. When you use RDC to order a product, the system uses this number to recall the customer name and billing information, Eclipse part number, location, and minimum and maximum values.
<b>Print Override</b>	Substitute a system-generated replenishment ID in place of a customer-defined part number assigned to this product to print on orders, shipping tickets, and invoices. You can select a pre-defined customer or vendor specific part number.

5. In the **Additional Information** area, view or enter the following:

## Maintaining Customers and Vendors

- In the **Location** field, view or enter the customer or vendor's warehouse storage location code for this product.
  - Click the **Comment** tab to view or enter a comment related to this product.
  - Click the **Commodity Code** tab to view or enter a customer-defined code used to categorize this product.
6. Save your changes and exit the dialog box.

### More Options for Viewing Customer/Vendor Specific Part Number Details

The following are some common options you might use while viewing customer/vendor specific part numbers:

To...	Select...
delete the currently displayed customer or vendor specific part number from the customer/vendor part number file.	<b>File &gt; Delete</b> You must have the ENTITY.PN.EDIT authorization key with Level 3 to delete a record.
inquire about a variety of history and maintenance items.	<b>Inquiries</b> Select from the following options: <ul style="list-style-type: none"> <li>• Inventory Inquiry</li> <li>• Future Ledger</li> <li>• History Ledger</li> <li>• Sales History</li> </ul>
display the Sell Matrix Maintenance window, where you can edit a customer/product matrix for the product cross-referenced to a customer or vendor -specific part number.	<b>Inquiries &gt; Matrix Maintenance</b> The current date is the default effective date for the new matrix cell. This option is disabled when the Customer/Vendor Specific Part Number Detail dialog box displays in view-only mode.

## Creating Customer/Vendor Specific Part Number Templates

Use a customer or vendor specific part number template to create default values for fields on a Customer or Vendor Specific Part Number record. Copy this template when you define new part numbers for a customer or vendor. The template enables you to quickly enter similar data for several products.

When you copy the template, it does not override pre-existing data.

### To create a customer/vendor specific part number template:

1. Display the Customer or Vendor Specific Part Numbers window.
2. Select **Edit > Template** to display the Customer or Vendor Specific Part Number Template dialog box.
3. In the **Product** field, enter the Eclipse product description for the part numbers to enter in this template.
4. In the **Location** field, enter the location code to assign the same warehouse storage location to the part numbers.
5. In the **Min** field, enter the minimum on-hand quantity of the item to maintain in inventory.
6. In the **Max** field, enter the maximum on-hand quantity of the item to maintain in inventory.
7. In the **Purchase Order** field, enter the purchase order number to use when the item using this part number is ordered.
8. In the **Break Point** field, enter the number to assign to the customer-defined code, or break point, to the part numbers you enter in this template.

The system assigns this break point to orders it generates for this product.

Use break points to generate multiple orders that are delivered to different locations. When RDC generates an order and encounters a product with a different break point, a new order is started.

This field applies to the use of the replenishment number (!), assigned to products for use with Remote Data Collection. When you use RDC to order a product, the system uses this number to recall the customer name and billing information, Eclipse part number, location, and minimum and maximum values.

9. In the **Release Number** field, enter the customer or vendor's release number to use when the item using this part number is ordered.
10. In the **Comment** field, enter any additional information about the part numbers you enter in this template. The comment displays when this product is ordered.
11. In the **Basis** field, enter name of the price basis to use to calculate this item's price or cost.
12. In the **Formula** field, enter the formula to use to calculate this item's price or cost.
13. Save your changes and exit the dialog box.

## Defining Substitute Products for Customers

The products displayed on the Customer Specific Part Numbers window are the primary products listed for the customer, but you create a list of substitute products for each primary product listed. When you select a substitute item, the line item on the Customer Specific Part Numbers screen updates to reflect the new primary item and the former primary item becomes one of the valid substitute products.

Customer specific substitute items are available when entering orders for that customer. You can also create product-specific substitutes in Product Maintenance.

### To define substitute products for a customer:

1. Display the Customer Specific Part Numbers window.
2. Select the primary product for which to create substitutes.
3. Select **Edit > Substitute Products**, enter a list of products that can substitute for the primary product, and click the **Save List** button.
4. To use one of the substitute products in the saved list, select **Edit > Change Primary** to display the Change Primary Substitute Product dialog box.
5. Select the product to substitute for the primary product.  
The product selected on the Customer Specific Part Numbers window changes places with the substitute product in the list. You can change the primary product back at any time.
6. Save your changes and exit the dialog box.

