brandwise
Your Modern Sales Studio

THE SALES REP'S GUIDE TO PLAY FOR PC

EVERYTHING THE MODERN SALES REP NEEDS TO KNOW ABOUT USING PLAY FOR PC

Play

Reach
Vision
Reward
Stream

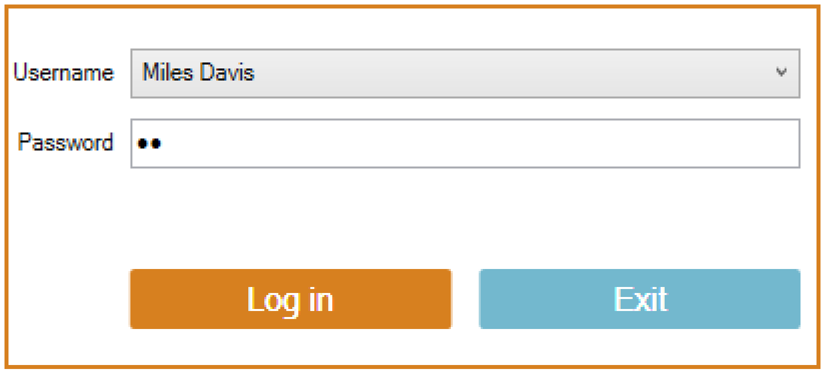
Contents

1 Introduction to Play for PC

Brandwise Play for PC brings digital order capture and engaging imagery together in one innovative application. Sales reps have access to digital images of their supplier's product lines, eliminating heavy and costly catalogs. Create brilliant product presentations using Whiteboards, browse supplier catalogs, generate sales reports, and much more.

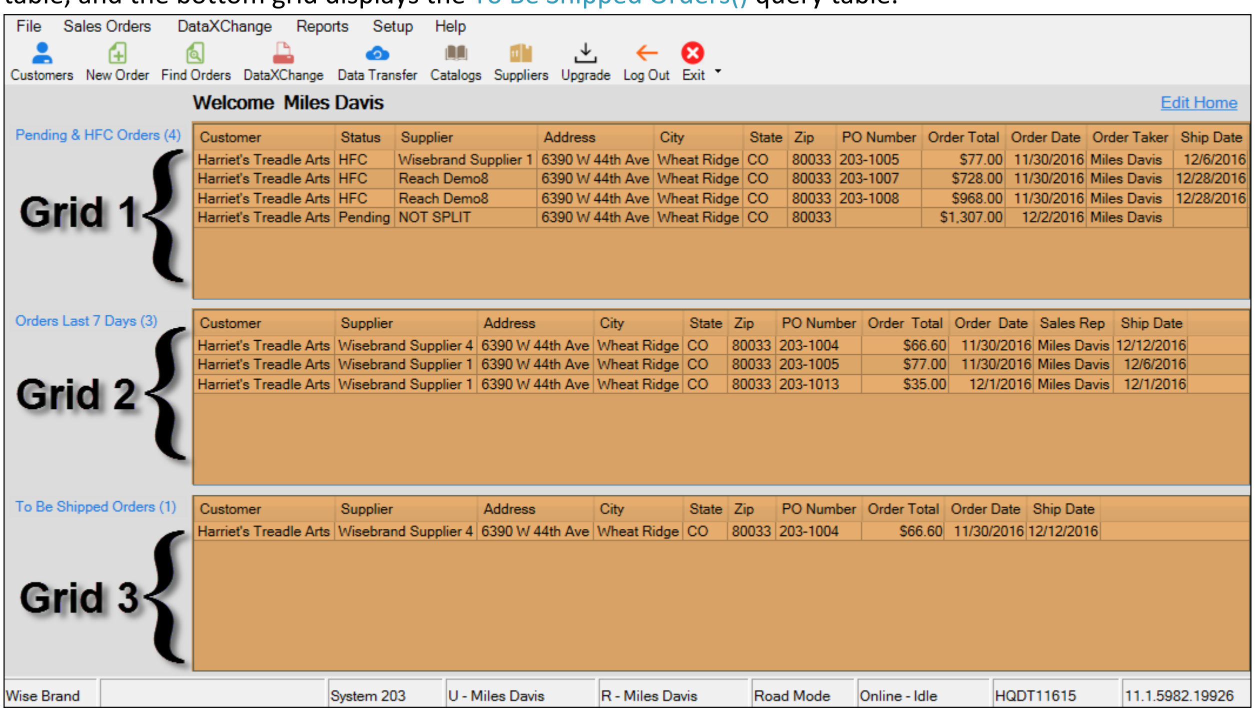
2 Welcome Screen

To launch Play for PC from your desktop, double-click the **Brandwise Studio** icon.



On the login page, select your username and enter a password, then click **Log in**. If you have questions about logging in, please contact your system administrator.

The **Welcome** screen displays three grids with query tables, as shown below. By default, the top grid contains the Pending & HFC Orders() query table, the middle grid contains the Order Last 7 Days() query table, and the bottom grid displays the To Be Shipped Orders() query table.

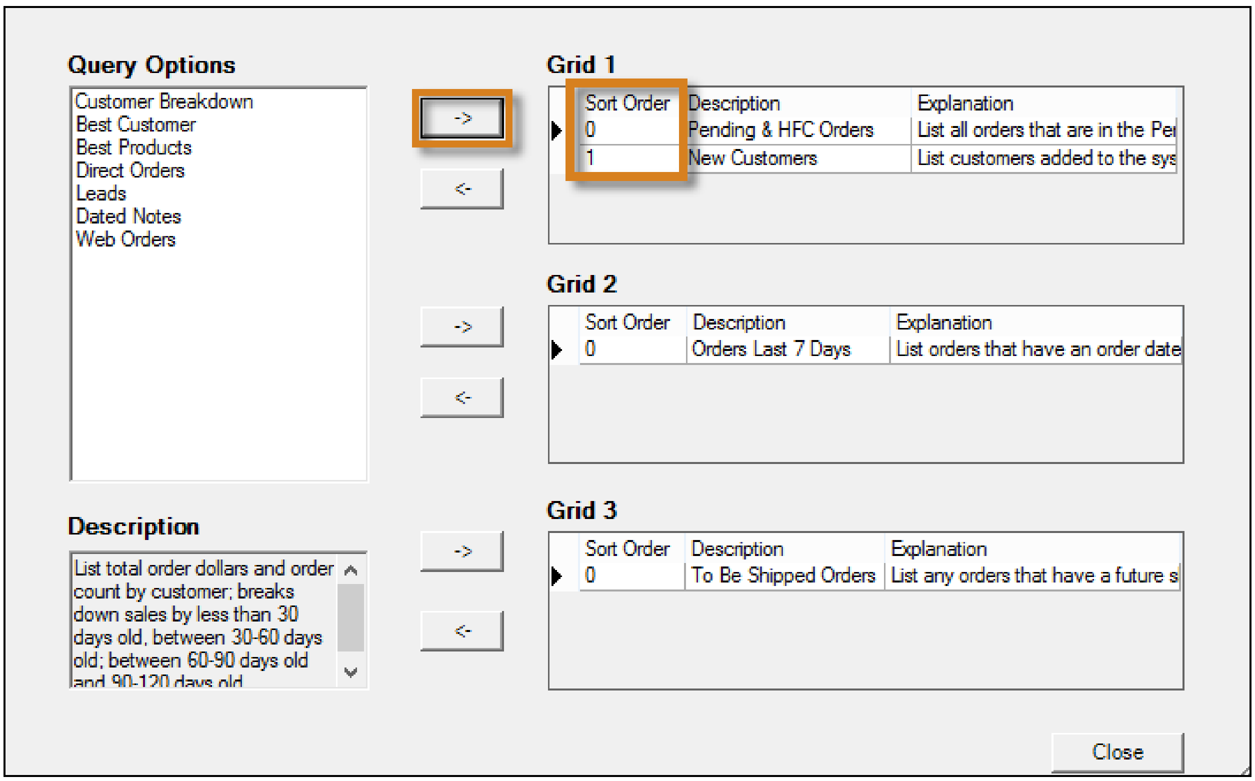


A **Pending** status indicates the order is not finished, while **HFC** (Hold for Confirmation) indicates the order is finished but has additional requirements before it can be confirmed. Sales order statuses are explained in section Sales Orders. There is additional information at the bottom of this screen about your system, including the mode your PC is in: “Show” or “Road” (see section Order Flow).

When your laptop is in “Show” mode, the Welcome screen displays your orders only. All show orders are not listed because your local database is utilized for the contents on the Welcome screen. However, you can see all orders if you navigate to the Find Orders screen.

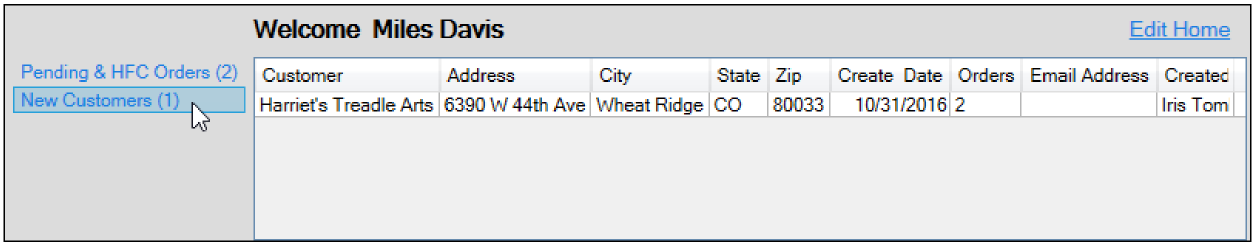
2.1 Edit Home

Click Edit Home in the top-right corner of the **Welcome** screen to launch the **Home Page Setup** dialog shown below.



You can customize the query tables displayed on the **Welcome** screen by adding or removing query options. To add a query from the list on the left to a grid on the right, click the query to highlight it, and then click the right arrow (**->**) button next to a grid. In the image above, the **New Customers** query table has been added to **Grid 1**.

If a grid contains more than one query, the **Sort Order** column defines the order in which the queries are listed next to the grid on the **Welcome** screen. Within a grid, click the empty space to the left of the sort order value to highlight a query (which also flags it with a black triangle: ). When a query is highlighted, you can remove the query from the grid or change the query’s assigned sort order value. To remove the query, click the left arrow (**<-**) button. A sort order value of 0 places the query first in the list, a value of 1 places the query second in the list, and so on. To change the **Sort Order** value, make sure the query is highlighted, and then type a number and press the **Enter** key. Click **Close** to return to the **Welcome** screen.



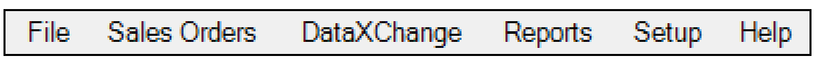
On the **Welcome** screen shown above, Grid 1 now contains two query tables: Pending & HFC Orders() and New Customers(). The Pending & HFC Orders() query table has a sort order value of 0, which lists it first and therefore it displays by default when the **Welcome** screen launches. The New Customers() query table has a sort order value of 1, which lists it second. Only one query table can be displayed in a grid, so you must click New Customers() in order to see the query table.

You can sort query table data by column, as well as change the order of columns. To sort the data by a column in ascending order, click the column header. Click the column header again to sort in descending order. To move a column, left-drag a column header to the preferred location.

2.2 Toolbars

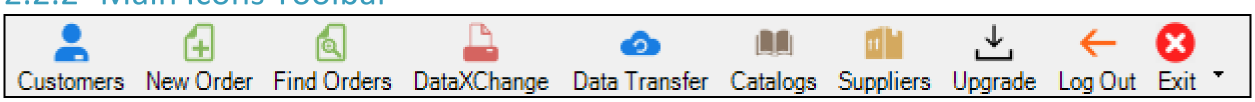
In addition to the query tables, there are two toolbars displayed on the **Welcome** screen.

2.2.1 Main Menu Toolbar



The main menu toolbar at the top of the application presents all available workflows.

2.2.2 Main Icons Toolbar



Several of the same workflows can be launched quickly from the icon toolbar. We will start by exploring workflows launched from the icon toolbar, and then review other workflow options on the main menu toolbar as we go. To customize the icons toolbar, click the down arrow on the far right side of the toolbar and click **Add or Remove Buttons**.

3 Customers

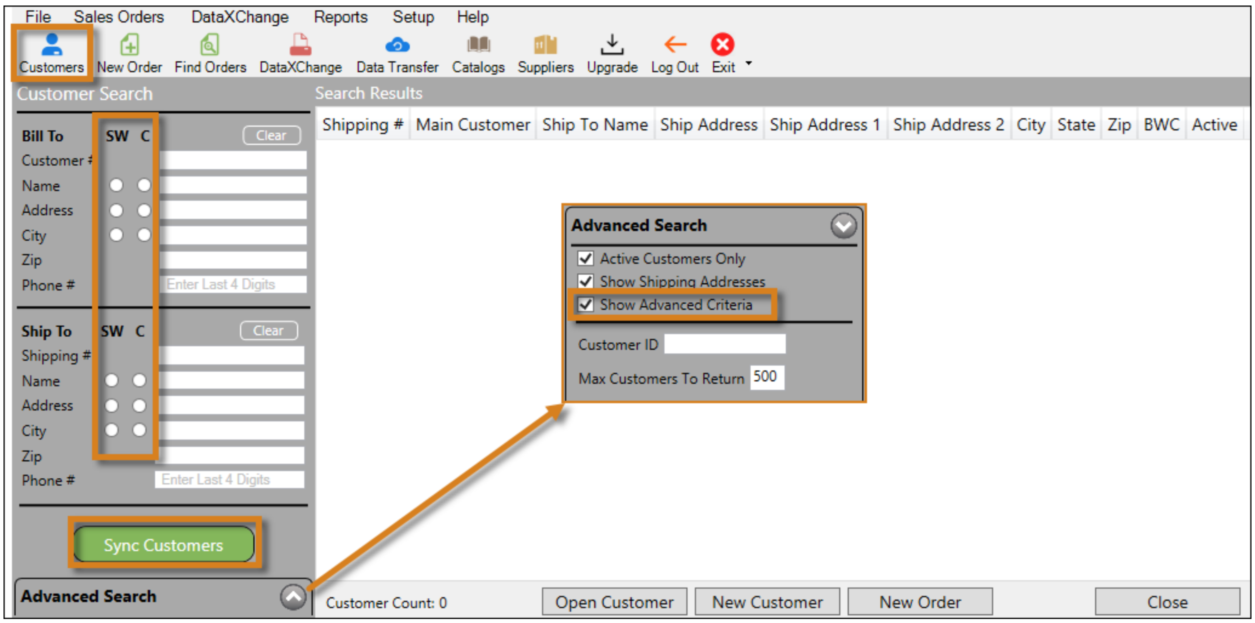
This section describes how to search for customers, and then outlines the components of a customer record.

3.1 Customer Search

Click **Customers** on the main icons toolbar to launch the **Customer Search** page, as shown below. Initially, customers that exist in the database are not listed in the **Search Results** table. Start by defining search criteria in the **Bill To** or **Ship To** sections. Matching results display as you type. The column labeled **BWC** refers to **Get BWConnected** and is explained in the next section.

*When searching for a customer, it is best to use as little search criteria as possible. The chances of finding the customer are lower as more search criteria is entered. If you cannot find customers that you know should be in the database, click **Sync Customers** to retrieve the latest customer information from the Brandwise database. Sometimes it helps to search in the **Ship To** section instead of the **Bill To** section. If you still cannot find the customer, try utilizing the advanced search as described below.*

Click the **Advanced Search** tab in the bottom-left corner.



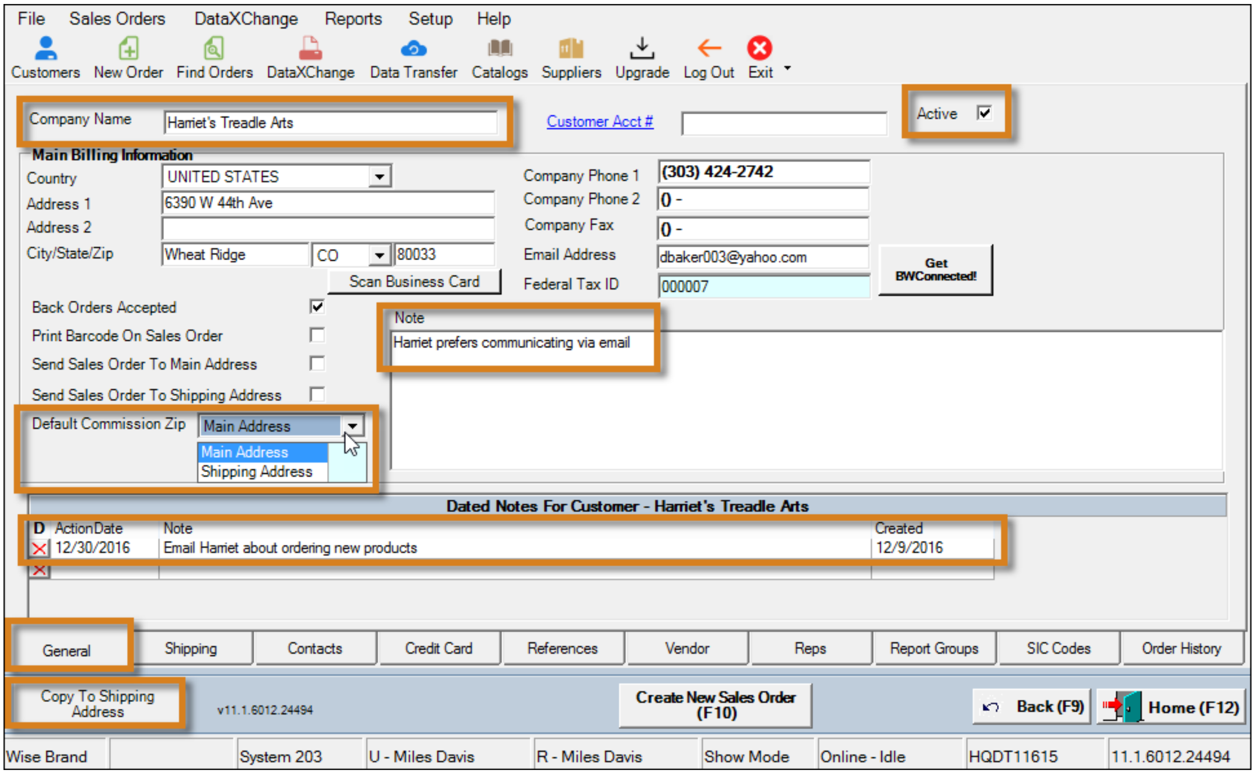
If **Show Shipping Addresses** is unchecked, phone numbers are listed instead of shipping addresses, and search results are limited to **Bill To** only. You can enter a **Customer ID** if you know it. The Customer ID is a customer database ID assigned internally by Brandwise. Check **Show Advanced Criteria** to add option buttons next to some of the search fields in the **Bill To** and **Ship To** sections. The **SW** and **C** option buttons refine the search criteria so that results **start with** or **contain** the criteria entered in the search fields.

To open a customer record, double-click a customer in the table, or highlight and click **Open Customer** at the bottom of the page.

3.2 Customer Record

A series of tabs at the bottom of the customer record store different categories of customer information. The following sections describe each tab.

3.2.1 General



The **General** tab displays the customer's main billing information. The Customer Acct # field is optional, and is intended to store the customer's account number used by your company. If you click Customer Acct #, the field changes to the customer SSI Number, which is the internal Customer ID automatically generated in the Brandwise database. A customer cannot be deleted if they are already attached to an order. However, you can hide the customer from displaying in customer tables and lists by unchecking **Active** in the top-right corner. Sales order notes entered in the **Note** field are strictly internal, meaning that customers do not see them. **Dated Notes** are internal customer notes with an action date.

*You might consider displaying **Dated Notes** as a query table on your Welcome screen as a reminder to contact customers on specific dates.*

The options displayed under the main billing address are described below.

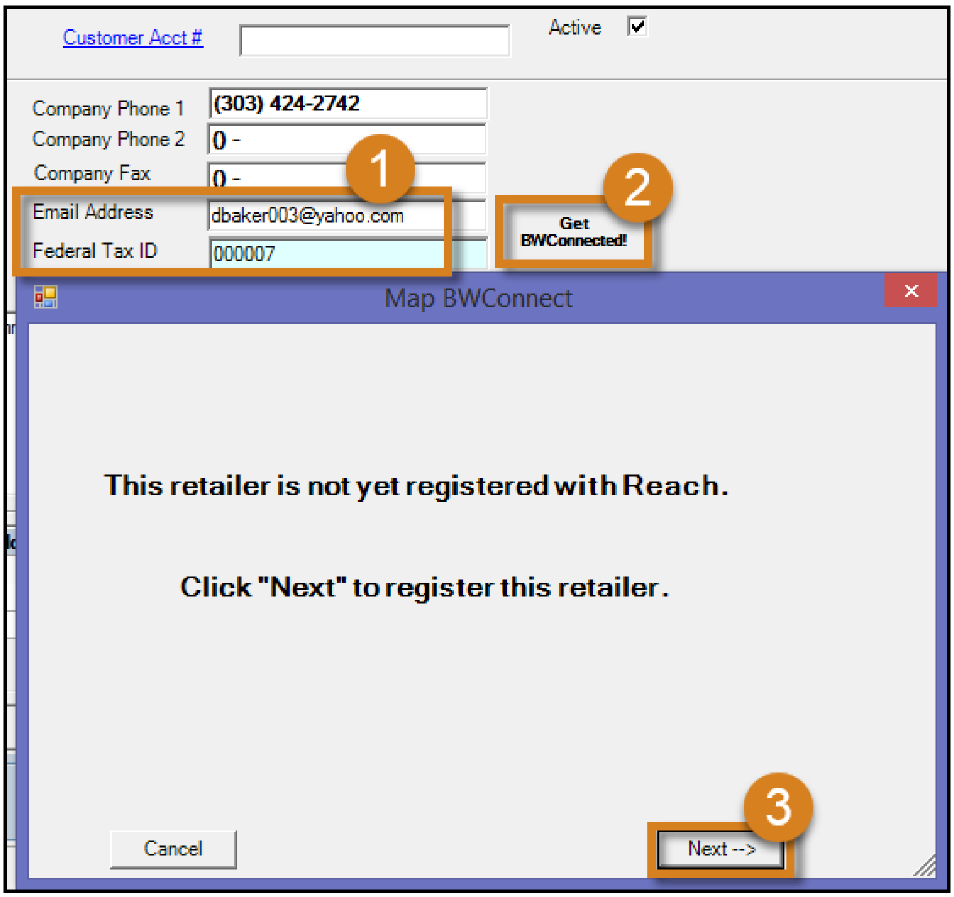
- **Back Orders Accepted** - The customer accepts orders for products that are in stock as well as out of stock.
- **Print Barcode on Sales Order** - A UPC code is printed for each product on the sales order. This option does not print barcodes that can be scanned.
- **Send Sales Order to Main Address** – Sales order copies are faxed through **DataXChange** to the fax number assigned to the main address (see section DataXChange).
- **Send Sales Order to Shipping Address** – Sales order copies are faxed through **DataXChange** to the fax number assigned to the shipping address (see section DataXChange).

- **Default Commission Zip** - Assign a customer to a sales rep using territories defined by your system administrator. The territories are zip code based, so if **Shipping Address** is selected, then the zip code associated with the shipping address is used to determine the territory.

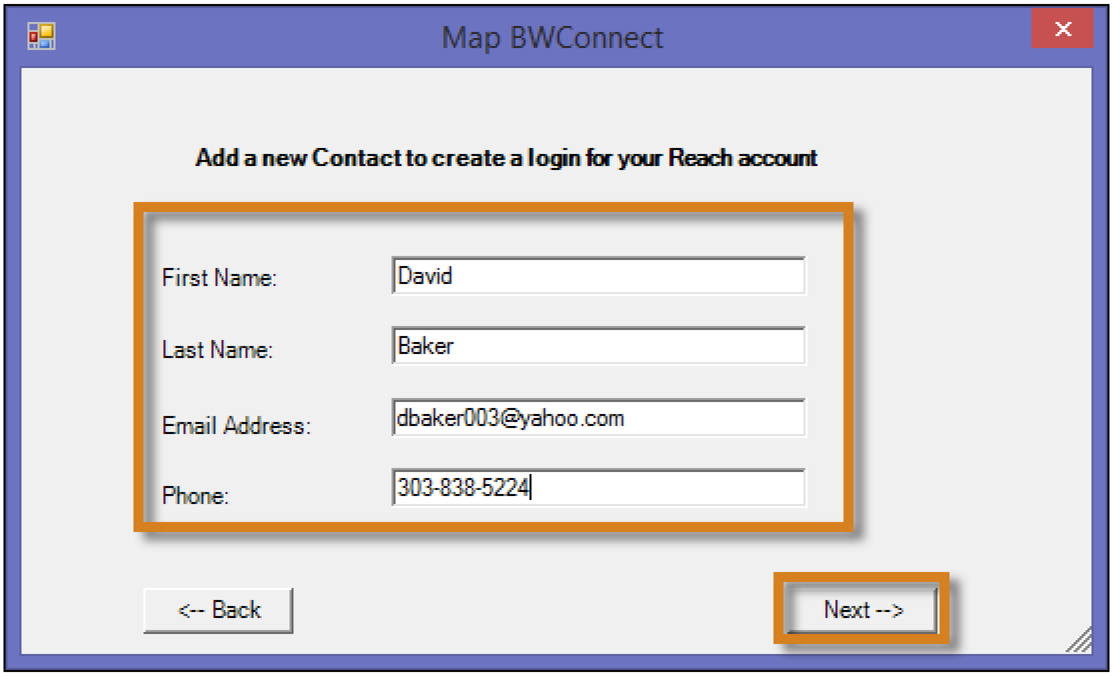
You can click **Copy To Shipping Address** in the bottom-left corner to populate the **Shipping** tab with the same address information. The **Get BWConnected** button registers the customer to your company's Reach site (if applicable). The Reach site hosts digital product information, and is a convenient way for retailers to shop online.

3.2.1.1 Get BWConnected

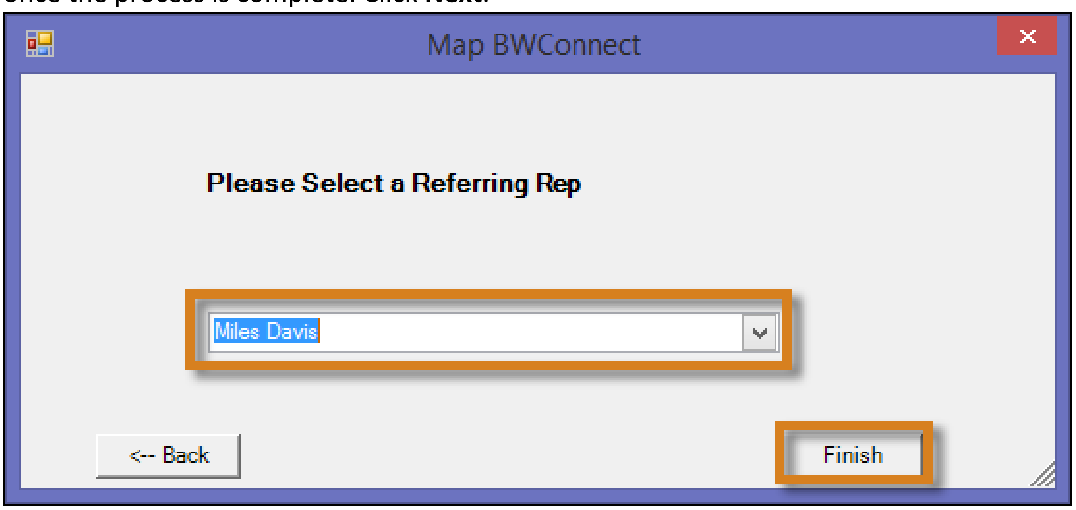
As shown in the image below, (1) enter an email address and a value with at least six digits in the required **Federal Tax ID** field.



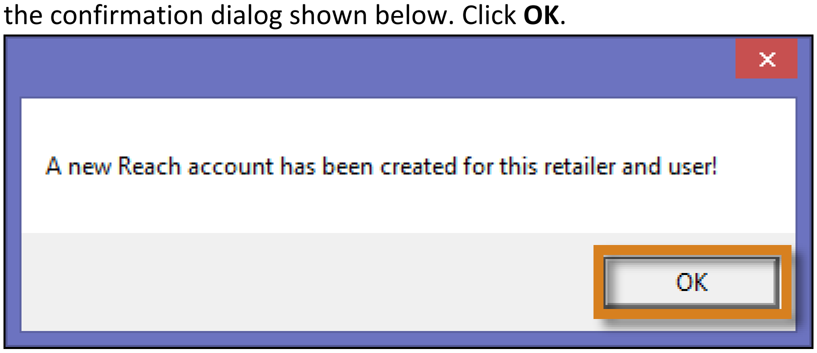
Then, (2) click **Get BWConnected**, and (3) click **Next**.



As shown above, we are adding a new contact for **David Baker**. He will receive a confirmation email once the process is complete. Click **Next**.



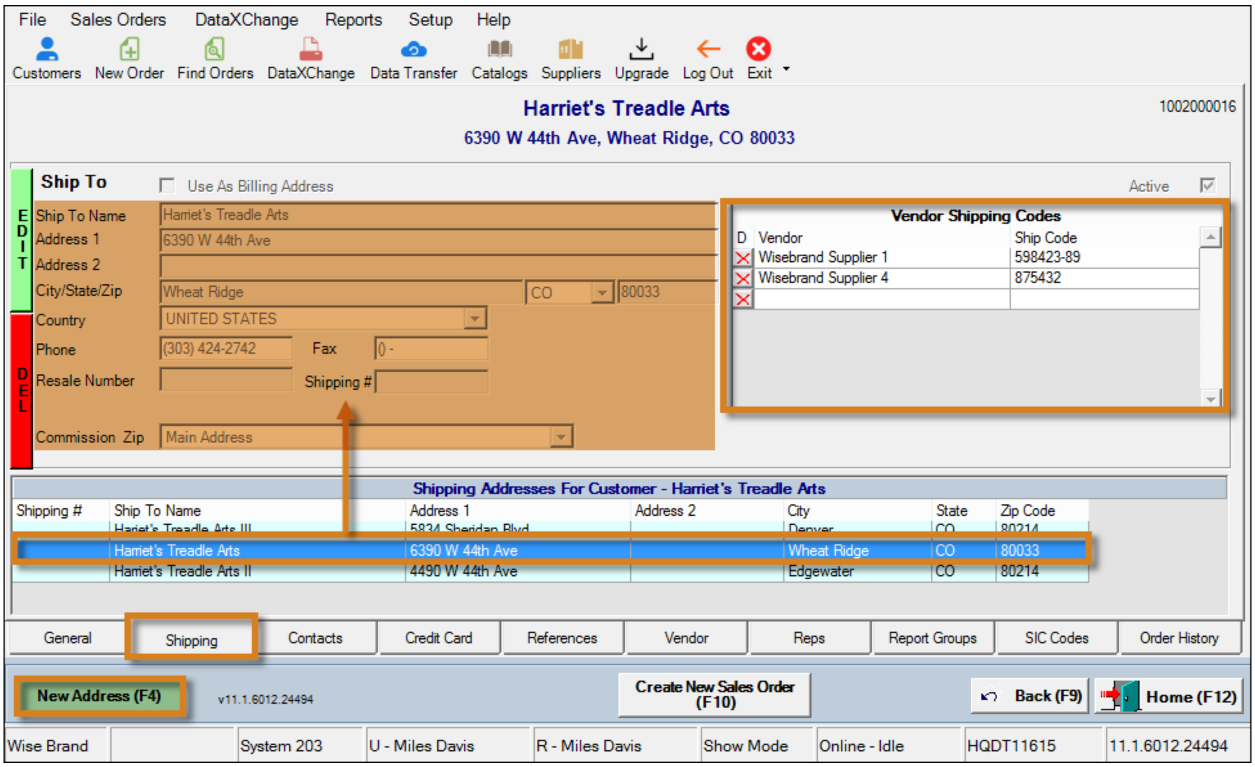
Select the referring rep, which is just the sales rep for this contact, and then click **Finish**. This launches the confirmation dialog shown below. Click **OK**.



The retailer receives an email with a username and password for the Reach website, and the home office is automatically prompted to approve the retailer for shopping.

3.2.2 Shipping

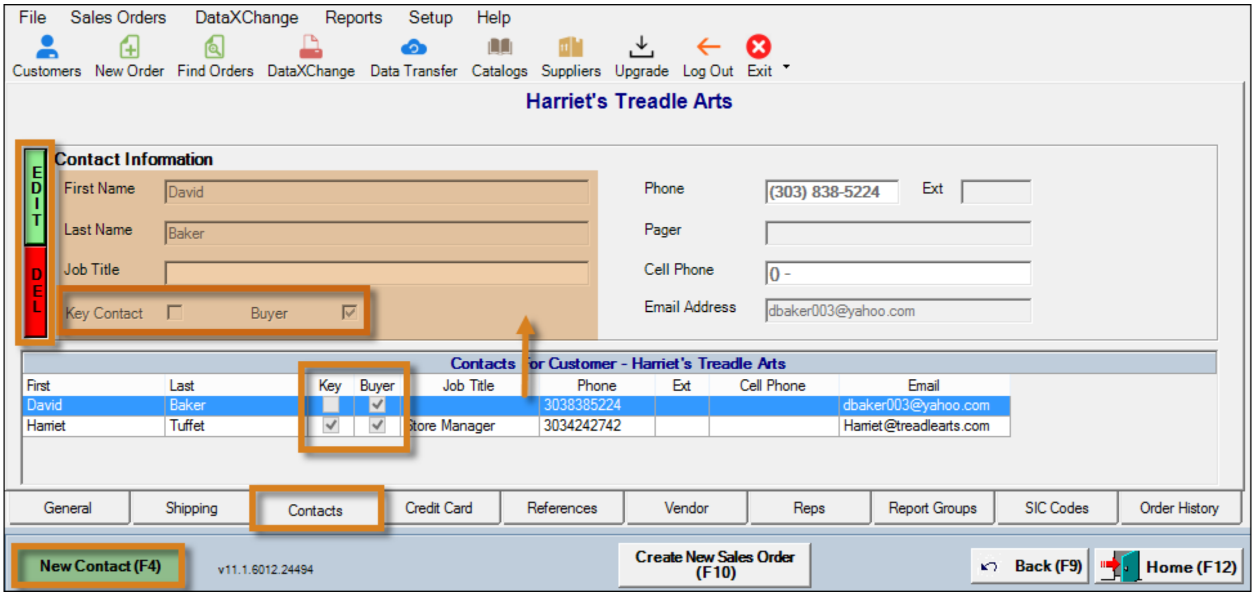
The **Shipping** tab lists the **Ship To** addresses for a customer selected in the bottom table, as well as detailed shipping information and vendor shipping codes (if they exist) above the table. Vendor shipping codes are the customer account numbers in a vendor's system. If the vendor receives orders electronically through the Brandwise Stream service, it is beneficial to enter vendor codes because it automates the process.



As shown above, highlight a shipping address in the bottom table to populate the detailed information reported above the table. To edit the shipping address, make sure the shipping address is highlighted in the bottom table and click the green **EDIT** button. After clicking **EDIT**, the two buttons change to **SAVE** and **UNDO**. You must save before you leave this screen. To delete all changes made after clicking **EDIT**, click **UNDO**. Click the red **DEL** button to delete the highlighted shipping address. To enter additional shipping addresses, click **New Address**. You can enter as many shipping addresses as necessary.

3.2.3 Contacts

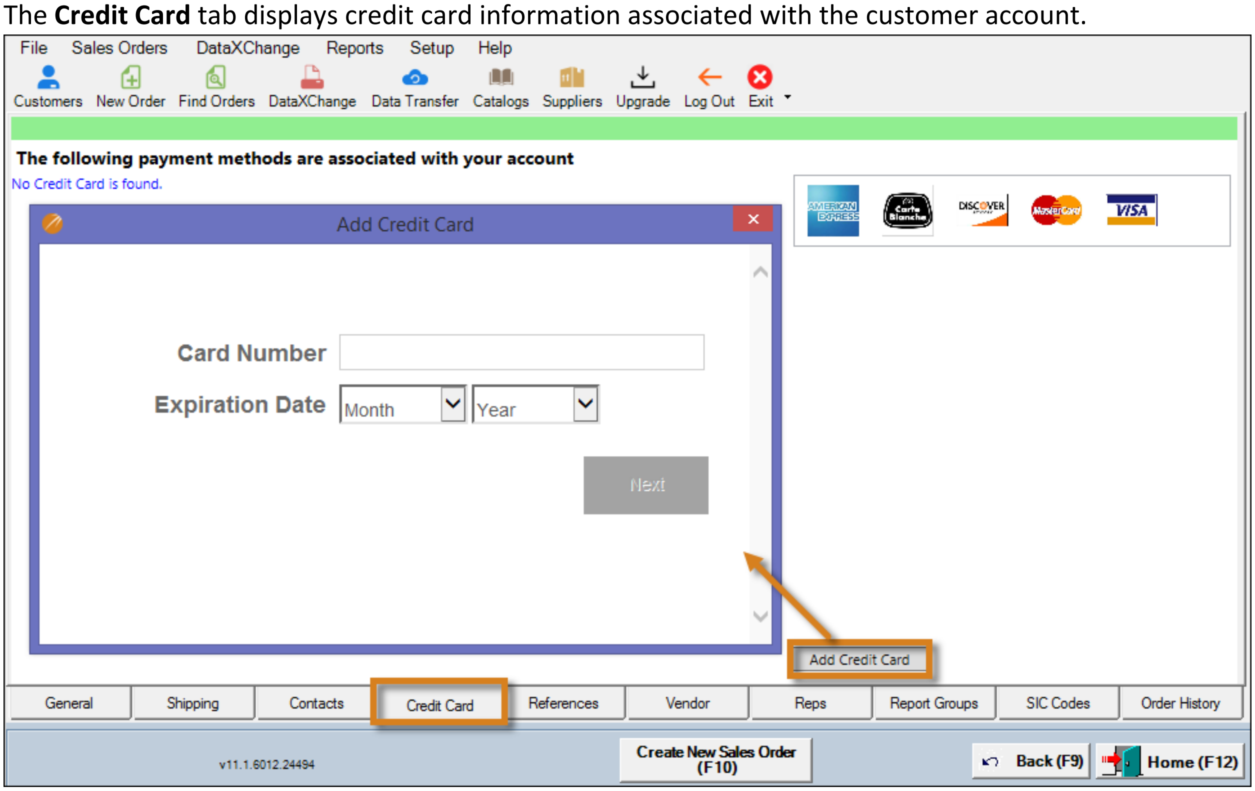
The **Contacts** tab behaves the same as the Shipping tab. Highlight a contact in the bottom table to populate the information above the table. If **Key** and **Buyer** are both checked, the contact is the default buyer that appears on an order for the customer. If only **Buyer** is checked, the contact's name is available to select as the buyer when finishing an order. There can only be one **Key** contact for a customer.



To enter a new contact, click **New Contact**. Notice that the **EDIT** and **DEL** buttons change to **SAVE** and **UNDO**. Once you have entered the contact's information, you can check **Buyer**. This customer already has a key contact named Harriet, but if we check **Key Contact** for David Baker and click **SAVE**, Harriet no longer has a check for **Key Contact**. Note that you cannot check **Key** or **Buyer** in the contacts table because those settings can only be defined when you are editing the customer.

3.2.4 Credit Card

The **Credit Card** tab displays credit card information associated with the customer account.



To add a new credit card, make sure you are connected to the internet, and then click **Add Credit Card**.

3.2.4.1 PCI Compliance

The Payment Card Industry Data Security Standard (PCI DSS) is a set of security standards designed to ensure all companies accepting, processing, storing or transmitting credit card information maintain a secure environment.

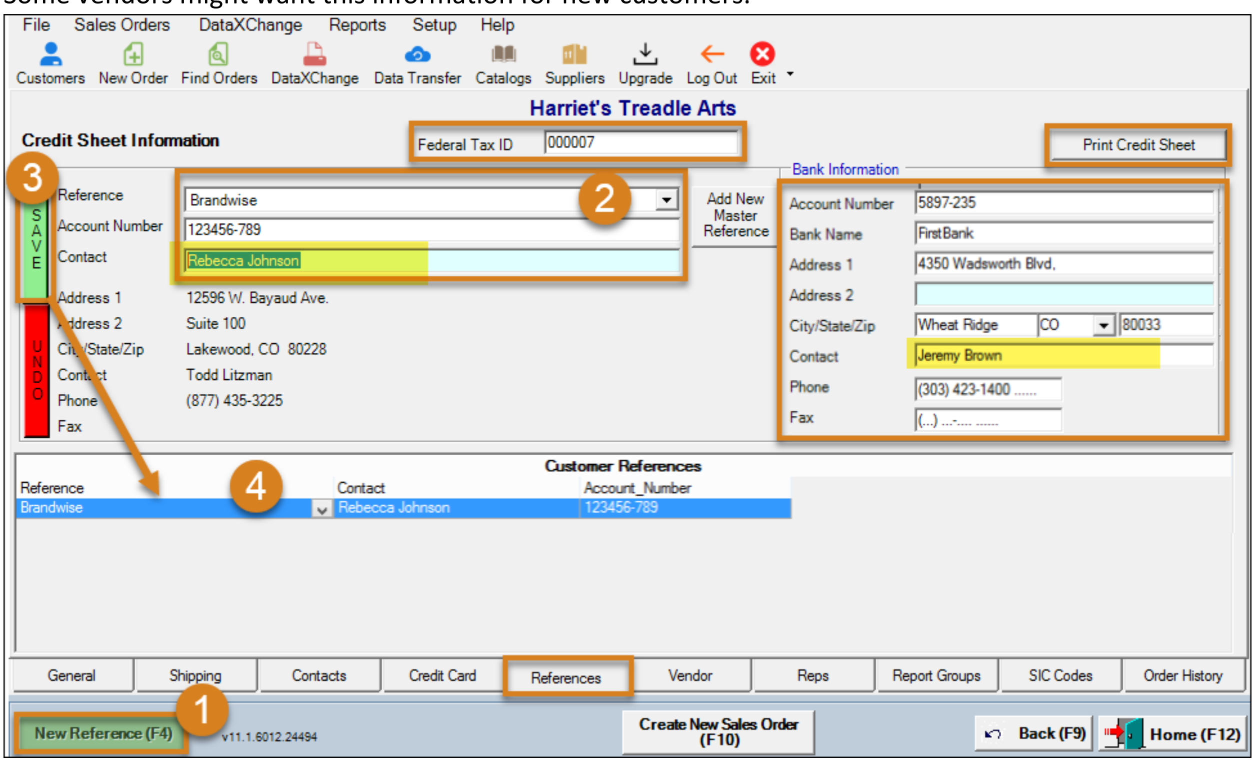
As of Play version 11, all credit card numbers captured are tokenized. Securely entering credit card information requires access to the internet to obtain a secure token. The only credit card information available on the PC is the card type and last 4 digits of the card number. The expiration date and the full card number are confidential. Full credit card information is not available to fax or email from Play because the data does not reside on the PC.

When you need to select a saved credit card, you can confirm with the customer that it is the correct card by reporting the last 4 digits of the card number, as well as the card type. If a credit card is expired, you need to re-enter the card information in order to obtain a secure token.

When the order is finished, the appropriate credit card information is sent to the supplier via the Brandwise Stream service. This requires that your suppliers utilize Brandwise Stream or StreamLite to receive orders electronically. If the supplier does not use Stream or StreamLite, they do not receive credit card information.

3.2.5 References

You can use the **References** tab to store account numbers and bank contact information for a customer. This information is used simply for viewing and attaching to sales orders if needed for credit validation. Some vendors might want this information for new customers.



The customer's bank information is reported under **Bank Information** to the top-right of the dialog. The **Customer References** table at the bottom lists all credit references for the customer. The top-left of the dialog is used to enter new references for the customer. There must be a **Master Reference** defined by your system administrator. In the example shown above, this customer does their banking with FirstBank, and Brandwise is a credit reference. We can add multiple references. Click (1) **New Reference** as shown above, (2) select a vendor from the **Reference** menu, and then enter the customer's account number in the vendor's system as well as a contact person. Finally, (3) click **SAVE**. Note that (4) the new reference is listed in the **Customer References** table. To print the customer's banking information as well as all credit references, click **Print Credit Sheet**. An example credit sheet is shown below.

Credit Sheet

Wise Brand

3211 West Hampden Ave.
Sheridan, CO 80110

CUSTOMER INFORMATION

Bill To Fed. Tax ID: 000007	**Ship To**
Harriet's Treadle Arts 6390 W 44th Ave Wheat Ridge, CO 80033 United States Phone: 303-424-2742 Fax:	, Phone: Fax:

REFERENCES

Brandwise
12596 W. Bayaud Ave.
Suite 100
Lakewood, CO 80228
Ph: (877) 435-3225 Fax:
Contact: Rebecca Johnson
Acct # 123456-789

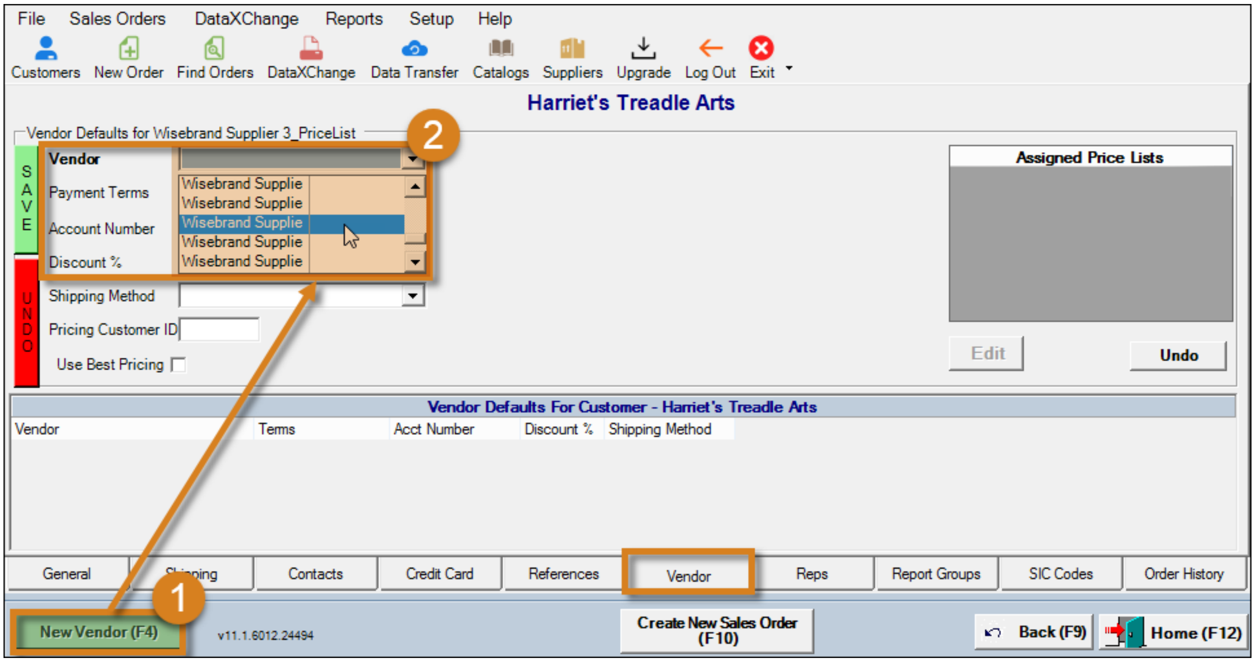
BANK INFORMATION

FirstBank
4350 Wadsworth Blvd,
Wheat Ridge, CO 80033
Ph: (303) 423-1400 ...... Fax: (...) ...-.... ......
Contact: Jeremy Brown
Acct # 5897-235

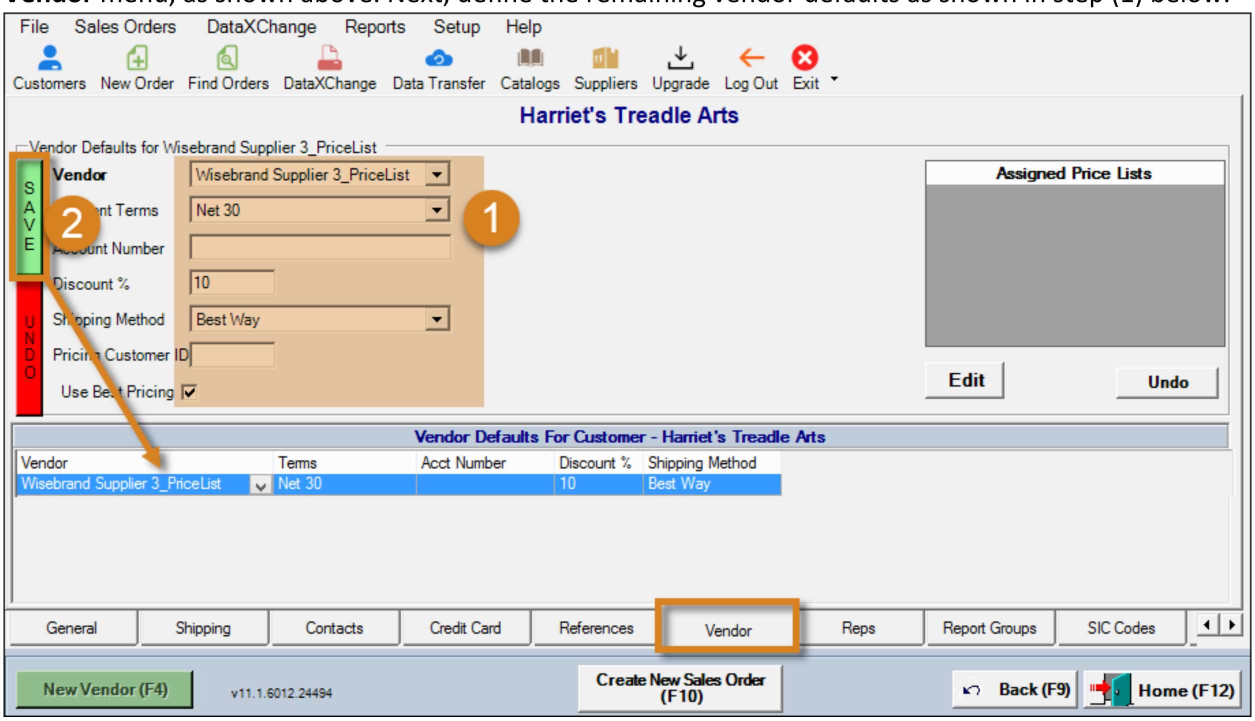
When an order is generated, there is an option to send the credit sheet with the sales order (see section Terms/Note).

3.2.6 Vendor

The **Vendor** tab defines specific vendor defaults for individual customers, such as payment terms or shipping methods. **Price Lists** refer to customer-specific pricing and are defined by your system administrator.



To enter vendor defaults for a new vendor, (1) click **New Vendor**. Then, (2) select a vendor from the **Vendor** menu, as shown above. Next, define the remaining vendor defaults as shown in step (1) below.