## Creating, Editing, and Deleting Customer or Vendor Specific Part Numbers

Edit new customer part numbers when you want to organize and monitor a customer's specific part numbers.

Create and edit replenishment numbers the same way you keep track of customer specific part numbers for those placing orders at the customer site through RDC.

This topic contains the following instructions:

- Replacing a part number
- Creating a part number
- Creating an auto-replenish number for RDC
- Deleting part numbers

You must be assigned the ENTITY.PN.EDIT authorization key to view, edit, or delete items on the Customer or Vendor Specific Part Number Detail window. If you access the window through Remote Order Entry, the window displays in view-only mode.

### To replace a part number:

1. Display the Customer or Vendor Specific Part Numbers window.
2. Select the product to view, and select **Edit > Detail** to display the Customer or Vendor Specific Part Number Details window.

You can view both customer and vendor records from this window, but you can edit only customer records.

3. Enter one of the following if prompted to delete the old record and create a new one:
  - **No** - Retains the original customer or vendor-specific part number record and creates a new record using the number you just entered.
  - **Yes** - Replaces the original customer- or vendor-specific part number with the new number.
4. Click **OK** to return to the Customer or Vendor Specific Part Number Details window.

### To create a part number:

1. Display the Customer or Vendor Specific Part Numbers window.
2. In the **Product Description** column, select the first blank line and do one of the following:
  - Enter the part number to use with this product. Press **Enter** to save the data and return to the Customer or Vendor Specific Part Numbers window. This number displays in order entry preceded by "Your #."
  - Enter **@** and press **Enter**. The system assigns the product ID as the part number preceded by **@**. If the **Allow Multiple Products To Be Associated With One Customer Part #** control maintenance record is set to **Yes**, you create a single customer part number and associate multiple products to it.
3. Save your changes and exit the window.

**To create an auto-replenish ID number for RDC:**

1. Display the Customer or Vendor Specific Part Numbers window.
2. In the **Product Description** window, select the first blank line, and enter the product ID.
3. In the **Customer PN** or **Vendor PN** column, enter an exclamation mark (!) and press **Enter**.  
The system generates a unique auto-replenish number, for example, !2343, to use when ordering products remotely for that product.
4. Save the information when finished making changes and return to the previous window.

No entity can have two identical replenishment numbers and no two entities can have the same replenishment number. Because a replenishment ID is unique, when an employee scans a label containing the replenishment ID, the system identifies the entity, location, and product.

**To delete part numbers:**

1. Display the Customer or Vendor Specific Part Numbers window.
2. Do one of the following:
  - Select **Delete All Items** to delete all products in the **Product Description** list. The system prompts for confirmation.
  - Select the product to delete and press **Alt-Delete** to delete that product from the list.

**Note:** On the Customer/Vendor Specific Part Numbers screen, if you delete one line, delete all lines, or change the Eclipse product number for the current line, and if a service stock number exists for a customer/PN combination, the system prompts to remove the customer service stock number from the product for that customer.

3. Save your changes and exit the window.

## Copying Customer/Vendor Specific Part Numbers

You can copy one or all customer/vendor specific part numbers from one customer or vendor record to another customer or vendor record. You can also create templates that you can copy to customer or vendor records.

### To copy customer/vendor specific part numbers:

1. Display the Customer or Vendor Specific Part Numbers window.  
The **Customer** or **Vendor** field displays the entity name from the previous window.
2. Select **File > Copy > Copy to Entity**.
3. In the **Copy to Customer** or **Copy to Vendor** field, enter an entity name to which to copy the part numbers.
4. Select one of the following check boxes:
  - **Copy Current Item** - Copies the currently selected product and part number to the entity.
  - **Copy All Items** - Copies the entire list of products and their part numbers to the entity.
5. Click **OK** to copy the part numbers.  
The system displays a message saying what it copied.

### To copy template information to part numbers:

1. Display the Customer or Vendor Specific Part Numbers window.
2. Select the product from which to build the template.
3. Enter the data as described in Creating a Customer or Vendor Specific Part Number Template
4. Save the template information.
5. Select **File > Copy**, and then select one of the following:
  - **Copy Template to Current Item** - Copies the template information to the selected product.
  - **Copy Template to All Selected Items** - Copies the template information to all products from the currently selected product to the bottom of the list.

The system returns to the Customer or Vendor Specific Part Numbers window. Your products now display the template's information.

## Printing Custom Labels

Set up parameters for printing custom labels for customers or vendors to identify products that have customer/vendor specific part numbers. Then, you can print custom retail price labels for one or more customer/vendor specific part numbers at a time.

This topic contains the following procedures:

- Setting up for printing custom labels.
- Printing custom labels.

### To set up for printing custom labels:

1. Display the Customer or Vendor Specific Part Numbers window.
2. To find a product in the list without having to scroll, right-click in the table and select **Search**.  
The system prompts for the product description, and then lists products matching the description. The product is selected when found.
3. Select **Item > Change View > Basis/Formula/Comment**.
4. In the **Basis** and **Formula** columns, enter the basis name and formula for the system to use to calculate the price to print on custom retail product labels.

**Note:** The basis and formula entered on this window do not affect the product pricing.

### To print custom labels:

1. Display the Customer or Vendor Specific Part Numbers window.
2. Select **File> Print Labels** to display the User Defined Document/Label Printing dialog box.
3. In the **Document/Label Format** field, the default format displays. You can select a different label format.
4. In the **Print Selection** field, enter one of the following:
  - **All Items Listed** - Prints a label for each item listed on the Customer or Vendor Specific Part Numbers window.
  - **Current Item Only** - Prints a label for the item at the cursor's current position.
  - **All Items for Current PN** - Prints a label for the item at the cursor's current position and each item listed that has the same customer or vendor-specific part number.
5. In the **Total Count** field, enter the number of each item to print.
6. Click **Print** to print the labels.

**Note:** To design more custom retail price labels, contact Eclipse for custom programming.

## Importing and Exporting Customer/Vendor Specific Part Numbers Using Microsoft Excel

You can import customer or vendor part number information from an Excel spreadsheet to display on the Customer or Vendor Specific Part Numbers window, or export customer part number information from the Customer or Vendor Specific Part Numbers window to an Excel spreadsheet.

This process does not require the use of Mass Load to populate the Customer or Vendor Specific Part Numbers window. Collect part number information from your customer in Microsoft Excel, save the file in tab-delimited text (.txt) format, and import it. To accurately import selected information, you must map column headings from the import file to Eclipse's field names on the Customer or Vendor Specific Part Numbers window.

Exporting customer part numbers requires no additional file manipulation or Eclipse setup before exporting data directly to an Excel spreadsheet.

### To display the import or export utility:

1. Display the Customer/Vendor Specific Part Numbers window.
2. Select one of the following, depending on which process you want to use:
  - **Excel Import** - Imports product data.
  - **Excel Export** - Exports product data.

### To import product data:

1. Save the Excel spreadsheet you want to import in tab-delimited text (.txt) format.
2. Display the Customer/Vendor Specific Part Numbers window.
3. Select **Import From Excel** to display the Import from Excel dialog box.
4. In the **Import Data Information** area, set up the options as needed:

For the option...	Do the following...
<b>Import Type</b>	Select one of the following: <ul style="list-style-type: none"> <li>• <b>Create New (When Not Found)</b> - Creates a new product record when no match is found for an Eclipse product and a customer/vendor-specific part number during the import process. When it finds a match for the product, the system does not overwrite any existing information.</li> <li>• <b>Create New and Update</b> - Creates a new product record when no match is found for an Eclipse product and a customer/vendor-specific part number during the import process, and then updates existing data from the import file.</li> <li>• <b>Update Only</b> - Does not create new records, but updates existing data from the import file.</li> </ul>
<b>Start Column Import on Row</b>	Enter the row number from the spreadsheet from which to start importing product information. For example, if the spreadsheet has column headings on the first row, enter <b>2</b> in this field to skip the heading row.