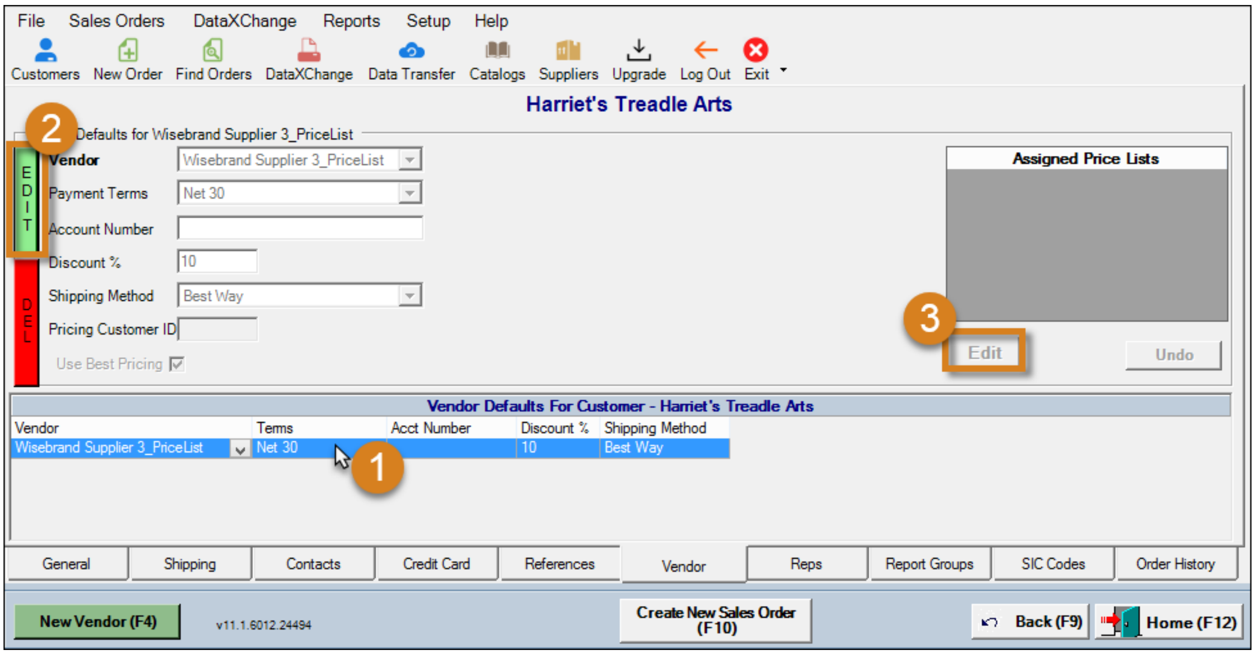
The following list describes each default option.

- **Payment Terms** automatically populate on a new sales order but can be changed when generating the order.
- **Account Number** is the customer's account number in the vendor system, but is not a required field.

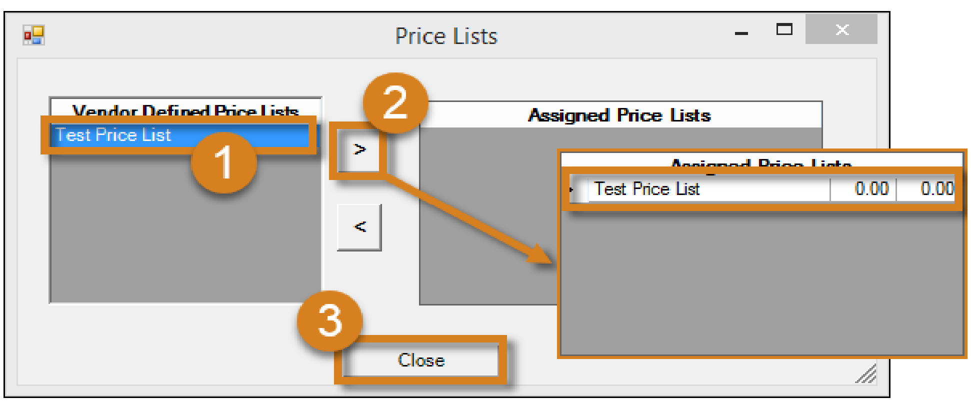
- **Discount %** automatically applies a discount when the customer writes an order for this vendor. The percentage is determined by the vendor.
- **Shipping Method**
- **Pricing Customer ID**
- **Use Best Pricing** determines the best price available for a product that is assigned to multiple price lists, and uses the lowest price in a new sales order.

Next, (2) click **SAVE**.

As shown below, (1) highlight the newly added vendor defaults in the **Vendor Defaults For Customer** table, and then (2) click the green **EDIT** button.



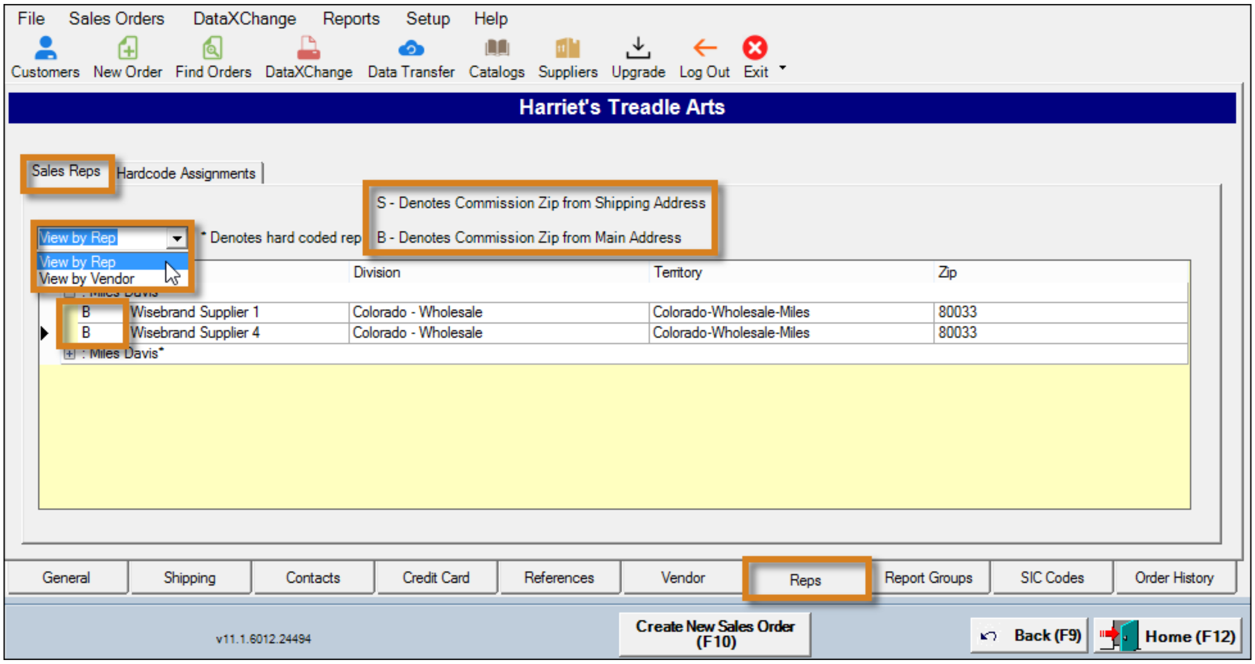
Then, (3) click **Edit** under the **Assigned Price Lists** field. This launches a dialog that allows us to assign price lists for the highlighted vendor.



As shown above, (1) highlight a price list in the **Vendor Defined Price Lists** field on the left, and then (2) click the right arrow button (**>**) to move the price list to the **Assigned Price Lists** field. You can assign multiple price lists. Two columns appear next to the price list name in the **Assigned Price Lists** field. The first is the unit price override, and the second is the discount percentage off the unit price. Double-click an amount to change it. Click (3) **Close** to return to the Vendor tab.

3.2.7 Reps

The **Reps** tab displays information about divisions and territories assigned to sales reps for the customer.

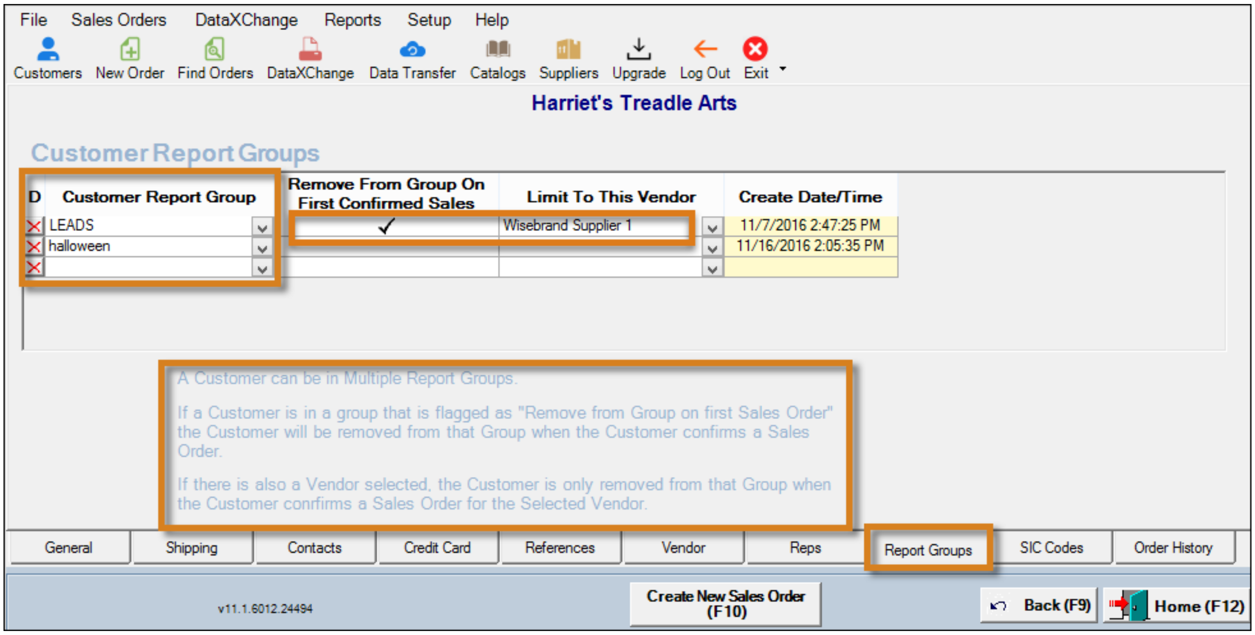


As shown above, the first tab on this page is **Sales Reps**. Click **View by Rep** to select **View by Vendor** instead. Click the plus (**+**) button to the left of a rep's name to see their assigned divisions, territories, and zip codes. These assignments are defined by your system administrator. If a vendor has a **B** next to the vendor name in the bottom table, the rep assigned to the main address zip code receives commission on an order. If a vendor has an **S** next to the vendor name in the bottom table, the rep assigned to the shipping address zip code receives commission on an order. An asterisk (*) next to the rep name indicates the rep has been assigned to a specific account, regardless of their territory or division assignments.

The **Hardcode Assignments** tab on this page is solely used by your system administrator.

3.2.8 Report Groups

The **Report Groups** tab displays information about existing **Customer Report Groups**. For example, you might have a **Leads** report group for potential customers, or a **Halloween** group for customers that only buy Halloween products.



Report groups are created by your system administrator. You can assign a customer to one or multiple report groups. If there is a checkmark in the **Remove From Group On First Confirmed Sales** column, the customer is removed from that group when the customer confirms their first sales order. If limiting to a vendor, the customer is only removed from that group when the customer confirms a sales order for the selected vendor.

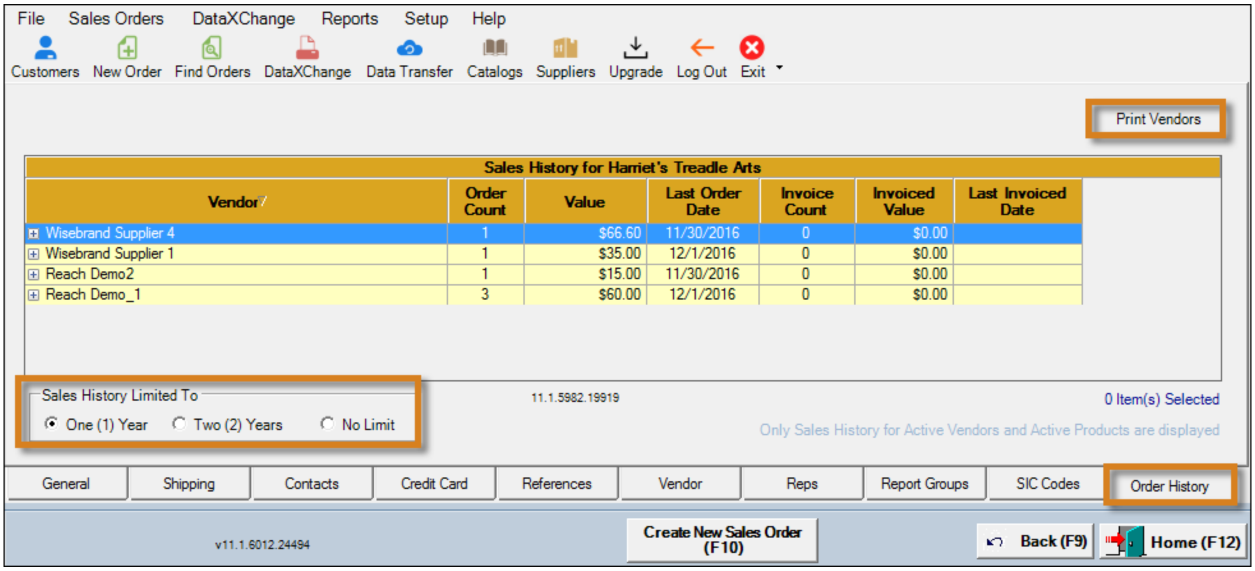
*You can run reports against Report Groups by using the **Select Customers By Customer Group** tab in the Customer Labels tool (see section Customer Lists and Labels).*

3.2.9 SIC Codes

The **SIC Codes** tab displays any SIC codes assigned to the customer by your system administrator. The **Standard Industrial Classification** is a system used by government agencies to classify industries by a four-digit code. This information is for viewing only, and it is also outdated, so it should not be leveraged.

3.2.10 Order History

The **Order History** tab displays the vendor sales history for a customer.



Sales history is only displayed for active vendors and active products. Click the plus (+) button to the left of a vendor name to view all items ordered from that vendor. Click **Print Vendors** to print a list of vendors displayed in the table. Currently, you can't print directly, but you can save as a PDF and then print. Note the option to apply a limit to the sales order history of one year, two years, or no limit.

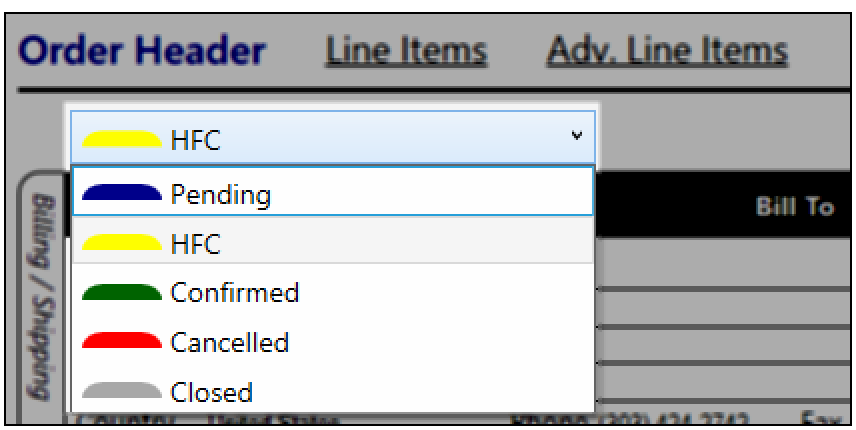
Click **Back** to return to the **Customer Search** page, or **Home** to return to the **Welcome** screen.

4 Sales Orders

This section describes how orders are generated and transmitted to the Brandwise cloud, and then outlines the process of generating new sales orders.

4.1 Sales Order Status

Before we explore the sales order flow, it is important to understand the status of a sales order.



The six status types are defined in the table below.

Order Status	Definition

Pending	The order is not finished and is not submitted anywhere
HFC (Hold for Confirmation)	The order is finished but requires approval before it can be confirmed and submitted to the vendor
Confirmed	The order is finished and submitted to the vendor
Cancelled	The order is no longer wanted, but you can reopen it if necessary
Deleted	The order is essentially cancelled. It is also hidden in the database, but you can find and reopen it if necessary
Closed	The order has been sent to the vendor and is fully invoiced

For example, you might have an order with an **HFC** status if you generate the order but are not yet ready to submit it to the supplier. The order still transmits to the Brandwise cloud, but is not sent to the supplier until the order is **Confirmed**. **Pending** orders can only be viewed and edited from the device the order was generated on. **HFC** and **Confirmed** orders can be viewed and edited from any device if it has internet access and the user has permission to view the order. Note that a confirmed order cannot be viewed or edited if the order is in the process of being transmitted to the vendor. Any changes made after the order is sent to the vendor must be communicated to the vendor outside of Brandwise.

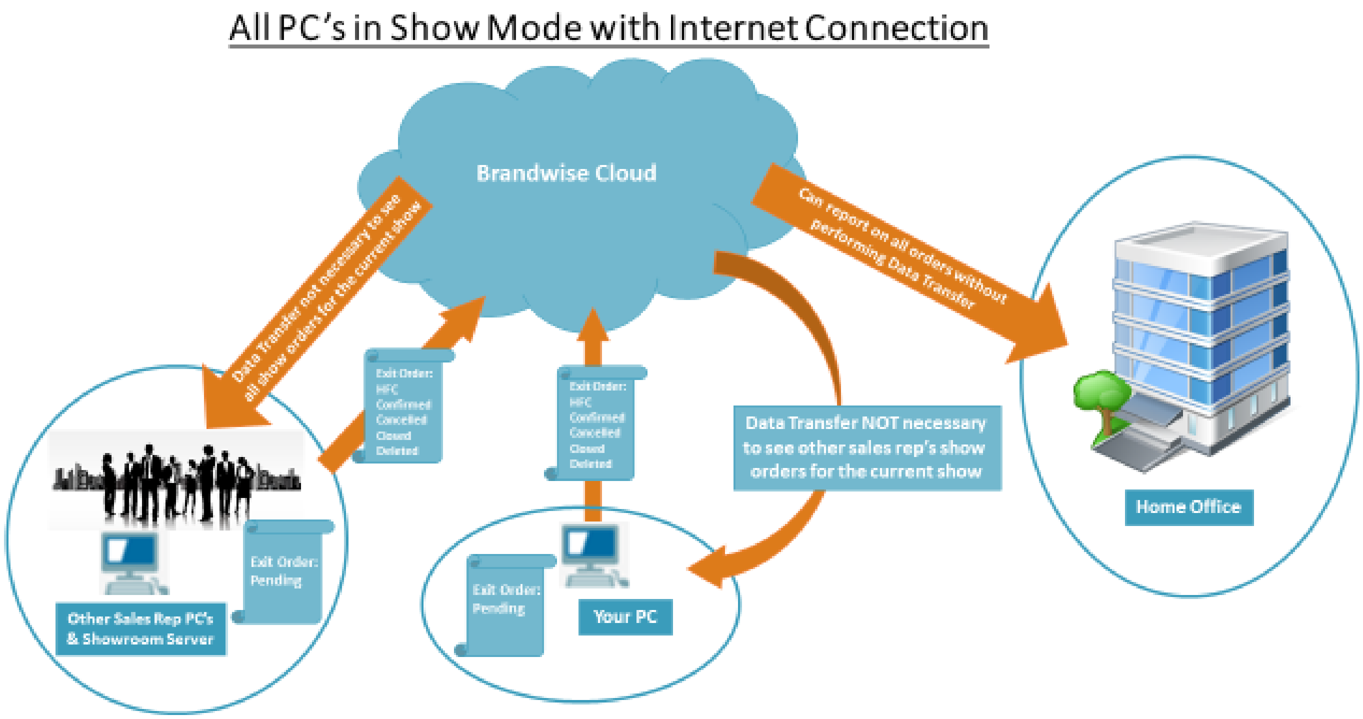
4.2 Order Flow

The system administrator for your agency can set your PC to "Road" or "Show" mode. In both modes, sales orders can be generated or edited and are automatically transferred to the Brandwise cloud. However, the way orders are stored and accessed in the Brandwise cloud by other users is different. In general, think of show mode as access to a public "playground" where all sales reps and agency personnel can "play" with all sales orders. Conversely, road mode provides sales reps access to their personal playground where only they can "play" with orders they have generated. The orders still transmit to the cloud, but sales reps can only access orders from their local database.

*In the diagrams below, **Pending** orders are shown as not transmitting to the Brandwise cloud. Technically, they do transmit to the cloud, but are not viewable by any other device, including the home office. The most important thing to know is that pending orders are indeed backed up in the Brandwise cloud.*

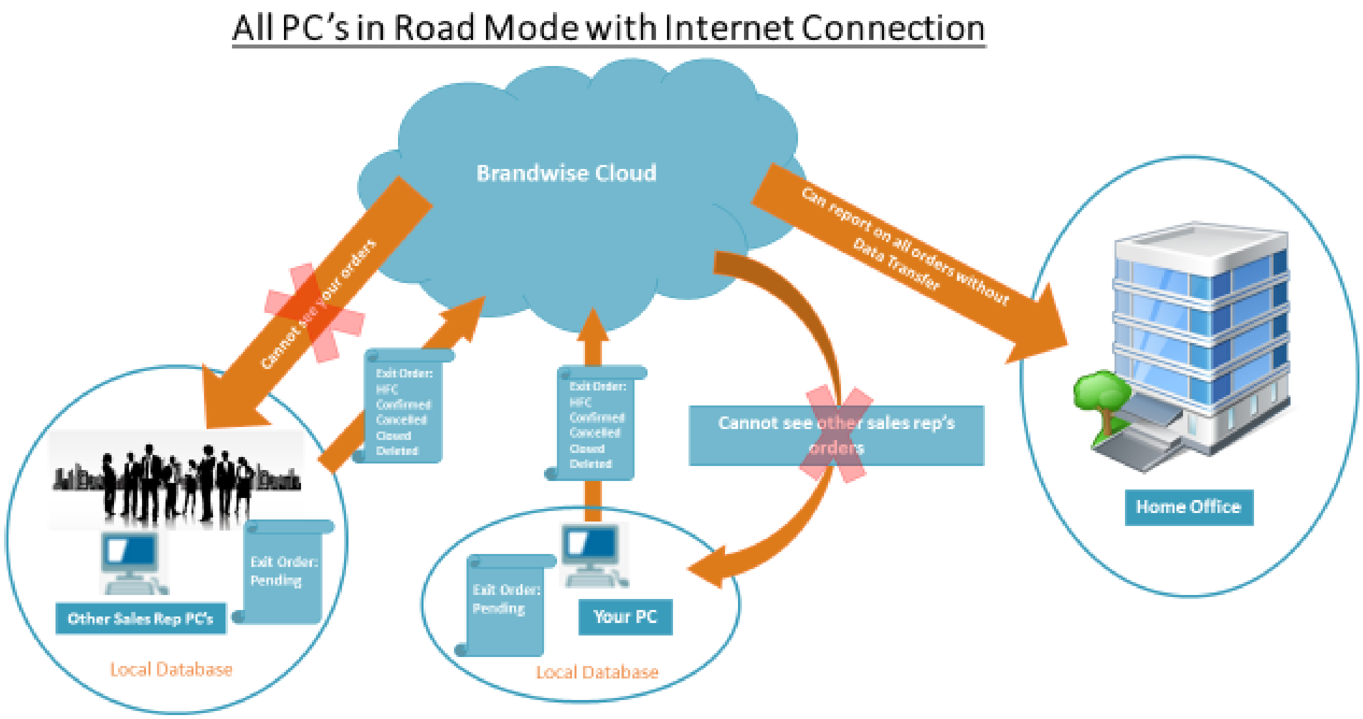
4.2.1 Show Mode

When a PC is in show mode, it is utilizing your local database, but you can still see other sales rep's show orders in the cloud if you have been given the appropriate permissions by your system administrator. As long as the PC has an internet connection, the order is automatically transmitted to the Brandwise cloud upon exiting the order. If you generate orders on your PC without internet access, you need to connect to the internet and run a Data Transfer (see section Send Orders Only) or open and exit the order to transmit it to the Brandwise cloud. Additionally, you can only access orders generated on your PC if there is no internet access. Your home office manages orders in the cloud and sends them to the vendor. Unlike **Road** mode where only your customers are visible, all customers are visible to sales reps in show mode.



4.2.2 Road Mode

When a PC is in road mode, sales orders are generated at a location other than a show and you are limited to your customers only. All orders are automatically transmitted to the Brandwise cloud upon closing the orders as long as you have an internet connection. Otherwise, you are able to transmit them to the cloud by running a Data Transfer (see section [Send Orders Only]) once you have an internet connection. No other sales reps can view the order.

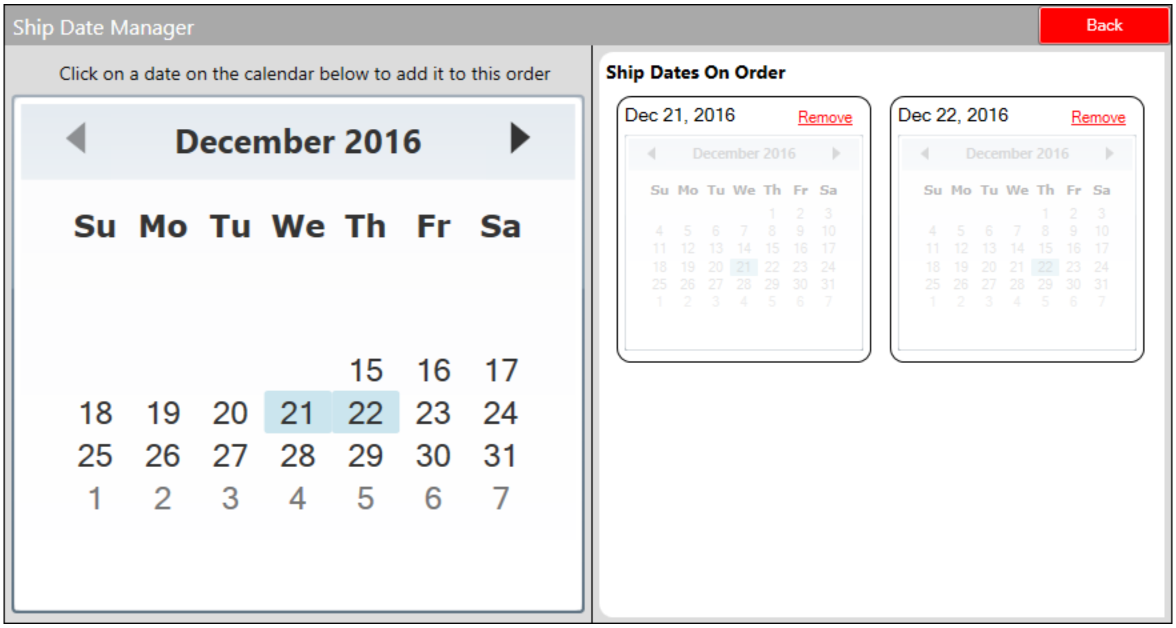


4.3 New Sales Orders

Click **New Order** on the main icons toolbar to launch the **Customer Search** page. To start a new sales order, you must search for a customer. Then, double-click the customer in the search results table, or highlight a customer and click **New Order** at the bottom of the page.

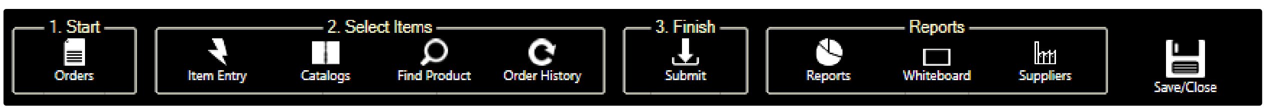
4.3.1 Ship Date

As long as your system administrator gave you permission to specify ship dates for orders, the **Ship Date Manager** launches as shown below. Otherwise, you bypass the manager and the default ship date is today's date.



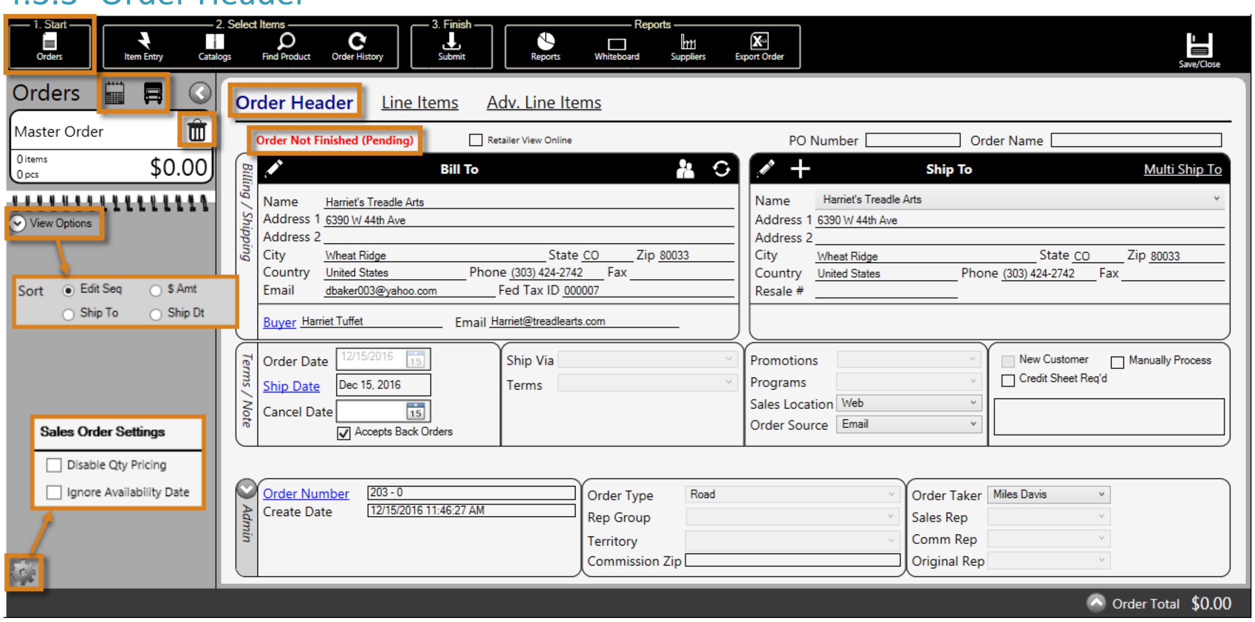
Pick at least one ship date by clicking a calendar day. Click additional days to add more ship dates. Click **Next** to proceed with order entry.

4.3.2 The Menu Bar



The icons at the top of the **Sales Order** dialog guide you sequentially through the steps of generating a sales order.

4.3.3 Order Header



Click the calendar icon at the top of the panel to change or add ship dates. Click the truck icon to change or add shipping addresses. The trash icon deletes all products in the sales order as long as the order still has a status of pending.

4.3.3.1 View Options and Sales Order Settings

Sort the orders in the left panel by clicking **View Options** in the **Orders** panel, as shown above. Sort the orders by sequence, dollar amount, shipping address, or shipping date.

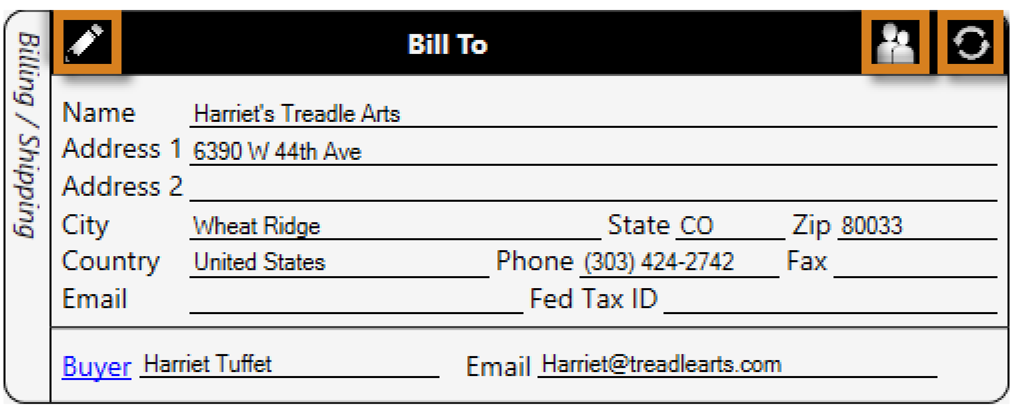
Click the gear icon in the bottom-left corner of the panel to **Disable QTY Pricing** or **Ignore Availability Date**, as shown above. The first option ignores any quantity price breaks that have been defined by your system administrator, while the second option ignores whether or not the product is available for purchase.

4.3.3.2 Order Status

The status of an order (see Sales Order Status) is reported at the top of the order header, above the **Bill To** section. Once the order is confirmed and exited, it is submitted to the vendor electronically if they receive electronic orders through the Brandwise Stream service. If the vendor does not receive orders through Stream, you can email or fax the order using the **DataXChange** utility (see section DataXChange).

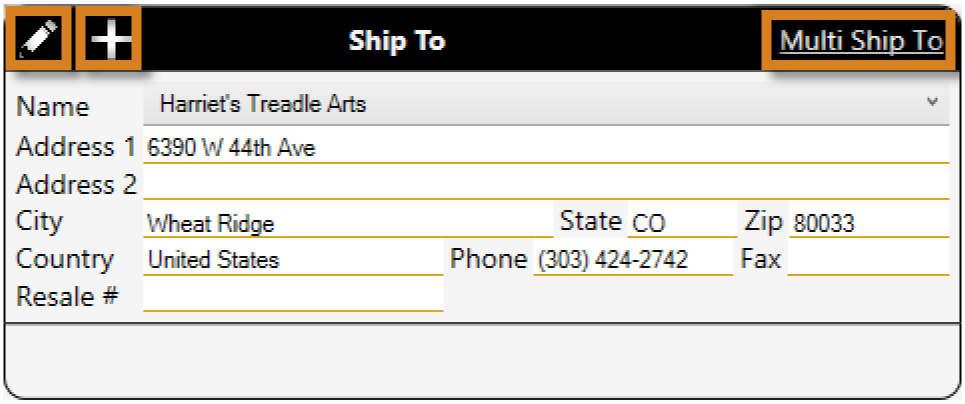
The **PO Number** and **Order Name** fields can be populated before or after a sales order is submitted. When **Retailer View Online** is checked, the sales order is sent to the Brandwise Reach platform for the retailer to view.

4.3.3.3 Bill To



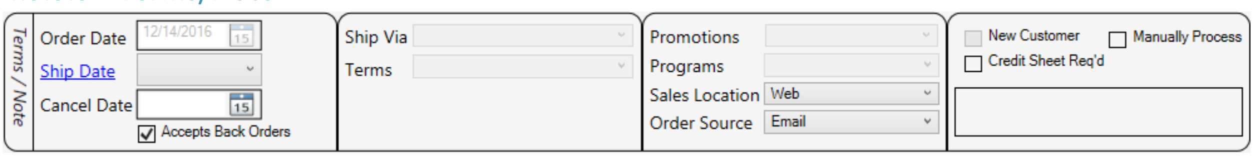
In the image above, the pencil and people icons essentially perform the same function. The pencil icon allows you to make changes in the **Bill To** section. Then, click the disk icon that appears next to the pencil icon to save changes. It is important to know that *<u>any changes made are permanently saved to the customer record</u>*. The people icon opens the entire customer record so that you can make more extensive *<u>permanent</u>* changes. In other words, neither icon allows you to edit the billing address *<u>for this order only</u>*. To change the customer for the order, click the refresh icon and find the customer on the launched **Customer Search** page. If the customer is changed, the billing and shipping information is automatically updated. If a buyer is designated as the key buyer associated with the customer record, their name populates next to Buyer by default. If a customer record contains more than one buyer, click Buyer to select from a list of buyers.

4.3.3.4 Ship To



The editing options in the **Ship To** section function exactly the same as the **Bill To** section. Any changes made in this section are *permanently saved* to the customer record. Click the plus (**+**) icon to change or add a shipping address. To enter multiple shipping addresses for the order, click Multi Ship To.

4.3.3.5 Terms/Note



Depending on the permissions set by your system administrator, the Ship Date menu lists either today's date or the shipping dates selected upon order creation. Click Ship Date to specify a new ship date. You can enter a **Cancel Date** to indicate the day the order should be cancelled if the order does not ship by a certain date. For example, you could enter a **Cancel Date** that is five days past the Ship Date to indicate that the order should be cancelled if it is not shipped within five days after the selected Ship Date.

The **Ship Via** menu lists the various shipping methods available, and the **Terms** menu lists the various payment terms available. These fields can only be defined after the order status is HFC or Confirmed.

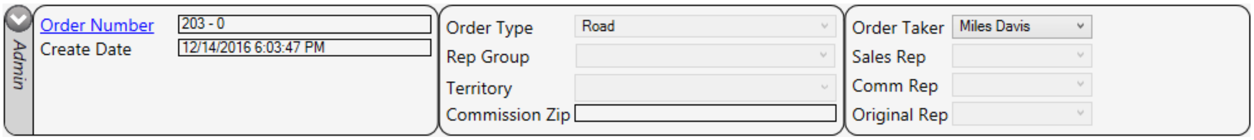
There are two drop-down menus for **Promotions** and **Programs**. If vendor promotions or programs are offered for the products on the order, options are listed in the drop-down menus. The options are defined by your system administrator. The promotion drop-down menu displays options if you have met the criteria for that promotion. The **Sales Location** reflects where the sale was made, while the **Order Source** refers to the way the sales rep and customer initially communicated. For example, the sales location could be **Road** with an order source of **Email**. The options listed in these menus are defined by your system administrator.

Flag the order as belonging to a new customer by checking **New Customer**. This is useful because you can view the **New Customer** query table on the **Welcome** screen, and reports can be generated against new customers.

*If vendors do not receive orders electronically through the Brandwise Stream service, check **Manually Process** to indicate the order will be submitted using a different method. As a result, the order is added to the **Manual** queue in the **DataXChange** utility. You can still email or fax the order to the vendor using the DataXChange utility. After you have emailed or faxed the order, you must mark the order as sent to* *the vendor in DataXChange so that the order can be seen by the home office. See section [DataXChange](#) for further details.*

Check **Credit Sheet Req'd** if the customer has credit references that should be attached to the sales order.

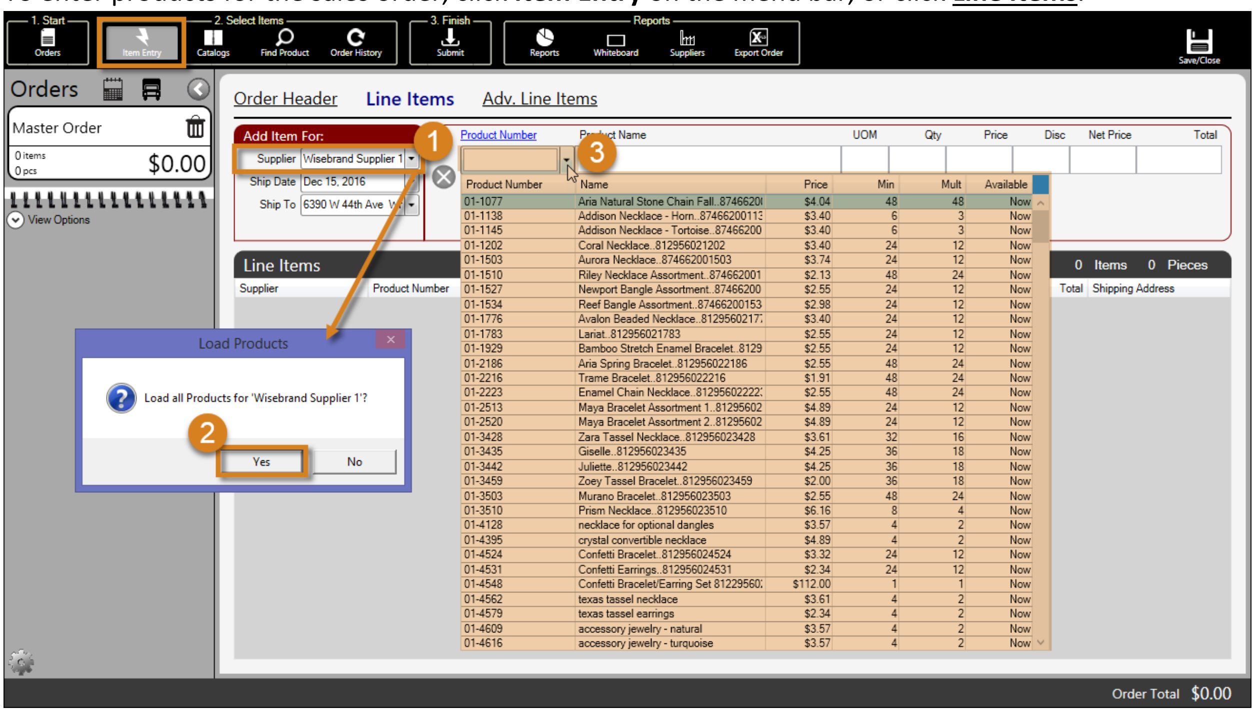
4.3.3.6 Admin



The **Admin** section is used by your system administrator. Once an order status is HFC or Confirmed, the Admin section automatically defaults to the system settings defined by your system administrator. Click Order Number to change the field to Order ID. The order number and order ID are automatically generated by Play. The next five sections describe different ways to add products to an order.

4.3.4 Line Items

To enter products for the sales order, click **Item Entry** on the menu bar, or click **Line Items**.

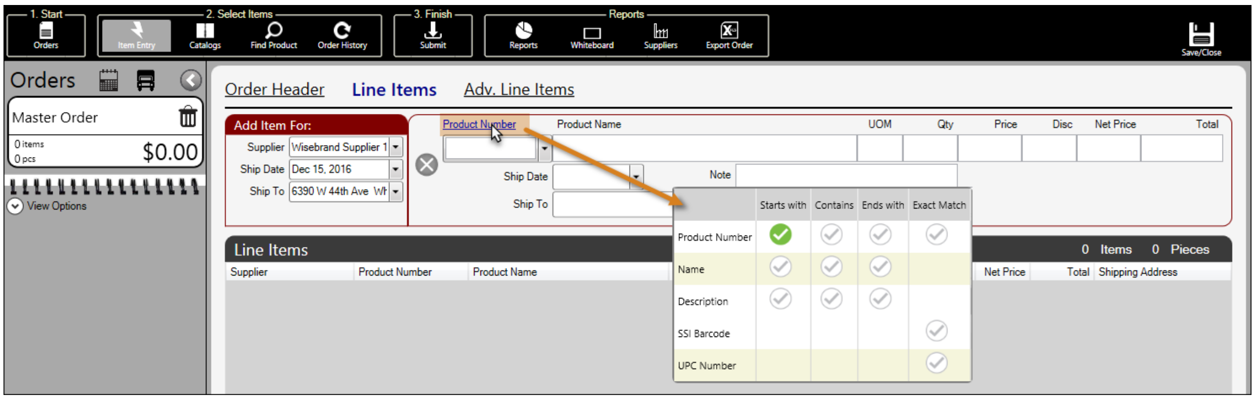


This page is primarily for quick entry of items when product SKUs are known, as well as when scanning product barcodes. It is a good idea to (1) limit results by **Supplier** in the **Add Item For** section if you are entering SKUs manually. Otherwise, you are (2) prompted to load products for all suppliers. However, if you are scanning products, especially in a showroom, you probably do not want to limit to a supplier. If catalogs exist for the supplier selected, they are listed in the **Catalog** menu. The shipping addresses associated with the customer account are listed in the **Ship To** menu.

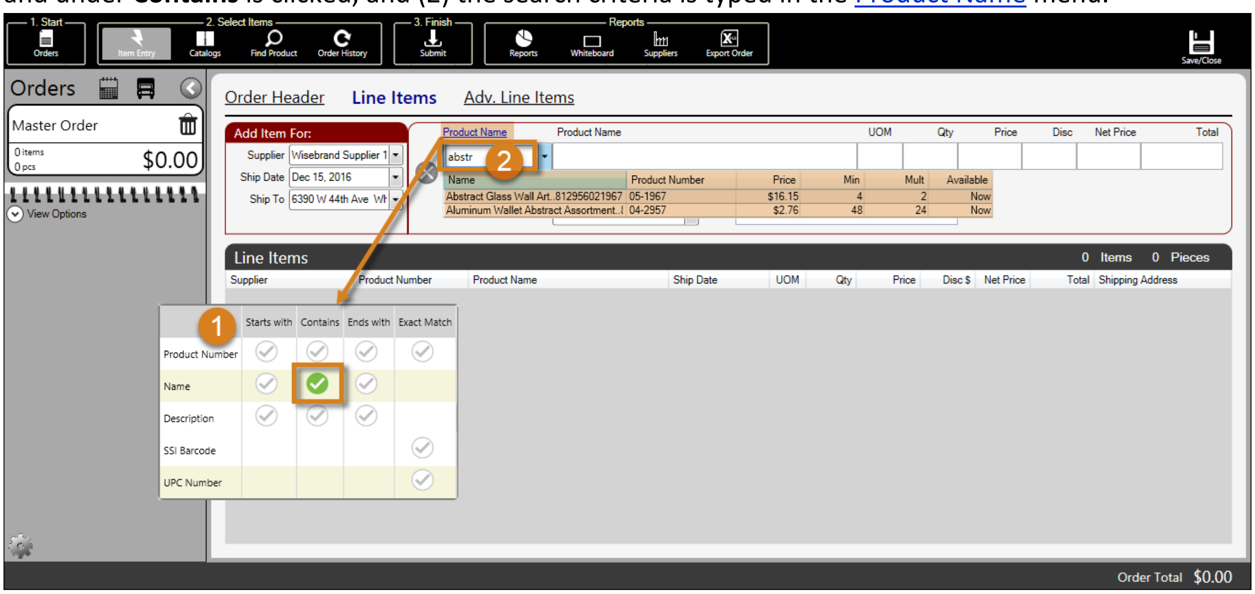
4.3.4.1 Product Number

Once products are loaded for the supplier, add items to the order by (3) selecting or typing a product number in the Product Number menu. When a product is selected, the remaining fields populate, the product is listed in the **Line Items** table, and the cursor defaults to the **Qty** field. If the minimum quantity is used for a product, you can simply press **Enter** to return to the Product Number menu, preventing the need to click different fields. Otherwise, enter a quantity. If your system administrator has given you permission, click the **UOM**, **Qty**, **Price**, or **Disc** fields to make changes. The field labeled **UOM** stands for **Unit Of Measurement**, such as pieces or cases of a product. The **Qty** field defaults to the required minimum, but you can click it to select a multiple of the minimum. If an item is eligible for a discount, enter the discount in the **Disc** field.

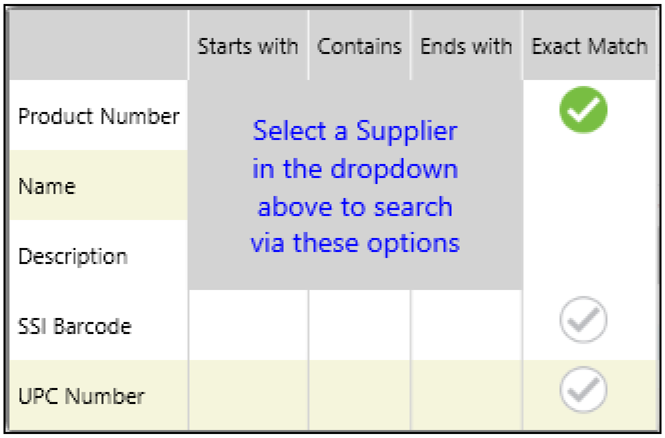
To search using other options, click Product Number as shown below.



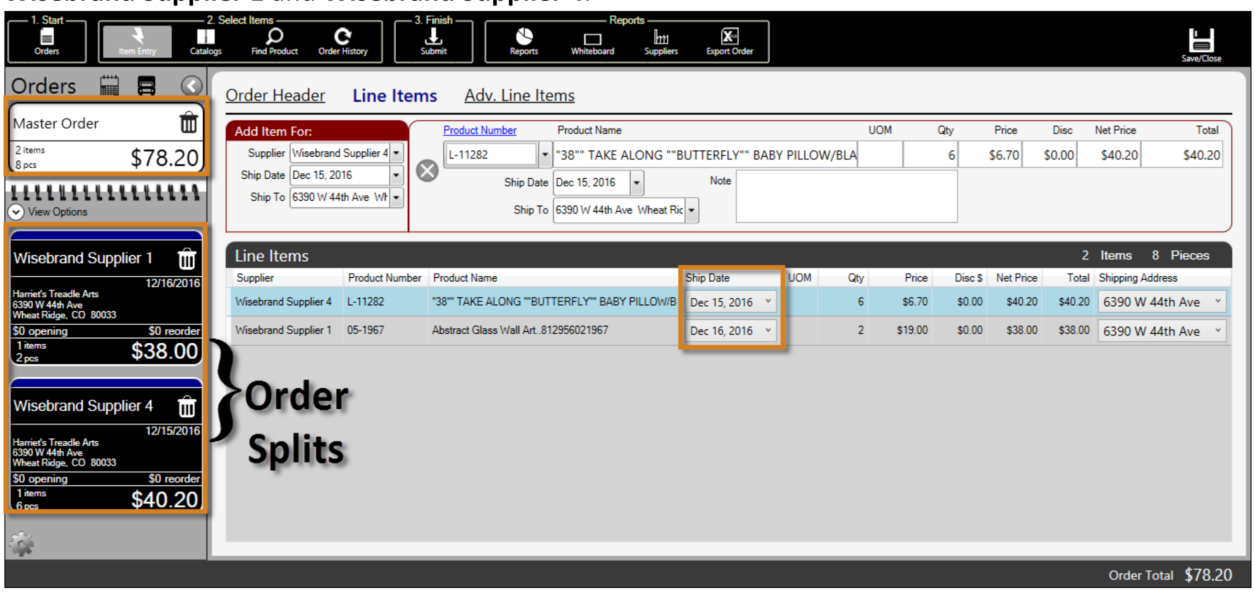
Then, click a checkmark on the preferred option. In the image below, (1) the checkmark next to **Name** and under **Contains** is clicked, and (2) the search criteria is typed in the Product Name menu.



If a supplier is not selected in the **Add Item For** section, the search options are limited. As shown below, the only search options available are **Product Number**, **SSI Barcode**, and **UPC Number**.



As shown in the example below, the **Orders** panel contains products from two different suppliers: **Wisebrand Supplier 1** and **Wisebrand Supplier 4**.



The **Master Order** reports the total number of products in the order and the summary order total. Beneath that, the order is split by supplier and ship date. Orders are also split if there are different billing or shipping addresses defined in the order.

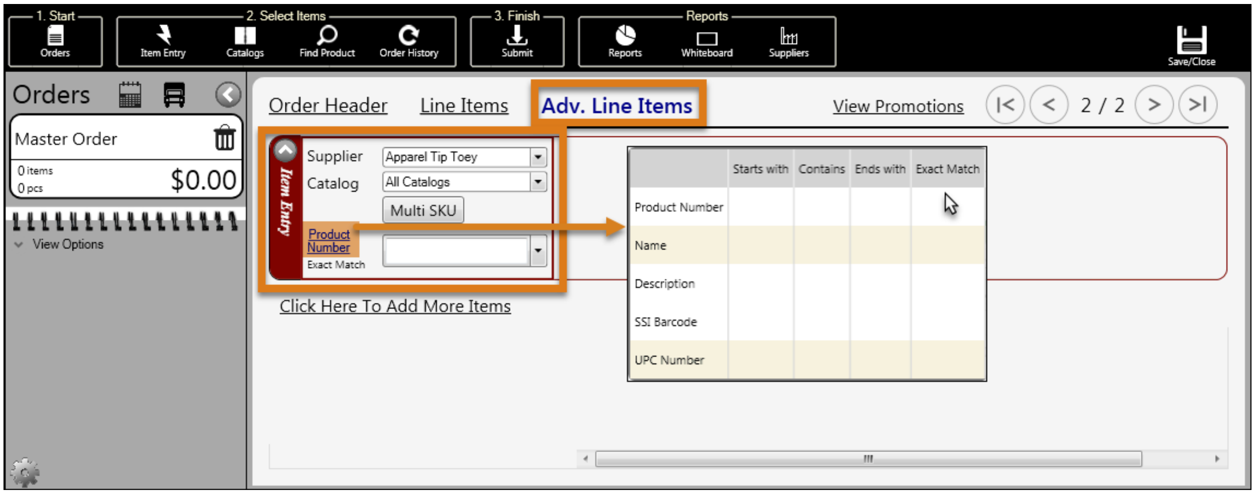
To delete a product from the **Line Items** table, highlight the product, and then click the (**X**) icon located next to the Product Number menu. If you add a product with options, you are prompted to add that item using the **Adv. Line Items** page, discussed below. The term “options” refers to additional product features, such as colors and sizes.

4.3.5 Advanced Line Items

Click **Adv. Line Items** at the top of the page. You may or may not see the option depending on the permissions defined by your system administrator.

4.3.5.1 Add Products with Options

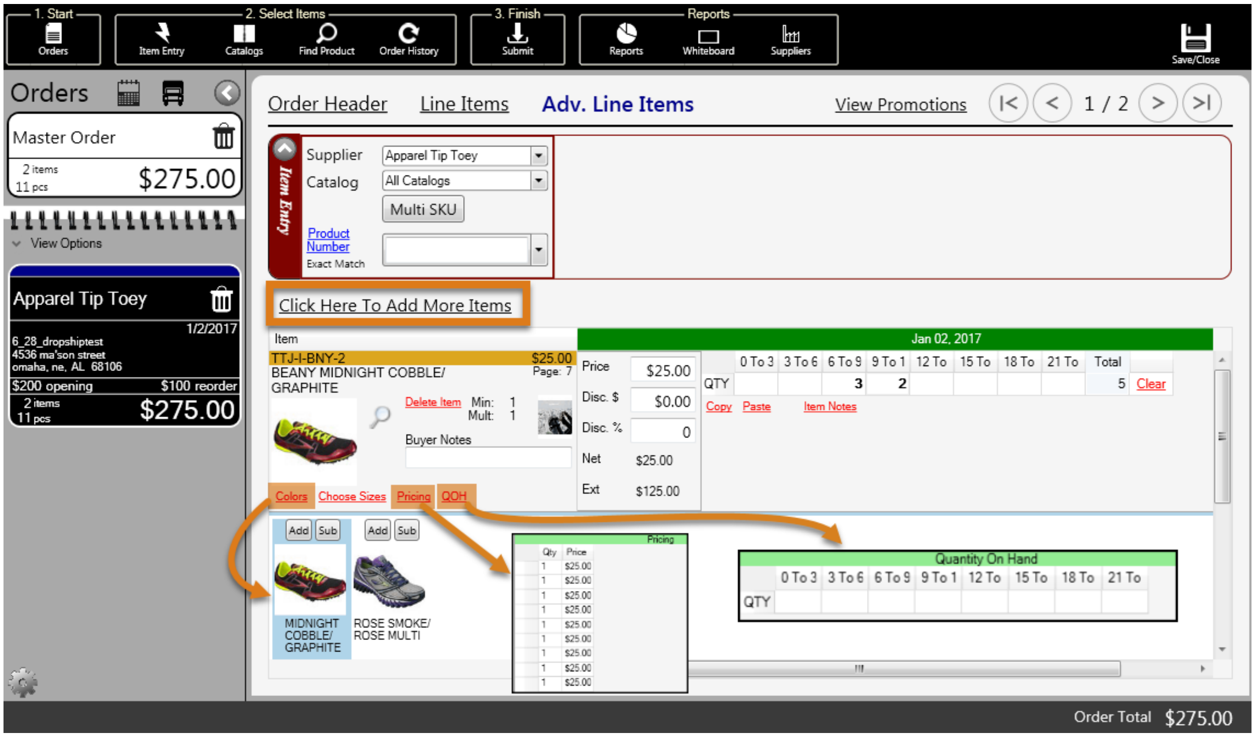
Similar to the **Line Items** page, there is a section for **Item Entry** where products can be limited to a supplier and catalog. The examples below demonstrate adding items that have options from the **Apparel Tip Toey** supplier.



As shown above, click **Product Number** to select different search options. The **Multi SKU** button is discussed in the next section. To select and highlight the product number for an item, click the product number or click the arrow buttons in the top-right corner to cycle through all items. The sales order total is $0.00 because you must enter quantities for the product options to add them to the order.

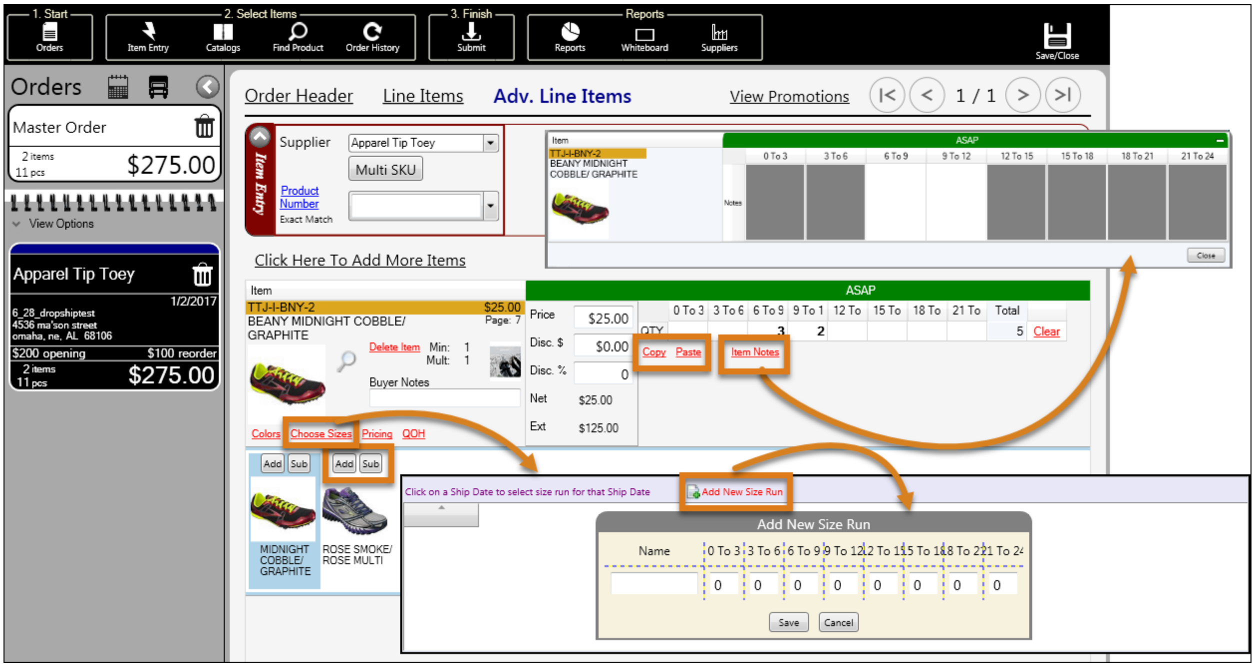
As shown above, (1) click the menu next to Product Number to type a SKU or select a product from the list. Once (2) quantities are added for the product, the (3) **Master Order** reports there are 2 **items** and 11 **pieces** in the order. In this case, the items are two styles of shoe (two different product numbers), and the pieces are the various shoe options (shoe sizes and quantities). The shoe style with a product number of **TTJ-I-BNY-2** in the example above has three pairs of shoes size 6-9, and two pairs of shoes size 9-11. Click Clear to remove all values entered in the QTY table. To view a larger image of an item, click the magnifying glass next to the thumbnail image. To remove an item from the order completely, click Delete Item.

As shown below, click Colors, Pricing, and QOH to see color options, as well as product pricing and QOH (quantity on hand) if that information has been defined by your system administrator. Click **Add** to add the product to the order, or **Sub** to replace the current product on the order with the selected product.

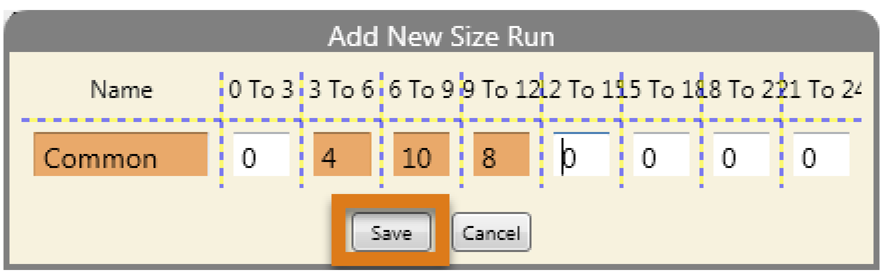


If you want to clear selections made in the **Item Entry** section, such as the **Supplier**, click **Click Here to Add More Items**.

As shown below, click Copy to copy the quantity values from one product to another. Apply the quantity values to the other product by clicking Paste in that product's quantity table. Click Item Notes to launch a dialog that presents text fields for each selected size option.

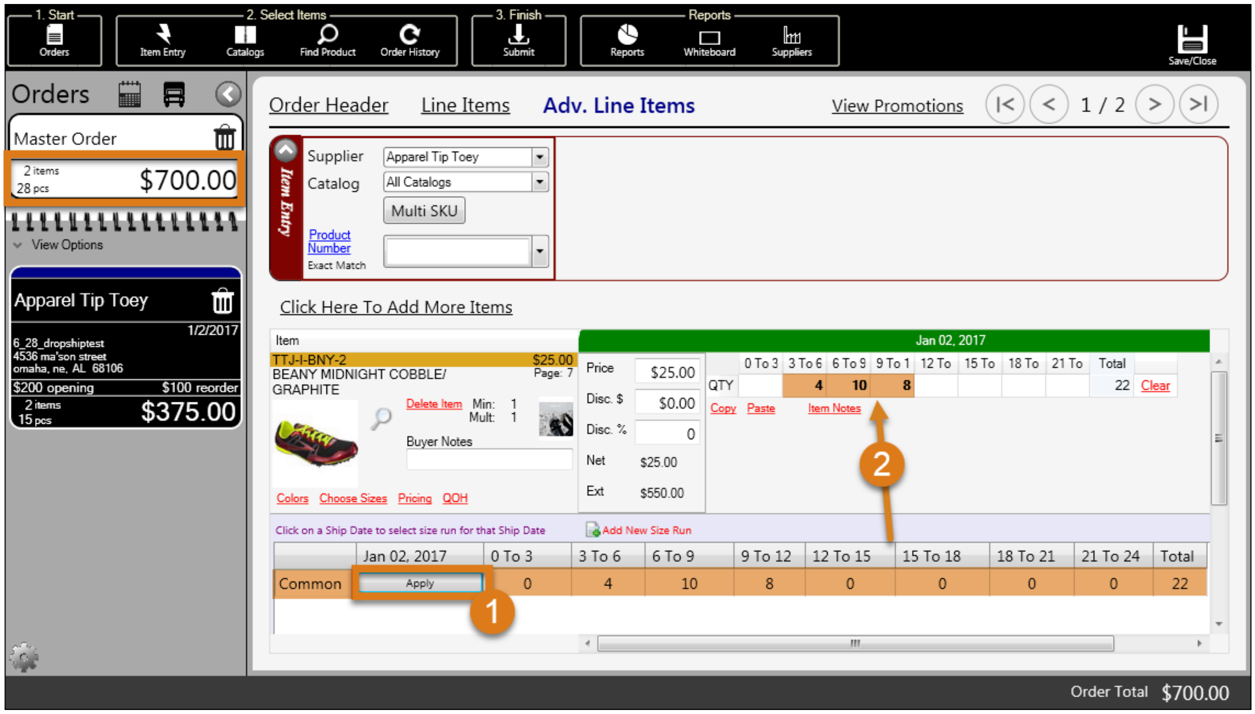


If there are specific quantities you regularly order for this customer, you can save the quantities by clicking Choose Sizes, and then click Add New Size Run. The purpose of adding a new size run is to save specific quantities for later use, so you can think of them as templates. Enter values in the quantity fields and provide a name for the size run, as shown below.



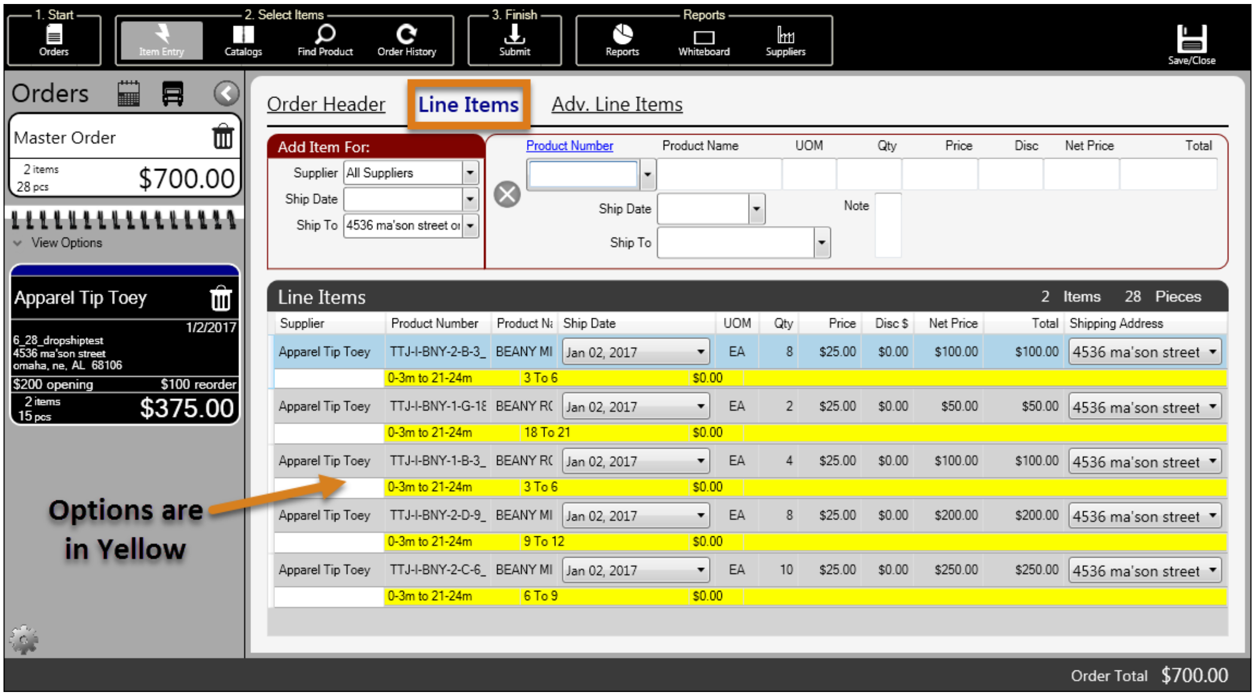
Then, click **Save**.

As shown below, (1) the new size run displays in the bottom table. It can be applied to a selected item by (2) clicking **Apply**.



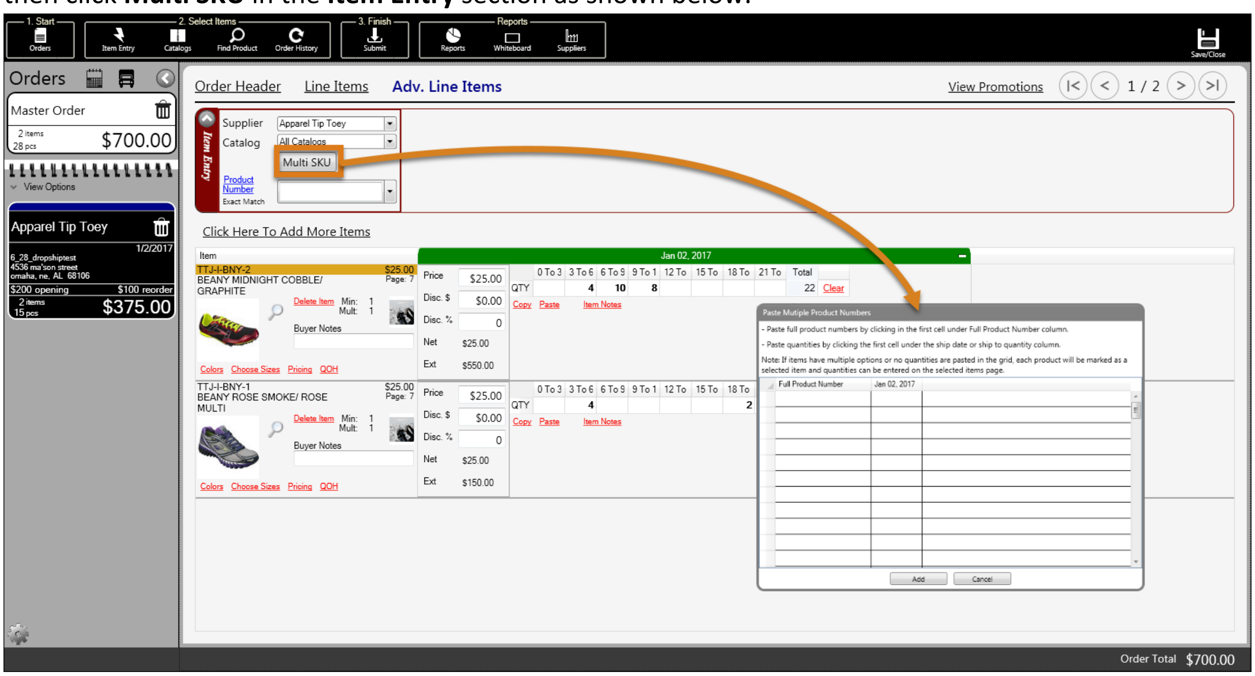
Note that the quantities previously defined have been overwritten by the quantities in the **Common** size run. As a result, the number of pieces as well as the sales order total have automatically updated.

If we return to the **Line Items** page as shown below, products are displayed with their options. However, you cannot adjust the options unless you return to the **Adv. Line Items** page.



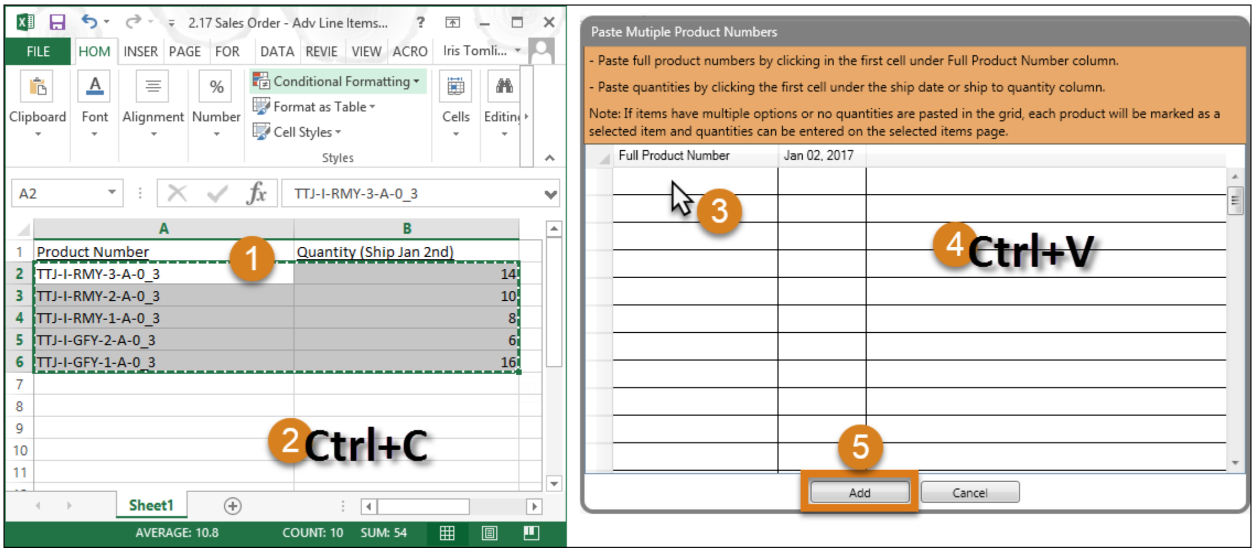
4.3.5.2 Importing Multiple SKUs

Multiple product numbers and quantities can be copied from an external file and pasted in a multi SKU table using the **Adv. Line Items** page. To begin, you must select a supplier from the **Supplier** menu and then click **Multi SKU** in the **Item Entry** section as shown below.



There are two columns in the Multi SKU table. The first stores full product numbers (or SKUs), and the second stores product quantities. The heading of the quantity column is the ship date selected for the order. If an order has more than one ship date, there are multiple columns for quantity values. You might consider formatting the column ordering in the external file to match the column ordering in the Multi SKU table so that you can copy and paste the values easily. If you are copying SKUs from an email or document that you cannot format, you can copy and paste the SKUs first, and then copy the quantities before adding the products to the order.

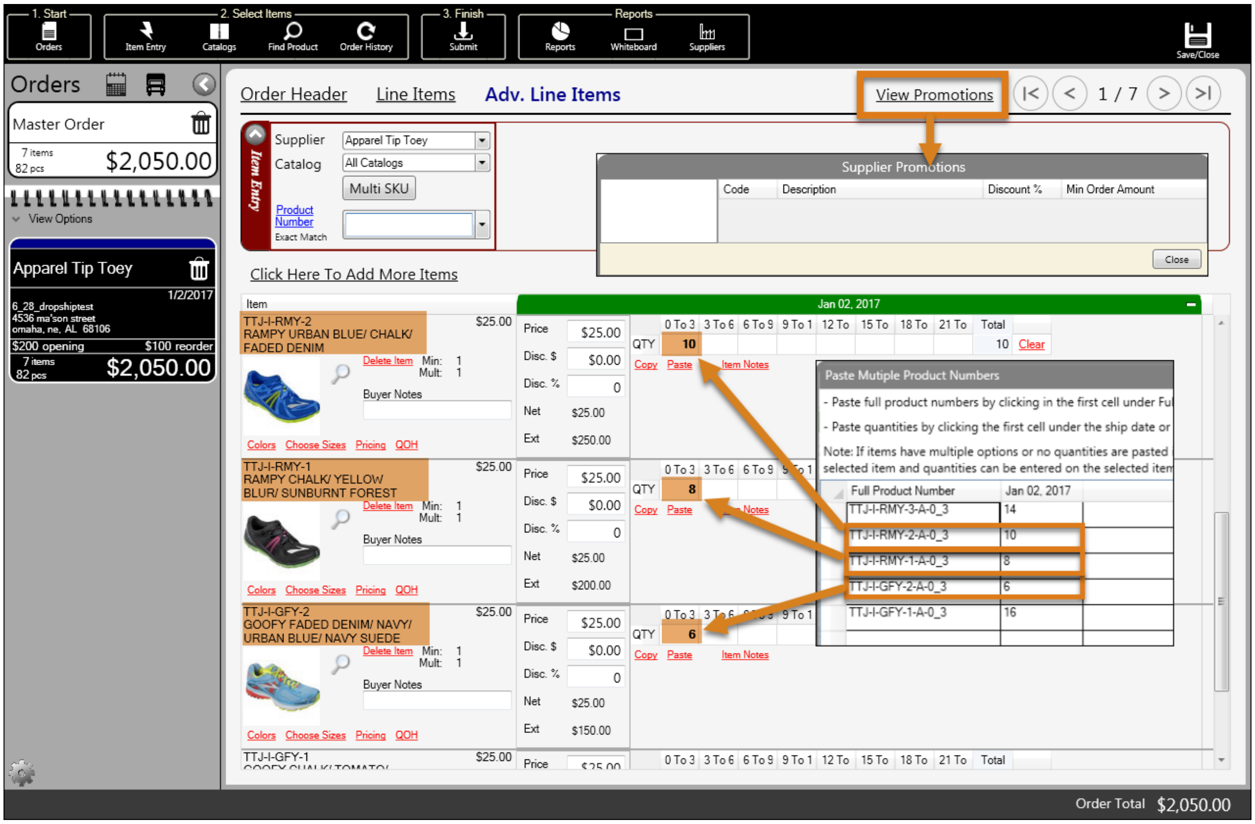
The product number should be the full product number. As shown below, (1) highlight the values in the external file first, excluding the headers, and then (2) press **Ctrl+C** to copy them to your Windows clipboard.



Next, (3) click once on the first cell under the **Full Product Number** column in the multi SKU table and (4) press **Ctrl+V**. Finally, (5) click **Add** at the bottom of the multi SKU table to save the products to the order. If null quantities are pasted in the table, and the data is saved, the actual quantities can be entered later on the **Line Items** or **Adv. Line Items** pages.

If the SKUs are not valid they do not paste correctly to the multi SKU table, and cannot be added to the order. If you encounter this, make sure you are using the full product number as it exists in the database.

The added products display on the **Line Items** page as well as the **Adv. Line Items** page, as shown below. Because we added products that have options, the quantity values are populated in the first (0-3) quantity field for each product. We can adjust these values if needed on the **Adv. Line Items** page.

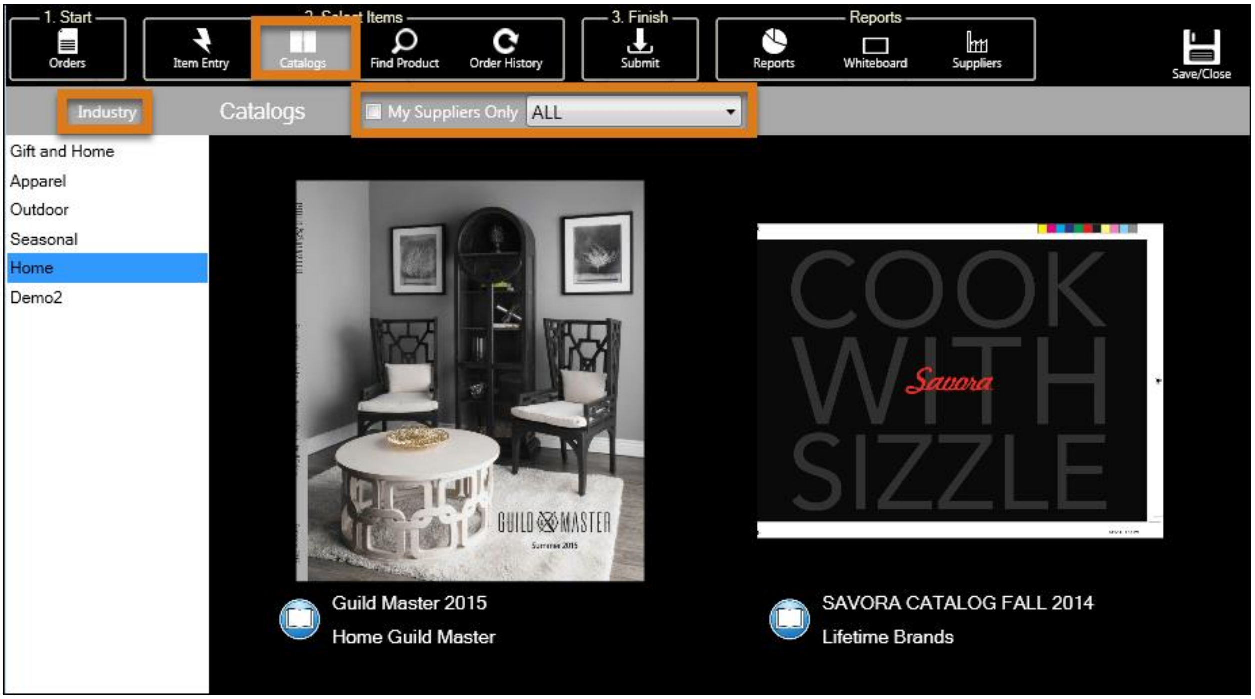


Once products are added, you can click **View Promotions** in the top-right of the page to view and apply any available promotions for that supplier. Keep in mind that the products you have added must meet the promotion criteria in order for the promotion to appear. Criteria for a promotion might be a discount of 10% is given when the sales order is over a certain dollar amount. In the example above, we have no promotions available because a) the supplier is not offering any or b) we have not met the criteria required for a promotion.

For an item, click Pricing to view the minimum and multiple quantity requirements and pricing for a product. Click Copy to copy quantities from a product, and then click Paste to apply the same quantity to other products displayed on the page. Click Item Notes to enter a note for the product. The product note displays on the final sales order. Notes that are entered in the **Buyer Notes** field do not display on the final sales order. Instead, the notes display on reports generated against the sales order (see section Reports).

4.3.6 Catalogs

You can add items to the order using supplier catalogs that exist in the database. To begin, click **Catalogs** on the menu bar to display a library of catalogs. By default, **My Suppliers Only** is checked, but you can uncheck it to see all available catalogs in the database.



Depending on the number of images, this page could take some time to load. If you still do not see any images on the page, they may not have been uploaded to the database by your content manager. If you know they have been uploaded, you should perform a data transfer (see section <u>Data Transfer</u>) to ensure you have the latest content. Otherwise, you should contact Brandwise technical support for troubleshooting (see section <u>Help</u>).

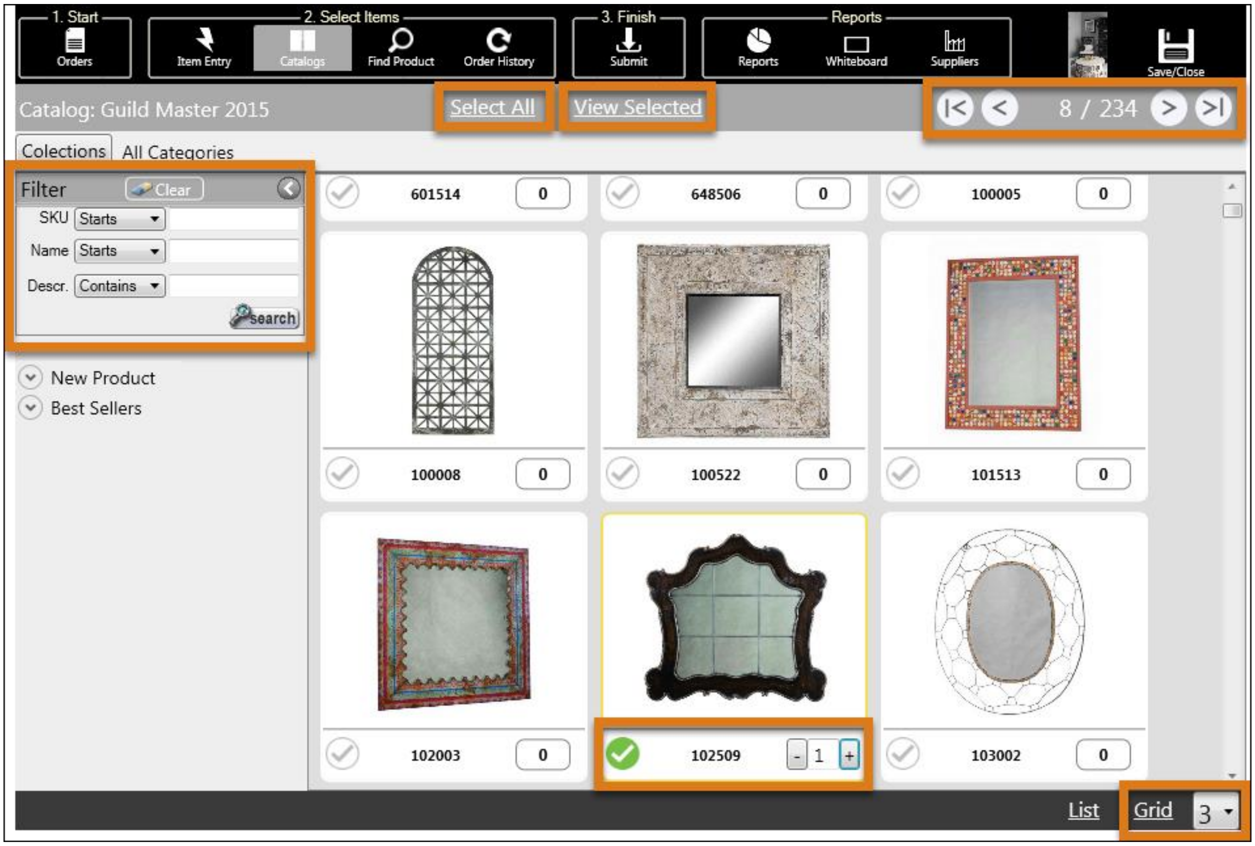
If your content manager has assigned catalogs to different industries, you can filter catalogs by clicking an industry on the left. In the example above, **Home** is selected, so we are only seeing catalogs with products for the home.

There are two viewing options for catalogs: digital or gallery. The first option displays a digitized version of the print catalog. This is especially useful when presenting products to a customer because it feels as if they are flipping through the pages of a paper catalog. The gallery view displays all products for a catalog in the same display sequence as the catalog pages.

*If you just want to browse catalogs without generating a sales order, click **Catalogs** on the main icons toolbar on the **Welcome** screen.*

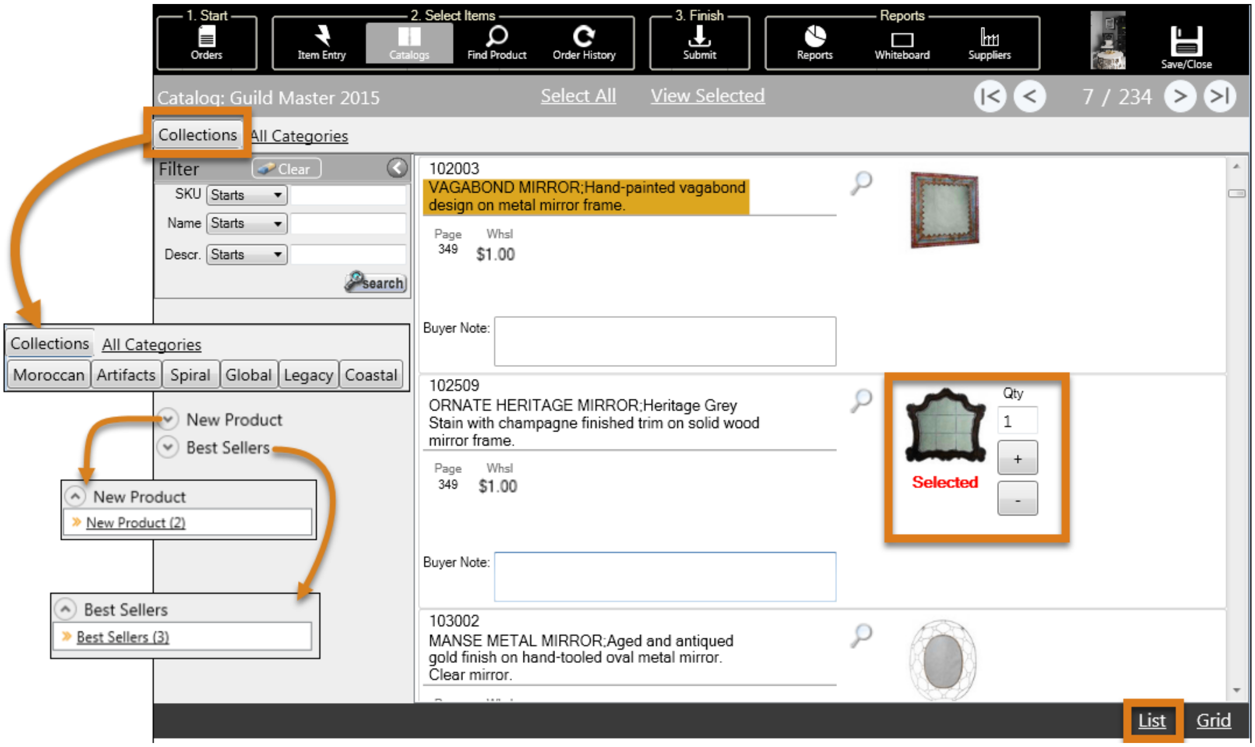
4.3.6.1 Gallery View

To display product images in a gallery view, click a catalog cover. Then, click <u>List</u> or <u>Grid</u> in the bottom-right corner of the page to change the method of display in the gallery view. When <u>Grid</u> is selected as shown below, a menu appears next to it that defines the number of images to display in a row. The number increases or decreases based on your screen resolution.



Click **Filter** to expand the side menu. Enter criteria in the **SKU**, **Name**, and **Description**. Click a product image to enlarge it and optionally enter a buyer note. Click the product number below an image to display product names instead, then click once more to display the product price. A green checkmark indicates the product is added to the order. To add additional products, click the checkmark on product images, and then specify quantities. Click View Selected to display only the products with a green checkmark. Click Select All at the top of the page to add all products that are currently displayed to the order. To scroll down and view more images, you can either drag the vertical slider bar on the right side of the dialog or click the arrow buttons below the **Save/Close** icon.

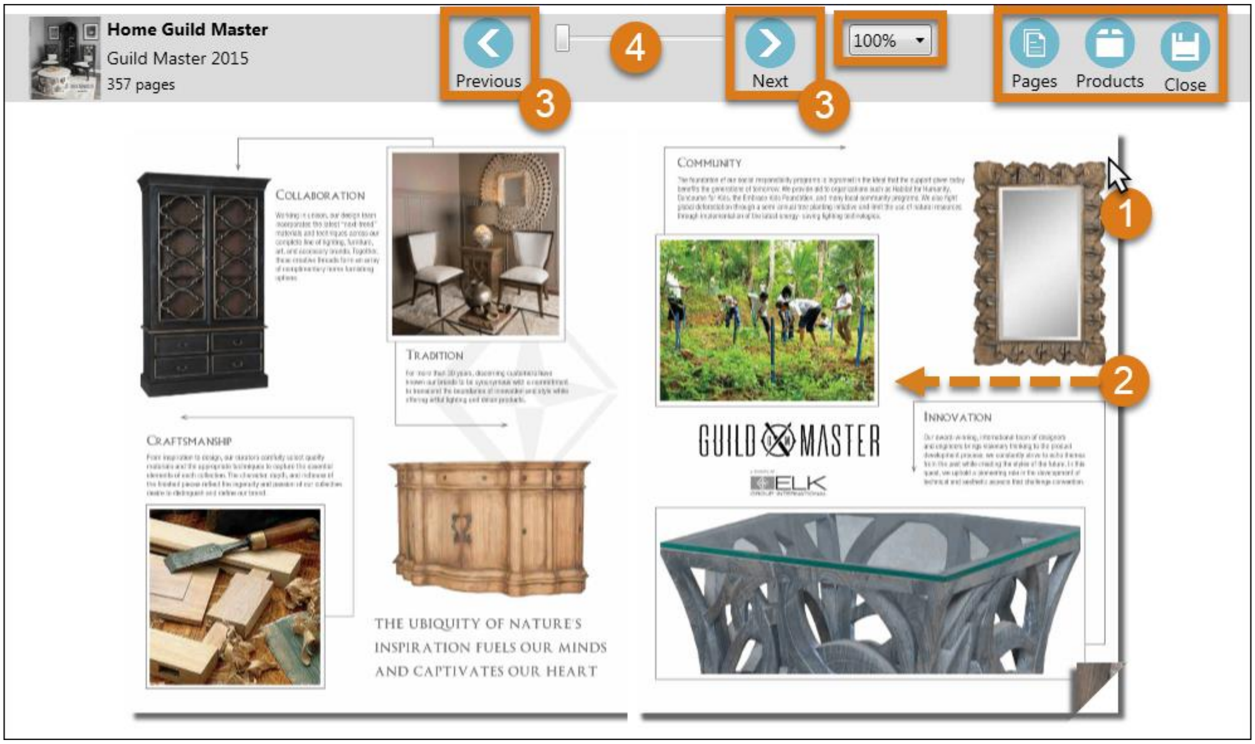
Click **List** on the bottom-right corner to leave the **Grid** view and launch the **List** view. As shown below, the view displays less items because product detail such as the catalog page number and the product description are included.



Note the **Collections** button, which appears because the content manager has grouped the products into **categories**. In the example above, a handful of collections are listed. Click a collection name to display only products assigned to that collection. The **New Product** and **Best Sellers** options appear if your home office has configured product **attributes**. Click one of the options to expand the menu, then click the link below it to see the associated products. For example, in the catalog we are viewing above, there are two new products and three best sellers.

To add items, click the item image and then type a value in the **Qty** field, or use the plus (+) and minus (-) buttons to adjust the value. Note that you can also enter a **Buyer Note** for an item, as well as click the magnifying glass to view a larger image.

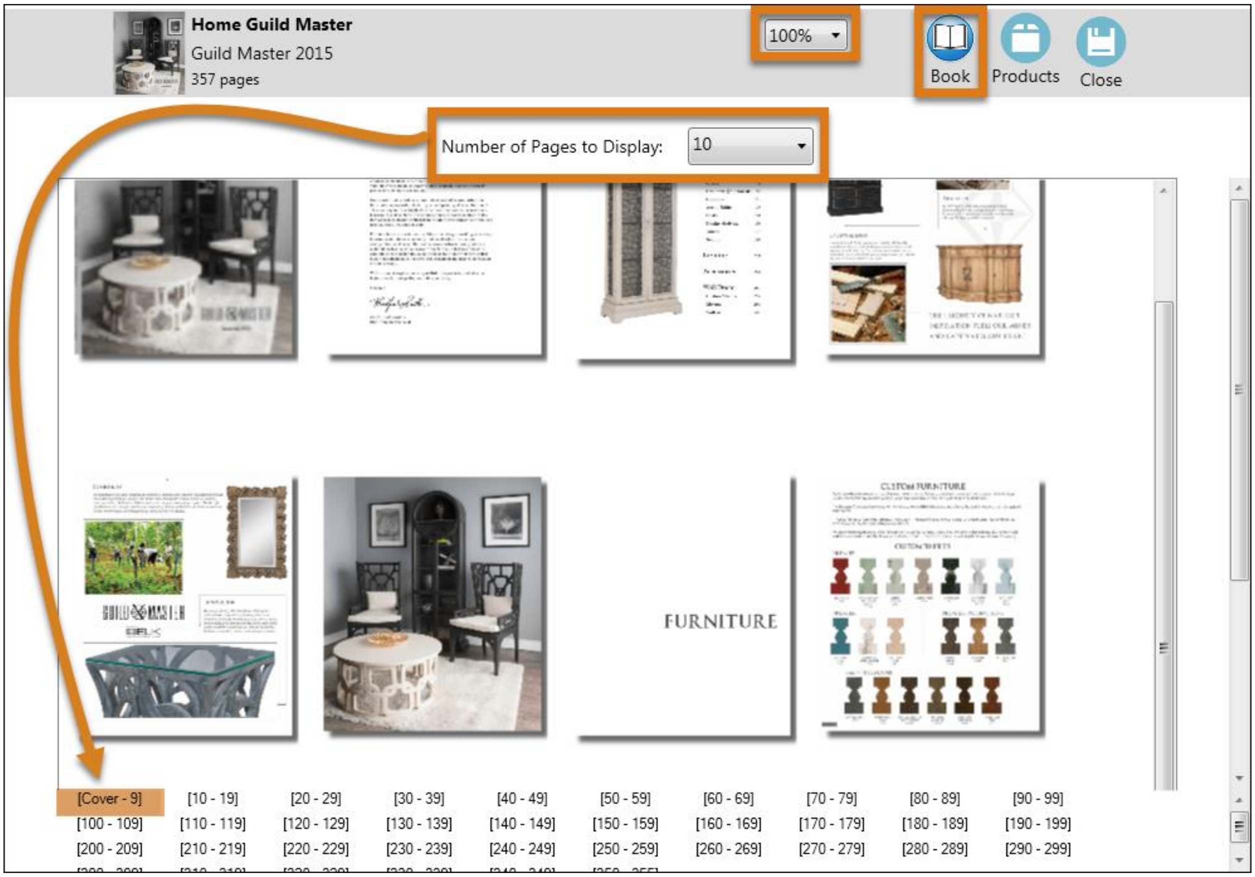
To "flip" through the catalog pages instead of viewing individual product images in a gallery, click **Catalogs** on the menu bar to return to the catalog library. Then, click the book () icon to the bottom-left of a catalog cover to launch the digital catalog view (shown below).



There are four ways you can flip through the pages:

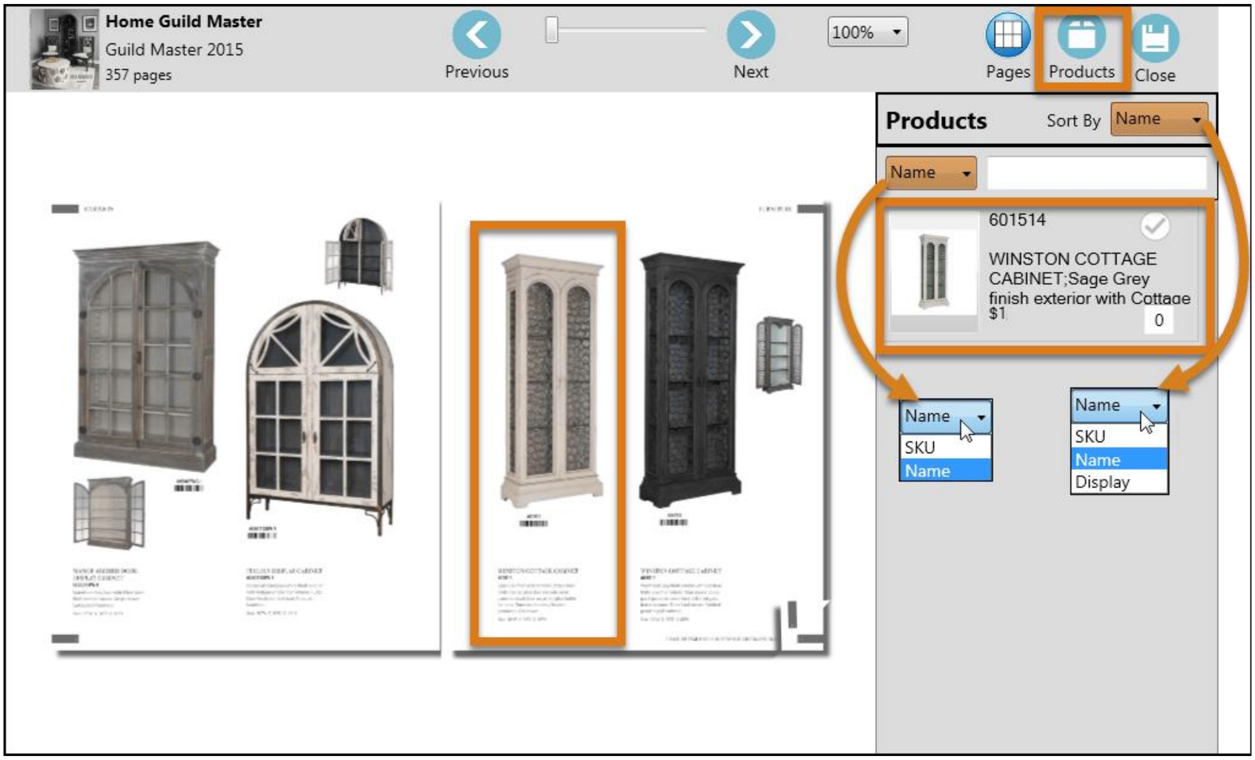
(1) click the outer edge of a page
(2) left-drag the outer edge of a page
(3) click the **Next** and **Previous** arrows at the top of the dialog
(4) drag the horizontal slider bar

By default, the image is viewed at **100%** which means there is no zoom. You can zoom in or out on the image by clicking the drop-down menu to the right of the **Next** arrow. Click **Pages** to display all pages in a grid view, as shown below.



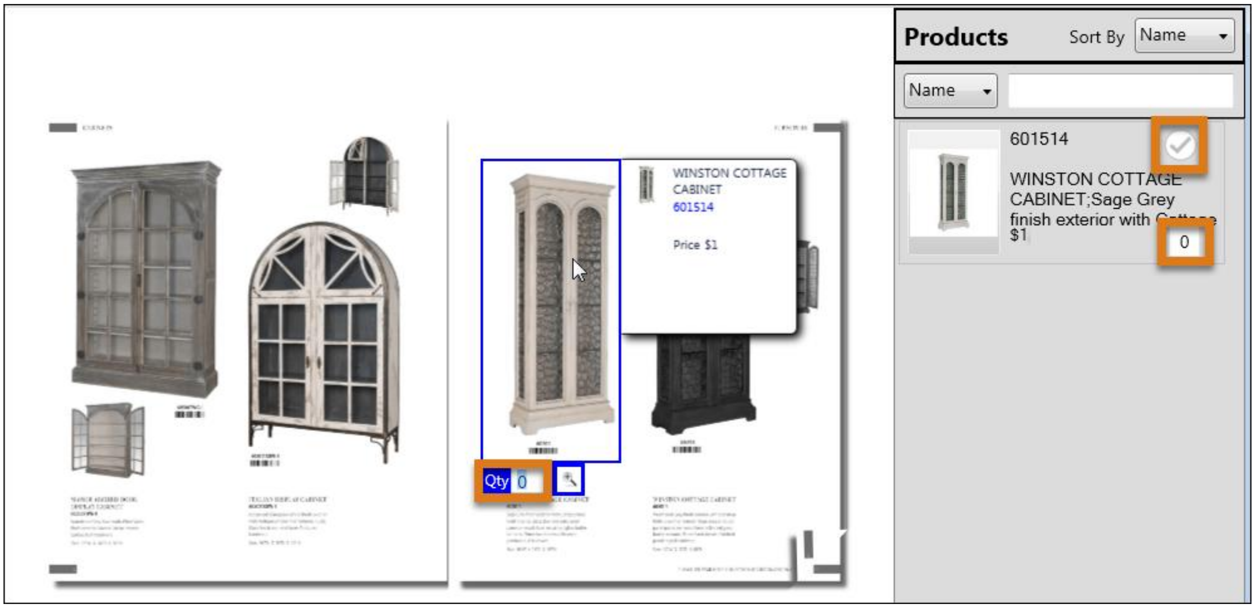
By default, the **Number of Pages to Display** is set to **10**. There is a table at the bottom of this view that allows you to navigate to different sets of page ranges. The range is determined by the **Number of Pages to Display**. Click a range in this table to view the corresponding pages. Note that you still have a zoom menu. Click **Book** to return to the catalog flipbook.

Click **Products** to show or hide the **Products** panel on the right side of the dialog, as shown below.