For the option...	Do the following...
<b>Use User Defined Column Headings</b>	<p>Select the check box to display ### for each Eclipse heading listed in the <b>Columns Imported From Excel</b> column under the <b>Imports Columns</b> tab. Match the spreadsheet headings to the Eclipse field names listed in the User-Defined Headings tab.</p> <p>If you leave this option unselected, the system uses Excel's A, B, C headings to map Eclipse fields from the Customer or Vendor Specific Part Numbers window. Excel's A, B, C headings display for each field name listed in the <b>Columns Imported From Excel</b> column under the <b>Imports Columns</b> tab.</p> <p><b>Note:</b> If you check this item, you cannot use the <b>Insert Blank</b> hot key to add blank lines to the <b>Columns Imported From Excel</b> column.</p>
<b>Column Headings Located on Row</b>	<p>Enter the row number where the user-defined headings appear on the import file.</p>

- In the **Columns Imported From Excel** column, use the **Add, Remove, Move Up, and Move Down** buttons to list the Eclipse column headings for the product information you want to import. This list is the product information you will be importing.

The **Product ID** item is required in the **Columns Imported From Excel** column for the system to match its product ID or description to the product information on the spreadsheet. The product ID can be the Eclipse part number or the exact product description.

You can use the **Insert Blank** hot key to add blank lines to this column only if the **Use User Defined Column Headings** field on the Data Info screen is set to **N**.

- To restore the list to its original or last saved version, select **File > Recall Work**.
- If you selected the **Use User Defined Column Headings** check box, click the **User Defined Headings** tab and map the column headings on the **User Defined Column Heading** column with the Eclipse column headings in the **Columns Imported From Excel** column.

**Note:** The **Columns Imported From Excel** column lists the field names from the Customer or Vendor Specific Part Numbers window that represent the information to be imported.

- Select **File > Import** to browse to select the text (.txt) file to import, and then click **Open** to import the file to the Customer or Vendor Specific Part Numbers window.

**To export product data:**

- From the Customer or Vendor Specific Part Numbers window, select **Edit > Export To Excel** to display the Excel Export dialog box.
- In the **Columns Exported to Excel** column, use the **Add, Remove, Move Up, and Move Down** buttons to list the Eclipse headings in the order you want them to appear on the exported spreadsheet.

## Importing and Exporting Customer/Vendor Specific Part Numbers Using Microsoft Excel

A	B	C	D	E	F
1	Customer/Vendor Part # for Customer : Merritt Builders				
2	Customer Number : 29017				
3					
4	Eclipse ID Product Description	Customer/Vendor Part #	Location	Max	Min
5	122185 Stillen Exhaust 3	@122185	B-12-47	8	4
6	122194 H&R Sport Springs	@122194	B-18-47	12	4
7	123 GC Electronics 12-1650 JUMPER TEST	@122198	D-11-77	12	4
8	345 #701 AMERICAN AIR VENT	@122198	H-17-12	3	1
9	477 AG6490 DUSTY ROSE 5' LH 2-PC				
10	122326 PERRY SERIAL KIT COMP A (122326)				
11	72327 3/4 - 1/2" 90 DEGREE COPPER				
12	72325 1/4" 90 DEGREE COPPER ELBOW WRO				
13	72324 3/4" 90 DEGREE COPPER ELBOW				
14	1222 26.10304-620 VB BAR FAUCET (D#)				
15	2344 22X61 CORIAN SGL BOWL TOP - BONE				
16	101128 G31-317 ABC-20 FUSE 5PK				
17					

Columns Exported to Excel	Columns Not Exported
Eclipse ID Product Description Customer/Vendor Part # Location Max Min	Break Comment Cost Code Purchase Order Release #

2 of 6

Shift Columns
Move Up
Move Down
Export
Reset
F12-Abort

**The Columns Exported to Excel column become the headings on the Excel spreadsheet.**

3. To restore the list to its original or last saved version, click **Reset**.
4. Click **Export** to select a destination, name the file, and click **Open** to export the Excel spreadsheet to that location.

## Uploading Customer Part Numbers

Use the User-Defined Customer Part # Entry utility to upload customer part numbers for existing products in the system. The uploaded part numbers display in Customer/Vendor Specific Part Numbers. You can upload part numbers from a spreadsheet or a text file.

This topic contains the following procedures:

- Uploading customer part numbers.
- Changing the file format.