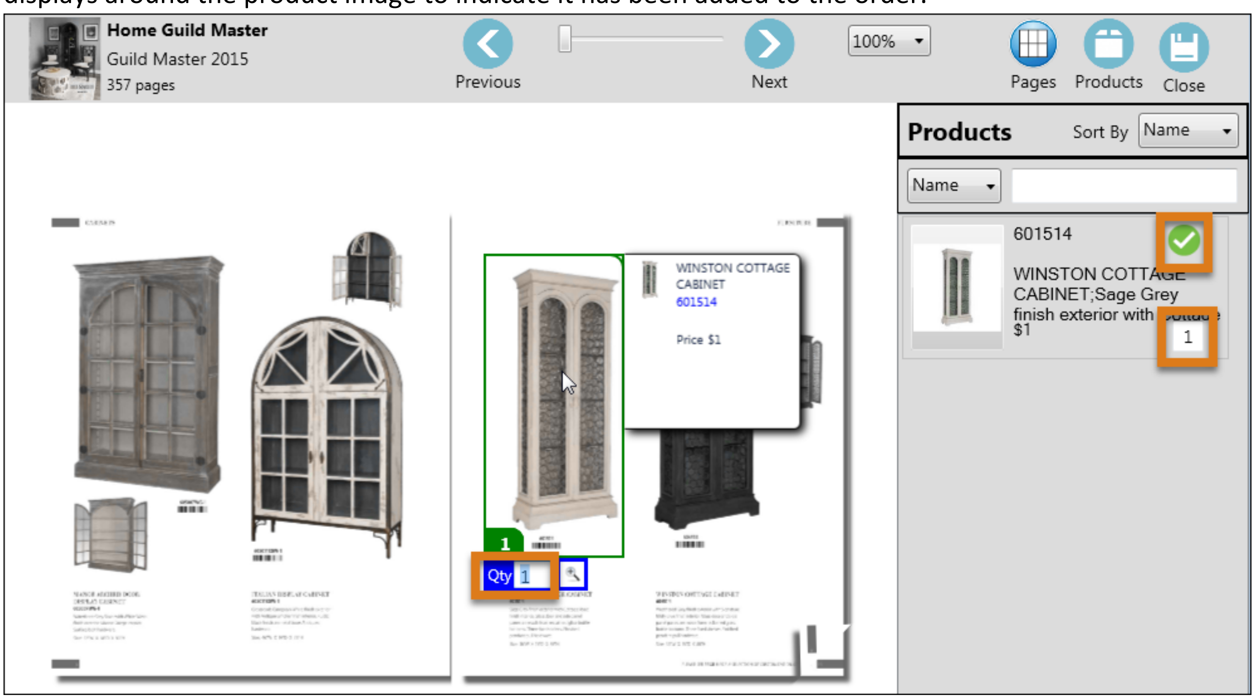
The products panel lists all products shown on the current page *if* the items have been “hotspotted” by a) your content manager or b) our internal algorithm. The algorithm attempts to recognize product numbers on catalog pages and match them to products. A hotspot allows you to add products to the order from the catalog view. The internal algorithm does its best to recognize product numbers, but it really depends on the image quality. In the example above, there is one product on the page that has been hotspotted or recognized by the internal algorithm. Therefore, only one product is displayed in the **Products** panel. Note the options in the **Sort By** menu that sort the images in the **Products** pane. The menu next to the search field allows you to select a method to search by. The gray checkmark next to the image, and a value of **0** in the quantity field, indicates that the product is not currently added to the order.

You can add products to the order by entering a quantity next to product images in the **Products** panel, or by hovering your cursor over images on the catalog pages that have “hotspots”. As shown below, when the cursor is hovered over a product image, hotspots display as blue or red borders.



A hotspot with a blue border indicates the product can be added to the order. A red border indicates the product is unavailable. You can enter a quantity in the quantity field on the **Products** panel, or enter a quantity in the hotspot to add the item to the order. When the product has more options such as multiple colors and sizes, you are prompted to enter quantities for all options. Click the magnifying glass to enlarge the product image.

If we specify a quantity for the product as shown below, the check mark turns green and a green border displays around the product image to indicate it has been added to the order.

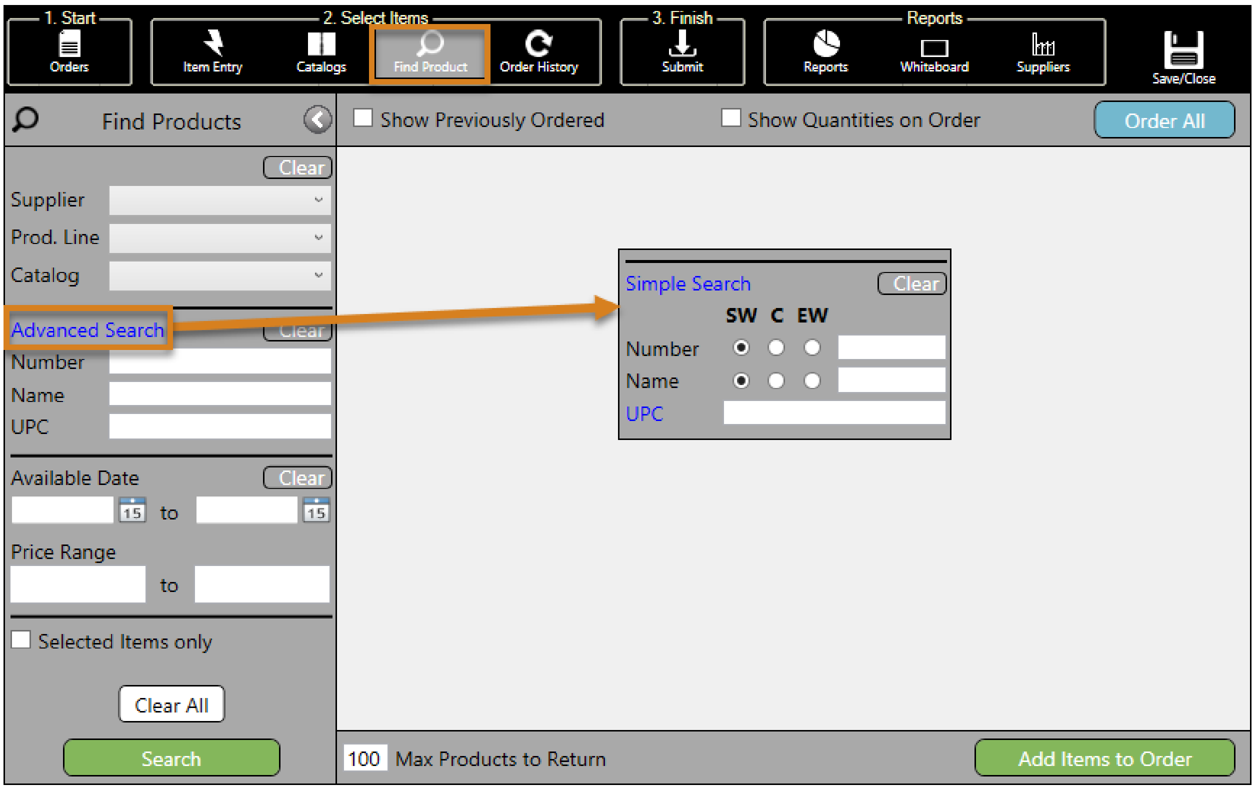


If hotspots do not appear when hovering over the images, (1) your content manager has not generated them and (2) the products were not automatically matched to the catalog pages by Brandwise's internal process. When hotspots do not exist, you cannot purchase product from the catalog pages.

Click **Close** to return to the sales order dialog.

4.3.7 Find Product

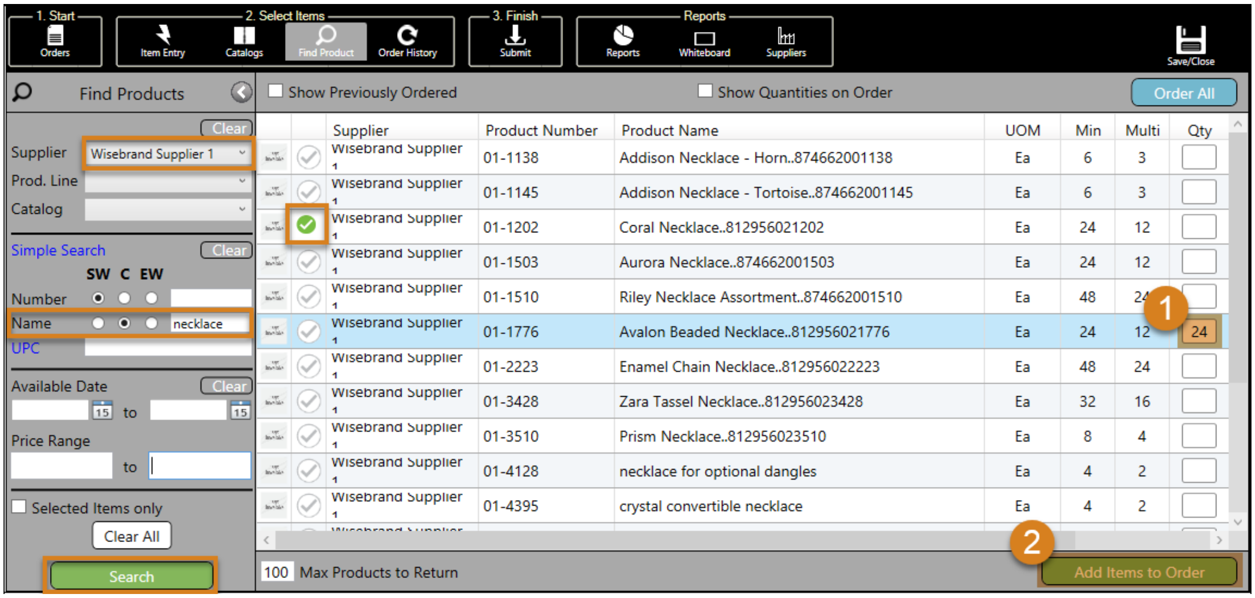
Click **Find Product** on the menu bar and search for products using the fields in the **Find Products** panel.



There are no products listed by default, but you can display all products before defining any search criteria by clicking **Search** at the bottom of the **Find Products** panel. Click **Search** after making any changes in the **Find Products** panel because the results do not automatically update when defining search criteria. Enter simple search criteria in the **Number**, **Name** and **UPC** fields on the **Find Products** panel. Or, click Advanced Search to utilize the "Starts With", "Contains", or "Ends With" option buttons, as shown above.

4.3.7.1 Advanced Search

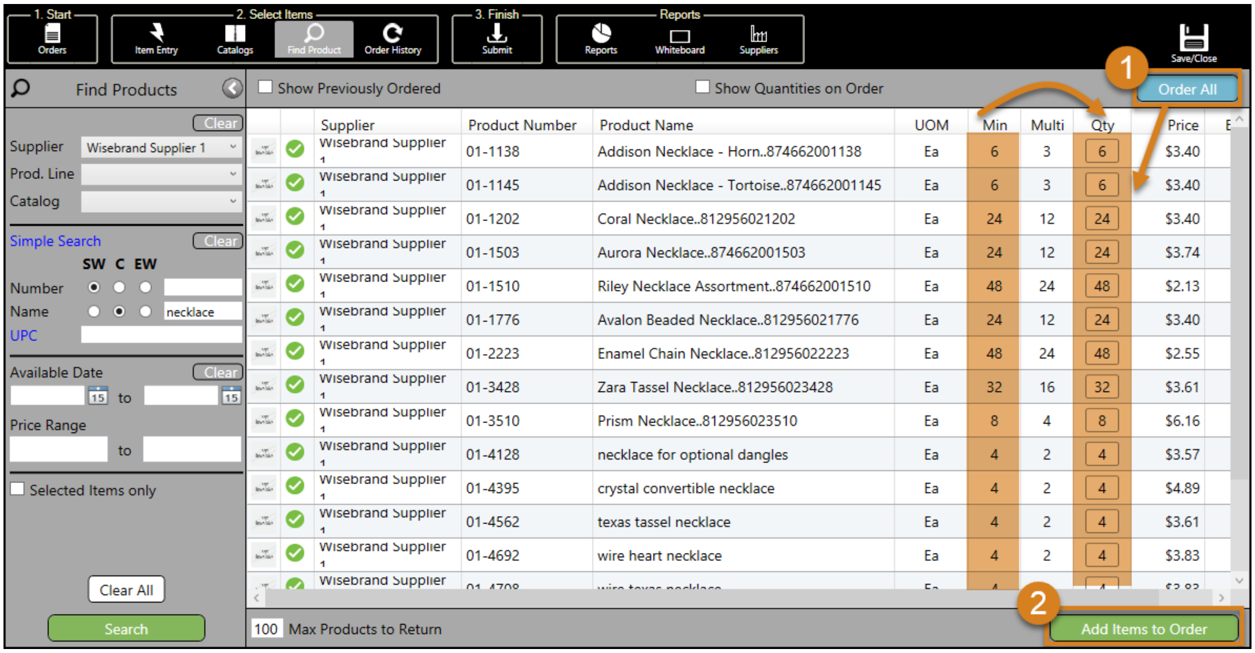
In the example below, an advanced search was performed for all **Wisebrand Supplier 1** products with names containing "necklace".



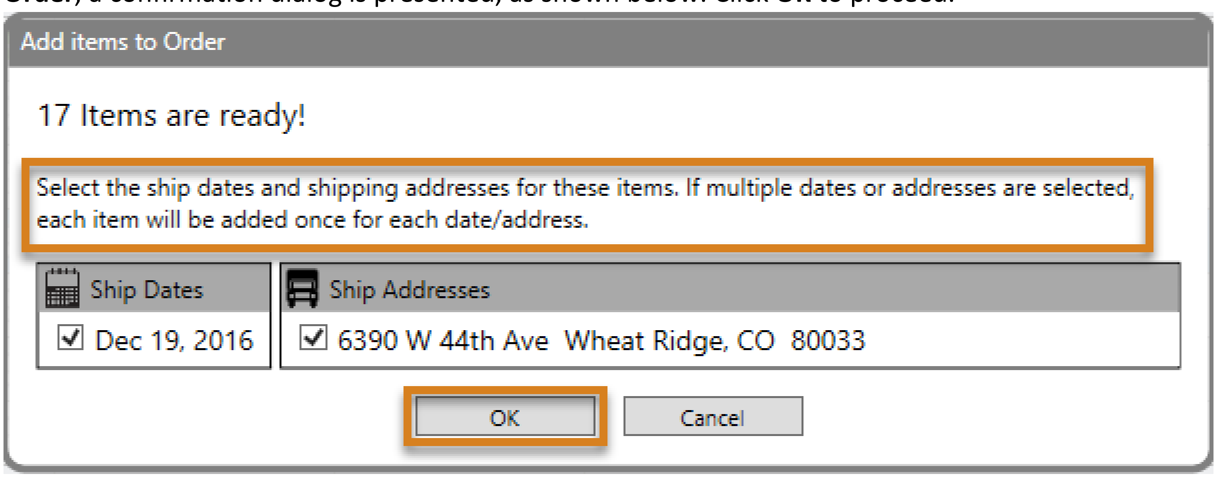
When **Show Previously Ordered** is checked, shaded blue triangles are displayed over the small thumbnail image on the far left column of the table to indicate they have previously been ordered by the customer. As shown above, a green checkmark indicates the product has already been added to the order. When **Show Quantities on Order** is checked, a new column reports the quantity of items that have already been added to the order. To open details for a product, click the small thumbnail image. When **Selected Items only** is checked, the search results are limited to the products already added to the order. To add individual products to the order, (1) enter a value in the **Qty** field or double-click the **Min** field to populate the same value in the **Qty** field. Finally, (2) click **Add Items to Order**.

*When manually entering order quantities you can navigate to surrounding fields by pressing the **Tab**, **Enter** or arrow keys.*

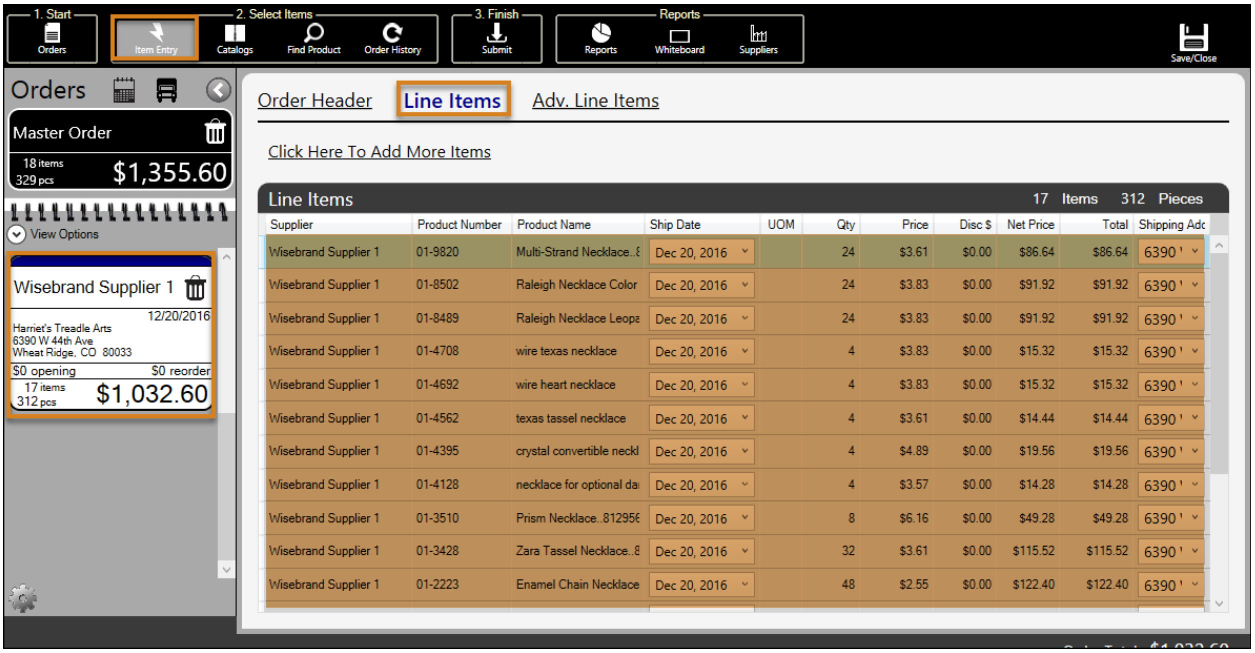
To select all products listed in the table, (1) click **Order All**. As a result, the **Qty** fields automatically populate with the minimum quantity value as shown below.



Then, (2) click **Add Items to Order**. If multiple products are selected before you click **Add Items to Order**, a confirmation dialog is presented, as shown below. Click **OK** to proceed.

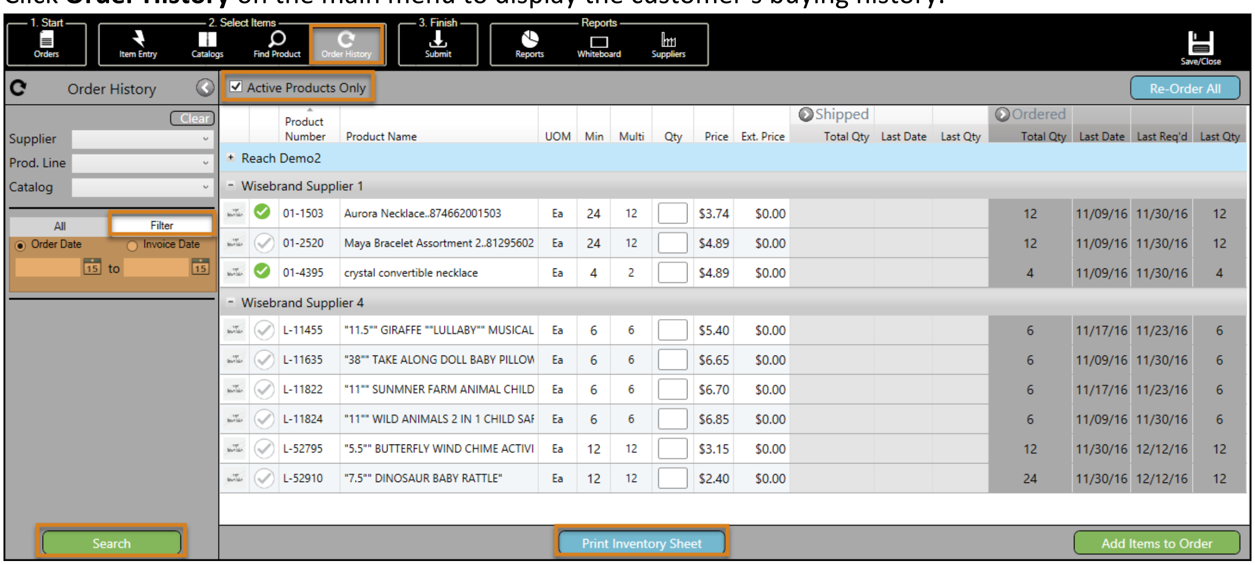


If you return to the **Line Items** and **Advanced Line Items** pages by clicking **Item Entry** on the main menu, the added products are listed, as shown below.

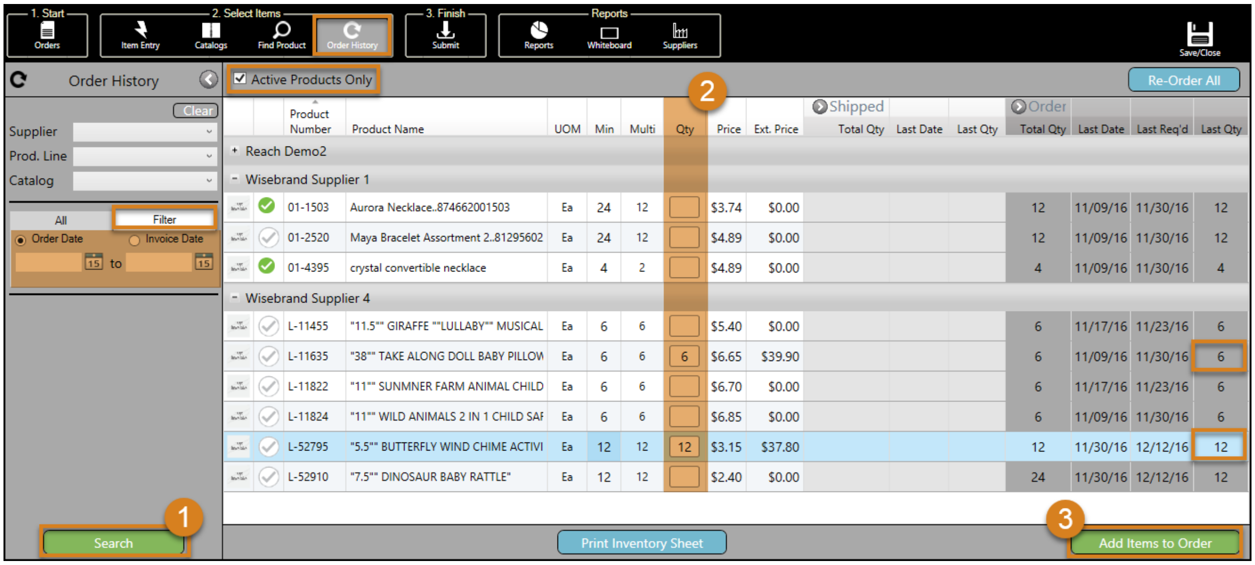


4.3.8 Order History

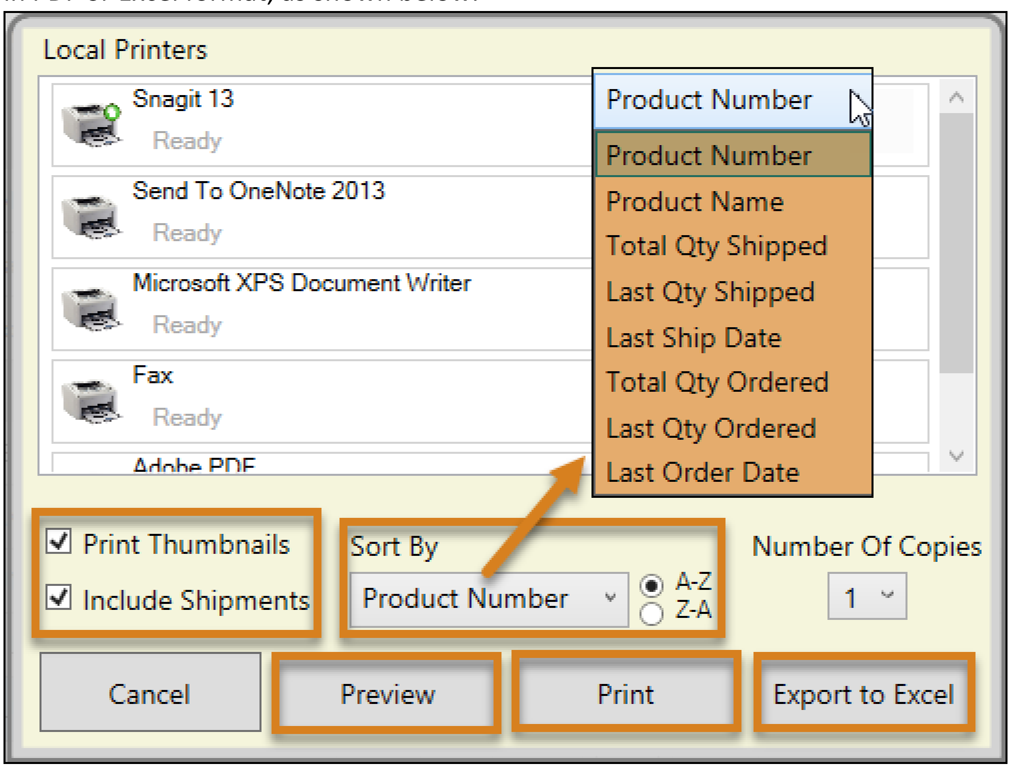
Click **Order History** on the main menu to display the customer's buying history.



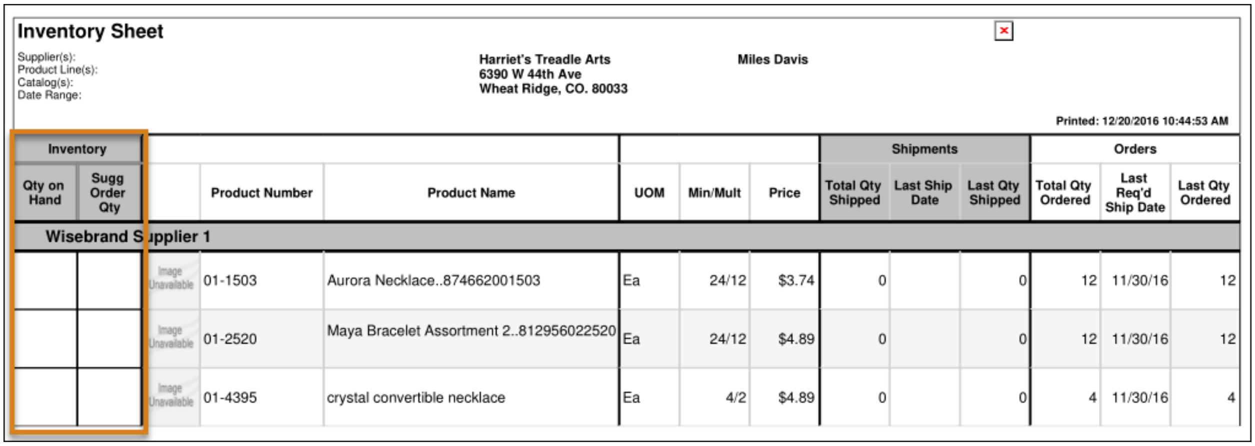
Optionally define search criteria in the **Order History** panel, and then click **Search** as shown in step (1) below. Note the **Filter** tab on the **Order History** panel where you can limit the search results to an **Order Date** range or an **Invoice Date** range. When **Active Products Only** is checked, the results are limited to products that are flagged as active in the database. The results table displays previous order and shipment information at the product level. To add an item in the table to the order, (2) use the **Qty** field. There are a few ways to populate the **Qty** field: manually type a value, double-click the **Min** field, or double-click the **Last Qty** fields in the **Shipped** or **Ordered** columns. Then, (3) click **Add Items to Order**.



Click **Print Inventory Sheet** to launch a dialog that has multiple options for generating a product report in PDF or Excel format, as shown below.



You might provide this report to your customer so they can take an inventory of products on the store shelves. Below is an example of what the inventory sheet looks like in PDF format. In this example, there are products added to the order from three different suppliers. Therefore, the report is three pages long because each supplier is reported on its own page.



Inventory Sheet

Supplier(s):
Product Line(s):
Catalog(s):
Date Range:

Harriet's Treadle Arts
6390 W 44th Ave
Wheat Ridge, CO. 80033

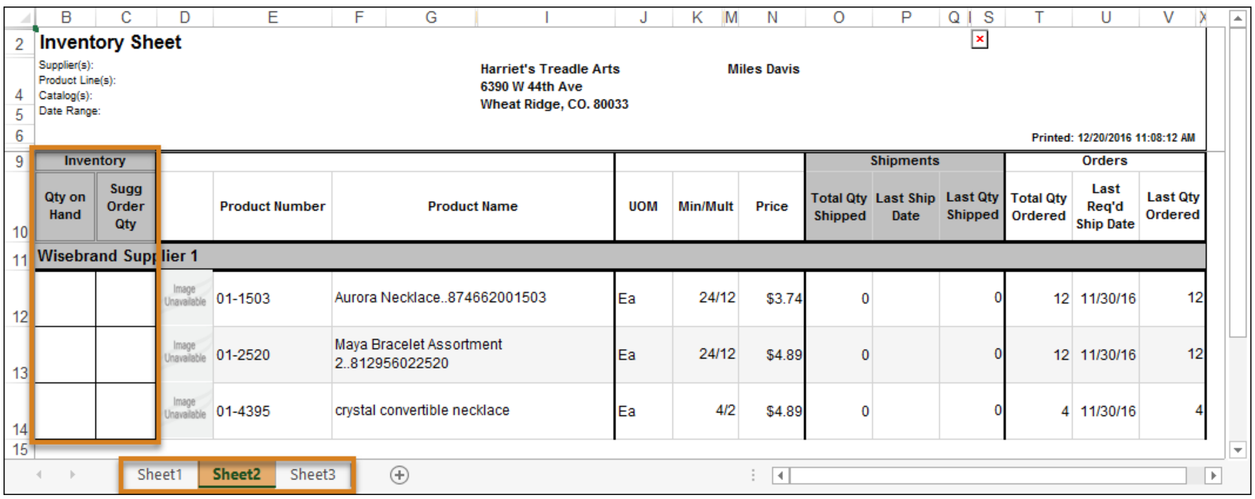
Miles Davis

Printed: 12/20/2016 10:44:53 AM

Inventory								Shipments			Orders		
Qty on Hand	Sugg Order Qty		Product Number	Product Name	UOM	Min/Mult	Price	Total Qty Shipped	Last Ship Date	Last Qty Shipped	Total Qty Ordered	Last Req'd Ship Date	Last Qty Ordered
Wisebrand Supplier 1													
		Image Unavailable	01-1503	Aurora Necklace..874662001503	Ea	24/12	$3.74	0		0	12	11/30/16	12
		Image Unavailable	01-2520	Maya Bracelet Assortment 2..812956022520	Ea	24/12	$4.89	0		0	12	11/30/16	12
		Image Unavailable	01-4395	crystal convertible necklace	Ea	4/2	$4.89	0		0	4	11/30/16	4

There are two blank columns to complete on the generated report: **Qty on Hand** and **Sugg Order Qty**. The first is the quantity of an item in stock or on the store shelves. The second is the sales rep's suggested quantity to reorder.

Below is an example of what the inventory sheet looks like if **Excel Export** is chosen instead of **Print**. Note that each supplier is reported on a different tab.



Inventory Sheet

Supplier(s):
Product Line(s):
Catalog(s):
Date Range:

Harriet's Treadle Arts
6390 W 44th Ave
Wheat Ridge, CO. 80033

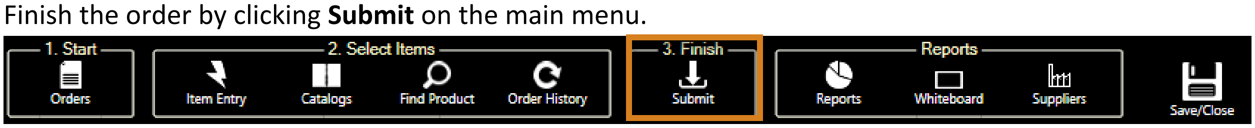
Miles Davis

Printed: 12/20/2016 11:08:12 AM

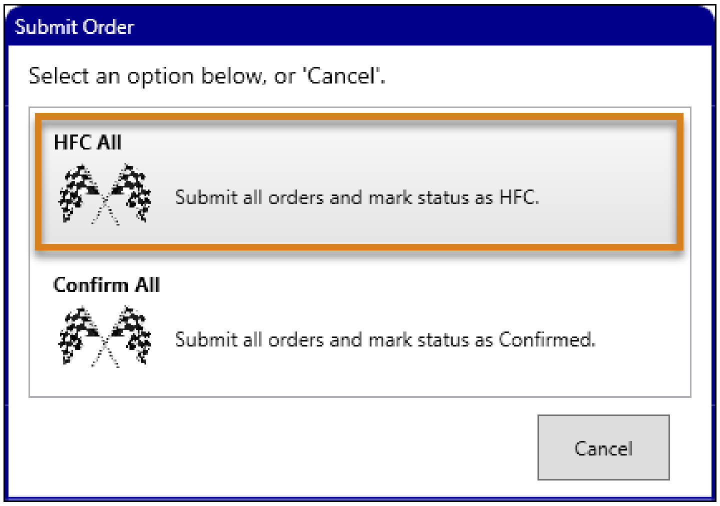
Inventory								Shipments			Orders		
Qty on Hand	Sugg Order Qty		Product Number	Product Name	UOM	Min/Mult	Price	Total Qty Shipped	Last Ship Date	Last Qty Shipped	Total Qty Ordered	Last Req'd Ship Date	Last Qty Ordered
Wisebrand Supplier 1													
		Image Unavailable	01-1503	Aurora Necklace..874662001503	Ea	24/12	$3.74	0		0	12	11/30/16	12
		Image Unavailable	01-2520	Maya Bracelet Assortment 2..812956022520	Ea	24/12	$4.89	0		0	12	11/30/16	12
		Image Unavailable	01-4395	crystal convertible necklace	Ea	4/2	$4.89	0		0	4	11/30/16	4

4.4 Finish Sales Order

Finish the order by clicking **Submit** on the main menu.



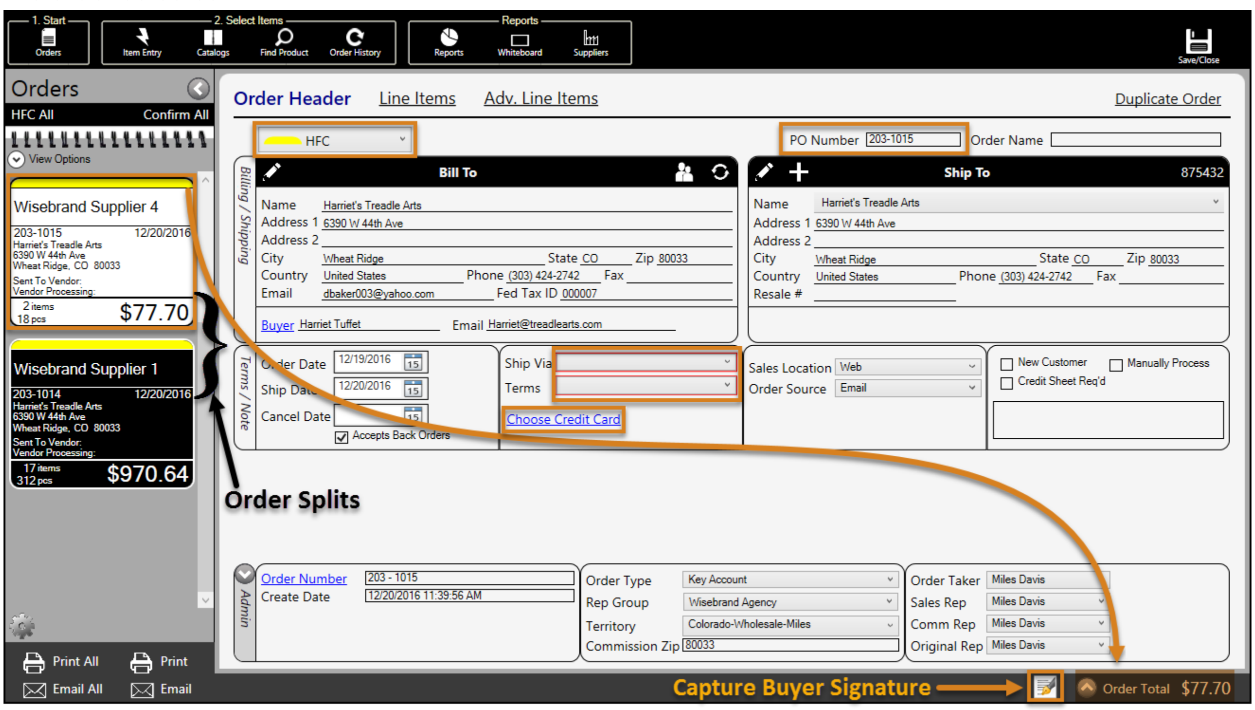
As shown the below, the next dialog prompts you to submit all orders and either mark the order status as **HFC** or **Confirmed**.



If the supplier receives orders electronically through the Brandwise Stream service, then selecting a status of **Confirmed** automatically sends the order to the supplier for processing when the order is exited, as long as there is an internet connection.

Remember that an order status of **HFC** is used if you are not ready to send the order to the supplier.

As shown below, the **Orders** panel splits the selected items into separate orders by supplier. When applicable, orders are also split by ship date or shipping address. Click a split order on the **Orders** panel, to see information for that order. The **Line Items** and **Adv Line Items** pages display only the products for the order selected.

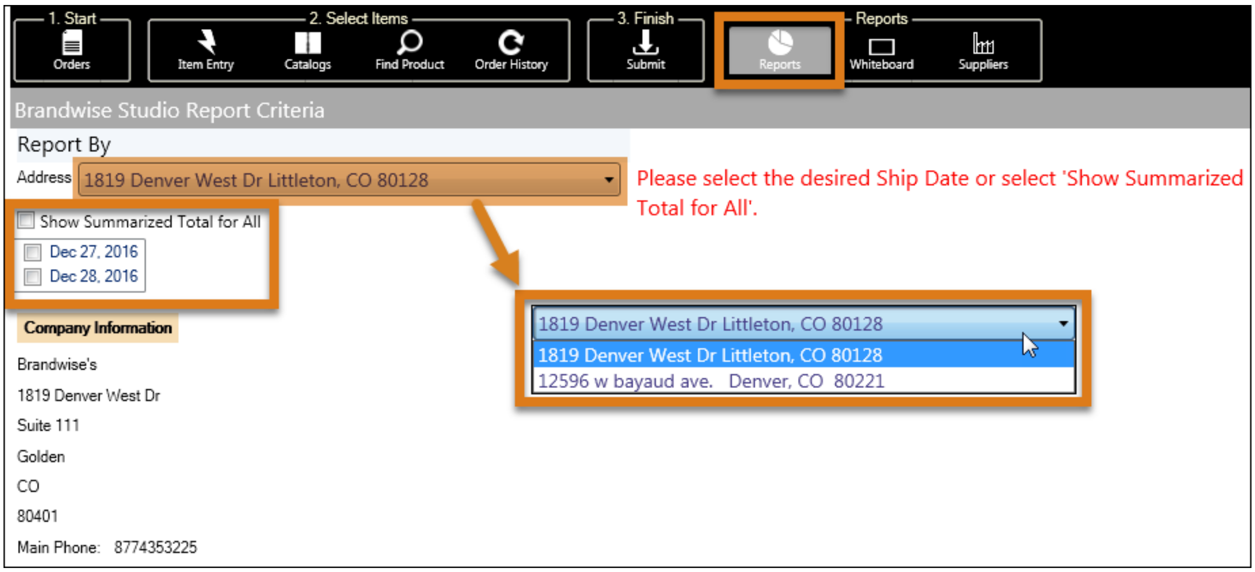


In the image above, the order status has changed from **Pending** to **HFC**. You can set a different PO number for each order and adjust order settings individually. Select options in the **Ship Via** and **Terms** menus if the information is not automatically populated. If credit cards are associated with the customer account, Choose Credit Card defines the customer credit card to be processed for the order. If you do not see this option, there are no credit cards associated with the customer record. Click the **Capture Buyer Signature** icon on the bottom-right corner of the dialog to launch a window that provides space for a digital signature. The signature is printed at the bottom of a printed sales order.

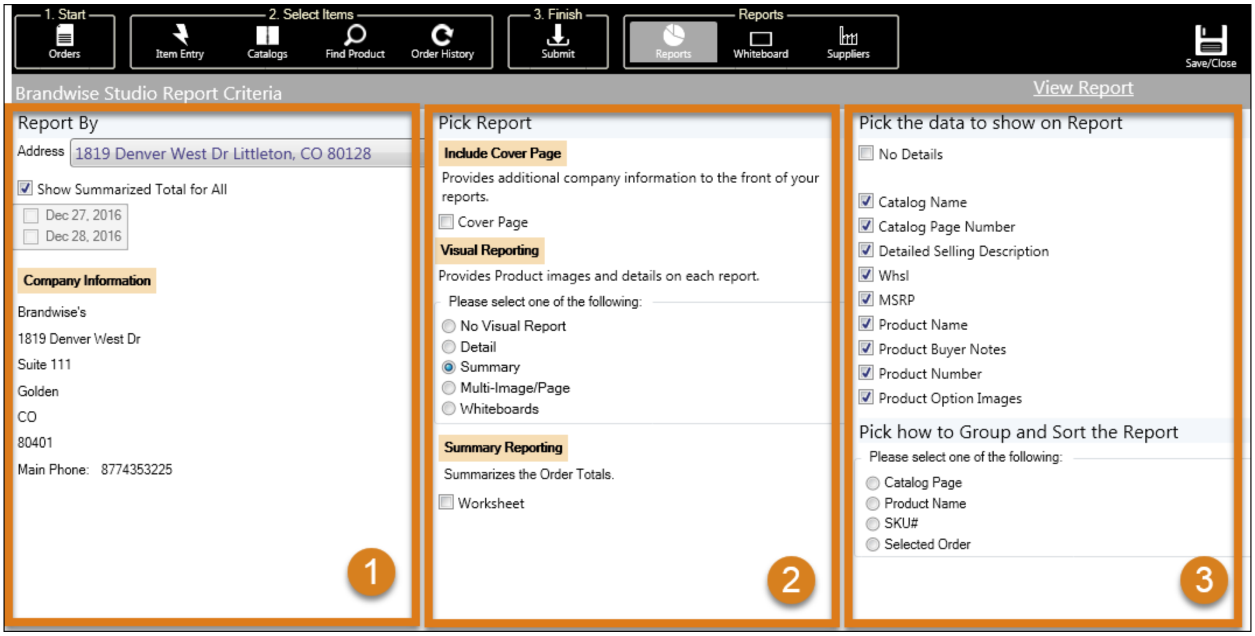
The **Print All** and **Email All** options shown at the bottom of the **Orders** panel can be used if you want to print or email all split orders displayed in the **Orders** panel. The **Print** and **Email** options can be used if you only want to print or email the split order selected in the **Orders** panel. If you choose to print, you can save the order as a PDF or Excel file. If you choose to email, the order is attached as PDF to the email. To use the email options, you must have a default email client installed on your PC.

4.5 Reports

Click **Reports** on the main menu to launch the report criteria page, as shown below.



In the example above, the company **Brandwise's** has two different shipping addresses as well as two ship dates. Select a shipping address from the menu, and then check a ship date or check **Show Summarized Total for All** to report on all ship dates. As shown below, the page is split into three vertical sections.



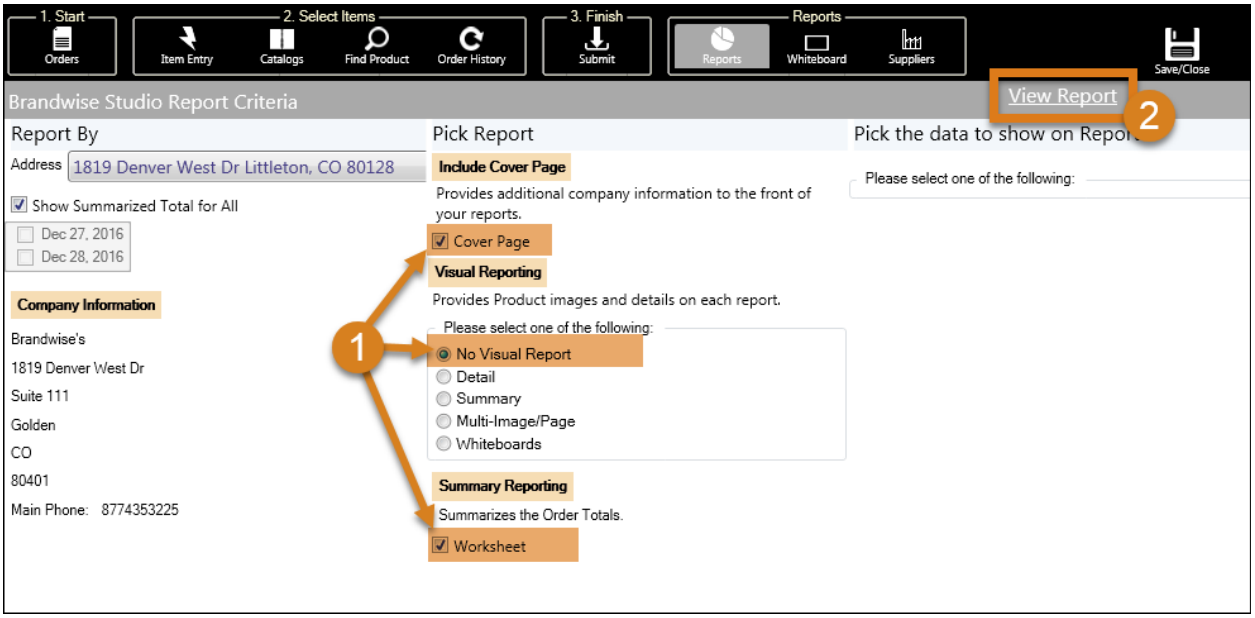
The (1) **Report By** section displays the shipping addresses, ship dates, and the company information. The next sections step through building a report by specifying criteria in the (2) **Pick Report** and (3) **Pick the data to show on Report** sections. The options displayed under **Pick the data to show on Report** change depending on the report type selected under **Visual Reporting** in the **Pick Report** section.

4.5.1 Report Types

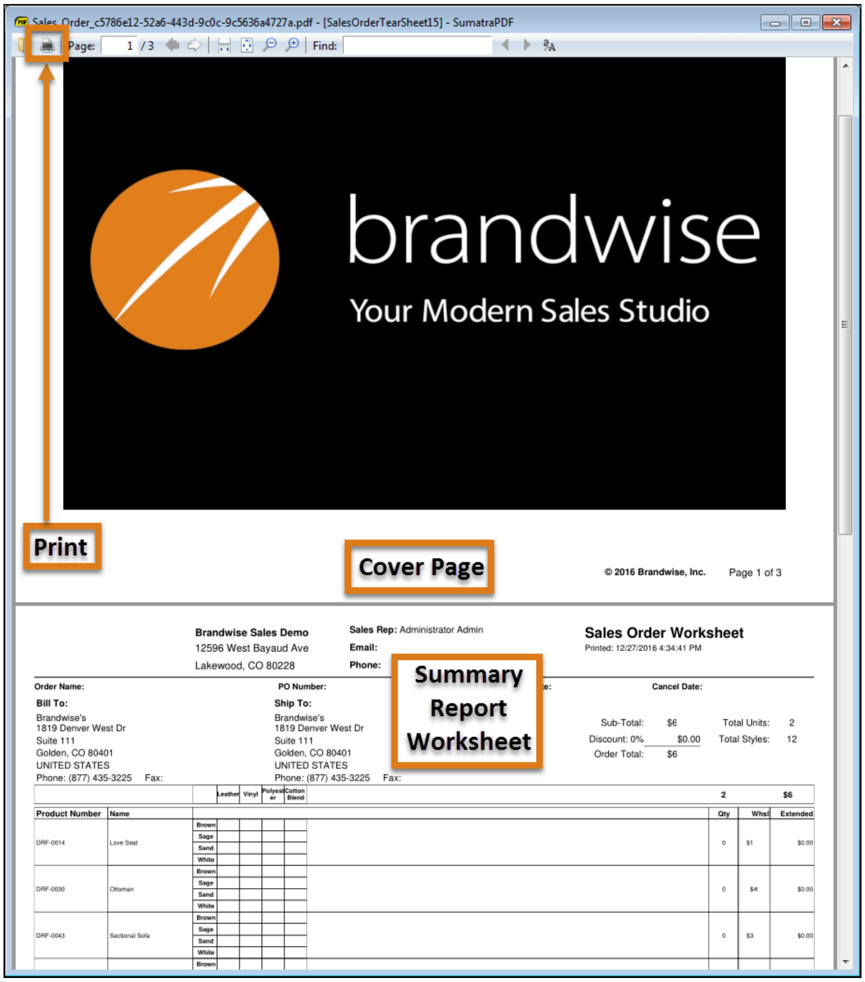
Now that we have configured the **Report By** section, we can begin specifying report criteria in the **Pick Report** section. If your system administrator has configured marketing materials, including a cover page for the company, check **Cover Page** under **Include Cover Page**. This option is unavailable if marketing materials have not been configured. The next sections discuss all of the options under **Visual Reporting**. To report the order totals as a spreadsheet on the report, check **Worksheet** under **Summary Reporting**.

4.5.1.1 No Visual Report

The default report selected under **Visual Reporting** is **Summary**. To begin, select **No Visual Report** instead, as shown below. This option excludes product images and details from the report.



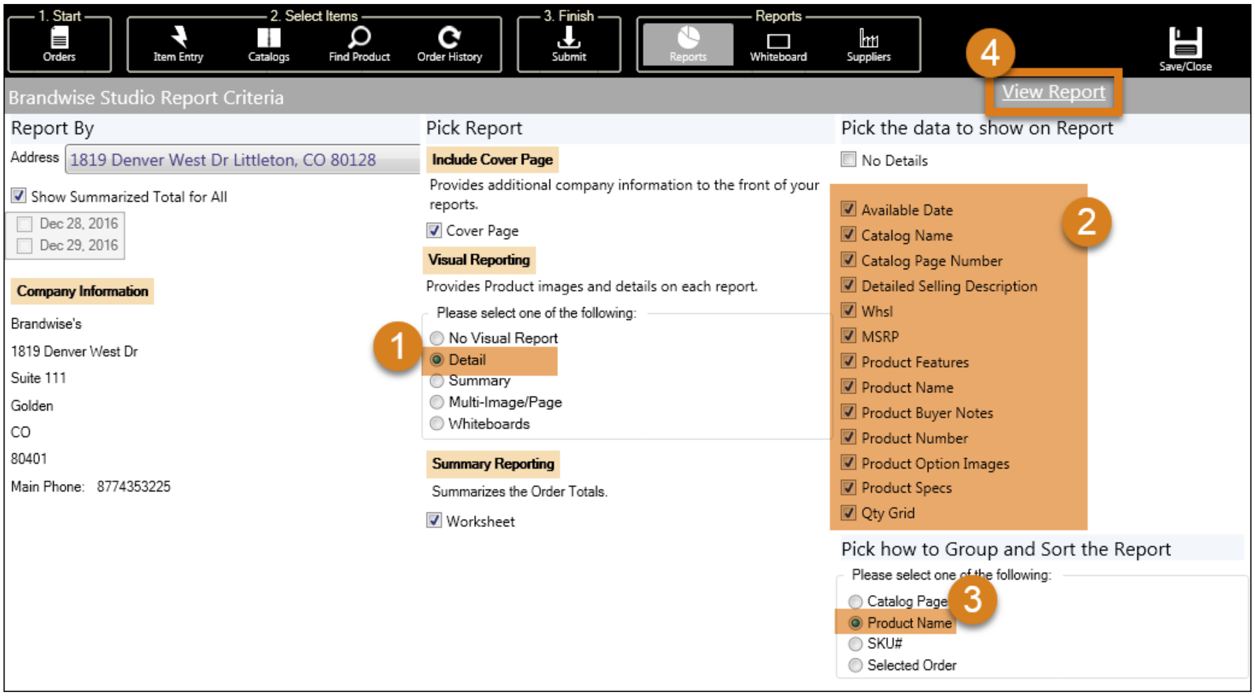
Note that the **Pick the data to show on Report** section is empty if we (1) choose to generate a report without visual reporting. Check **Cover Page** under **Include Cover Page**, and then make sure **Worksheet** is checked under **Summary Reporting**. Finally, (2) click **View Report** to launch a PDF file of the report as shown below.