### To upload customer part numbers:

1. From anywhere in the system press **Shift F2** to display your Report Queue.
2. Upload the file containing the part numbers if necessary.
3. Select **Tools > Process** to display the User Defined Upload Processing screen.  
**Note:** If prompted, log on to the character-based system.
4. In the **Processing Type** field, enter **Customer Part # Import**.
5. Click **Begin** to display the User Defined Customer Part # Entry dialog box.
6. In the **Work ID** field, do one of the following:
  - Leave the field blank - Does not save the template after this upload.
  - Enter a name that identifies the upload file - Creates a new template for use with future uploads.
  - Select an ID - Uses an existing template.
7. In the **Description** field, enter a complete description for the upload.
8. In the **Customer** field, enter a name to identify which customer part numbers you are uploading.
9. Select **File > Format** to prepare the system for the upload file as described in the following procedure.
10. In the **Start** or **Element #** field of the **Data Format** section of the window, scroll down the list to find the data format to match in the update file.

### Start or Element # Field for Part Number Upload:

The title of the first column in the **Data Format** section toggles depending on which format you are using for the update. In blocked format the column shows **Start**, in variable format it shows **Element #**. In either format, you point to the location of data in the update file.

For blocked records:

- **Start** - For each **Data Format**, enter the number for the starting position on the upload file.
- **Length** - For each **Data Format**, enter the number of characters needed for the data on the upload file.

For variable records:

- **Elmt#** - For each **Data Format**, enter the column number from the upload file.
11. In the **Dec#** field, enter one of the following for numeric data:
- The appropriate number of decimal places if the decimal point is not embedded, but the numeric data contains a defined number of decimal places.
  - A zero if the decimal point is embedded.

**More Options for Uploading Customer Part Numbers**

The following are some common options you might use while uploading customer part numbers:

To...	Select the following...
Start the upload.	<b>File &gt; Begin</b> The system imports customer part numbers into the ENTITY.PN.IDS table.
Delete the upload template	<b>File &gt; Delete</b> Type <b>delete</b> at the prompt. <b>Note:</b> If the system finds errors in the report data, it generates a Failed Entries report and places it in your Hold file.

**Changing the file format:**

1. From the User Defined Customer Part # Entry dialog box, select **File > Format** to display the Upload File Format dialog box.
2. In the **Record Type** field, enter one of the following formats for the upload file:
  - **Blocked** - Fixed-length.
  - **Variable** - Comma- or tab-delimited.

**Note:** Data elements in a blocked record may also be separated by a delimiter.
3. In the **Record Length** field, enter one of the following:
  - Enter the number of characters necessary if specifying a record length.
  - Leave the field blank if not specifying a record length.

**Note:** This field is accessible only for blocked-type records.
4. In the **Delimiter Character** field, enter the character used between each field as a delimiter, such as a comma (.). This field is active only for variable record type files.
5. In the **Delete Characters** field, enter any characters you do not want read as data, such as quotation marks or the dollar sign.
6. Save your changes and exit the dialog box.

## Entering Internet and E-mail Information

Access an e-mail address or web site without having to retype the address each time. By entering Internet information into your customer or vendor records you have immediate access to Internet or e-mail communication.

### To enter internet and e-mail information:

1. From the customer, vendor, or contact record click the **WWW** tab.
2. In the **WWW Address** field, enter the web site address of this customer, vendor, or contact. For example, enter **www.eclipse.com**.

Click the **Link** button to connect to the web site.

3. The **HTTP Document Address** and **Account Manager** fields are for internal Eclipse use only.
4. In the **E-mail Address** column, enter the e-mail addresses you will use for this entity. The system uses the first email address in this list to populate the Sales Order Header with a contact email address.

If you use the Web Commerce companion product, use a unique e-mail address for this field. If you enter the same e-mail address for the company and a contact within the company, then Web Commerce cannot respond if the user with that e-mail address submits a "Forget my password" request.

5. In the **Type** column, select the type that best describes each e-mail address. For example, you could categorize an e-mail address as a contact's business e-mail address, or as a personal e-mail address.

E-mail types are defined in the **Valid E-mail Types** control maintenance record.

6. In the **Preference** column, select the e-mail format you want to use to send e-mail messages to your customer.

For example, you can send e-mail in HTML or text format.

E-mail preferences are defined in the **Valid E-mail Preference** control maintenance record.

7. In the **Account Manager** field, enter the name of the person who manages the web site account.
8. Save your changes and exit the window.