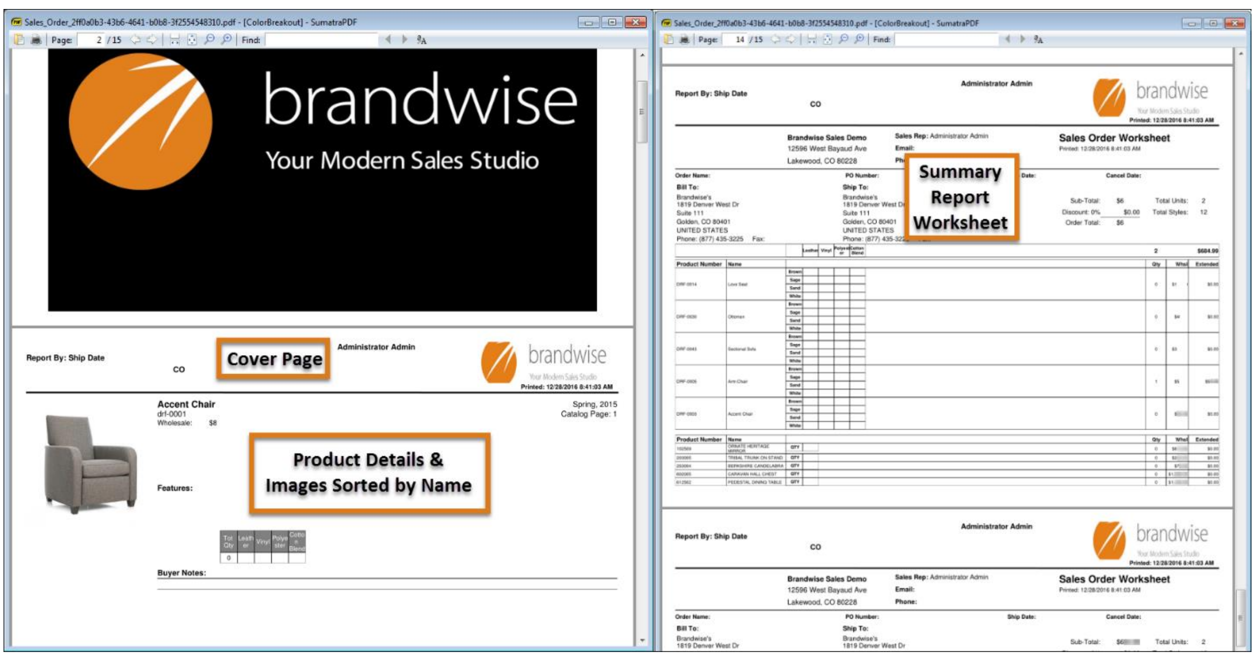
The first page is the cover page, the second and third page is the summary report worksheet, and the fourth page reports the ship dates and the total dollar amount. Additionally, there are no images. If we had not checked **Worksheet**, the generated report would only contain the cover page. Note that you can print the PDF file by clicking the printer icon at the top of the dialog. Next, we will look at the **Detail** report.

4.5.1.2 Detail Report

First, select **Detail** beneath **Visual Reporting**, as shown in step (1) below**.** This option generates report images of each product as well as all of the product's details we selected under **Pick the data to show on Report**.



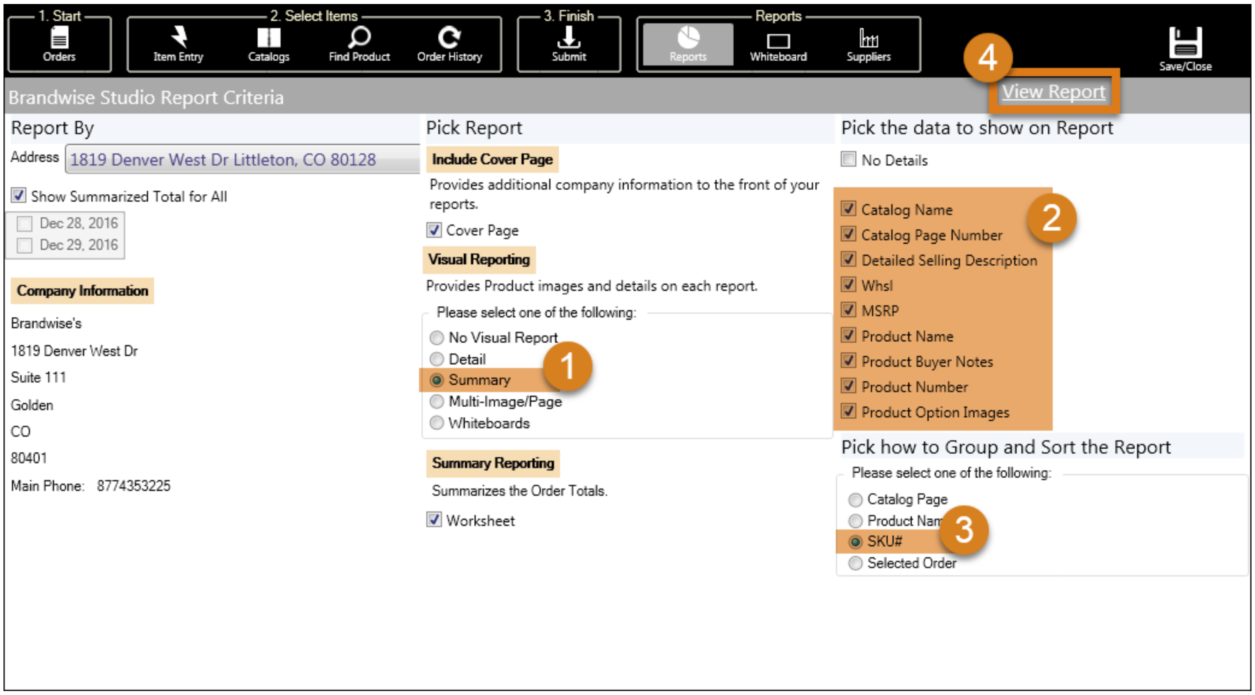
Next, (2) make sure all details on the right are checked. If you check **No Details**, all of the details beneath it are unchecked. Then, (3) select **Product Name** under **Pick how to Group and Sort the Report**. Click **View Report** to (4) launch a PDF file of the report as shown below.



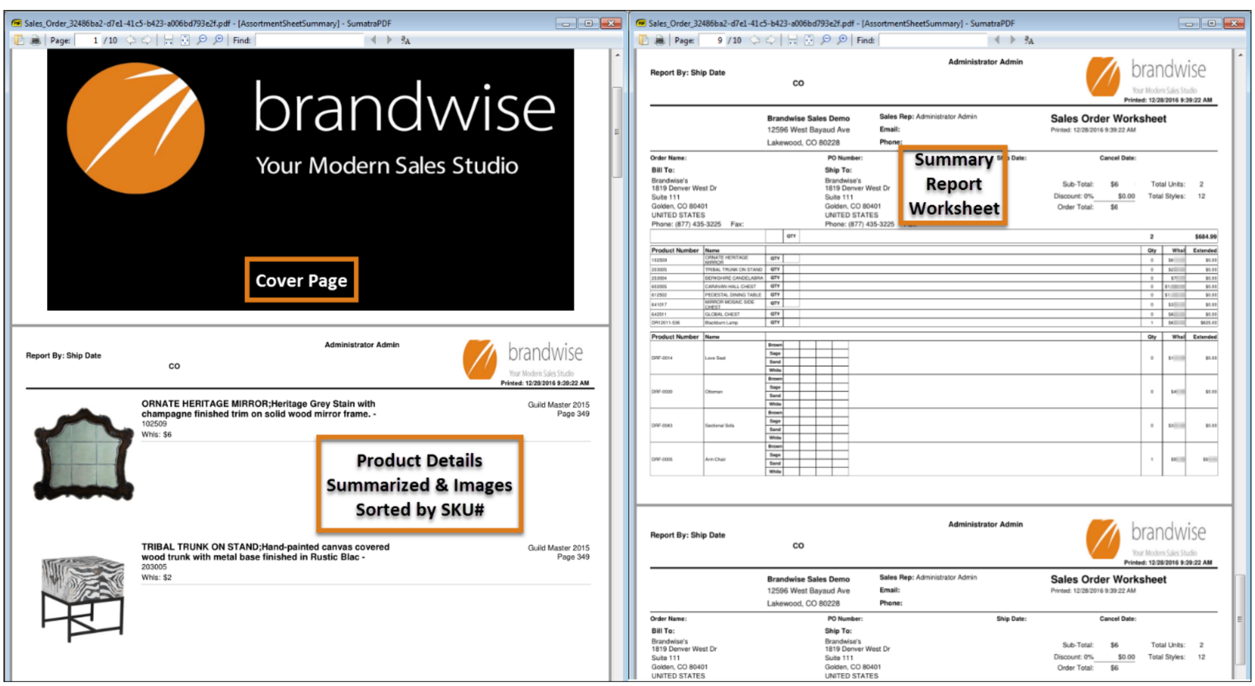
The first page is the cover page, the last is the summary report worksheet, and the remaining pages have individual product images sorted by name, as well as product details. Next, we will look at the **Summary** report.

4.5.1.3 Summary Report

First, (1) select **Summary** beneath **Visual Reporting**, as shown below**.** This option generates a report with individual product images, but has less detailed information.



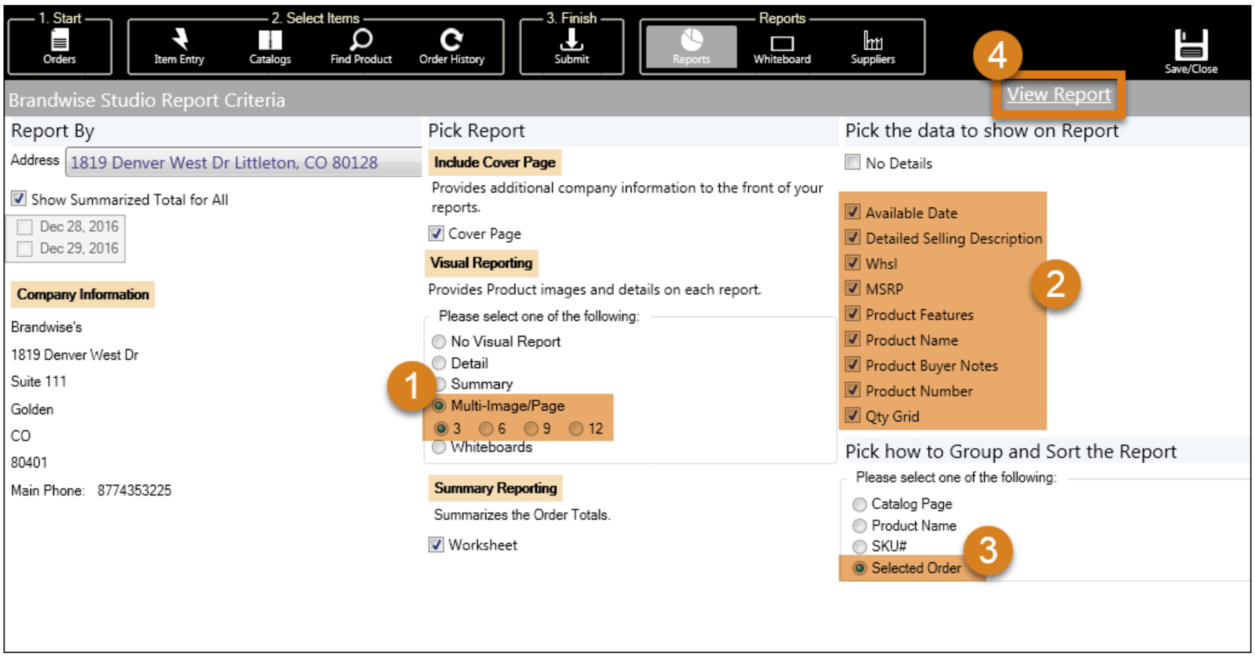
Note that the **Pick the data to show on Report** section does not display as many options as the **Detail** report. Next, (2) make sure all details are selected, and that (3) **SKU#** is selected under **Pick how to Group and Sort the Report**. Finally, (4) click **View Report** to launch a PDF file of the report as shown below.



The first page is the cover page, the last is the summary report worksheet, and the remaining pages have individual product images sorted by **SKU#**, as well as summarized product details. Next, we will look at the **Multi-Image/Page** report.

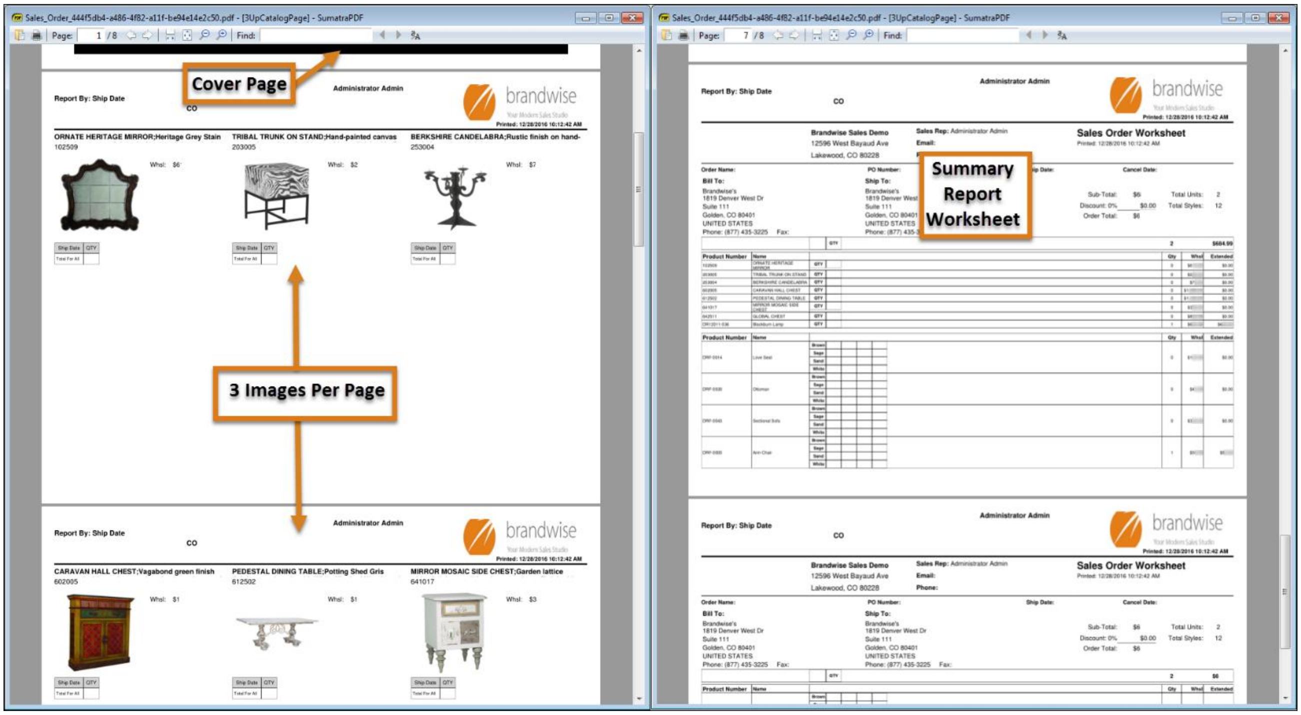
4.5.1.4 Multi-Image/Page Report

First, select **Multi-Image/Page** under **Visual Reporting**, and the value of **3** beneath it, as shown in step (1) below**.** We will explore the other values later. The **Multi-Image/Page** option generates a report with multiple images per page, arranged in a tile view.

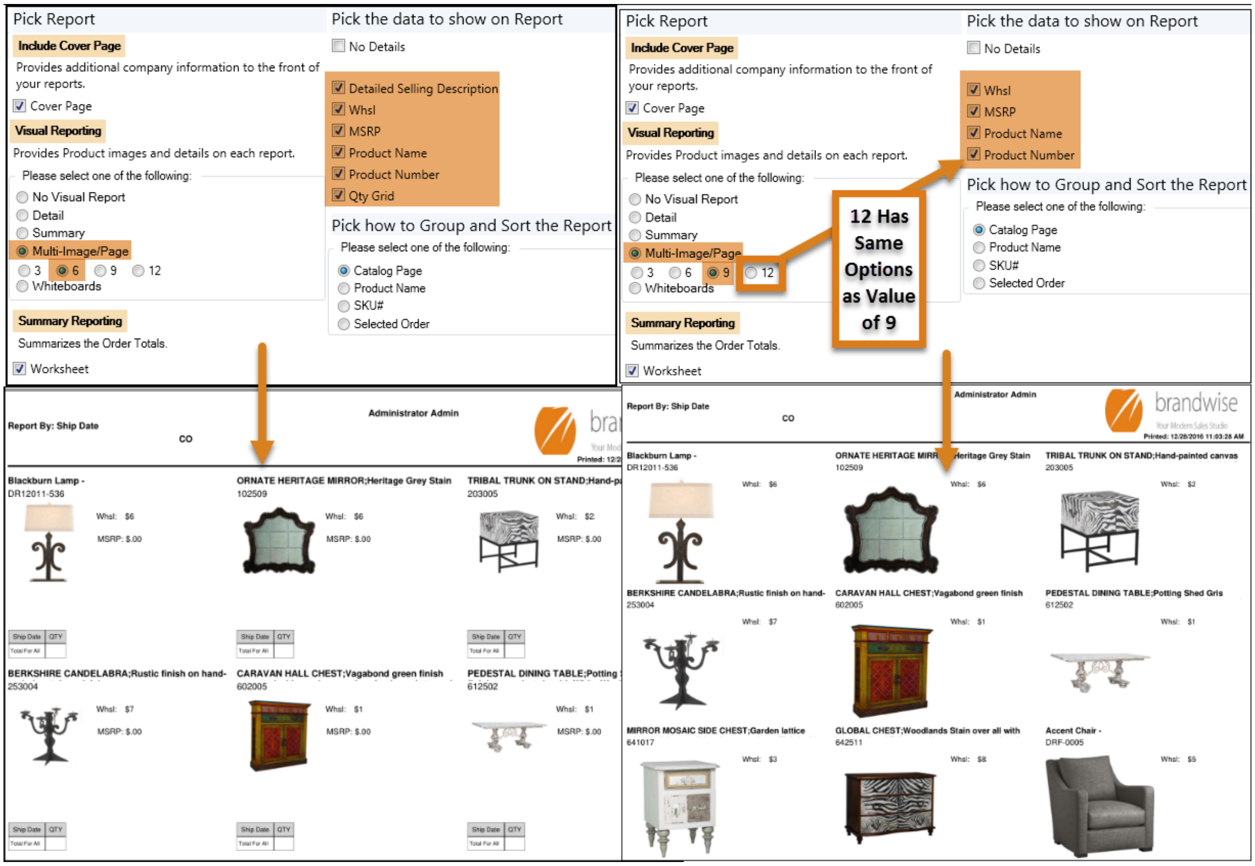


Note the details available under **Pick the data to show on Report**. Next, (2) make sure all details are selected (**Qty Grid** is unselected by default), and that (2) **Selected Order** is selected under **Pick how to Group and Sort the Report**. **Selected Order** only reports results for the selected order on the **Order**

Header page. Finally, (4) click **View Report** to launch a PDF file of the report as shown below.

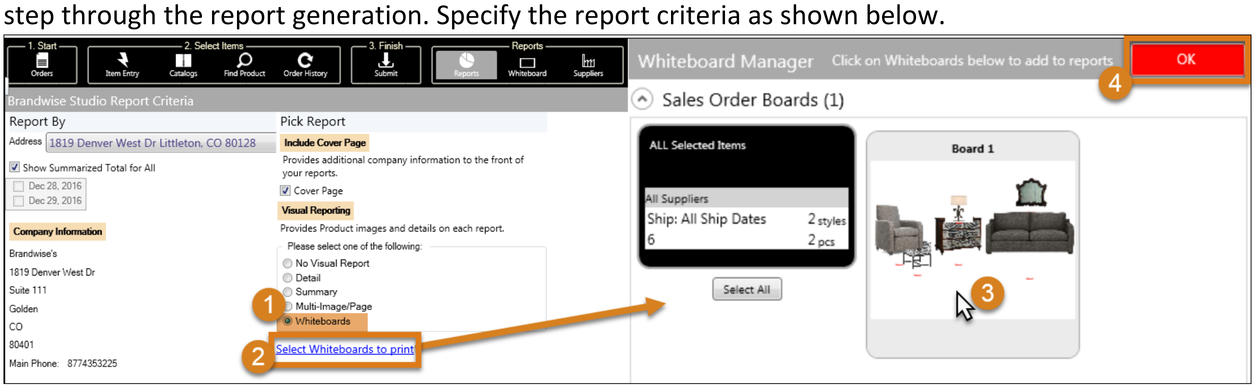


If we select a value of **6** instead of **3**, there are 6 images arranged in a tile view per page. Likewise, if a value of **9** is chosen, there are 9 images arranged in a tile view per page, and so on. However, the greater the value you select, the less details that can be generated on the report because page space becomes an issue as more images are displayed. See examples below.



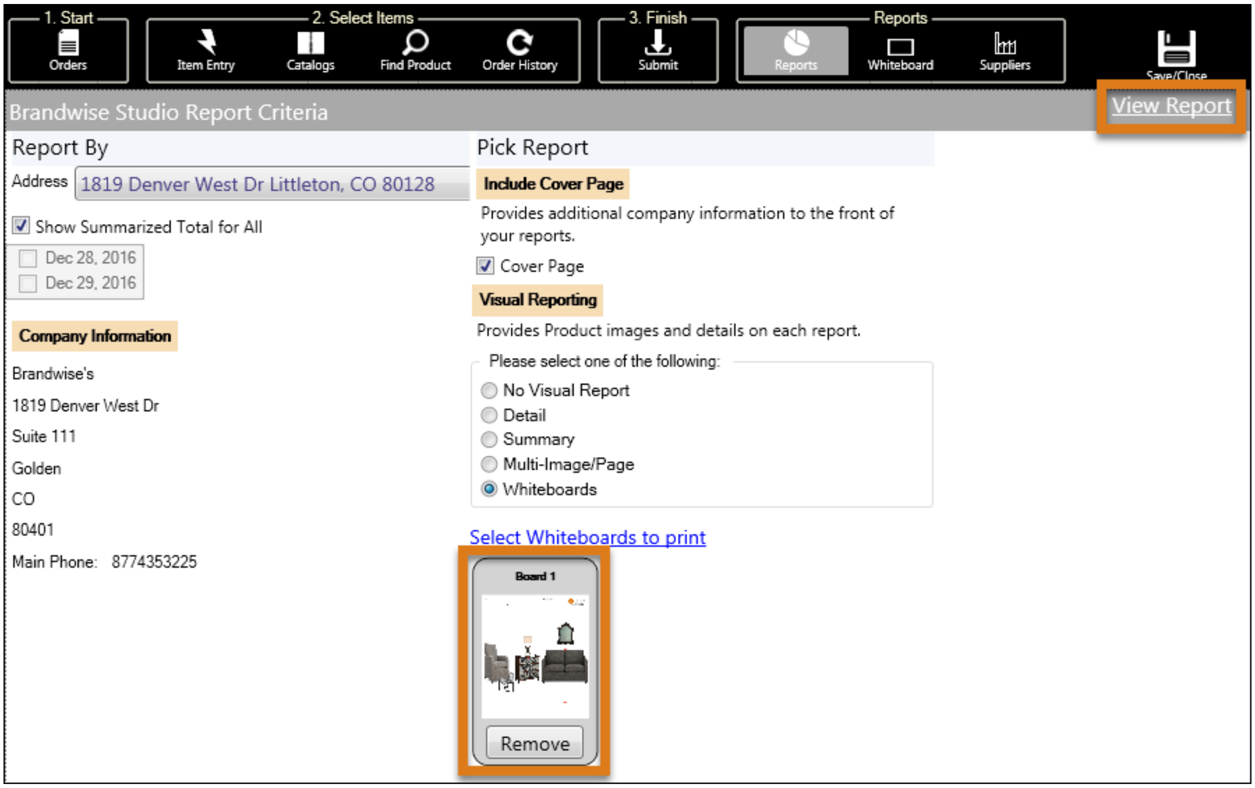
4.5.1.5 Whiteboards Report

The **Whiteboards** visual reporting option is used if there are whiteboards associated with the order (whiteboards are discussed in the next section). Whiteboards serve as custom work spaces for displaying product images, product details, and notes. This order has a whiteboard associated with it, so we will step through the report generation. Specify the report criteria as shown below.

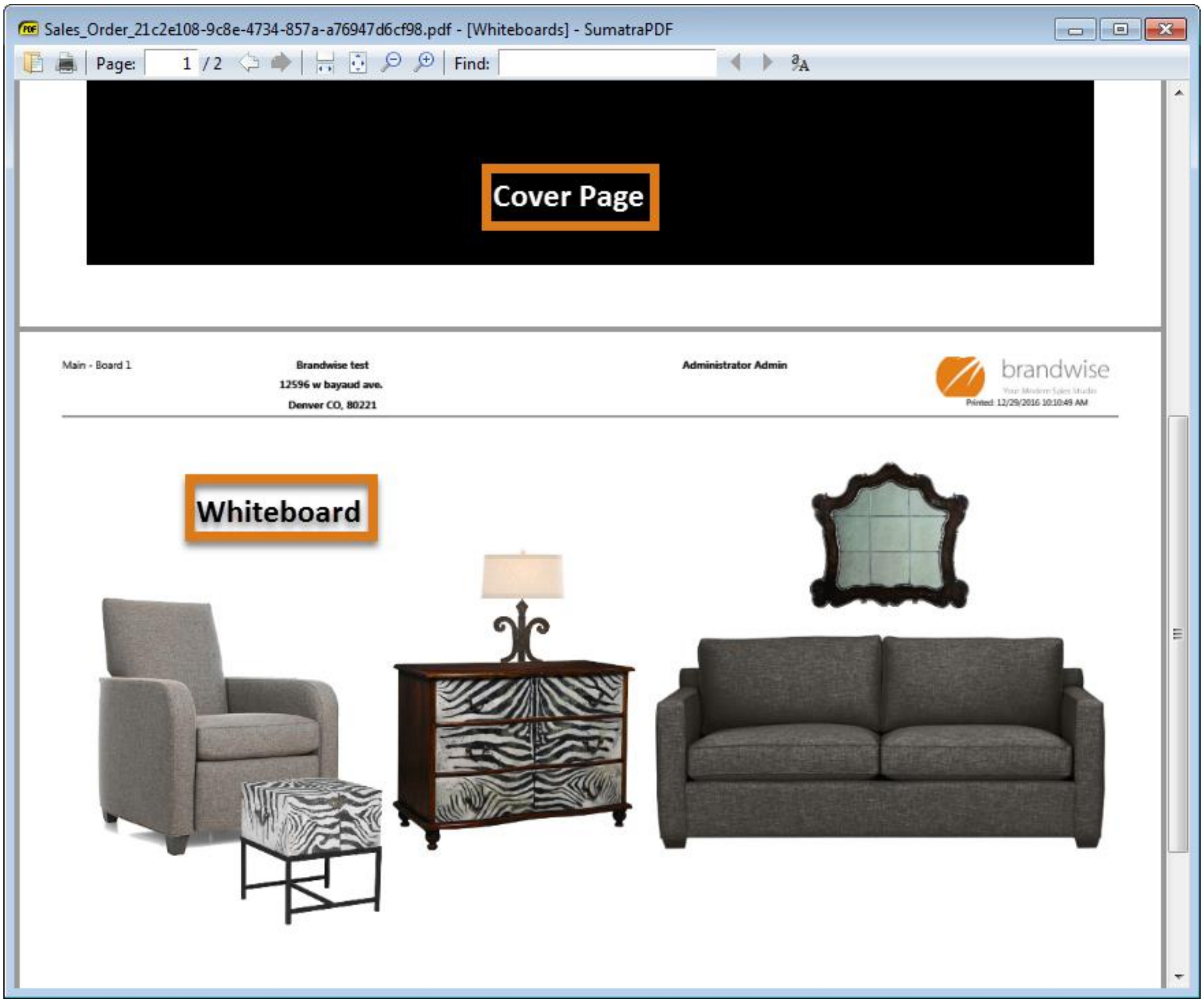


Notice that there are no details included with the report, unless you have configured your whiteboard to display details. Select (1) **Whiteboards** under **Visual Reporting**, and then (2) click Select Whiteboards to Print. Click (3) an existing board, and then (4) click **OK**.

The board image is placed below [Select Whiteboards to Print] on the report criteria page, as shown below.



Next, click **View Report**. This only prints the cover page and the whiteboard, as shown below.



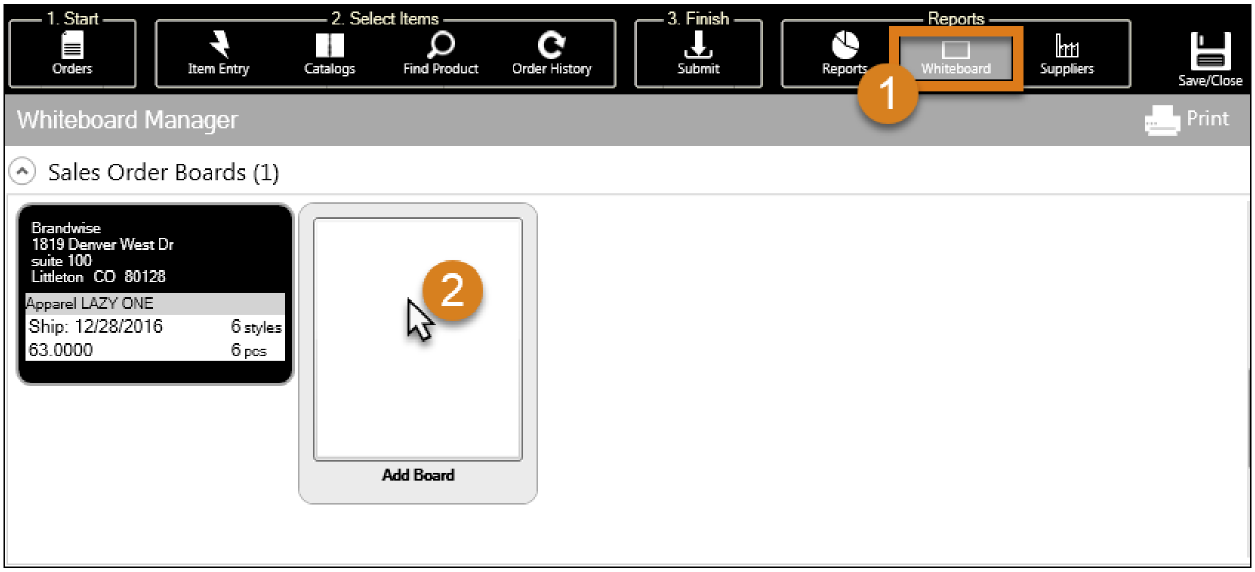
Close the report preview to return to the report criteria page. Next, we will explore the Whiteboards utility.

4.6 Whiteboard

As stated above, whiteboards serve as custom work spaces for displaying product images, product details, and notes. You can use this tool to create dynamic visual aids for sales orders or proposals. In the last section, we looked at a whiteboard with home goods. Next, we will generate a whiteboard with apparel.

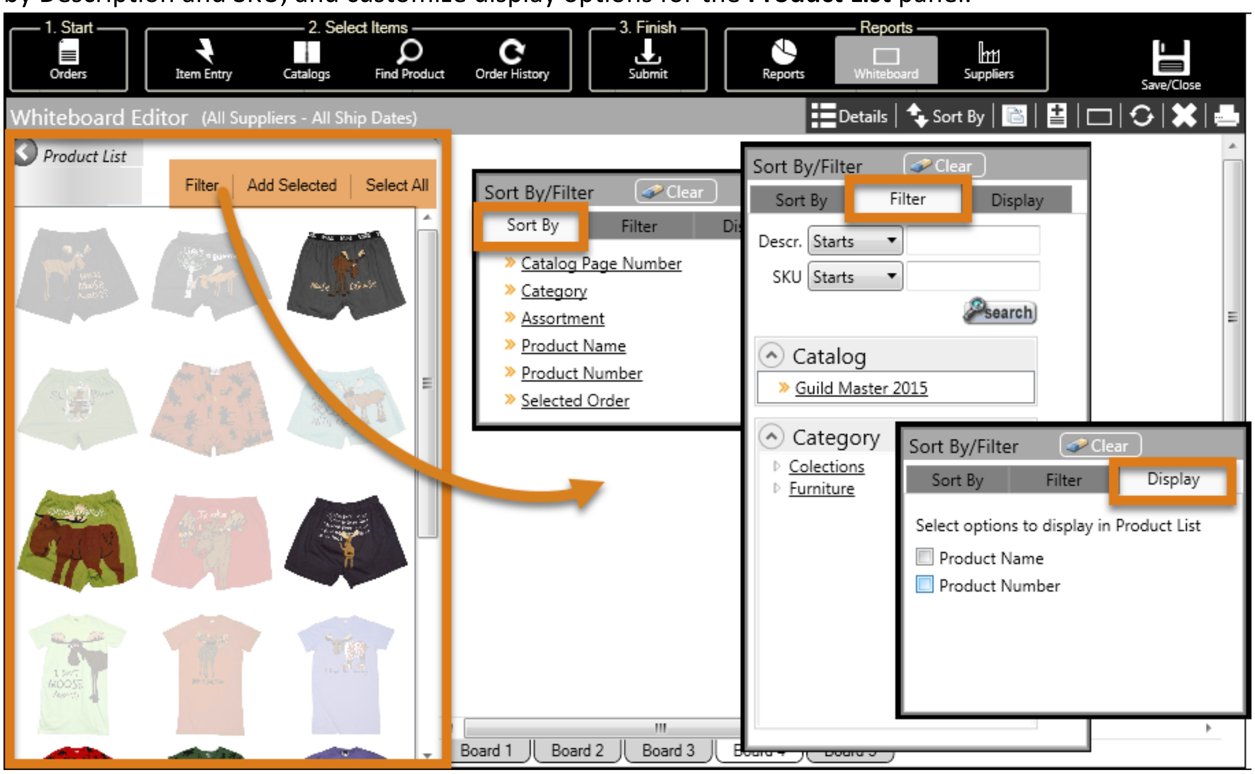
To launch the **Whiteboard Manager**, click **Whiteboard** on the main menu as shown in step (1) below. Then, (2) click the blank board next to an order, as shown below, to open a new board in the

Whiteboard Editor.



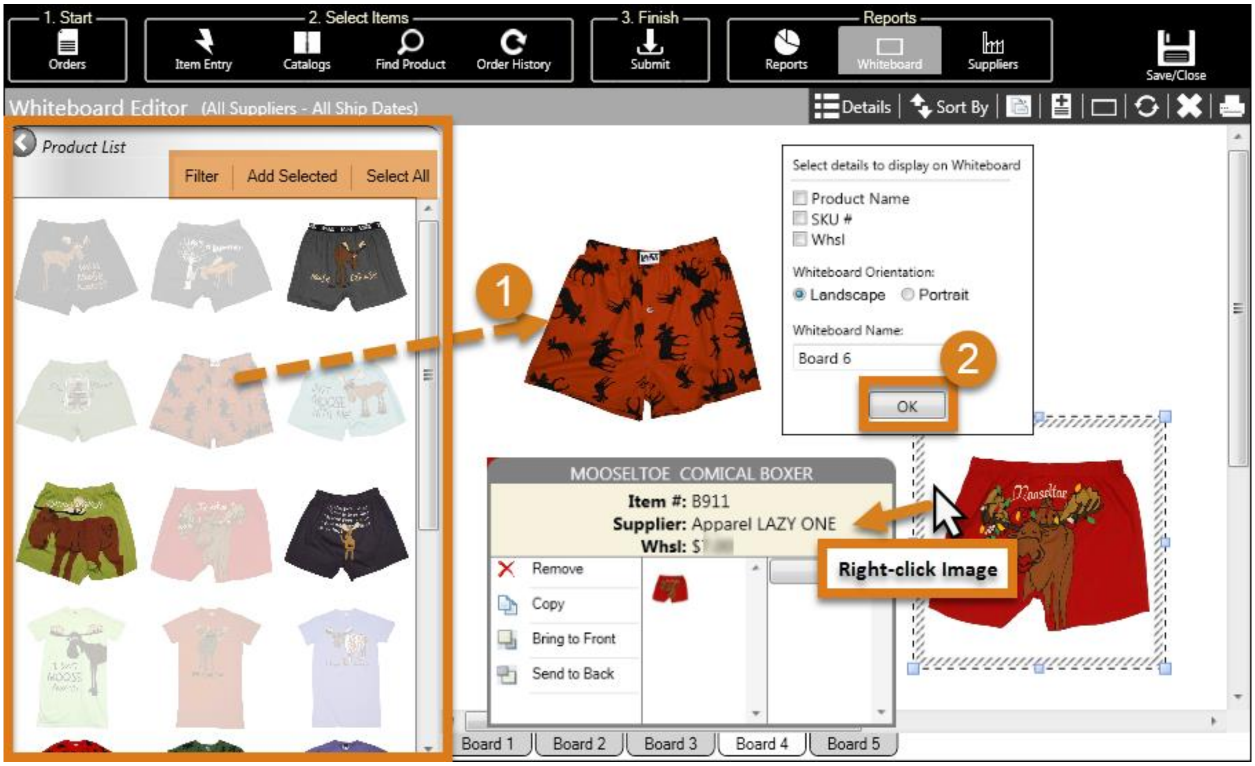
4.6.1 Product List

As shown below, the **Product List** panel displays images of products in the order. Click **Filter** at the top of the panel to launch the **Sort By/Filter** dialog. You can sort the data in a variety of ways, filter the results by Description and SKU, and customize display options for the **Product List** panel.



4.6.2 Add Products

To add a product image to the whiteboard as shown below, (1) left-drag the image to the space on the right, or click an image to select it, and then click **Add Selected**. Click multiple images to add them at once. To deselect an image in the **Product List** panel, click it once more.



When images are added for the first time, you are (2) prompted to select the product details to display with the images. You can also change the whiteboard orientation and name on this dialog. However, the dialog only appears once when you add the first image. You can change the settings by using the **Details** and **Change Whiteboard Orientation** menu options discussed in the next section.

To move an image within the whiteboard, click so a border displays around it, and then drag to the preferred location. Right-click the selected image to remove, copy or arrange the image to be in front of or behind other images on the whiteboard. Remove the image from the whiteboard by clicking it and pressing **Delete**. To remove multiple images at once, use your mouse to draw a circle around the images to select them, and then press **Delete**, or click the delete icon, which is discussed next.

Below is an example of a populated whiteboard. The images are in .png format, which is required if you want to use transparent images and overlay them.

4.6.3 Whiteboard Menu

Notice the whiteboard menu displayed above the board space.

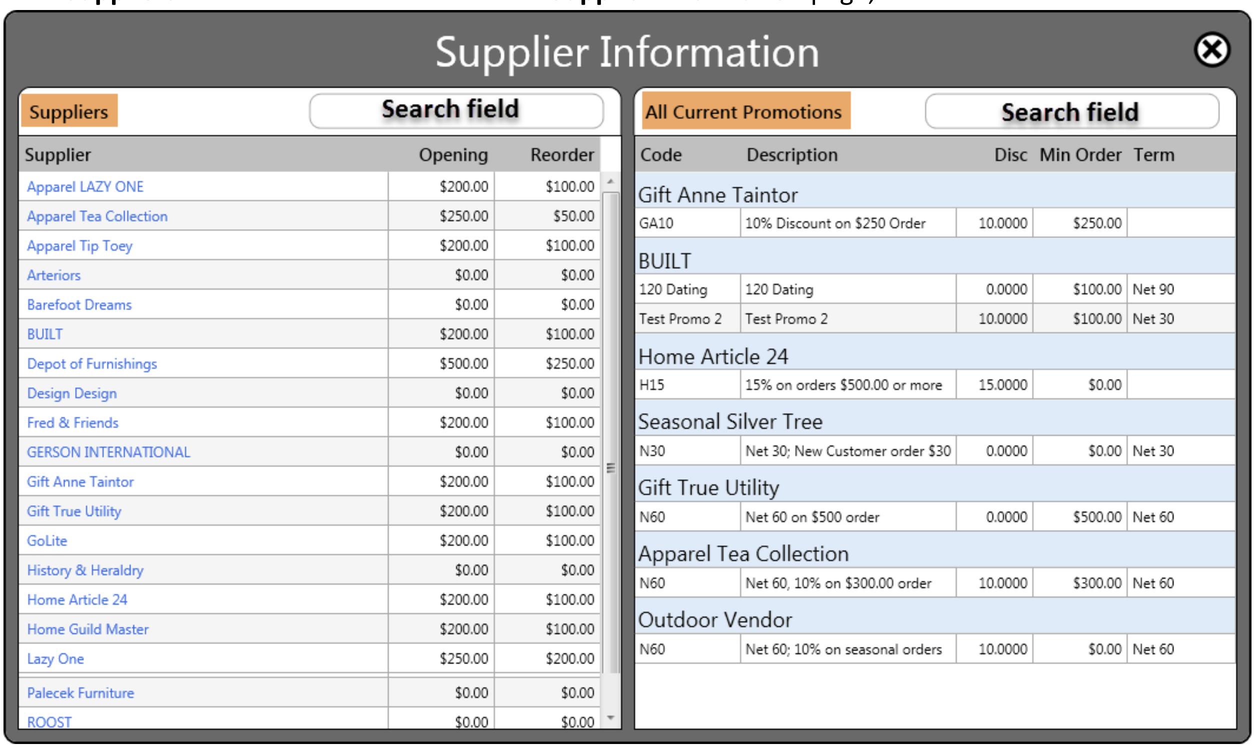
The menu options are listed below.

1) **Details** adds or removes the displayed product information.
2) **Sort By** provides various options for sorting images, such as catalog page or product name.
3) **Change Whiteboard Orientation** displays the board space in landscape or portrait view.
4) **Add Notes** launches a dialog with a comments field, and provides basic text formatting options. To move a note on the board, click it and then left-drag to the preferred location. To remove or edit a note, click it and then right-click to remove or edit.

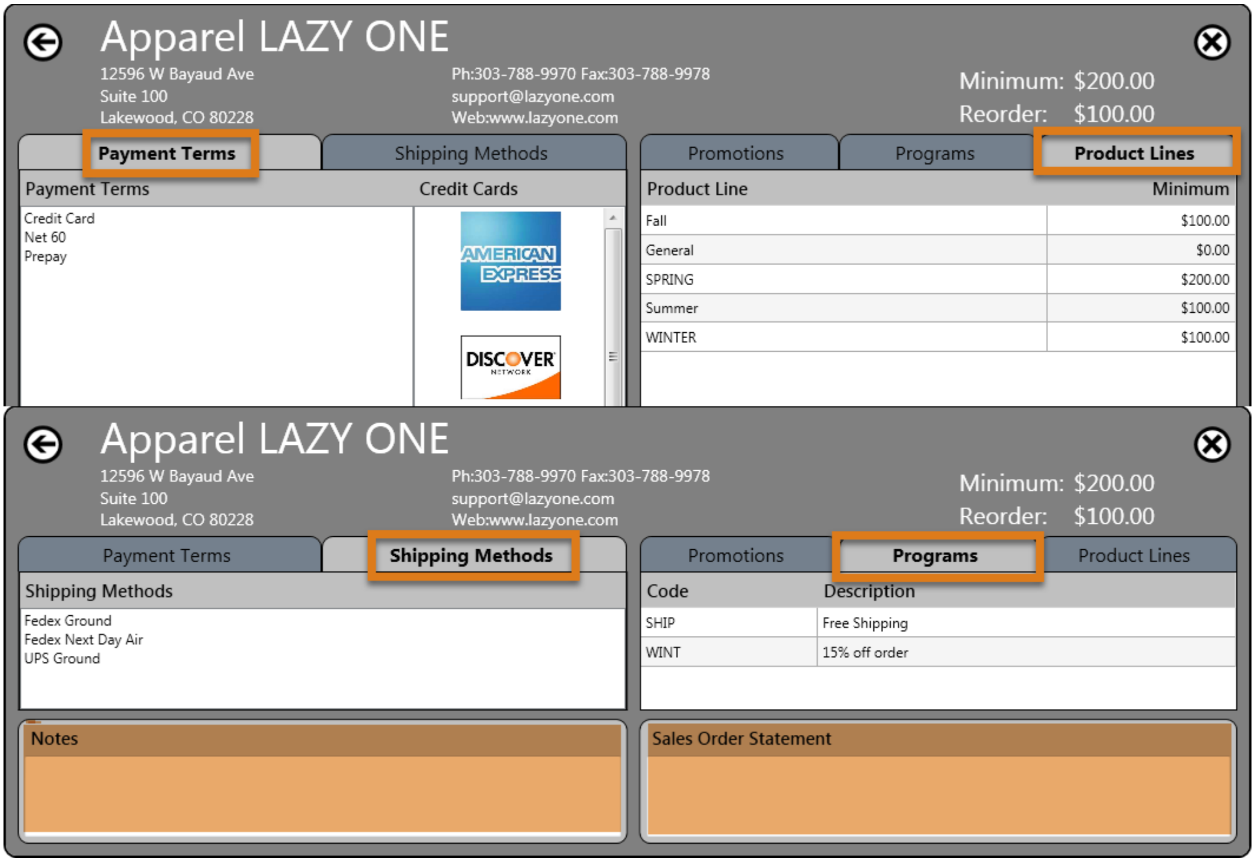
5) **Add New Board** creates a new tab below the board space to store additional images and notes for the same order. If you have multiple tabs, you can easily tell the difference between them by renaming the tab. Right-click a tab and select **Rename**.
6) **Clear Board** clears all items from the current tab selected below the board space.
7) **Delete Board** removes the current tab selected from the whiteboard.
8) **Print** provides the option to print all or individual whiteboards.

4.7 Suppliers

Click **Suppliers** on the main menu to view the **Supplier Information** page, as shown below.



You can use the search fields above each table to find a supplier or current promotion. Click a supplier in the left table to launch a page with the supplier's location and contact information, as shown below.



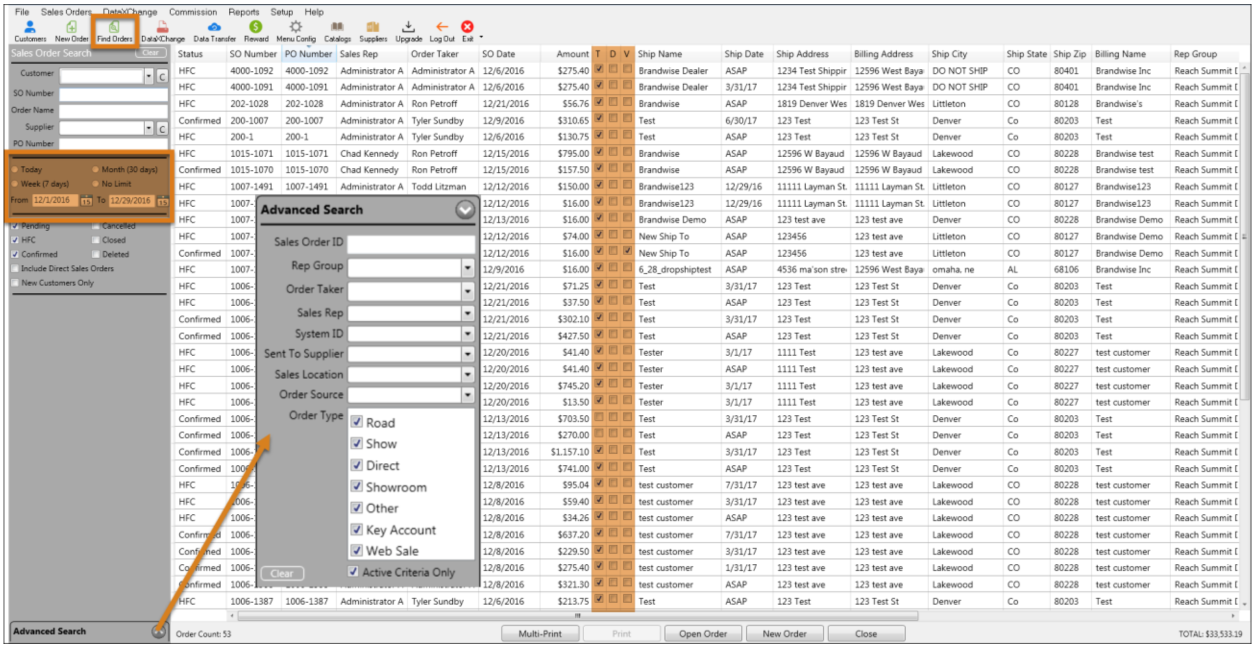
Additionally, there are sections for payment terms, shipping methods, notes, promotions, programs, product lines, and a sales order statement. The notes are internal, while the sales order statement displays on every generated sales order. This supplier does not have any promotions, so the **Promotions** tab is empty.

*To browse supplier information and current promotions without generating a sales order, click **Suppliers** on the main icons toolbar on the **Welcome** screen.*

Click the left arrow in the top-left of the screen to return to the **Supplier Information** page, or click the X in the top-right corner of the screen to close the dialog to return to the **Whiteboard Editor**. Then, click **Save/Close** to return to the **Welcome** screen.

4.8 Find Orders

Click **Find Orders** on the main icons toolbar to launch the **Sales Order Search** page, as shown below.



In the example above, the PC is in **Show** mode, and therefore the results returned are show orders. If you want to see a customer's complete sales history, including road orders, you can search for the customer by name and adjust the date range. One of the most important tips to remember on this page is that the default date on the **Sales Order Search** panel is set to **Today**. Make sure to adjust the date options to see any orders generated before today. Make sure the preferred order statuses are checked, optionally define additional search criteria in the **Sales Order Search** panel, and then press **Enter**. The columns in the search table can be rearranged by dragging the column headers to the preferred position. The data in the table can be sorted by clicking a column header. Click the **Advanced Search** tab at the bottom of the **Sales Order Search** panel for additional search options. Keep in mind that the date options are always enforced, except when searching by **Sales Order ID**.

Remember that the orders you see on this page depends on the mode your PC is in. If the PC is in show mode and your system administrator has given you permission, you can see all show orders from all sales reps. If the PC is in road mode, you can only see orders you have generated. See Order Flow for more information.

You might have to drag the horizontal scroll bar to the right in order to see the three column headers labelled **T**, **D**, and **V**. The headers are explained in the table below.

T	Transferred to Home Office
D	Direct Order
V	Sent to Vendor

The **Transferred to Home Office** and **Sent to Vendor** fields are useful because at a glance, you know if the order has been sent to the vendor, and subsequently to the home office. An order can be sent to the home office, but not to the vendor, if the order has a status of **Pending** or **HFC**. A **Direct Order** refers to a summary sales order (see section Summary Sales Order) or an order that was imported to the database.