## Entering Reminder Notes

You can create customer or vendor reminder notes that display when a screen, such as the Sales Order Entry Header screen is accessed for a customer or vendor.

You can set reminder notes to display for the entity for following screens:

- Sales Order Entry Body, Status, or Header
- Purchase Order Entry Body, Status, or Header
- Transfer Order Entry Body, Status, or Header
- Customer or Vendor Maintenance
- Cash Receipts, A/R Inquiry
- A/P Entry, A/P Inquiry
- Activity Log Viewing and Entry
- R/F Shipping

You can also create user reminder notes to display when the user logs on or off.

## Entering User-Defined Notes

Select a user-defined note category to write a note for this customer, vendor, or product. Define categories for user-defined notes in the following control maintenance records:

- User Defined Customer Notes
- User Defined Vendor Notes
- User Defined Product Notes

Define as many as 20 note categories, such as, "Special Dates" or "Freon Purchases" that you can use to write notes. Note categories cannot be assigned for individual entities or products, but each note you write is specific to that entity or product.

### To enter user-defined notes for a customer, vendor, or product:

1. From the Maintenance menu select **Customer**, **Vendor**, or **Product** to display the Maintenance window you want to edit.
2. Enter the ID to display a customer, vendor, or product record.
3. Select **Additional > [Customer, Vendor, or Product] Notes** to display the Notes dialog box.
4. In the **Available Titles** area, select the note category to edit or create a note.
5. In the **Notes** area, type the note pertaining to the category you picked for this entity or product.

**Note:** The name of the **Notes** area is determined by your selection in the **Available Titles** area, such as *Personnel Notes* or *Hardware Notes*.

6. Save your changes and exit the dialog box.
7. To read the note, select **Additional > [Customer, Vendor, or Product] Notes**. The note does not display automatically on any other window, as do Customer and Vendor Reminder Notes, Order Entry Messages, or Order Entry Reminder Notes for products.

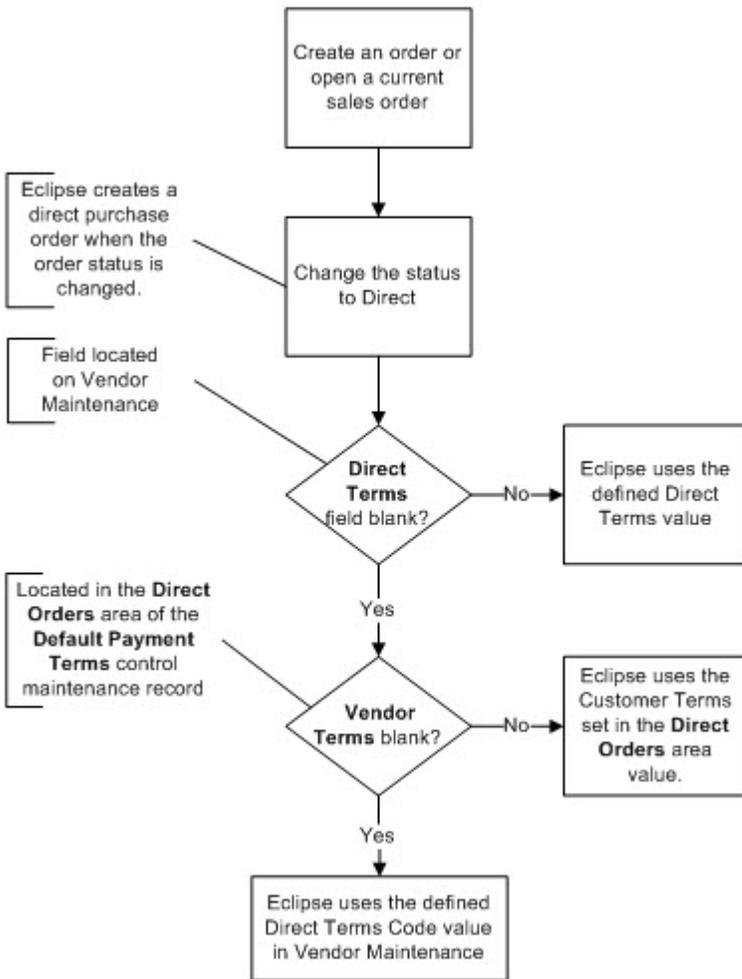
## Entering Internal Notes and Vendor Instructions

Enter internal notes and vendor instructions that display on the Header window of Purchase Order Entry.