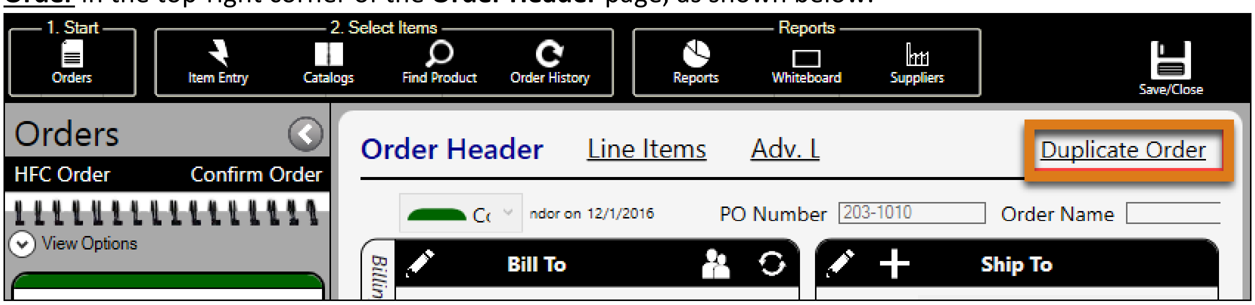
To sort the data in the results table by column headers, click the header name. To print or export the multiple orders displayed in the results table to Excel, click **Multi-Print** and check the orders to print. To print one order at a time, highlight an order in the results table and click **Print**. When **New Order** is clicked, the customer search page launches. Click **Close** to return to the **Welcome** screen.

4.8.1 Edit/Duplicate Sales Order

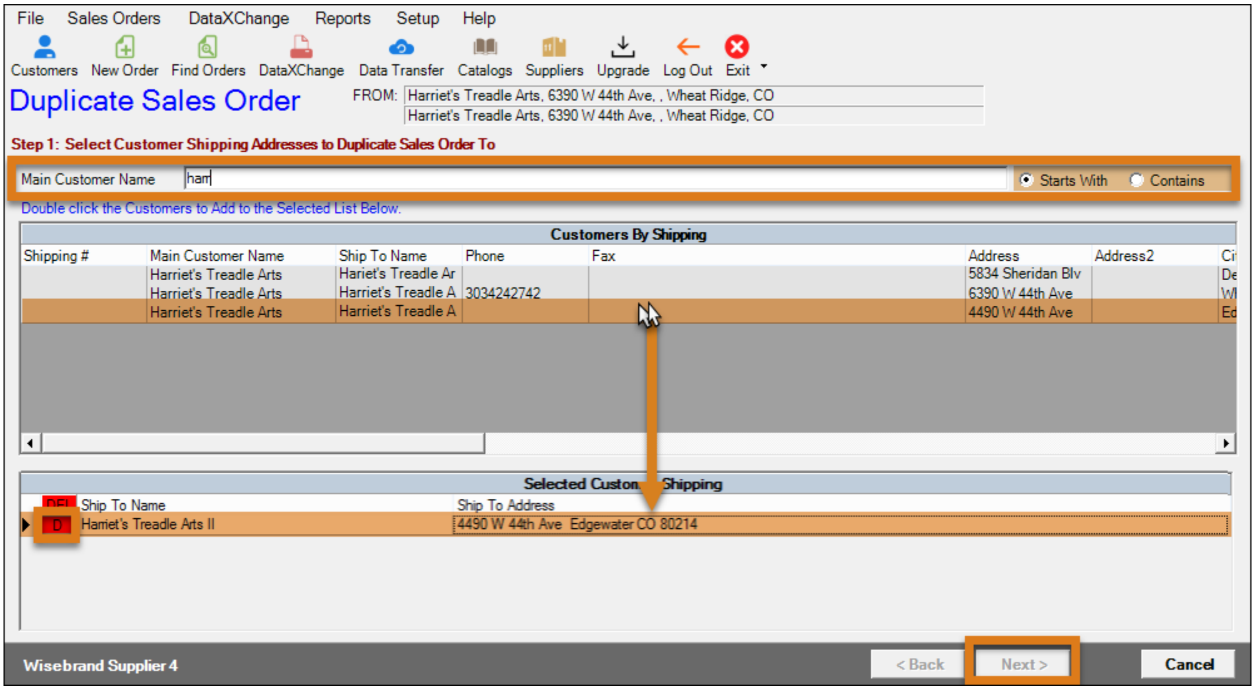
Changes made in a sales order are automatically saved, and an order does not need to be re-confirmed if the status is already set to confirmed.

If changes are made to an order after it has already been sent to the supplier, you need to inform the supplier. Changes made after the order is sent are never automatically sent to the supplier. Once an order status has been set to HFC or Confirmed, it cannot be deleted. However, the status can be changed to Canceled. Canceled orders transmit to the home office, but not to the supplier.

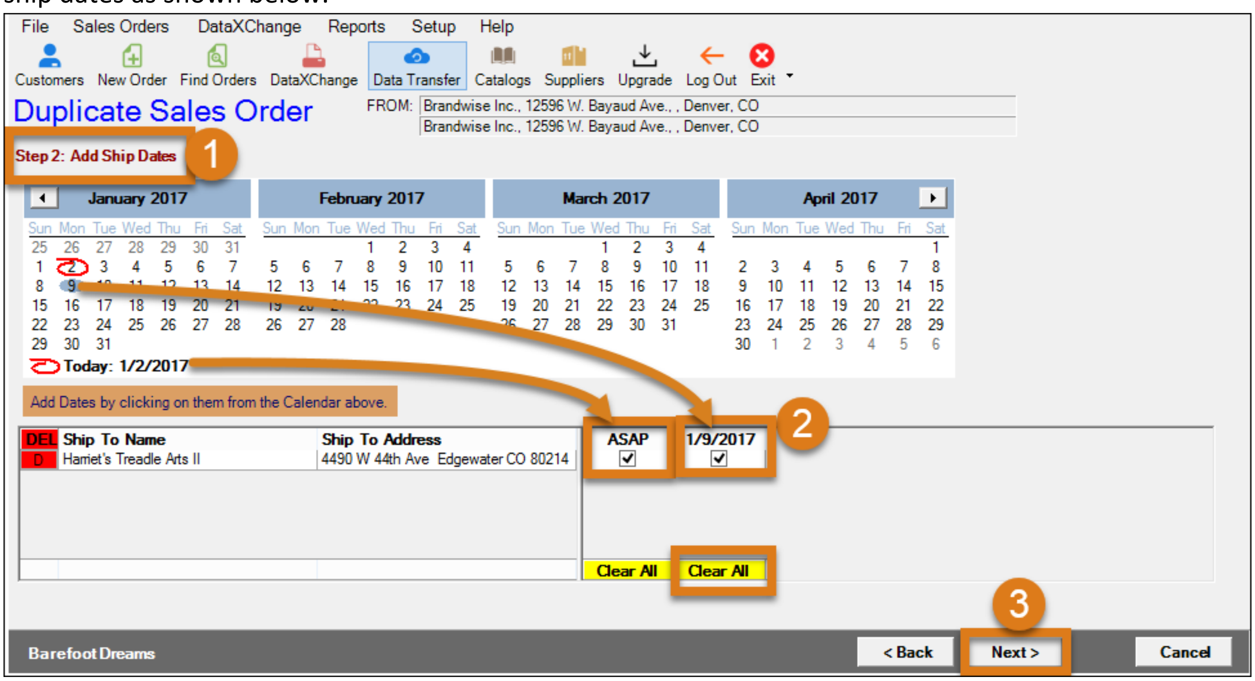
To duplicate an order, it must have a status of HFC or Confirmed. Open the order and click **Duplicate Order** in the top-right corner of the **Order Header** page, as shown below.



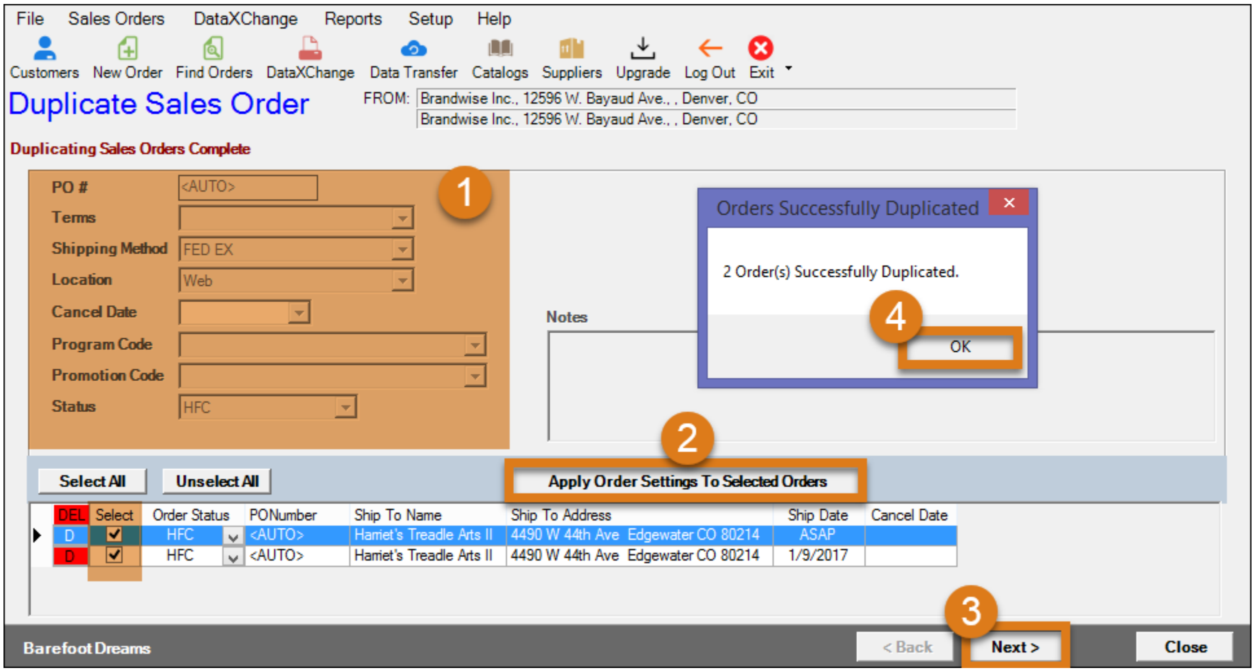
Then, begin typing a company name in the **Main Customer Name** field.



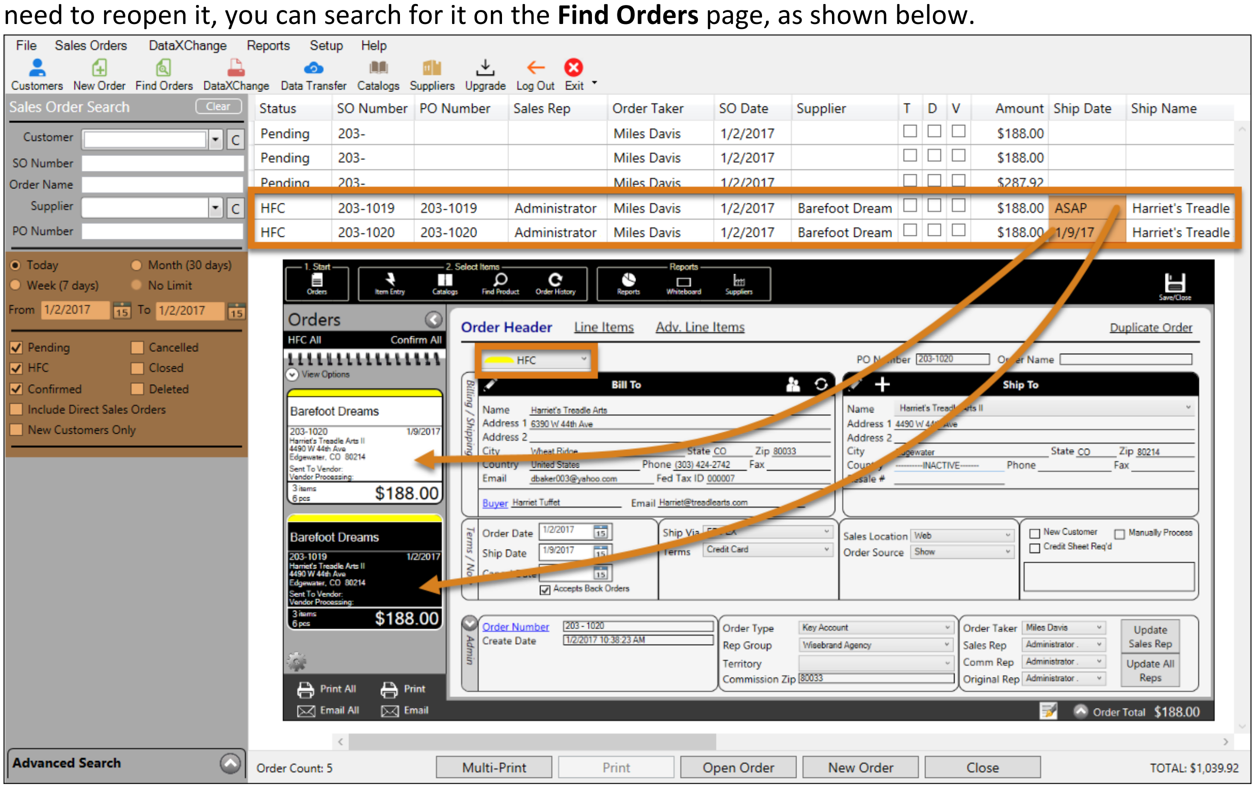
Results display in the **Customers By Shipping** table. Double-click a customer result to move it to the **Selected Customer Shipping** table. To remove it from the table, click the red **D** button. Click **Next** to add ship dates as shown below.



This dialog displays more months on the page as the window is expanded horizontally. Click (1) a ship date to add it to the order, (2) uncheck a ship date to remove it from the order, or click **Clear All**. Once ship dates are defined, (3) click **Next** to finalize the duplicated orders.



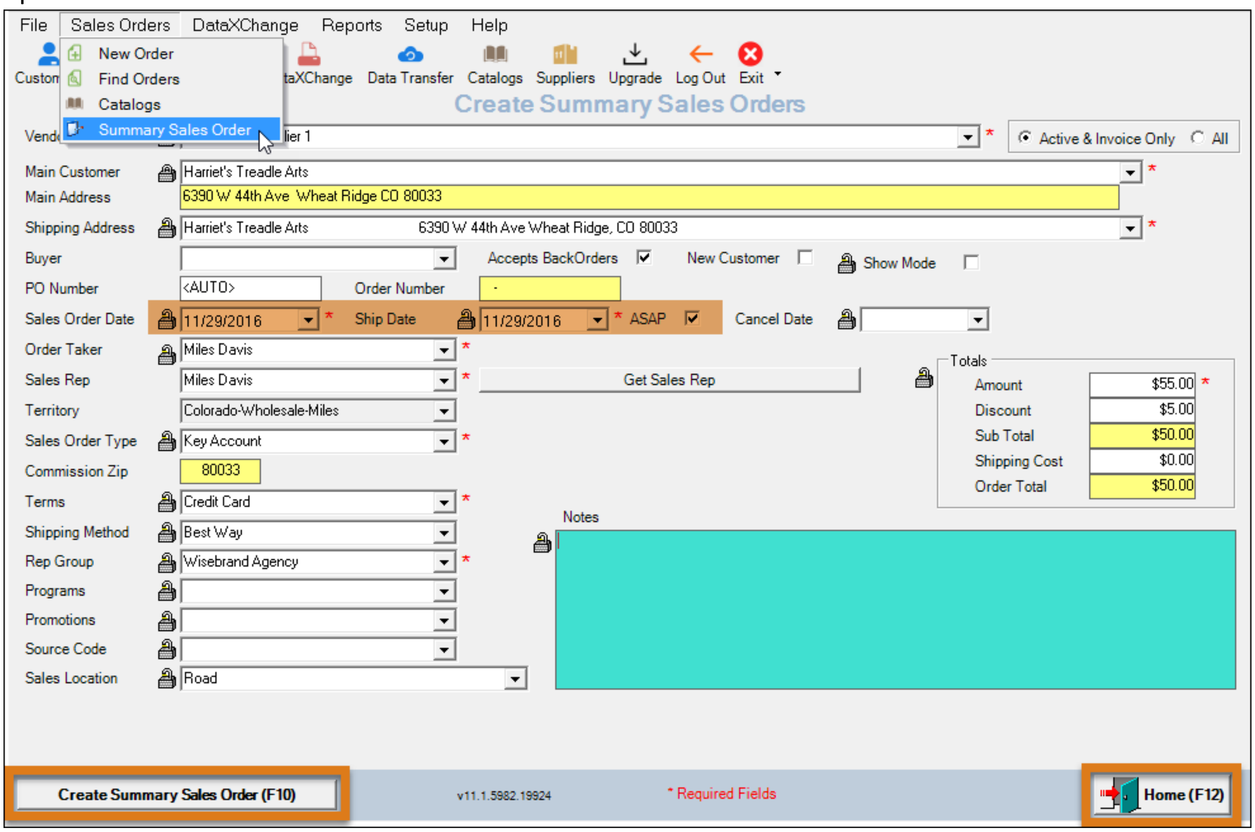
Two orders are listed in the bottom table because two different ship dates were selected on the previous page. If you decide to make any changes (1) to the order details (shaded in orange above), click (2) **Apply Order Settings To Selected Orders** to commit the changes to orders that are checked in the bottom table. Click (3) **Next** to proceed with duplicating the order, and (4) click **OK** on the confirmation dialog to finish. The duplicated order automatically opens after clicking **OK**. If you close the order and need to reopen it, you can search for it on the **Find Orders** page, as shown below.



4.9 Summary Sales Order

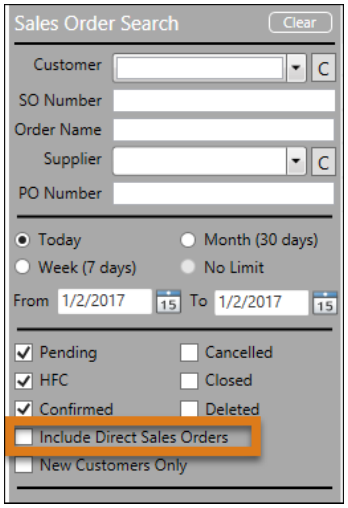
A Summary Sales Order is useful if an order has already been placed with the vendor directly (outside of Play), and you want to create a record of that order in the system. They are good for a high level glance at dollar amounts, but are not the right tool to use if you want item history saved because you cannot enter line items for a summary sales order. This prevents having to key-in line items before the order is reflected in the database, but it also means the item history is missing. If you want the line item detail, which is recommended for bookkeeping purposes, you can enter the order and mark it as manually sent to the supplier instead of creating a summary sales order. This prevents another order from being sent to the supplier, but preserves the item history in your system. To do this, check the **Manually Process** box on the new sales order header, and then mark as sent to the supplier using the **DataXChange** utility. The next section discusses the **DataXChange** utility in detail.

As shown below, click **Sales Orders** on the main menu toolbar and then click **Summary Sales Order**. Depending on the permissions given to you by your system administrator, you may or may not see this option.



Define criteria for the summary sales order, noting the required fields flagged by an asterisk (*). The **Sales Location** should automatically populate, but if it does not, make sure to select a location. If you want to generate multiple summary sales orders using the same criteria, click the lock next to fields to save the current settings for the next summary sales order. After search criteria is defined, you must click **Create Summary Sales Order** to save the information and generate the order. The order is automatically confirmed and sent to the vendor. The order is listed on the **Welcome** screen in the **Orders Last 7 Days** table, or you can search for it on the **Find Orders** page. If you search from the **Find**

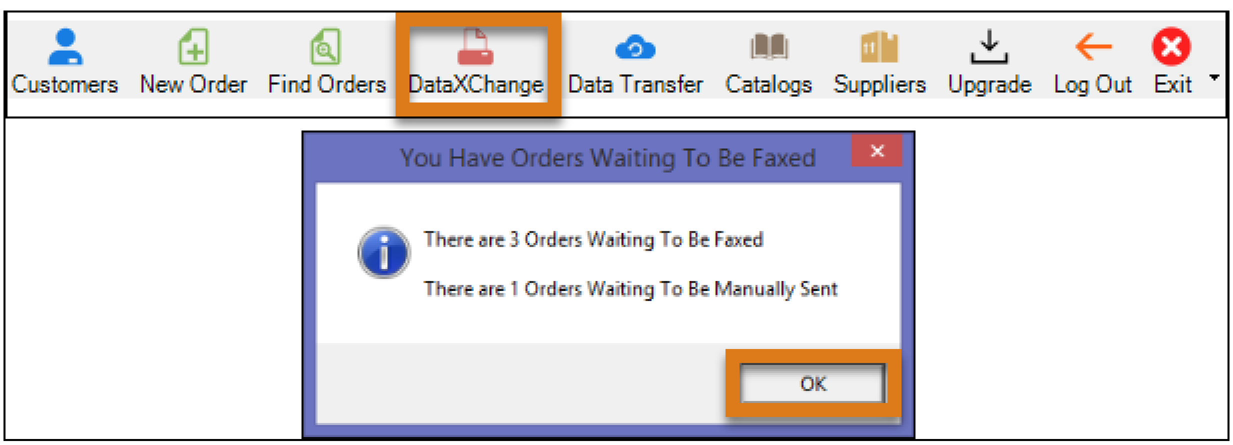
Orders page, make sure to check the **Include Direct Sales Orders** box in the order status section as shown in the image below, because it is unchecked by default.



Click **Home** to return to the **Welcome** screen.

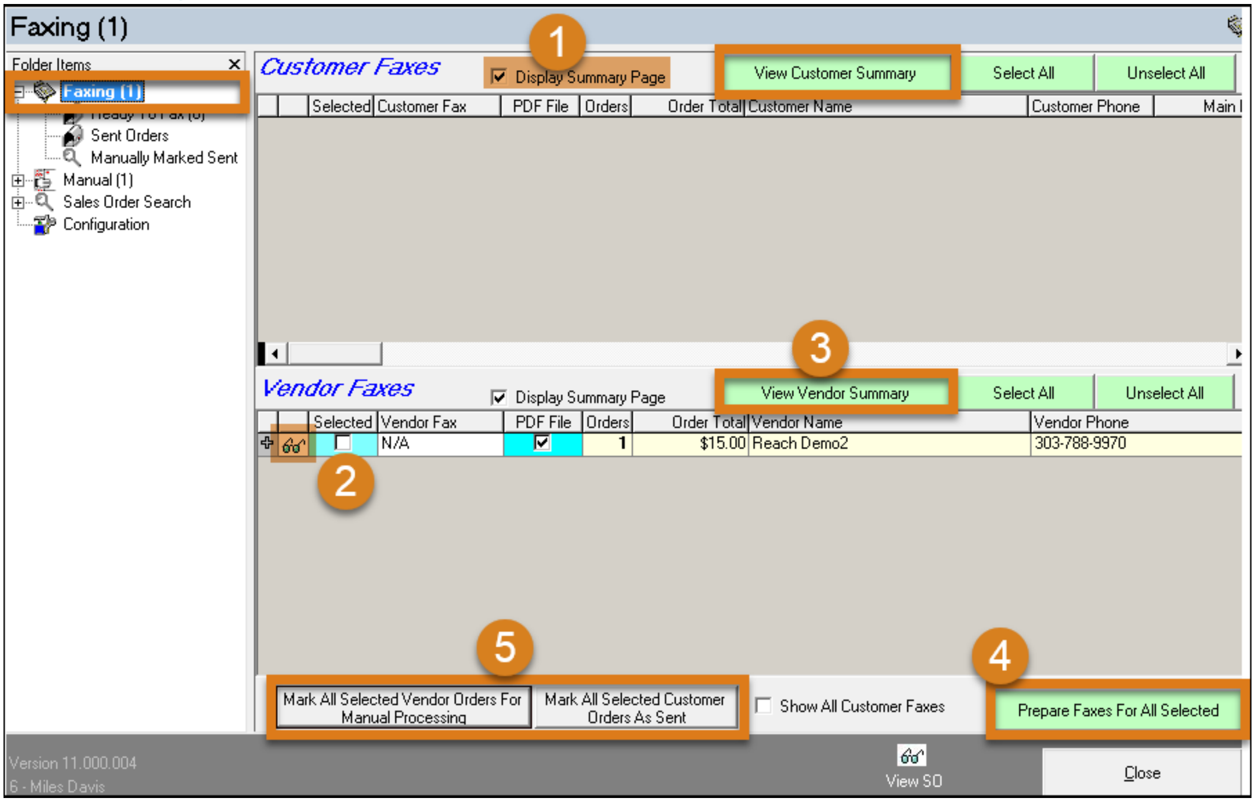
5 DataXChange

If a vendor does not receive orders electronically through the Brandwise Stream service, you can use the **DataXChange** utility to fax or print orders. Keep in mind that no credit card information is sent. Credit card information is only sent if the vendor receives orders electronically through Stream or StreamLite. Click **DataXChange** on the main icons toolbar to launch the Data Exchange Manager. An initial dialog reports the number of faxes waiting in the queue. Click **OK** to proceed. This is only a message, and clicking **OK** <u>does not</u> send any orders.



Next, the **DataXChange** utility launches, as shown below.

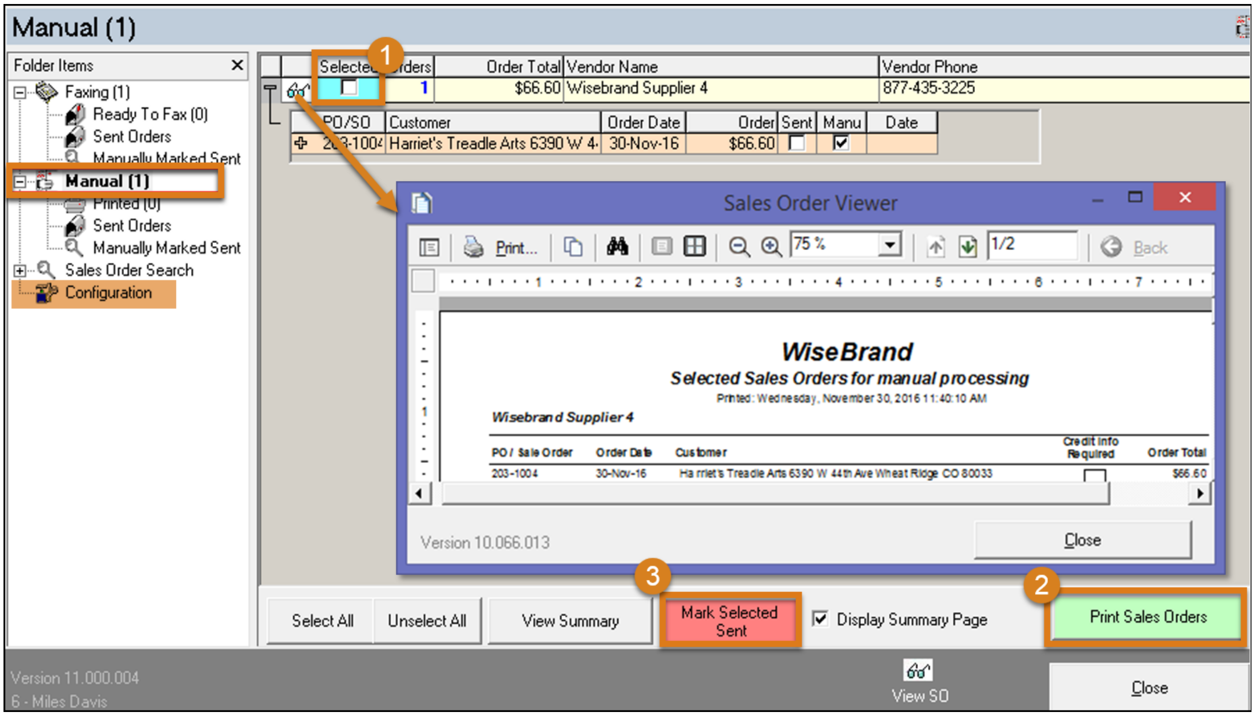
5.1 Faxing



Check (1) **Display Summary Page** to preview the fax before it is sent. Click the plus icon next to each row item to see additional details about the item. Click the glasses icon to view the sales order associated with the item. Check (2) the box next to row items to select them for faxing and click (3) **View Customer Summary** or **View Vendor Summary** to view and print a report of the selected items. Click (4) **Prepare Faxes For All Selected** to proceed with faxing the orders. You are prompted to fax immediately, which faxes any orders you have marked as selected and any orders displayed in the **Ready To Fax** queue. To select which of these faxes to send, click **No** to this message. Otherwise, click **Yes**. There must be a default printer configured (see section Configuration) because **DataXChange** uses it to compile the fax image.

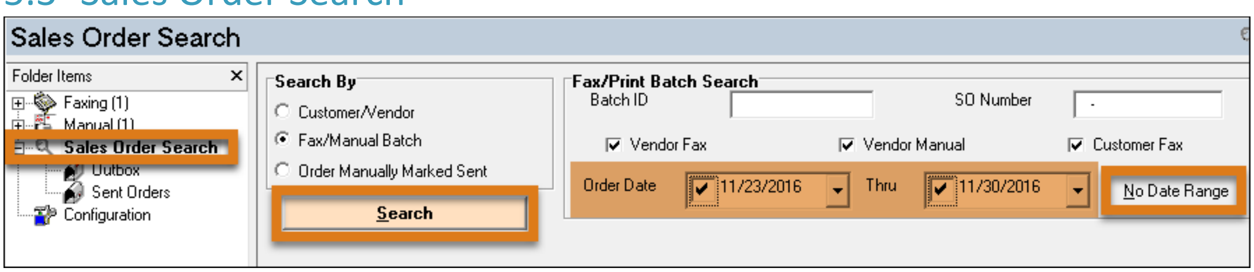
If you need to manually transmit the order by printing or saving a PDF for emailing instead, select the items and (5) click **Mark All Selected Vendor Orders For Manual Processing**. This moves the order from the **Faxing** queue to the **Manual** queue. Click **Mark All Selected Customer Orders As Sent** to move the selected orders to **Sent Items**.

5.2 Manual



Click **Manual** in the **Folder Items** panel to print or save PDF sales orders. When an order is processed manually, it is not sent anywhere. You must send the orders independently of **DataXChange**. Check (1) the box next to row items and (2) click **Print Sales Order**. If you see a message that a manual printer has not been specified, click **Configuration** on the **Folder Items** panel and select a printer on the **Printers For Manual Printing** menu. Then, submit the order for printing again. Click (3) **Mark Selected Sent** to move the selected orders to **Sent Orders**. It is very important that orders sent to the vendor have been marked as such in order for them to transfer correctly to your home office. For example, if the order has not been marked as sent to the vendor in the database, but you have printed and faxed it to the vendor, then your home office cannot see the order and **DataXChange** continues to display that order in the **Manual** queue.

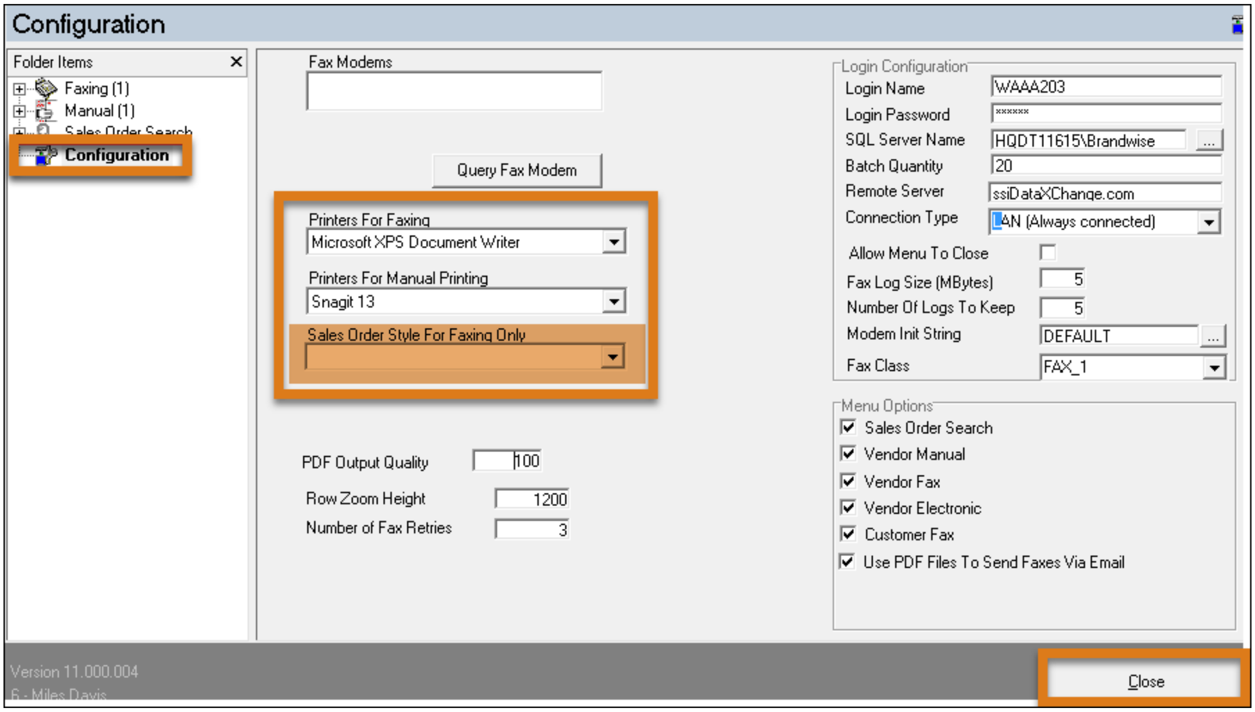
5.3 Sales Order Search



Click **Sales Order Search** on the **Folder Items** panel to search for sales orders to print or fax, or to verify an order has been sent to the supplier via **DataXChange**. Orders sent electronically do not show up in **DataXChange**.

5.4 Configuration

Click **Configuration** to view options for faxing, printers, sales order style, and PDF output quality.

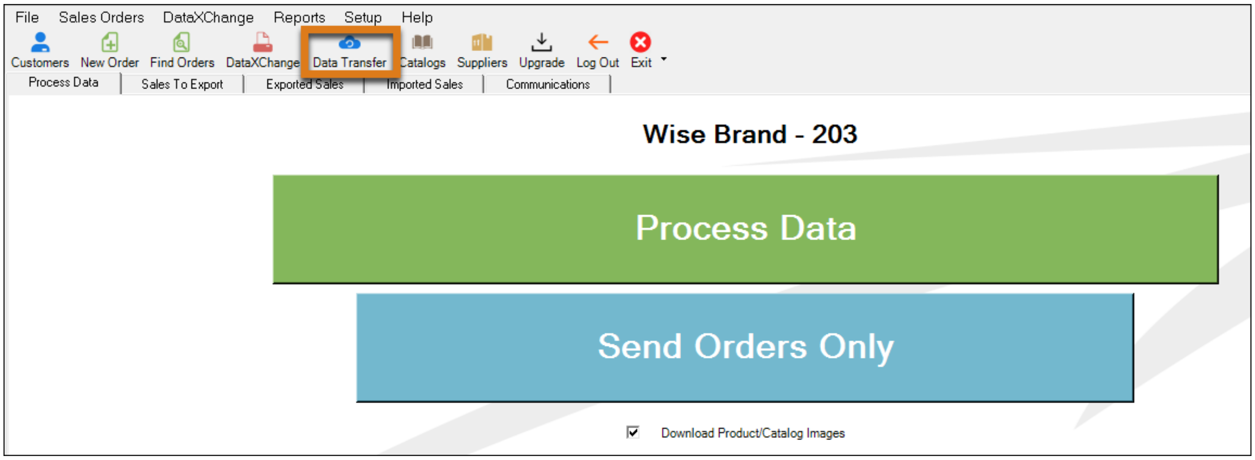


The **Sales Order Style For Faxing Only** menu is only used if a company logo has been configured by your system administrator. The options shown in the **Login Configuration** and **Menu Options** sections cannot be changed because they are defined by your system administrator. If you receive an error about the fax port after faxing orders, click **Query Fax Modem** to retrieve Windows settings on the location and configuration of your fax modem. After the process is complete, the location of the fax modem is displayed in the **Fax Modems** field. If this does not return a result, there are no faxes configured in your Windows settings.

Click **Close** to return to the **Welcome** screen.

6 Data Transfer

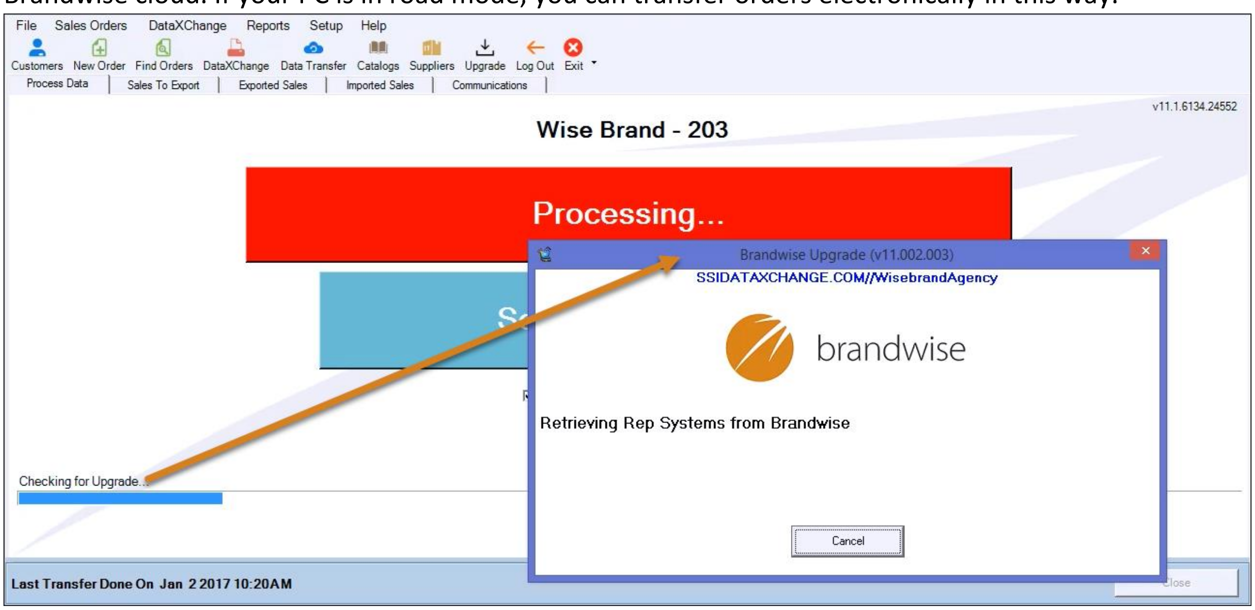
Data transfers need to be performed to retrieve any new customer or product data from the database. You might also perform a data transfer if you wrote an order without access to an internet connection, or need to send orders electronically when in Road Mode. The other way the order could be sent after connecting to the internet is if you open any order and close (which is essentially the same as exiting an order when there is access to an internet connection). Data Transfer is the last thing you will want to do at the end of each day. This process sends all updated information from your PC to the Brandwise cloud, as well as retrieves any updated information from the Brandwise cloud. On the **Welcome** screen, click **Data Transfer** on the main icons toolbar to launch the page, as shown below.



If **Download Product/Catalog Images** is checked, any new product images or catalogs will be available on your PC for viewing. Note that if there are a lot of new images, or this is the first time you are downloading images, you should run this process when your computer is connected to a power source and has a reliable internet connection.

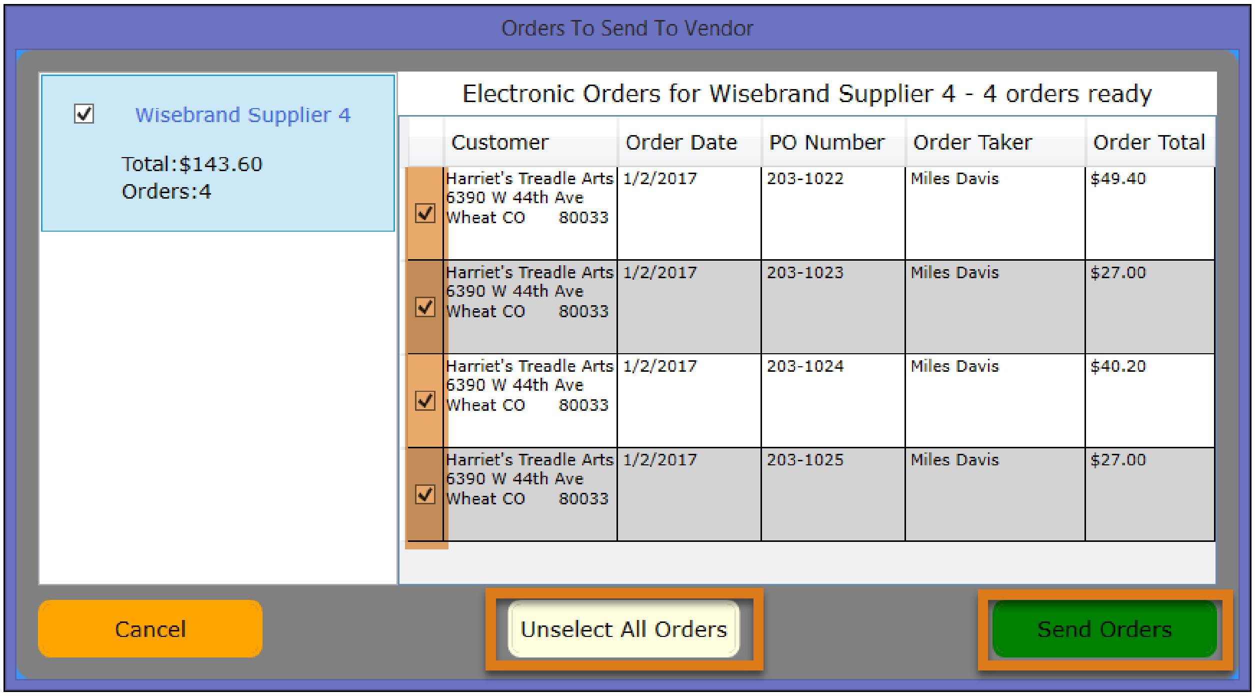
6.1 Process Data

Click **Process Data** to begin a full transfer of all data. First, the tool ensures that your system is on the correct version, applies updates automatically as shown below, and then begins to send your data to the Brandwise cloud. If your PC is in road mode, you can transfer orders electronically in this way.



Note that there are tabs shown on the top left of the page that report the sales orders to be sent, sent orders, imported orders, as well as data transfer settings. **Imported Sales** orders are orders that have already been submitted.

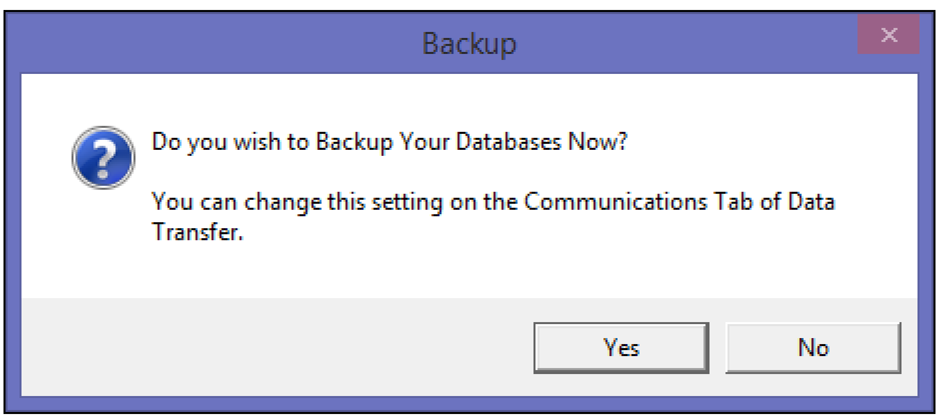
If there are orders to be sent, a confirmation dialog displays, as shown below.



All orders are checked by default. Note that if all orders are unchecked, and you click **Send Orders**, no orders are sent.

Finally, any new data is retrieved by your PC. New data includes sales orders generated by your home office or during a market for which you are the assigned rep, products, product details and images, catalogs and customer data that has not already been gathered automatically. Be sure to execute this regularly so that you are working with the most current data.

When processing finishes, a dialog prompts you to backup your databases, as shown below.



If you click **Yes**, a local copy of the databases is saved, but there is not much need to do so because the data is backed up at the home office. If you have questions on this topic, please speak with your system administrator.

6.2 Send Orders Only

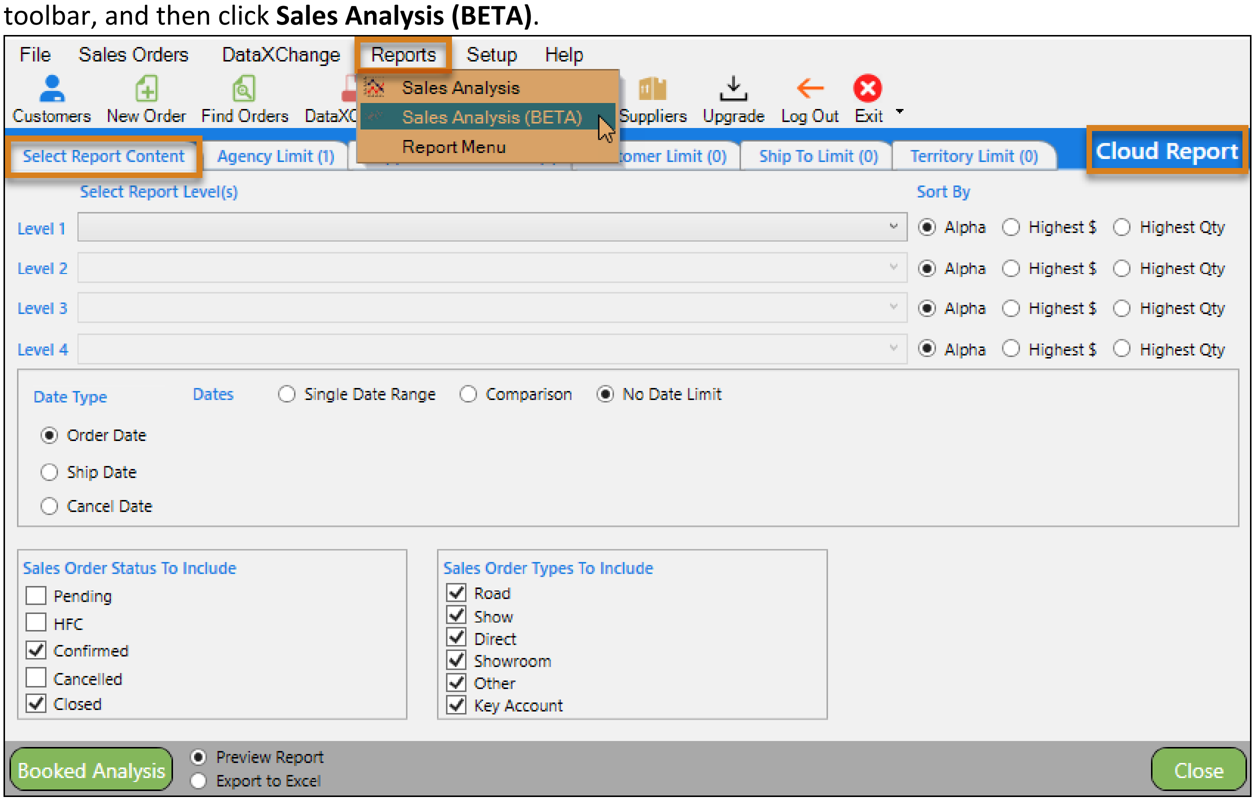
Depending on the amount of data, the data transfer could take a while. When processing finishes, the orders are immediately available for download by the home office. If they receive electronic orders, suppliers can easily access their orders through the Brandwise Stream service. This tool is only used if you have been generating orders offline (no connection to the internet) and are now connected to the internet. Remember that there is another way the order can be sent once an internet connection is available. For example, if you took ten orders offline, then modified one order once back online, all 10 orders are sent via Order Flow (see section Order Flow).

7 Reports

There are an abundance of reports you can generate against the database that provide detailed information about submitted sales orders. The report criteria can be saved to a template that defines limits placed on the data. Limits can be placed on the agency, vendor, product, customer, shipping address, and territory data.

7.1 Sales Analysis (BETA)

Sales Analysis gathers information about the selected products and assigned customers in your sales orders. Users are encouraged to use this tool as opposed to web show reporting during markets. To begin, we will launch the BETA version of Sales Analysis because the original version of the Sales Analysis report has the same options and is discussed in the next section. Some benefits to launching the BETA are that the view does not launch in a separate window, it has an intuitive interface, there are four report levels instead of three, and the results can be exported to Excel. Click **Reports** on the main menu toolbar, and then click **Sales Analysis (BETA)**.



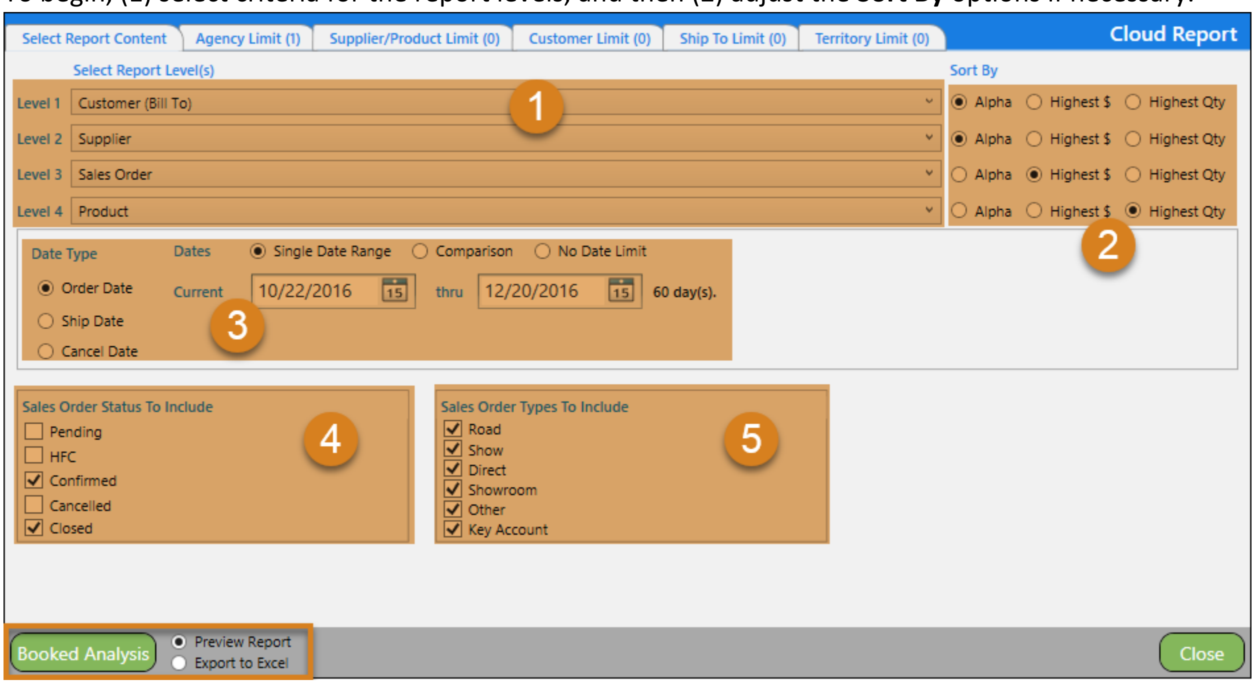
When you are connected to the internet, this view displays the words “Cloud Report” in the top-right to indicate that reporting is run against your orders stored in the Brandwise cloud, as shown above. If you do not have an internet connection, the view displays the words “Local Report”, as shown below, to indicate that reporting is run against your orders stored on your local PC.

The next sections discuss the series of tabs at the top of the view. To generate a new report, begin with the **Select Report Content** tab.

7.1.1 Select Report Content

The **Select Report Content** tab details the basic report information. As shown below, there are four report levels listed under **Select Report Level(s)**. The levels act as a hierarchy such that **Level 2** only displays information that also meets the selection criteria for **Level 1**. Likewise, **Level 3** only displays information that also meets the selection criteria for **Level 1** and **Level 2**, and so on. Note that you only need to define **Level 1** to run a report. A sales total is included on every report, regardless of the levels chosen.

To begin, (1) select criteria for the report levels, and then (2) adjust the **Sort By** options if necessary.



In the example above, the levels are defined as follows:

Level 1: **Customer (Bill To)**
Level 2: **Supplier**
Level 3: **Sales Order**
Level 4: **Product**

Based on these definitions, we are asking the report generator to list all customers on **Level 1**, list the suppliers the customer has purchased products from in the past on **Level 2**, report sales order information such as the PO Number on **Level 3**, and finally list the product numbers associated with the sales orders on **Level 4**. As shown in the **Sort By** section above, the **Customer (Bill To)** and **Supplier** levels are sorted alphabetically, **Sales Order** is sorted by the highest dollar amount, and **Product** is sorted by the highest quantity.

Next, (3) specify a **Date Type** and a date range under **Dates**. Select **Comparison** to compare the report results using two different date ranges. Then, (4) select the sales order status to include, as well as (5) the sales order types to include. Finally, click **Booked Analysis**. By default, **Preview Report** is selected, but can be changed to **Export to Excel** before clicking **Booked Analysis**. An example report preview is shown below.

Booked Analysis Cloud Report

Sales Order Date Between 10/22/2016 and 12/20/2016
Sales Order Status Included: Confirmed / Closed /
Sales Order Types Included: Road / Show / Direct / Showroom / Other / Key Acct /

Customer (Bill To)	Supplier	Sales Order	Product	Qty	Amount	Avg	% of Above
Harriet's Treadle Arts 6390 W 44th Ave Wheat Ridge CO 80033 (3034242742)				89	420	5	100%
	Wisebrand Supplier 1			29	171	6	41%
		PO# 100-1078 SO# 100-1078 Status: Confirmed SO Date:Nov 9 2016 Ship:Nov 30 2016 - Cancel Date:		28	136	5	32%
			01-1503	12	50	4	12%
			01-2520	12	65	5	15%
			01-4395	4	22	5	5%
		PO# 203-1013 SO# 203-1013 Status: Confirmed SO Date:Dec 1 2016 Ship:ASAP- Cancel Date:		1	35	35	8%
			SSO	1	35	35	8%
	Wisebrand Supplier 4			60	249	4	59%
		PO# 100-1077 SO# 100-1077 Status: Confirmed SO Date:Nov 9 2016 Ship:Nov 30 2016 - Cancel Date:		24	110	5	26%
			L-52910	12	29	2	7%
			L-11635	6	40	7	9%
			L-11824	6	41	7	10%
		PO# 100-1081 SO# 100-1081 Status: Confirmed SO Date:Nov 17 2016 Ship:Nov 23 2016 - Cancel Date:		12	73	6	17%
			L-11455	6	32	5	8%
			L-11822	6	40	7	10%
		PO# 203-1004 SO# 203-1004 Status: Confirmed SO Date:Nov 30 2016 Ship:Dec 12 2016 - Cancel Date:		24	67	3	16%
			L-52795	12	38	3	9%
			L-52910	12	29	2	7%
Grand Total				**89**	**420**	**5**	

Level 1
Level 2
Level 3
Level 4

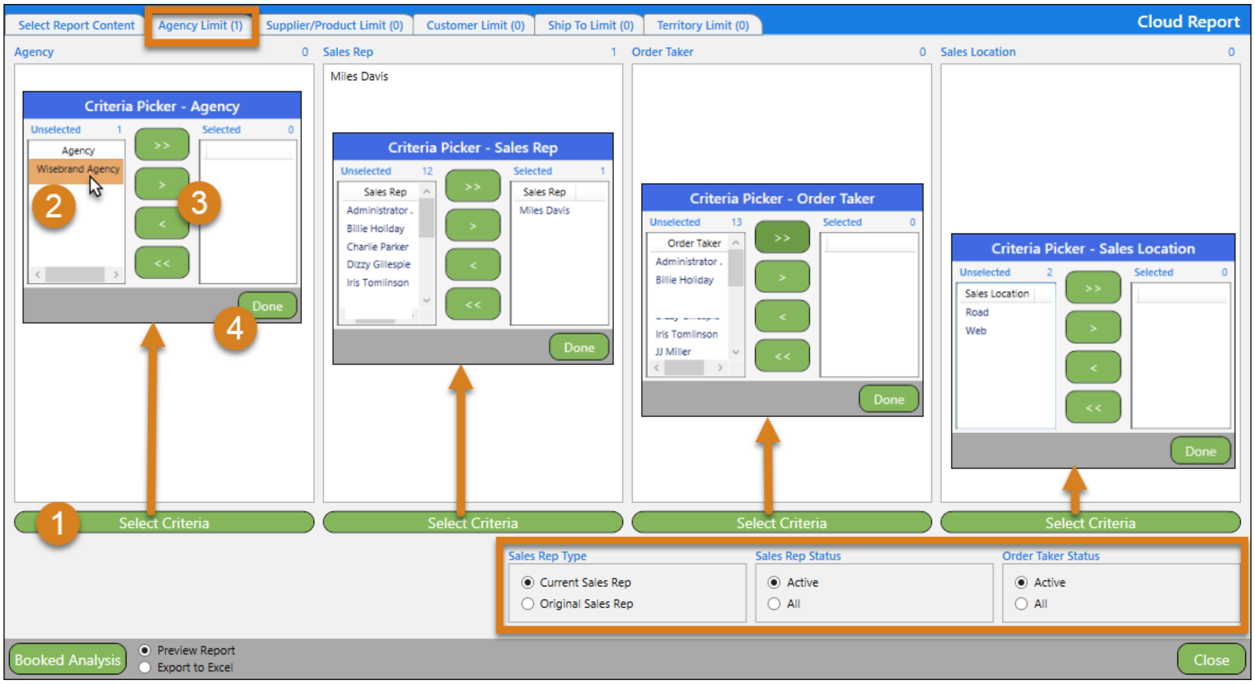
Print Date: 12/20/2016 4:42:01 PM

Page 1 of 1

Next, we will explore the remaining tabs. The tabs present options that further limit the report results.

7.1.2 Agency Limit

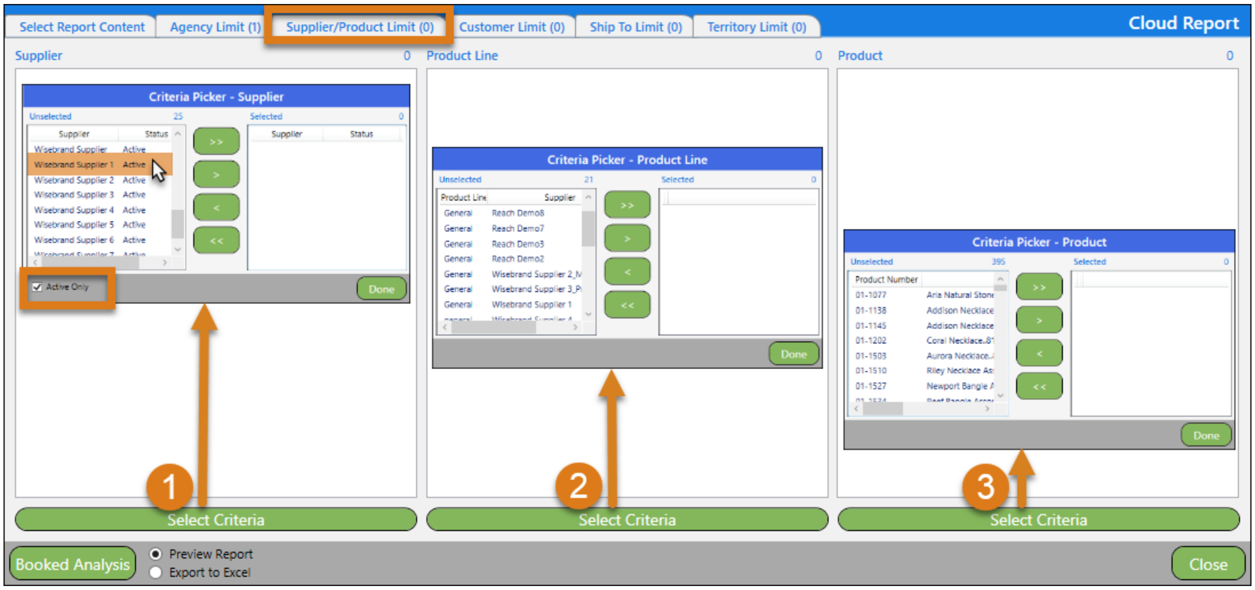
Use this tab to limit report data by agency, sales rep, order taker, and sales location. Note that there is a "(1)" next to the tab name to indicate that there is one item contributing to the limiting criteria (Miles Davis is the Sales Rep).



To begin, (1) click **Select Criteria** under the **Agency** field to launch the **Criteria Picker - Agency** dialog. The available limiting criteria is listed in the **Unselected** field. To use them as limiting criteria for the report, move items to the **Selected** fields. To move one item, (2) highlight it and then (3) click the right arrow (**>**) button. To move all items in the **Unselected** field, click the double right arrow (**>>**) button. You can also select a group of items by highlighting the first item in the group, then hold down the **Shift** key while highlighting the last name in the group. Then, use the right arrow (**>**) button and (4) click **Done**. Repeat this process for the **Sales Rep**, **Order Taker**, and **Sales Location** fields. Note the additional options at the bottom of the page where you can specify the **Sales Rep Type**, **Sales Rep Status**, and **Order Taker Status**. When all agency limits have been set, click the **Supplier/Product Limit** tab.

7.1.3 Supplier/Product Limit

Use this tab to limit report data by suppliers, product lines, and products.

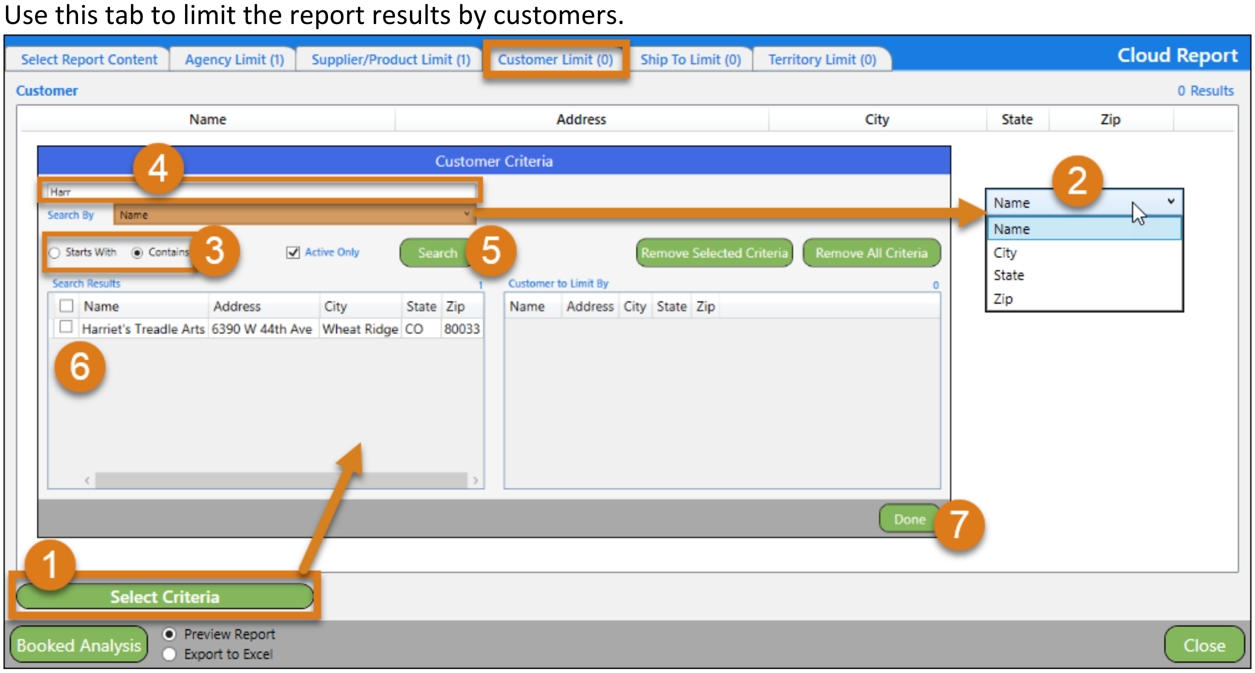


Launch the **Criteria Picker** dialogs sequentially from left to right and move items from the **Unselected** fields to the **Selected** fields using the same method described in the previous section. Note the **Active Only** checkbox on the **Criteria Picker – Supplier** dialog. Uncheck it to view inactive suppliers in addition to active suppliers.

When all product limits are set, click the **Customer Limit** tab at the top of the dialog.

7.1.4 Customer Limit

Use this tab to limit the report results by customers.

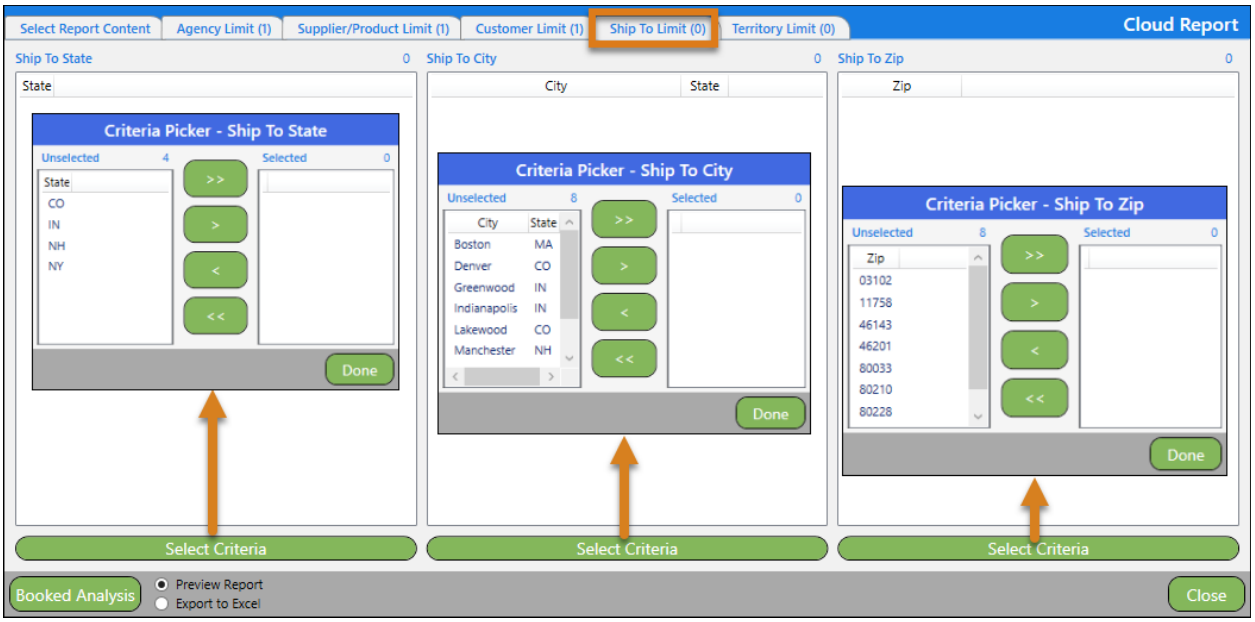


First, (1) click **Search Criteria** at the bottom of the page. To return all customers, leave the search string field at the top of the dialog empty and click **Search**. Otherwise, (2) select an option in the **Search By** menu. Next, (3) click **Starts With** or **Contains**, and then (4) begin typing search keywords in the search string field. Note that **Active Only** is checked by default, uncheck it to display inactive customers as well as active customers. Then, (5) click **Search**. Check boxes (6) next to Customer names in the **Search Results** field to move them to the **Customer to Limit By** field. Finally, (7) click **Done** to return to the **Customer Limit** tab.

When all customer limits are set, click the **Ship To Limit** tab at the top of the dialog.

7.1.5 Ship To Limit

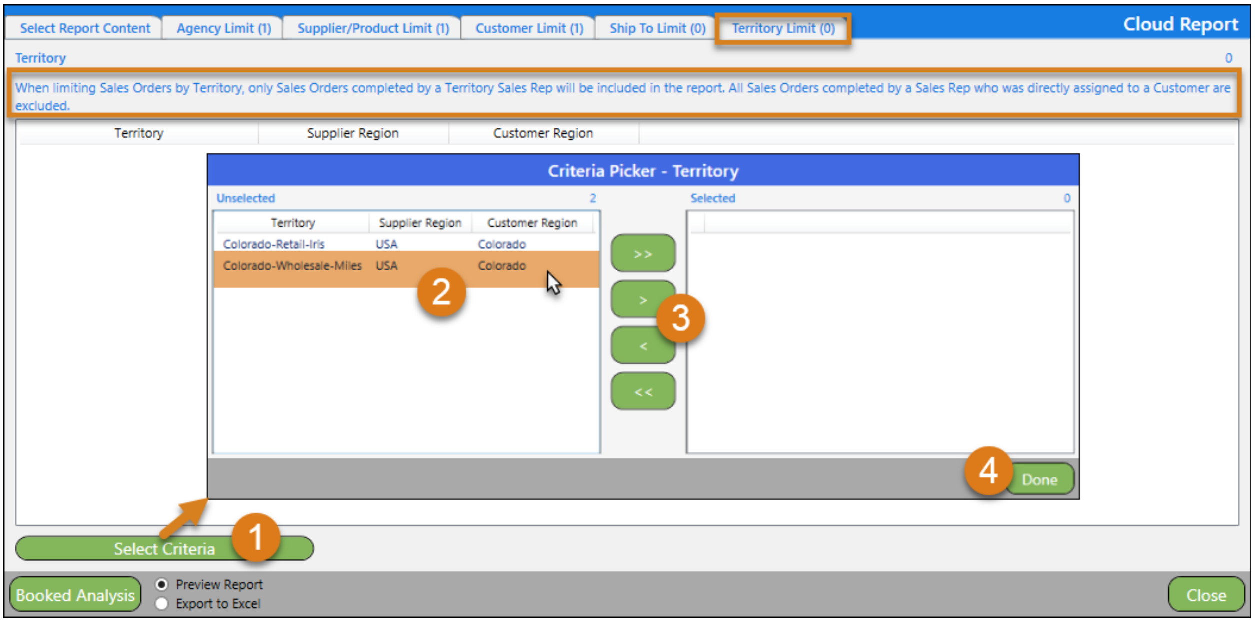
Use this tab to limit the report results by state, city and then zip code



When all customer limits are set, click the **Territory Limit** tab.

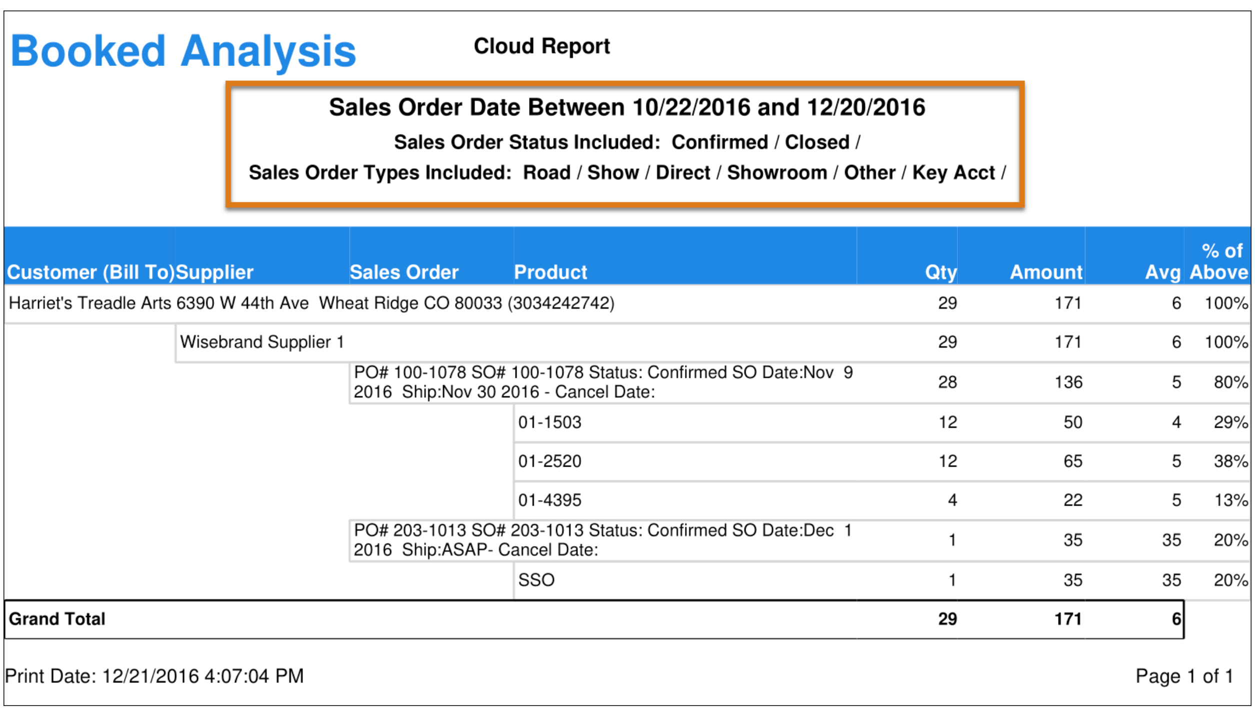
7.1.6 Territory Limits

Use this tab to limit the report results to territories. Territories are generated by your system administrator.



Move territories from the **Unselected** field to the **Selected** field as shown in steps (1-4) above. If you choose to limit by territory, then only sales orders completed by a Territory Sales Rep are included in the report. That means sales orders completed by a sales rep who is directly assigned to a customer are excluded. If the report does not look accurate, your home office may need to perform a territory replacement. If territories are changed, the territory replacement process must be executed to affect past sales orders with current territory setups.

Now that some report limits are set, we can regenerate the report. Click **Booked Analysis** at the bottom of the page to preview and print the report. The image below reflects what the report results are with the limits we imposed.



Booked Analysis — **Cloud Report**

Sales Order Date Between 10/22/2016 and 12/20/2016

Sales Order Status Included: Confirmed / Closed /

Sales Order Types Included: Road / Show / Direct / Showroom / Other / Key Acct /

Customer (Bill To)	Supplier	Sales Order	Product	Qty	Amount	Avg	% of Above
Harriet's Treadle Arts 6390 W 44th Ave Wheat Ridge CO 80033 (3034242742)				29	171	6	100%
	Wisebrand Supplier 1			29	171	6	100%
		PO# 100-1078 SO# 100-1078 Status: Confirmed SO Date:Nov 9 2016 Ship:Nov 30 2016 - Cancel Date:		28	136	5	80%
			01-1503	12	50	4	29%
			01-2520	12	65	5	38%
			01-4395	4	22	5	13%
		PO# 203-1013 SO# 203-1013 Status: Confirmed SO Date:Dec 1 2016 Ship:ASAP- Cancel Date:		1	35	35	20%
			SSO	1	35	35	20%
Grand Total				**29**	**171**	**6**	

Print Date: 12/21/2016 4:07:04 PM

Page 1 of 1

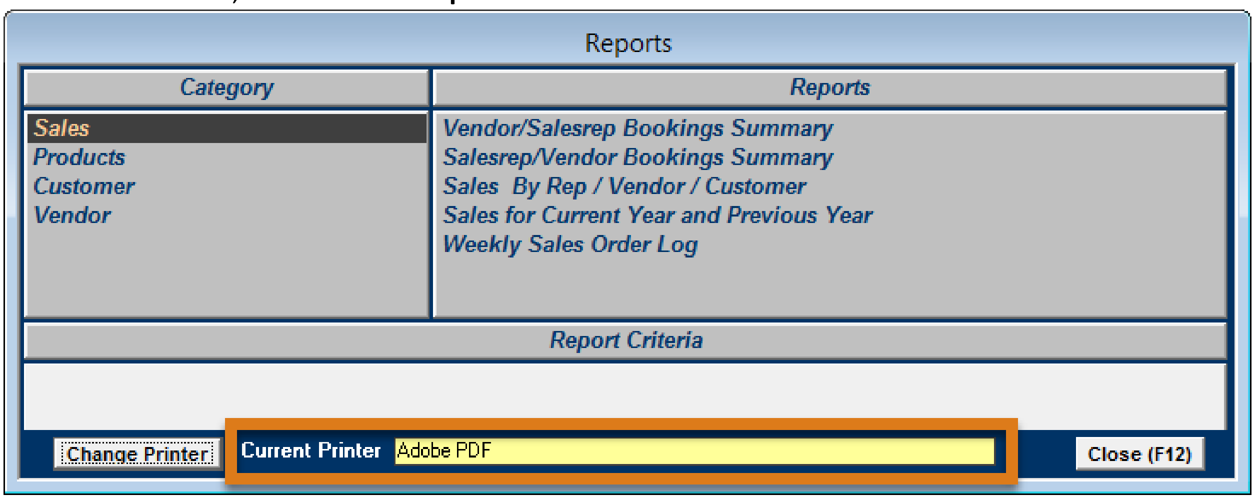
Click **Close** to return to the **Welcome** screen.

7.2 Sales Analysis

The original version of the Sales Analysis report has the same options for limiting report criteria. Users are encouraged to utilize the BETA version, but for further detail on the original version, see Appendix B: Sales Analysis.

7.3 Report Menu

While Sales Analysis lets you customize a report for your sales orders and invoices, the report menu provides simple prebuilt reports that are not limited to orders and invoices. First, click **Reports** on the main menu toolbar, and then click **Report Menu**.

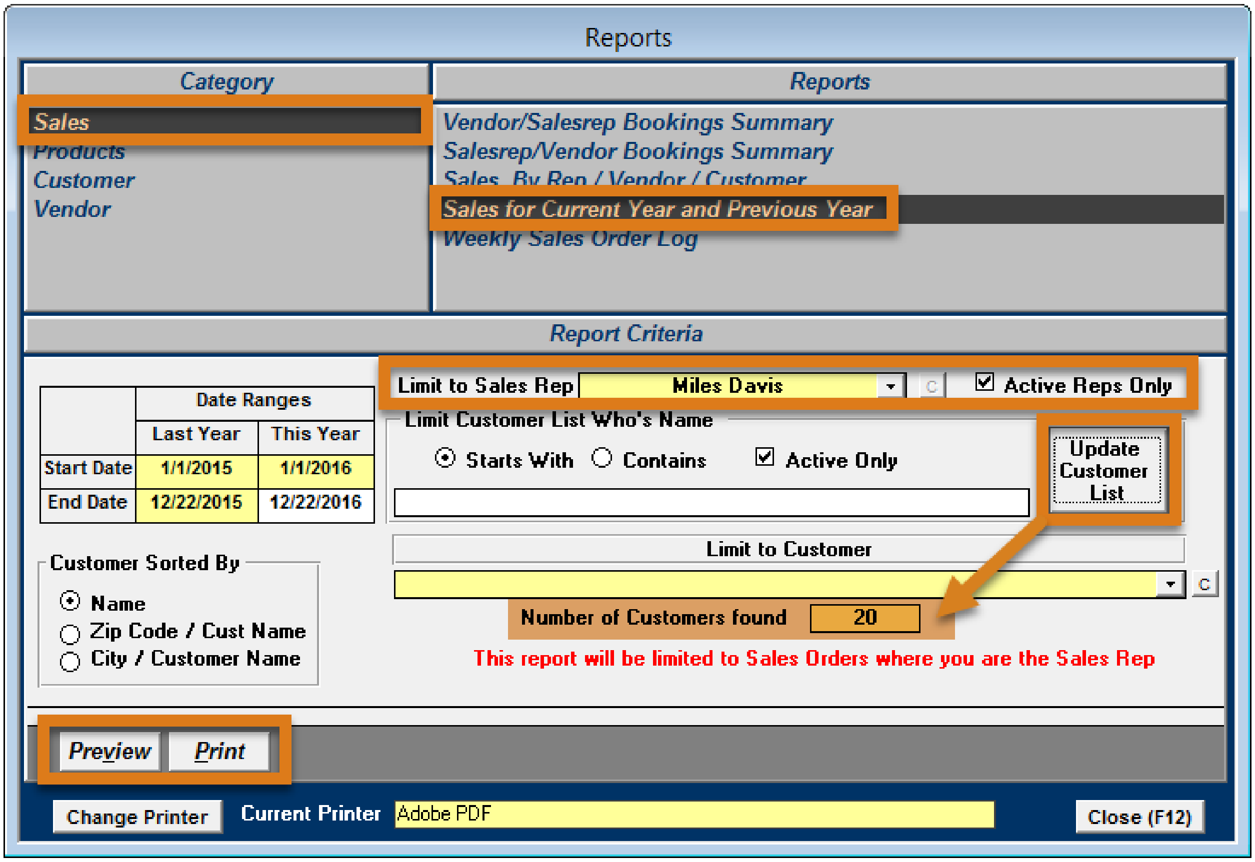


You must have a default printer defined in the **Current Printer** field. Click **Change Printer** to select a new printer.

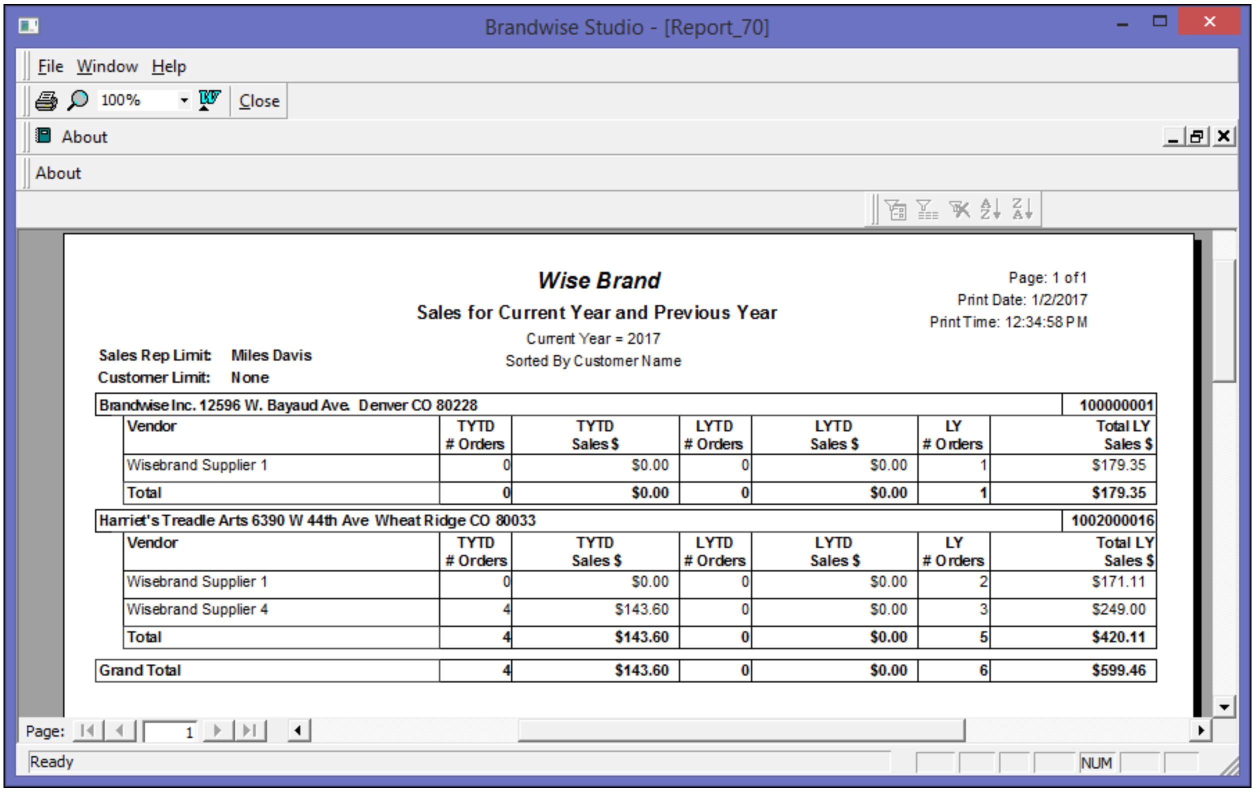
The next sections introduce each **Category** and discuss some of the available reports.

7.3.1 Sales

Generate reports on Sales by selecting **Sales** in the **Category** column. Then, select a report from the **Reports** column. In the example below, we are generating a report by sales rep (Miles Davis) that compares sales for the current year with sales for the previous year.



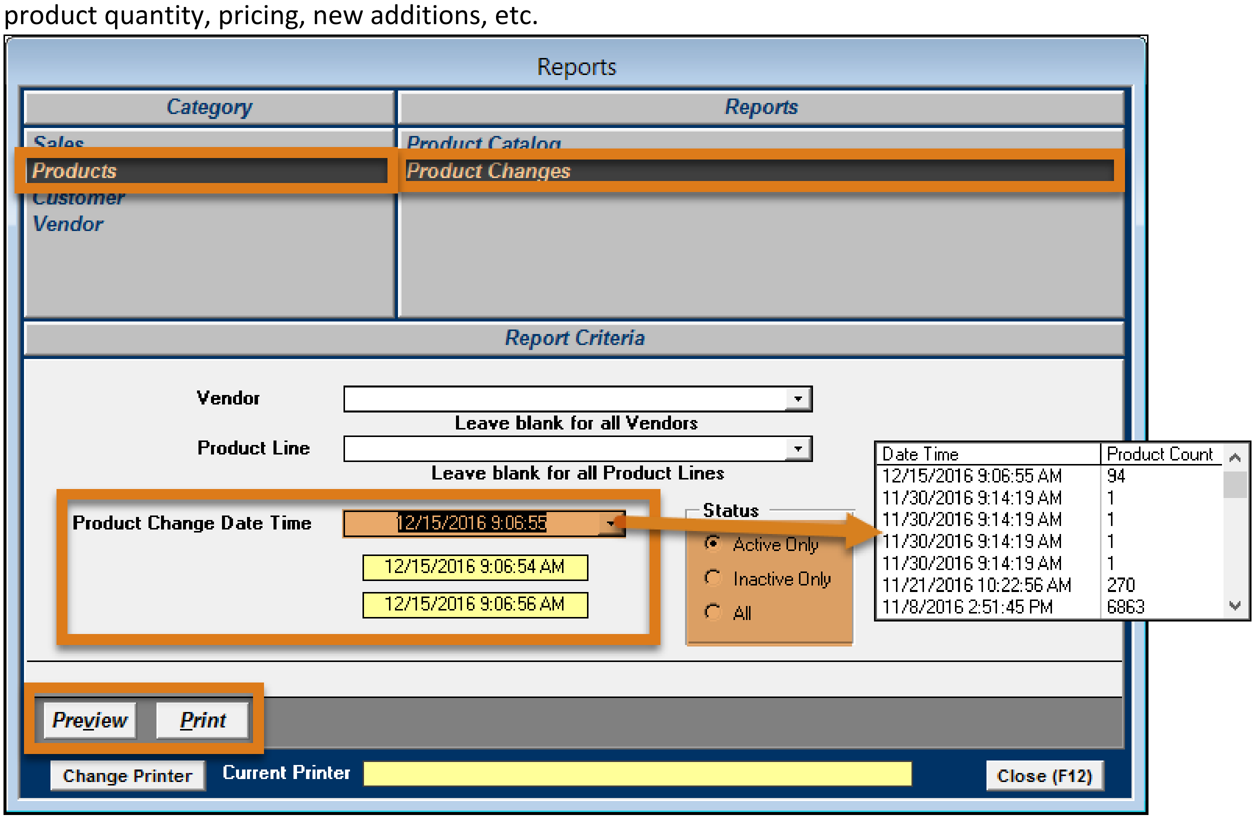
Click the **Limit to Sales Rep** menu to select an individual sales rep. You can limit the customer results by using the **Starts With** or **Contains**, and **Active Only** options. Finally, click **Preview** to see what the report looks like. An example is shown below. You can print from this screen, or by clicking **Print** instead of **Preview**.



Vendor	TYTD # Orders	TYTD Sales $	LYTD # Orders	LYTD Sales $	LY # Orders	Total LY Sales $
Brandwise Inc. 12596 W. Bayaud Ave. Denver CO 80228						**100000001**
Wisebrand Supplier 1	0	$0.00	0	$0.00	1	$179.35
Total	**0**	**$0.00**	**0**	**$0.00**	**1**	**$179.35**
Harriet's Treadle Arts 6390 W 44th Ave Wheat Ridge CO 80033						**1002000016**
Wisebrand Supplier 1	0	$0.00	0	$0.00	2	$171.11
Wisebrand Supplier 4	4	$143.60	0	$0.00	3	$249.00
Total	**4**	**$143.60**	**0**	**$0.00**	**5**	**$420.11**
Grand Total	**4**	**$143.60**	**0**	**$0.00**	**6**	**$599.46**

7.3.2 Products

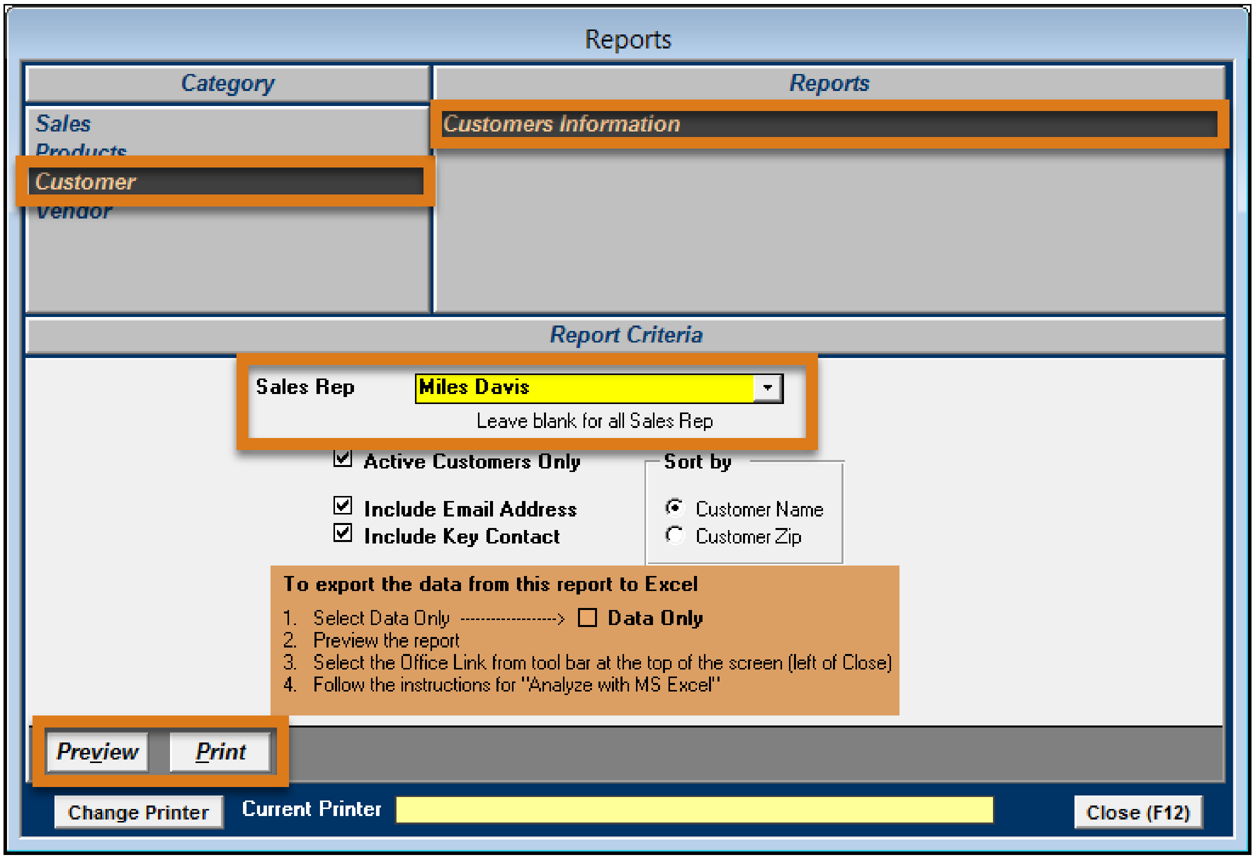
As shown below, we can generate a **Product Changes** report that provides information about changes in product quantity, pricing, new additions, etc.



Click the **Product Change Date Time** menu to select a date from the list. The listed dates reflect each date product changes occurred, as well as the number of changed products.

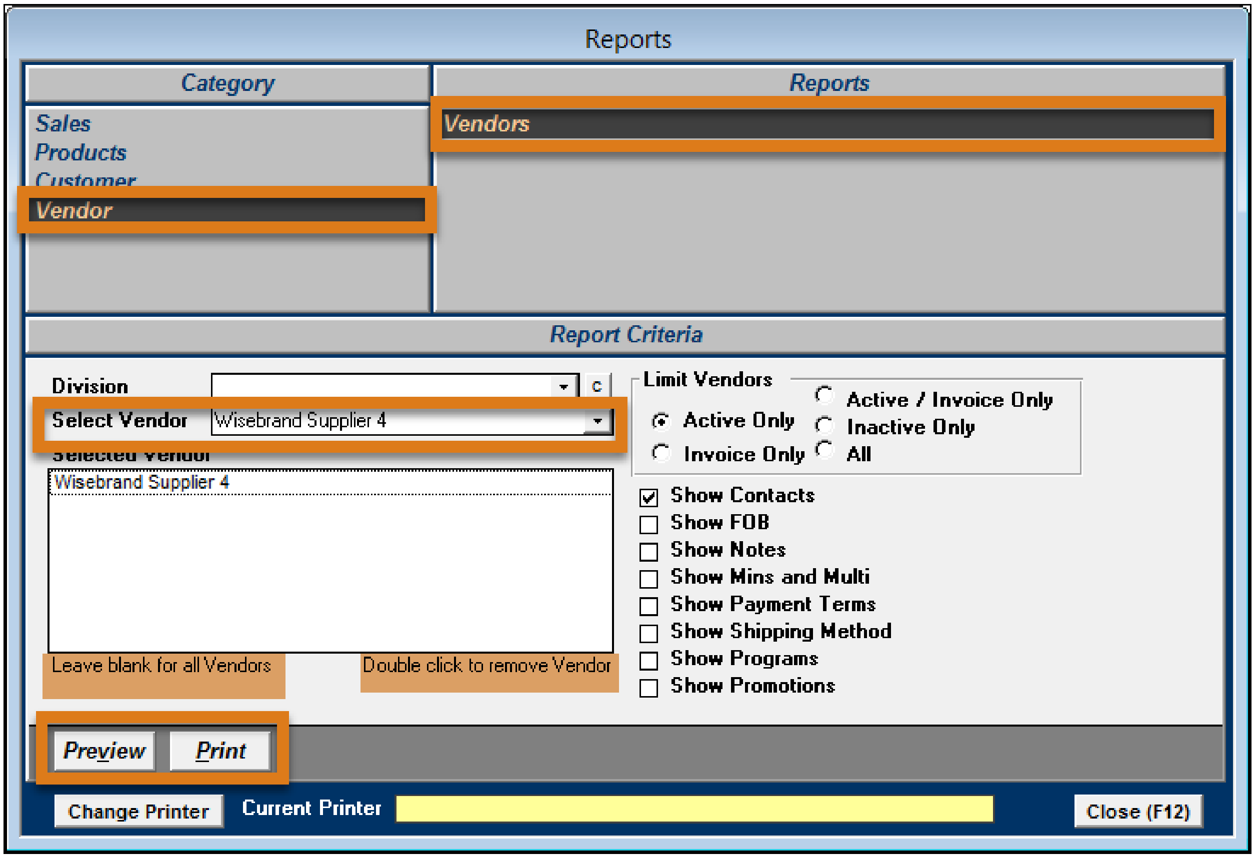
7.3.3 Customer

The **Customers Information** report produces a list of all customers assigned to the selected sales rep. Note the message at the bottom of the page explaining the procedure to view the report in Excel.



7.3.4 Vendor

The **Vendors** report produces a list of vendors and their information.



By default, the only information checked is **Show Contacts**. Select a vendor from the **Select Vendor** menu or leave it blank to report on all vendors. If you have accidentally added a vendor to the **Selected Vendor** table and need to remove it, double-click it.

Check out the document, "Ten Reports You Just Cannot Live Without" which can be found in the Brandwise Customer Support Center at https://support.brandwise.com. *It provides step-by-step instructions on how to generate various helpful reports such as: all orders within one year, top 50 orders, opportunity reports, and more.*

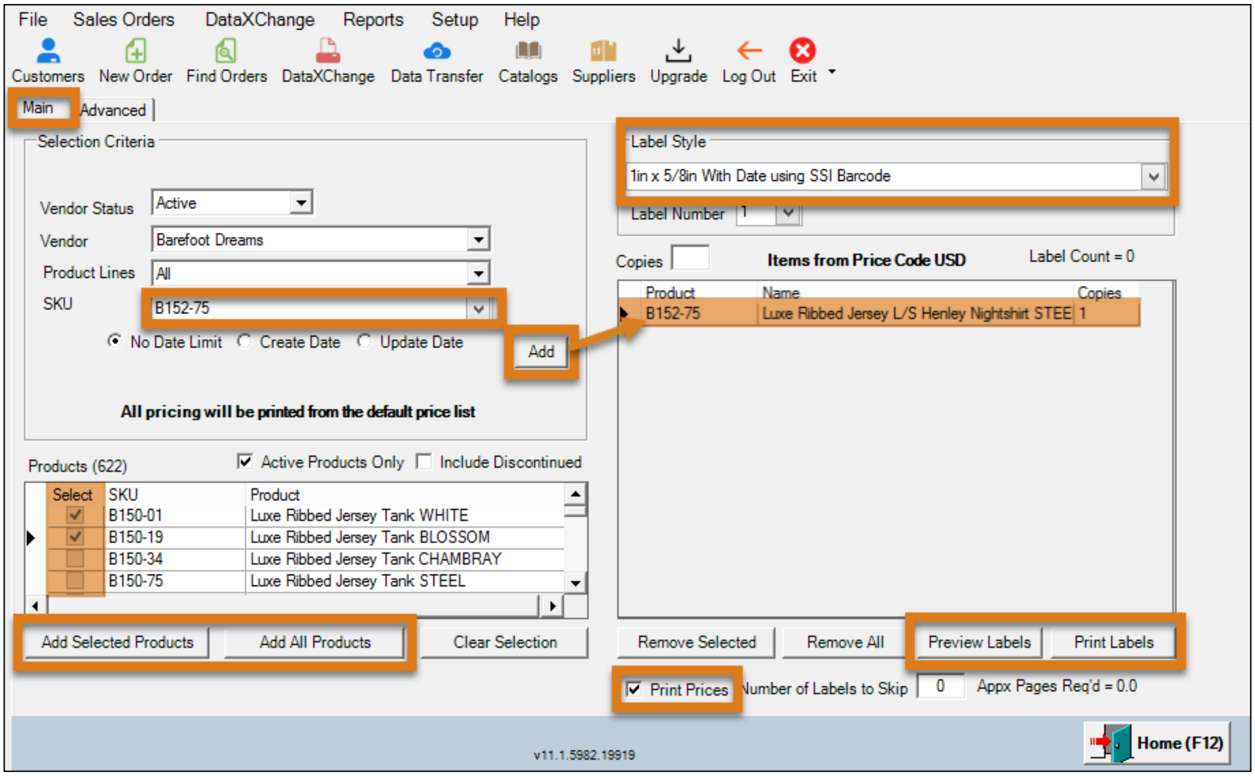
8 Print Labels

Before printing labels for the first time, please visit https://support.brandwise.com for instructions on installing the appropriate barcode fonts.

8.1 Product Labels

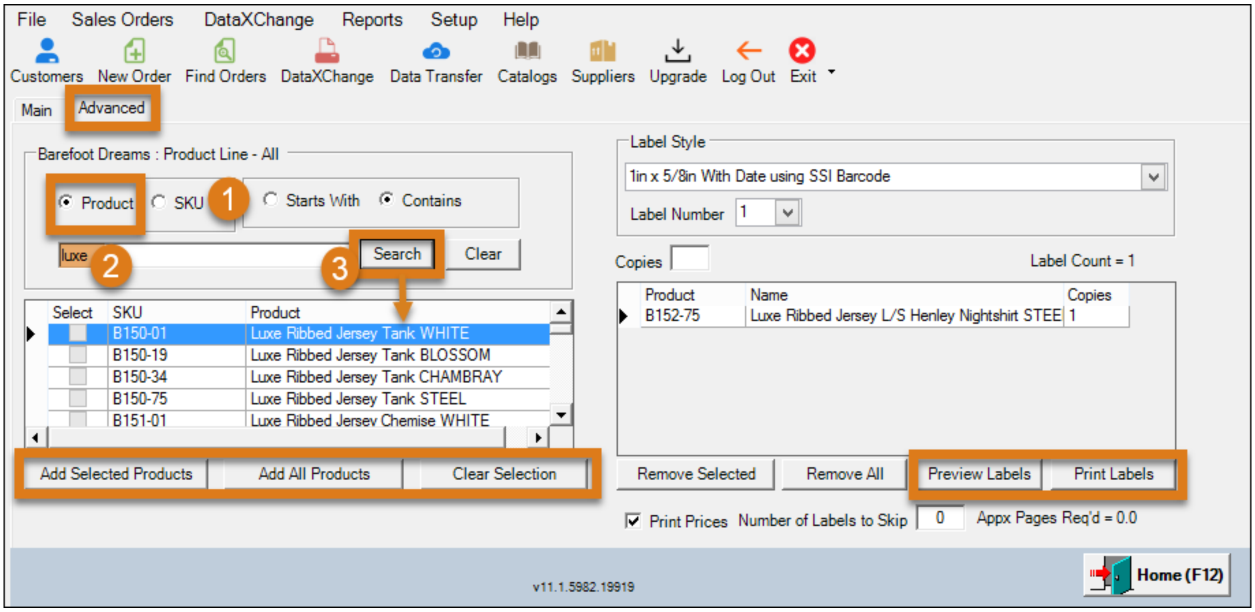
You might use this tool to generate product "scan books", which are just pages with printed product barcodes. These are useful if you need a quick and handy resource to scan products while visiting with a customer, and do not want to carry around samples.

To begin, click **Setup** on the main menu toolbar, click **Products**, and then click **Print Product Labels**.



The **Main** tab lists all products for a selected vendor that can be added to the print list. Select a barcode type from the **Label Style** menu. A few of the common barcode styles are defined in the Glossary. To search for individual products, click the **SKU** menu and type a SKU or select one, and then click **Add**. Otherwise, use the table at the bottom to add multiple products at once. Note the **Print Prices** box is checked by default, and should be unchecked if you do not want prices printed along with the barcodes. Then, click **Preview Labels** or **Print Labels**.

The **Advanced** tab provides the ability to search for a product by product name, and also provides the **Starts With** and **Contains** search options, as shown in steps (1-3) below.