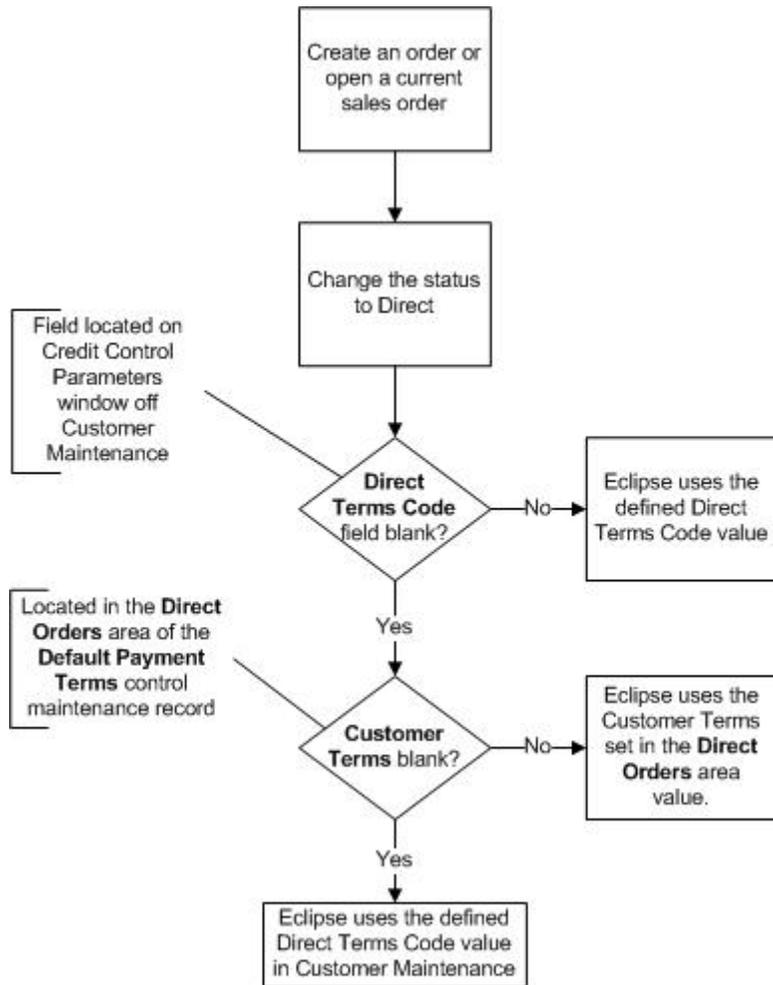
### To enter internal notes and vendor instructions:

1. From the Files menu, select **Vendor** to display the Vendor Maintenance window.
2. In the **Vendor** field, enter the vendor's name to display the vendor record.
3. Select **Orders > Vendor Order Entry Instructions** to display the Vendor Order Entry Instructions dialog box.
4. In the **Instructions Type** field, select one of the following:
  - **Vendor Instructions** - To enter instructions for the vendor entered in step 2, above.
  - **Internal Notes** - To enter notes to your personnel regarding this vendor.
5. Enter the messages you want to display in Purchase Order Entry.
6. Save your changes and exit the dialog box.

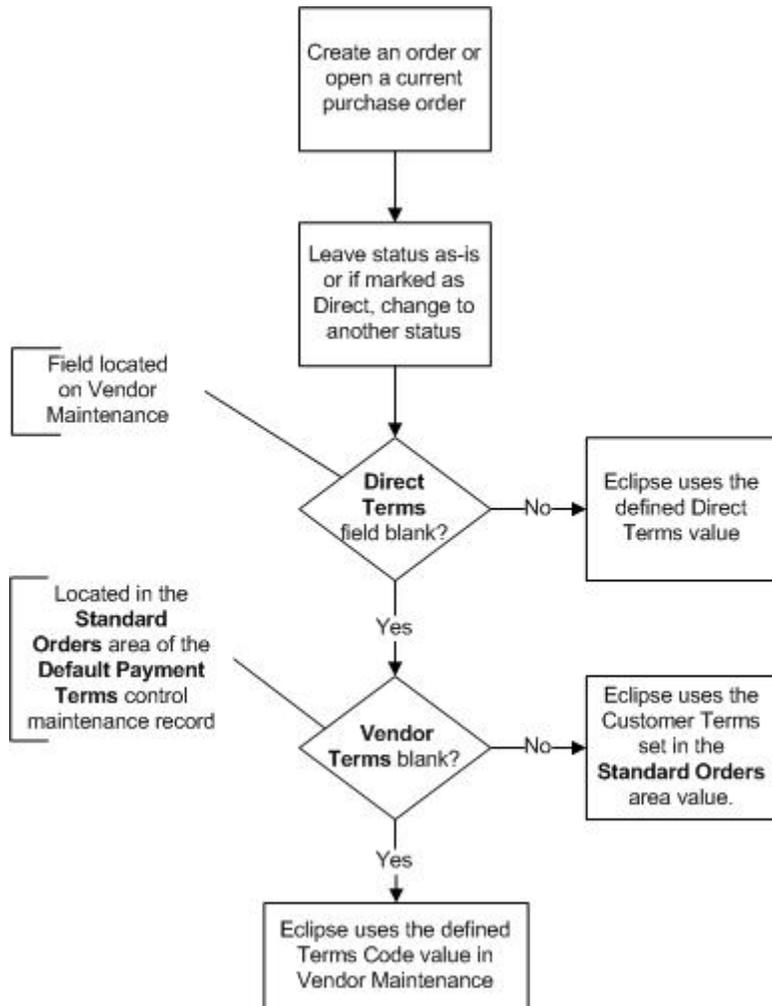
## How Eclipse Applies Direct P/O Payment Terms



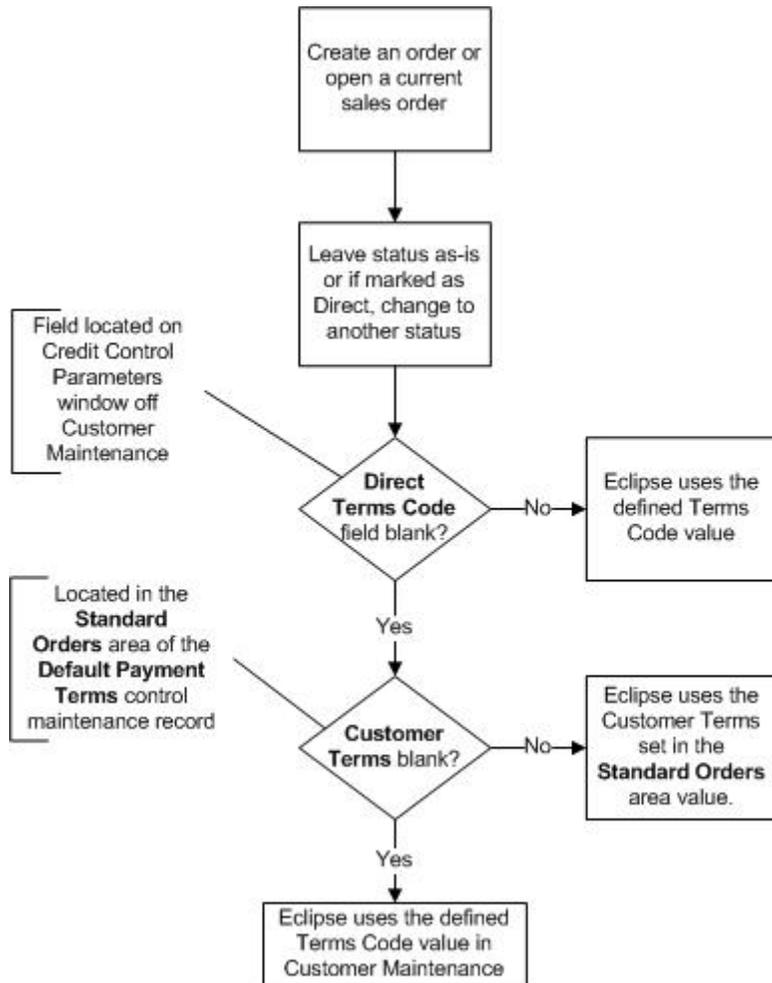
## How Eclipse Applies Direct Sales Order Payment Terms



## How Eclipse Applies Standard P/O Payment Terms



## How Eclipse Applies Standard Sales Order Payment Terms



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