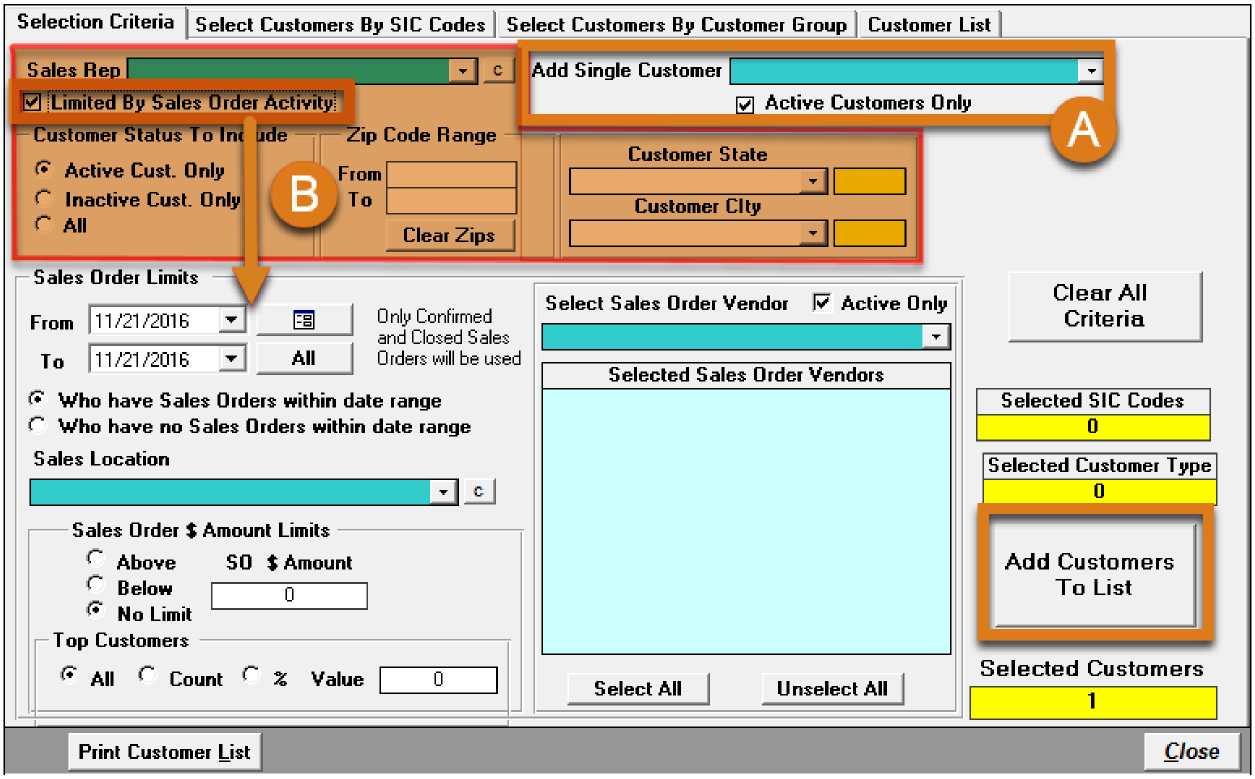
After printing labels, click **Home** to return to the **Welcome** screen.

*The print list is saved upon exiting the product labels page. Click **Remove All** the next time the utility is launched to reset the print list.*

8.2 Customer Lists and Labels

To create customer mailing labels and customer lists that can be exported to Word or Excel, click **Setup** on the main menu toolbar. Click **Customers**, and then click **Customer Labels**.

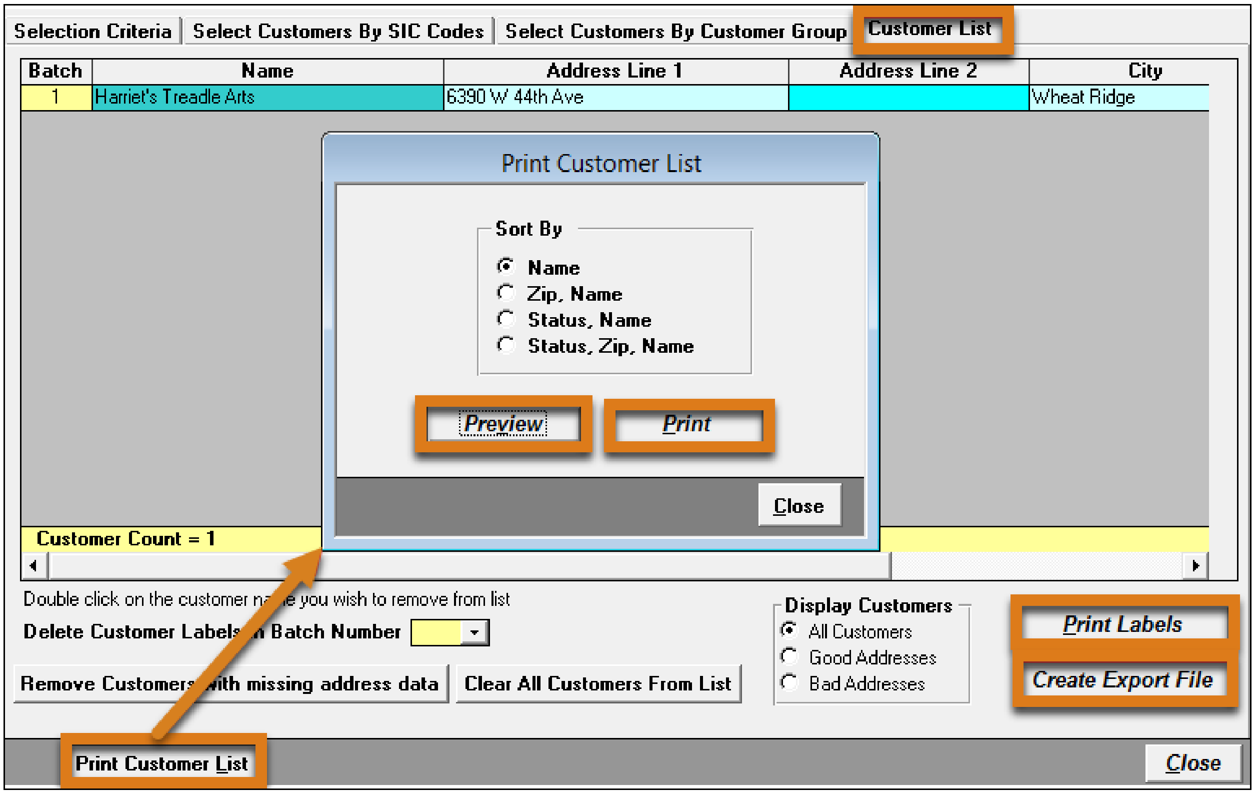
8.2.1 Selection Criteria



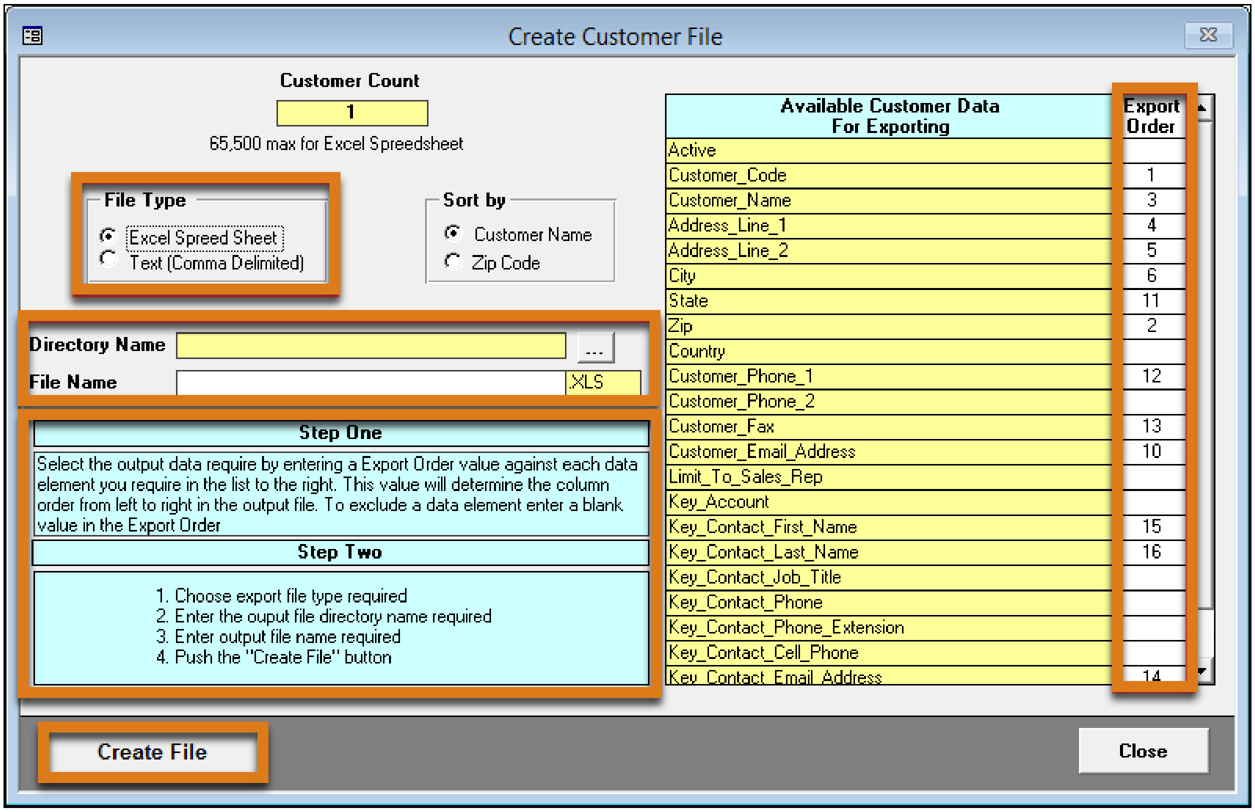
Use this tab to (A) simply add a single customer to the customer list or (B) limit the customer list by various attributes. To add a single customer, click **Add Single Customer** and notice that the customer is automatically added to the **Customer List** tab. Otherwise, specify search criteria to limit the results. Check **Limited By Sales Order Activity** to see the **Sales Order Limits** section shown above. After criteria is selected, add customers to the customer list by clicking **Add Customers to List** on the right side of the dialog. You can also add customers by SIC code or customer group using the next two tabs: **Select Customers by SIC Codes** and **Select Customers By Customer Group**. We will move on to the **Customer List** tab.

8.2.2 Customer List

The **Customer List** tab reports a list of customers added based on the criteria specified on the previous tabs.



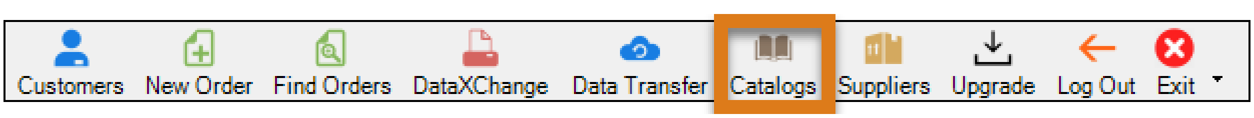
Verify all customer information. If any changes need to be made, they must be done in the Customer Record. To search for customers with incomplete address data, click **Bad Addresses** under the **Display Customers** section. To preview a list of customers displayed in the table, click **Print Customer List** and click a sorting option, and then click **Preview**. As shown below, you can generate an Excel spreadsheet of the customer list, by closing the **Print Customer List** dialog, and then click **Create Export File**.



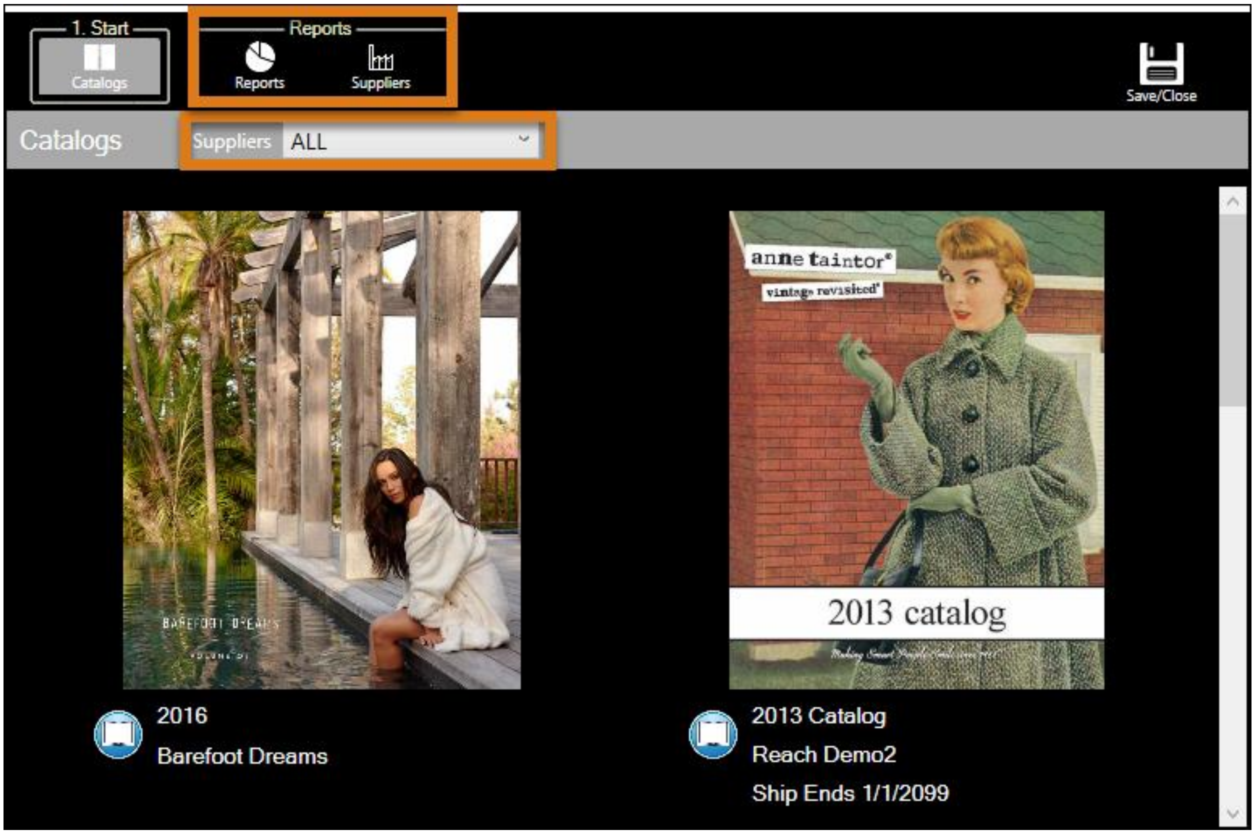
In this dialog, pay special attention to the export directions in the blue fields. First, click an option in the **File Type** and **Sort by** sections. Then, click the ellipses button (**...**) next to **Directory Name** and browse to the location where you want the file to be exported. Enter a name for the output file in the **File Name** field. In the **Available Customer Data For Exporting** table, the values in the **Export Order** column define the column order from left to right in the exported file. If the field is blank, the customer data does not export. Click **Create File** to proceed, or **Close** to return to the customer labels dialog.

9 Catalogs

Click **Catalogs** on the main icons toolbar to browse vendor product images and catalog pages. You cannot generate orders from these pages.



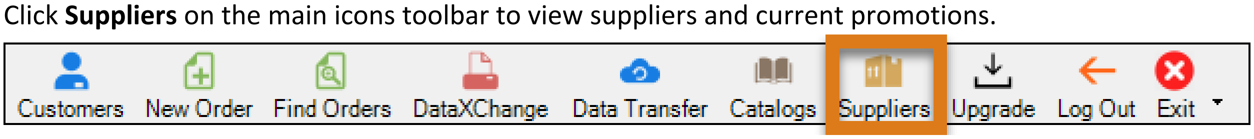
This launches the **Browse Catalog** dialog, as shown below.



Click a catalog cover to display the products in a grid view. Otherwise, click the book icon ( ) beneath the cover page to display the products in a catalog view where you can flip through the catalog pages. Note that you also have **Reports** and **Suppliers** as options on this dialog. You must open a catalog in order to click **Reports.** For information about viewing catalogs, generating product reports, and the **Suppliers** page, please see sections Catalogs, Reports, and Suppliers above.

10 Suppliers

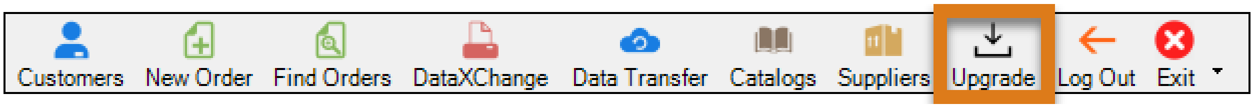
Click **Suppliers** on the main icons toolbar to view suppliers and current promotions.



Click a supplier listed in the **Suppliers** table to see further detail such as payment terms, shipping methods, and product lines. For information about the **Suppliers** page, please see section Suppliers above.

11 Upgrade

Click **Upgrade** on the main icons toolbar to download the latest version of Play for PC.



Note that updates are applied automatically during a data transfer.

12 Help

12.1 MyBrandwise

To view your company website as shown below, click **mybrandwise** on the **Help** menu.

Click the gray icon to view help documents.

12.2 help.brandwise.com

To launch the Brandwise Customer Support Center, click **help.brandwise.com** on the **Help** menu. You can find information about how to contact support, as well as browse helpful how-to articles.

13 Appendix A: System Requirements

See the document, "SYSTEM REQUIREMENTS" located on the Brandwise website at http://www.brandwise.com/ under **Resources**.

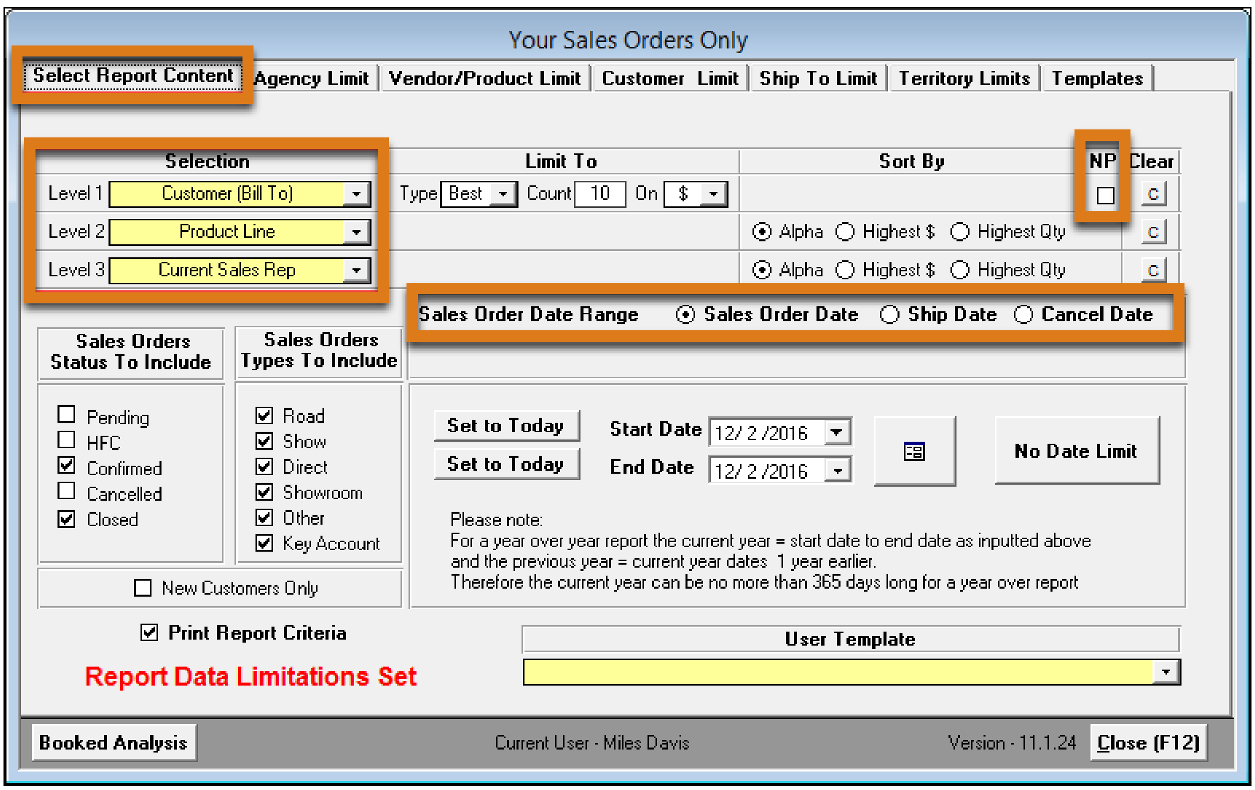
14 Appendix B: Sales Analysis

Users are encouraged to utilize the latest version of Sales Analysis, which is launched by clicking **Reports** on the main menu toolbar, and then click **Sales Analysis (BETA)**. To proceed with the older Sales Analysis utility, click **Reports** on the main menu toolbar as shown below, and then click **Sales Analysis** to launch a dialog that guides you through the report setup.

To generate a brand new report, click **Yes** to clearing the limiting criteria as shown above. The next sections discuss the series of tabs at the top of the dialog.

14.1 Select Report Content

Use this dialog to limit the report content and save the limit settings to a template for future use. To generate a new report click the **Select Report Content** tab, optionally specify additional limits on the remaining tabs, and then finish with the **Templates** tab.



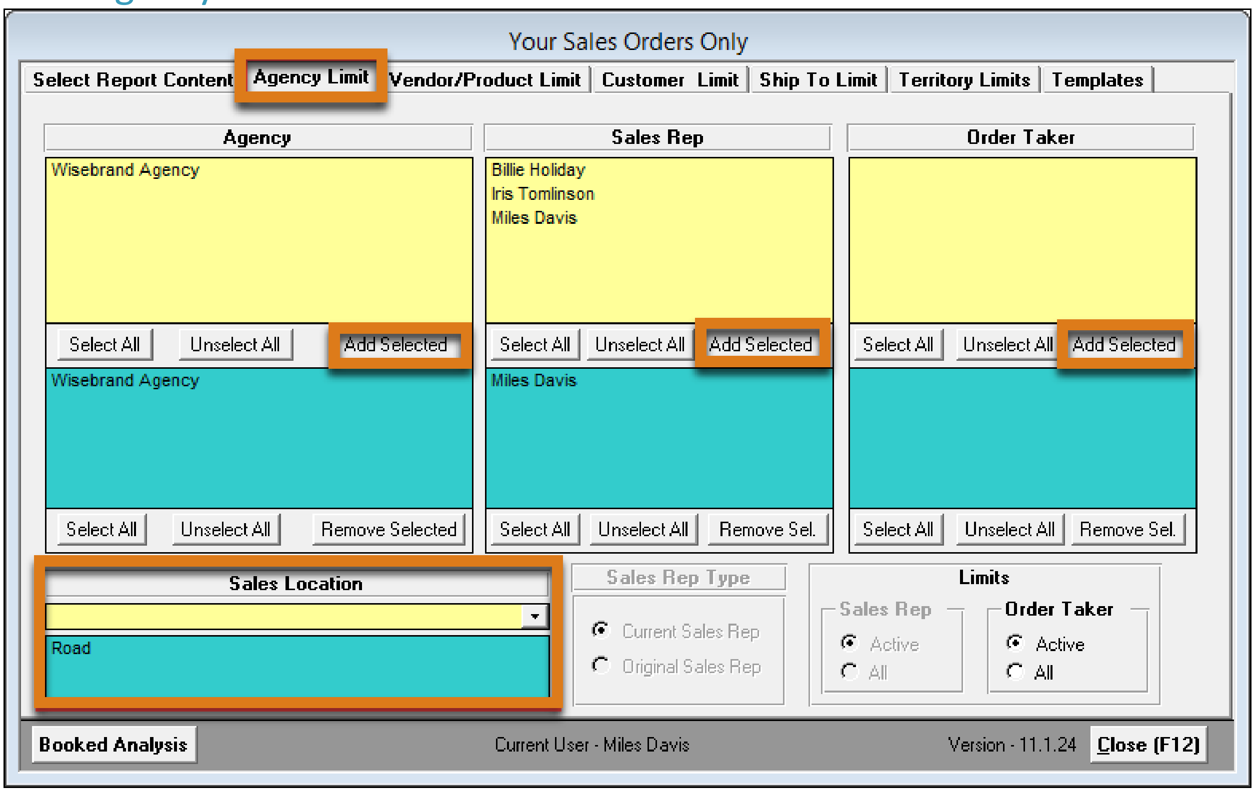
The **Select Report Content** tab details the main report information. In the **Selection** table shown above, three report levels are selected:

(1) Customer Bill To
(2) Product Line
(3) Current Sales Rep

The levels act as a hierarchy such that **Level 2** only displays information that also meets the selection criteria set for **Level 1**. Likewise, **Level 3** only displays information that also meets the selection criteria for **Level 1** and **Level 2**.

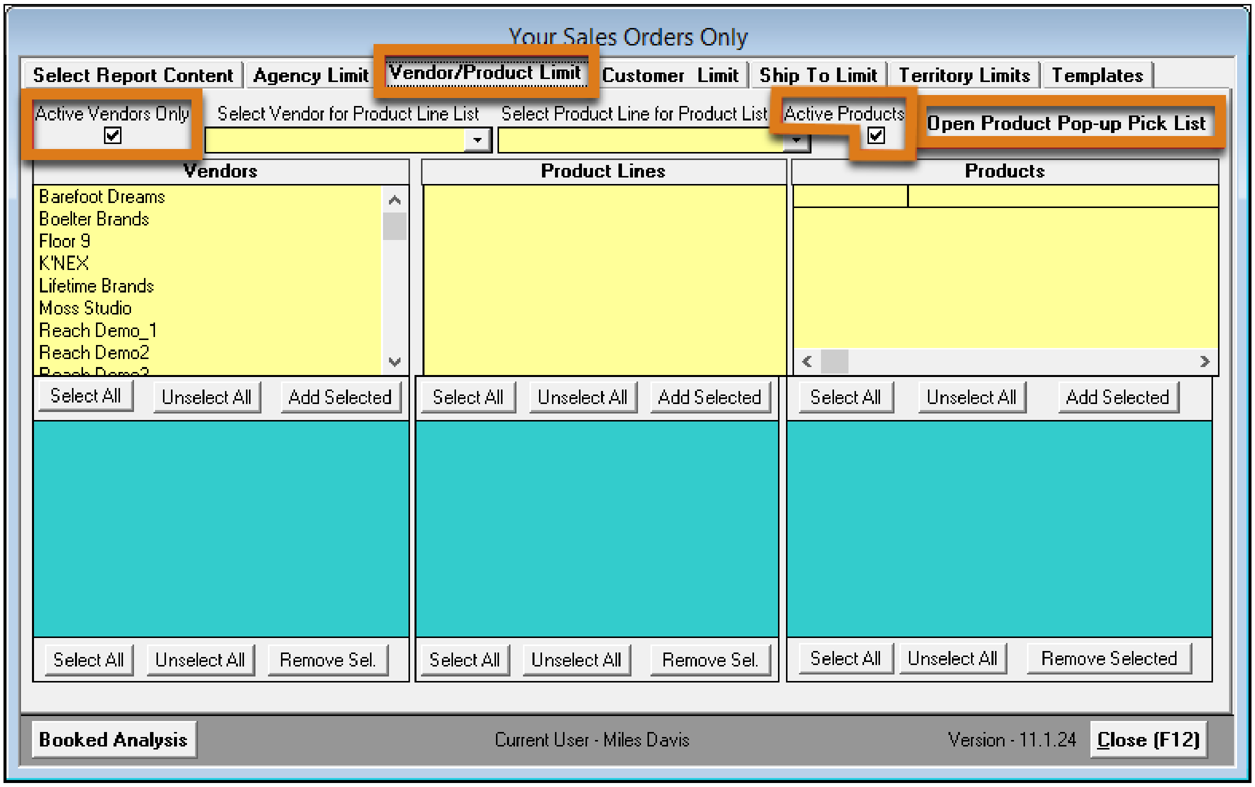
Regardless of the levels chosen, the report includes a sales total. In the **Limit To** section, **Level 1** can be limited to a **Type** of **Best** or **Worst**. In the image above, **Level 1** limits the customers to a type of **Best**, with a **Count** of 10 which means the top **10** customers who spent the highest dollar amount. If you want to see the top ten percent instead, click **%** on the **On** menu. In the **Sort By** section, you can sort the level selections alphabetically, by highest price, or by highest quantity. When **NP** is checked, every **Level 1** begins on a new page. Select an option in the **Sales Order Date Range** section, and then specify the start and end dates or click **No Date Limit**. The **User Template** menu lists previously defined templates. The **Booked Analysis** button is discussed in Submit Report at the end of this section. For now, click the **Agency Limit** tab at the top of the dialog.

14.2 Agency Limit

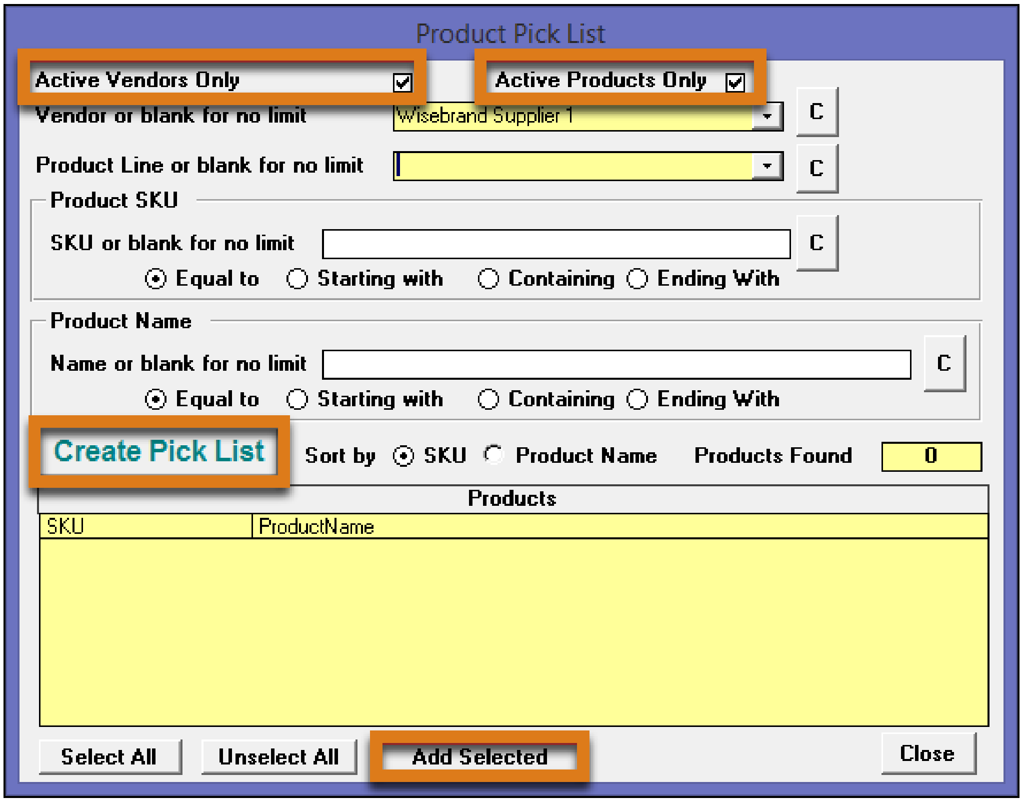


Use this tab to limit report data by agency, sales rep, order taker, and sales location. The available limiting criteria are listed in the yellow fields. To use them as limiting criteria for the report, move items to the blue fields. To move items, highlight them individually or click **Select All** and then click **Add Selected**. When all agency limits have been set, click the **Vendor/Product Limit** tab.

14.3 Vendor/Product Limit

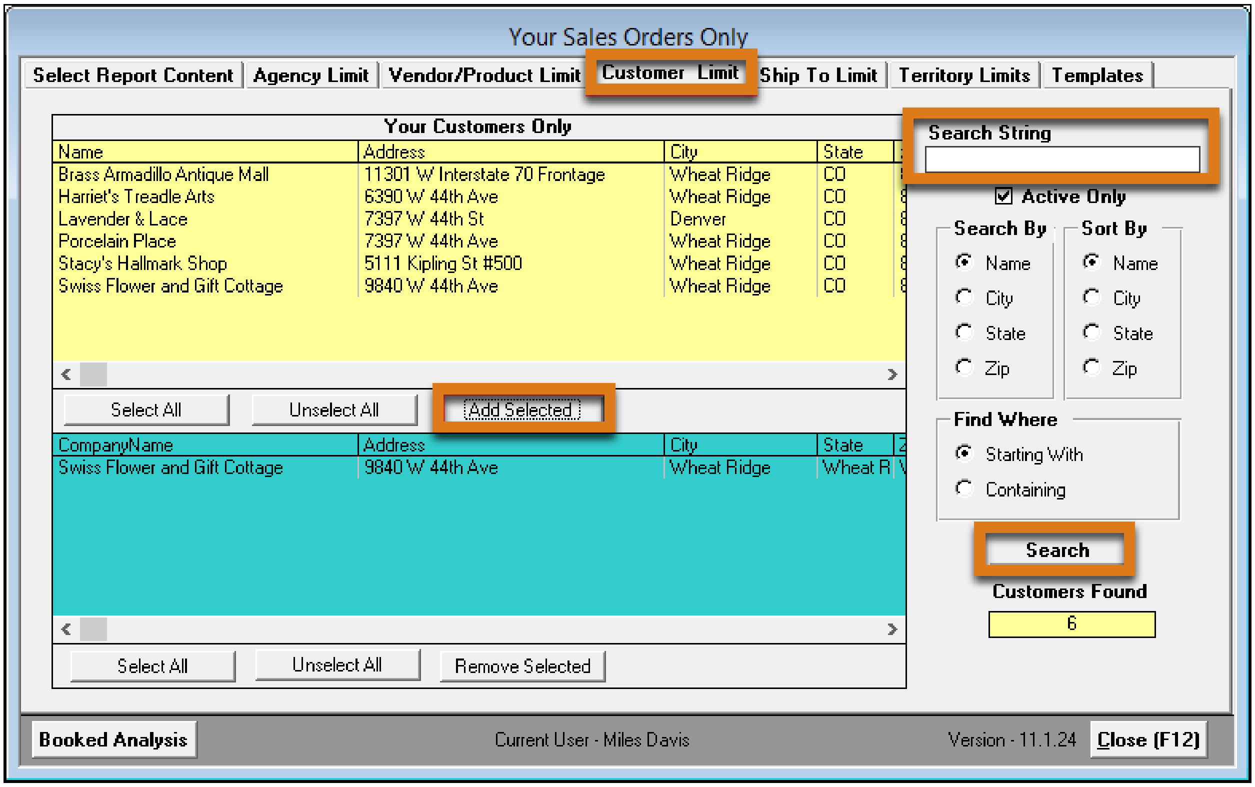


Use this tab to limit report data by vendors, product lines, and products. Highlight items in the yellow fields and move them to the blue fields by clicking **Add Selected**. The two checkboxes at the top of the dialog limit the results to **Active Vendors** and **Active Products**. The two menus at the top of the dialog are for selecting a vendor and product line. A Pick List is just a product list. Click **Open Product Pop-up Pick List** to create a list of products to add to the yellow **Products** field.



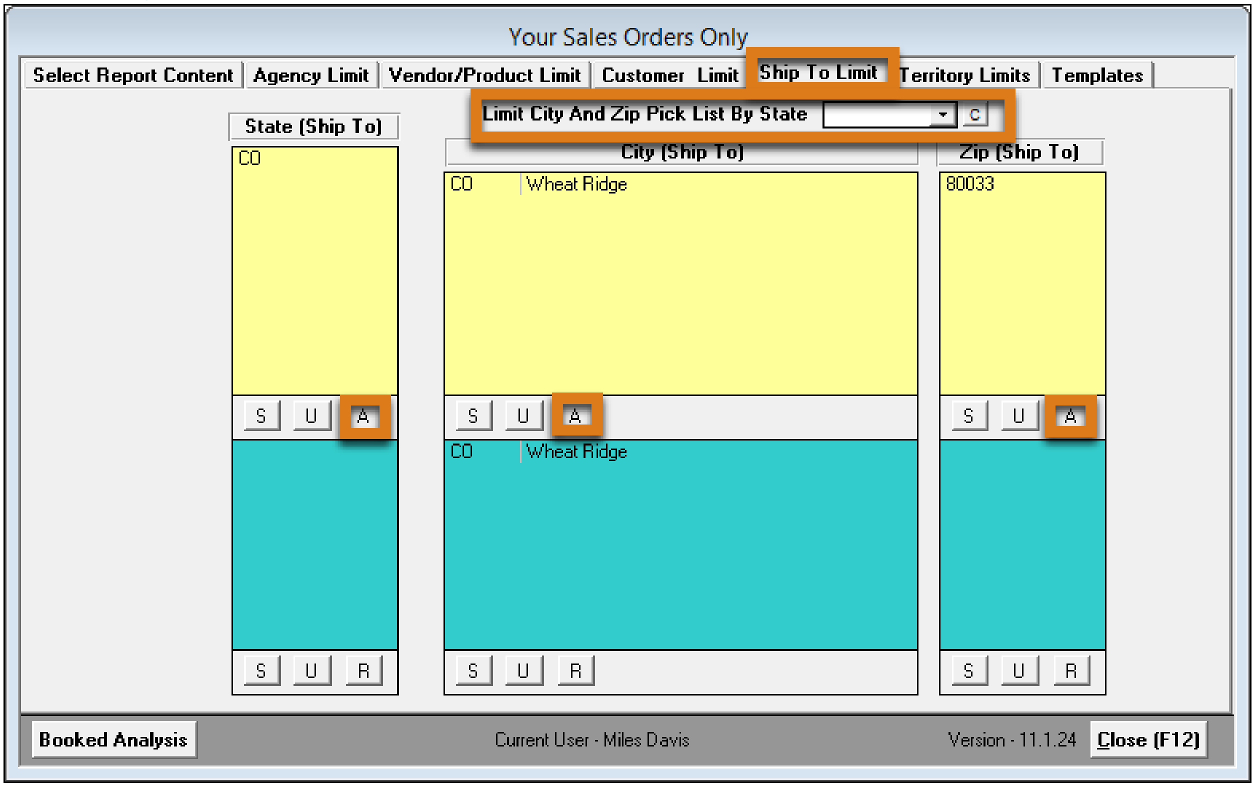
Add products by entering product SKU or name and click **Create Pick List**. The yellow **Products** table reports the products found based on the criteria. Highlight products in the table and click **Add Selected** to proceed or click **Close** to exit the dialog. When all product limits are set, click the **Customer Limit** tab at the top of the dialog.

14.4 Customer Limit



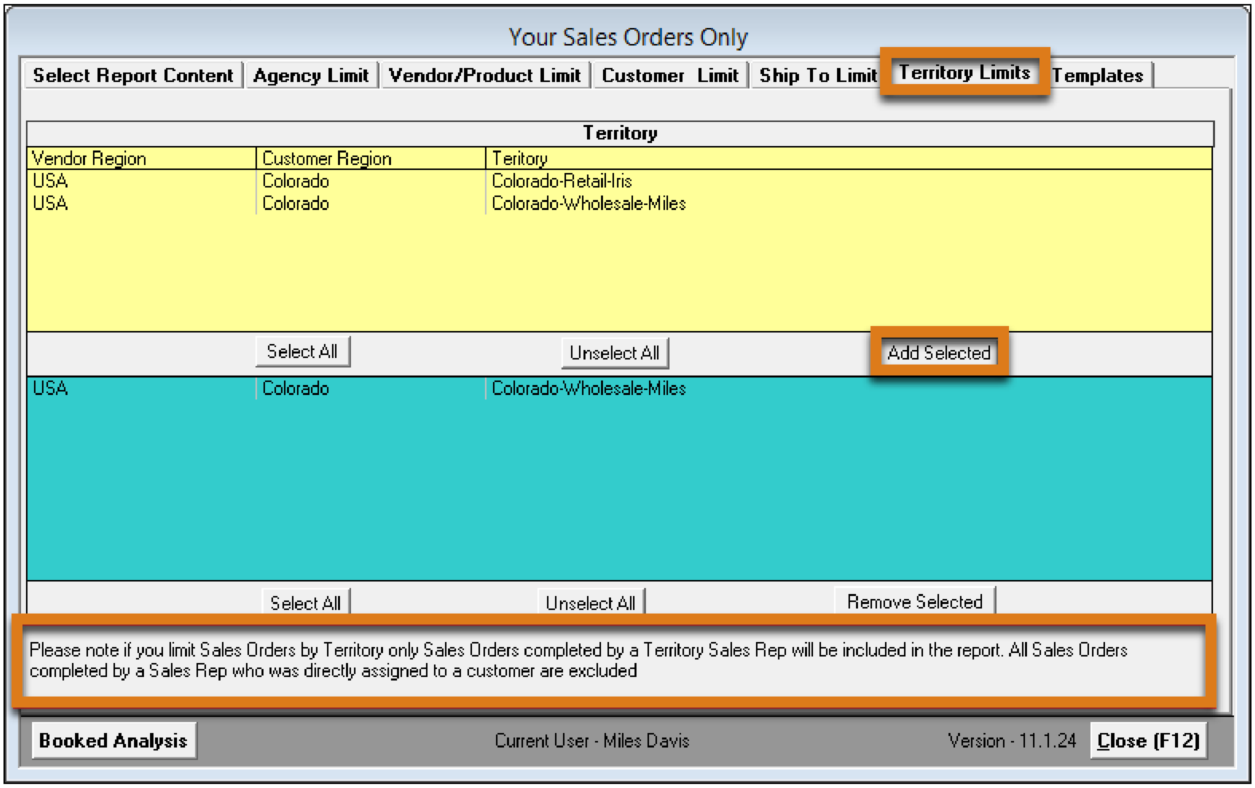
Use this tab to limit report data by customers. First, specify customer search options on the right side of the dialog. You can also type customer information in the **Search String** field, and then click **Search**. To see a list of all customers, leave the **Search String** field empty and click **Search**. Note that **Active Only** is checked by default, uncheck it to display inactive customers as well as active customers. Highlight items in the yellow field and move them to the blue field. When all customer limits are set, click the **Ship To Limit** tab at the top of the dialog.

14.5 Ship To Limit



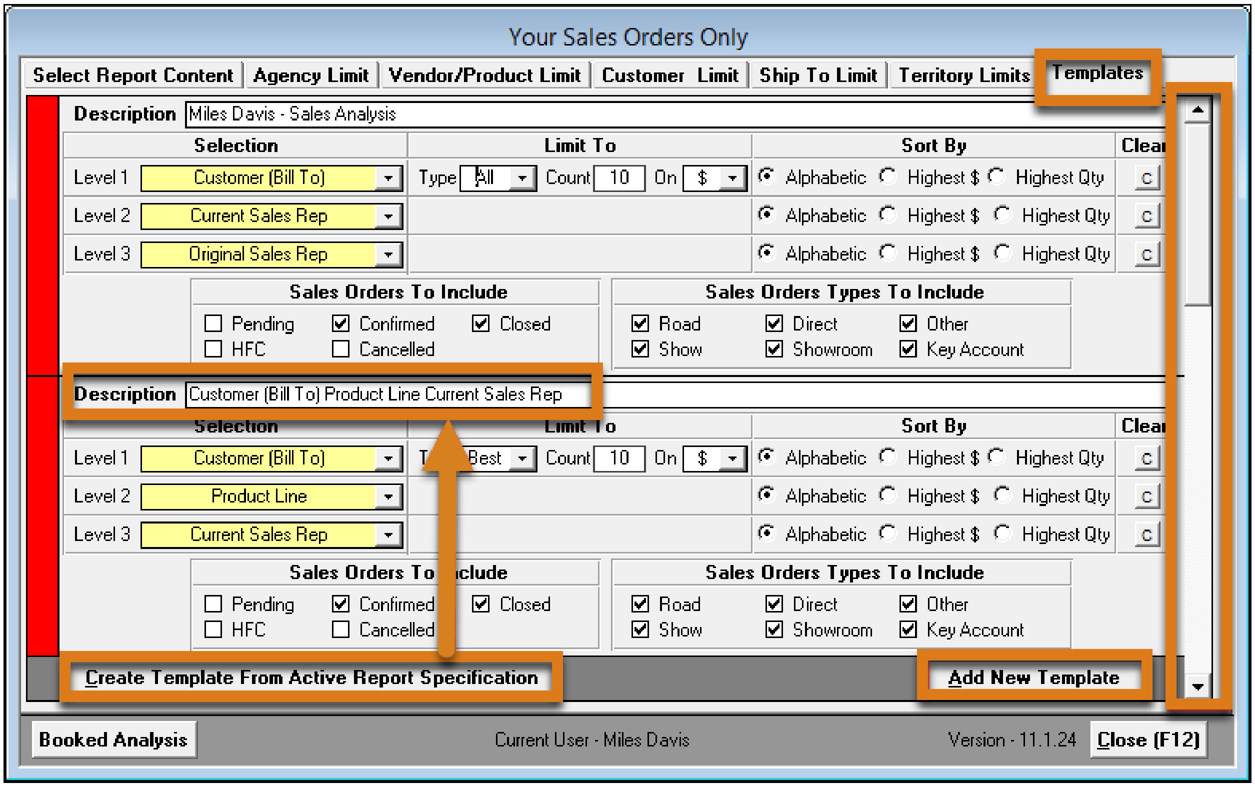
Limit the report data by state, city and zip code by adding items from the yellow fields to the blue fields. Click **S** to select all items in the list, **U** to unselect all items, and **A** to add the selected items. Filter items listed in the yellow **City (Ship To)** and **Zip (Ship To)** fields by a state in the **Limit City And Zip Pick List By State** menu. Next, click the **Territory Limits** tab.

14.6 Territory Limits



Territories are generated by your system administrator. Add limiting territories to the blue field. If you choose to limit by territory, then only sales orders completed by a Territory Sales Rep are included in the report. That means sales orders completed by a sales rep who is directly assigned to a customer are excluded. If the report does not look accurate, your home office may need to perform a territory replacement. If territories are changed, the territory replacement process must be executed to impact past sales orders with current territory setups. Finally, click the **Templates** tab.

14.7 Templates

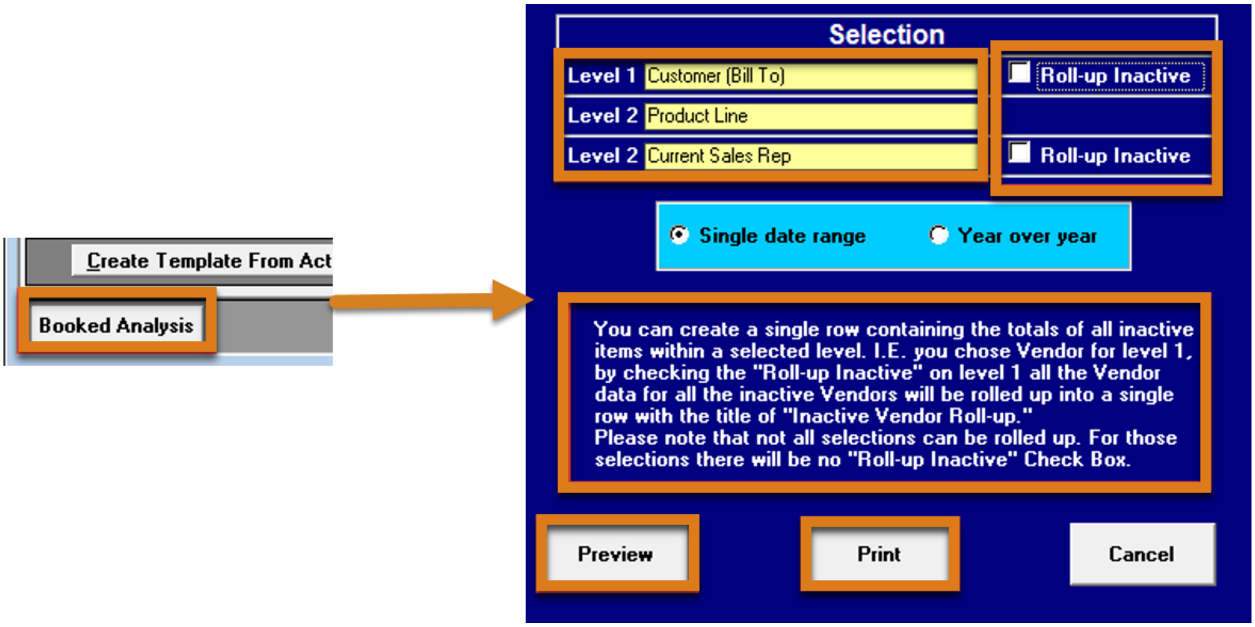


To use the limiting criteria specified on the tabs for future reports, save a template by clicking **Create Template From Active Report Specification**. To create additional templates, click **Add New Template**, and then type a name in the **Description** field and specify the limiting criteria. If multiple templates exist, a vertical scroll bar appears on the right side of the dialog. Delete a template by clicking the red cell to the left of it. Note that a template cannot be deleted if the **Description** field is empty.

To load an existing template, click the **Select Report Content** tab again and select the template name from the **User Template** menu. The only field that needs to be specified each time you generate the report is the date range.

14.8 Generate Report

Our final step is to generate the report. As shown below, click **Booked Analysis** at the bottom of the dialog to preview and print the report.



If **Roll-up Inactive** is checked, the report displays a single row containing the totals of all inactive items within a selected level. For example, if **Vendor** is selected in the **Level 1** menu, and **Roll-up Inactive** is checked, all data for inactive vendors is rolled up into a single row. Note that not all levels can be rolled up. Specify whether to generate the report on just the date range specified on the **Select Report Content** tab, or **Year over year**. If **Year over year** is selected, you can compare this year's numbers to last year's numbers, within the date range specified. Then, click **Preview** or **Print**.

The output file type is determined by your default printer. If a preferred file type is not available, check the default printer setting. The setting is located on the Report Menu dialog (see section Report Menu).

Click **Close** to return to the **Welcome** screen.

15 Glossary of Terms

Supplier/Vendor/Manufacturer	All of these terms refer to the same thing. A supplier/vendor/manufacturer is the one receiving sales orders for their product.
Pending Order	The order is not finished and is not submitted anywhere
HFC Order	Hold For Confirmation - the order is finished but requires approval before it can be confirmed and submitted to the vendor
Confirmed Order	The order is finished and submitted to the vendor
UPC barcode	Universal Product Code barcodes are mostly used in the United States to label and scan consumer products. The UPC-A variation encodes 12 numerical digits and uniquely identifies a product for retail checkout. It encodes the Global Trade Item Number (GTIN-12) and is also used by retailers to identify privately owned brand products sold only in their stores. The UPC-E variation allows the use of U.P.C. barcodes on smaller packages where the UPC-A may not fit. It utilizes a zero-suppression method to compress the Global Trade Item Number (GTIN-12) into an 8-digit format. Reference: http://www.gs1us.org/standards/barcodes/ean_upc)
SSI barcode	Showroom Solutions Inc. is a barcode generated internally by Brandwise. If you do not have product barcodes, and want to scan products for whatever reason, you can select "SSI" so a barcode is generated for you. It is not a barcode that is valid outside of the Brandwise system.
ISBN barcode	The International Standard Book Number (ISBN) is a 13-digit number that uniquely identifies books and book-like products published internationally. The purpose of the ISBN is to establish and identify one title or edition of a title from one specific publisher and is unique to that edition, allowing for more efficient marketing of products by booksellers, libraries, universities, wholesalers and distributors. Reference: http://www.isbn.org/faqs_general_questions
Code 39 (3of9) barcode	Code 39 is a common barcode type used for various labels such as name badges, inventory and industrial applications. The symbology of the Code 39 character set consists of barcode symbols representing numbers 0-9, upper-case

	letters A-Z, the space character and the following symbols: - . $ / + %. Reference: www.idautomation.com/barcode-faq/code-39/