Play for PC

BACK OFFICE MANUAL

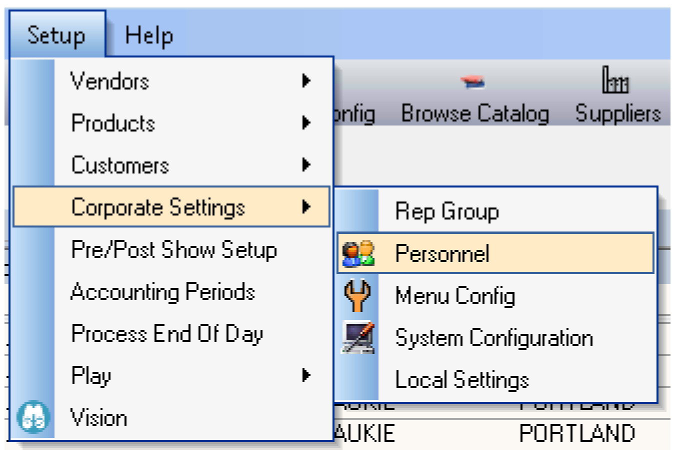
Play

Table of Contents

Corporate Settings

Corporate Settings is broken into 5 sections. They are all found in Setup> Corporate Settings:

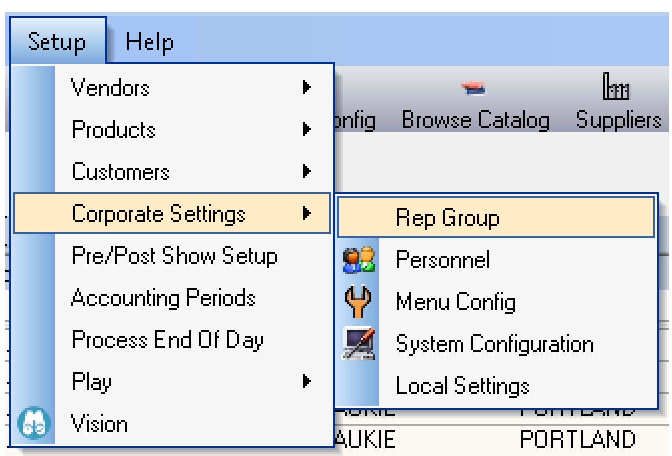
1. Rep Group: Shows information for each rep group
2. Personnel: Shows information for each user of the system
3. Menu Config: Sets each users permissions in the system
4. System Config: Sets system settings throughout
5. Local Settings: Sets certain defaults throughout the system



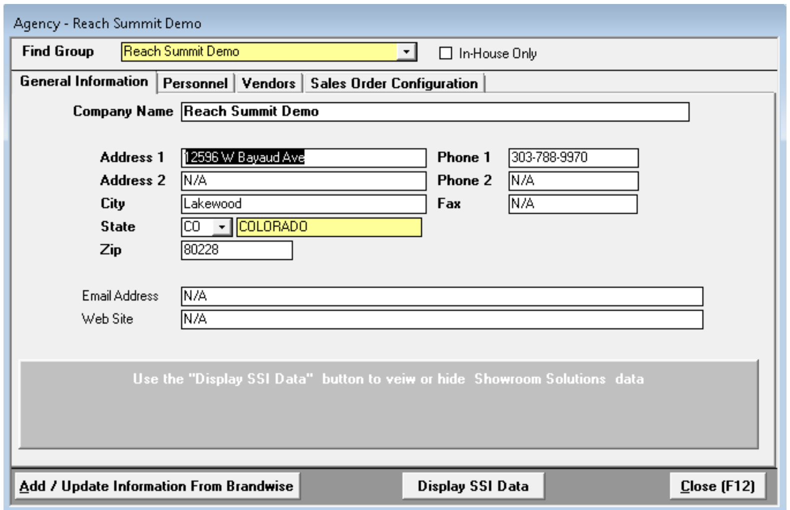
Rep Group

Rep Group is used to identify what information displays on the orders and to quickly view a list of personnel and vendors assigned to each rep group.

To enter rep group data go to: ***Setup> Corporate Settings> Rep Group***



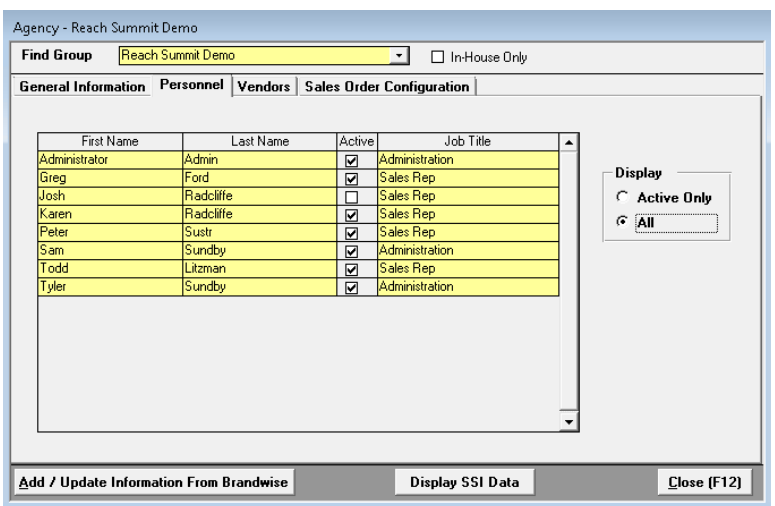
General Information Tab



The Rep Group general information is the information which prints on all sales order copies.

If you have multiple rep groups, you can select the correct one from the dropdown. This tab allows you to edit the information that will show up on the sales orders.

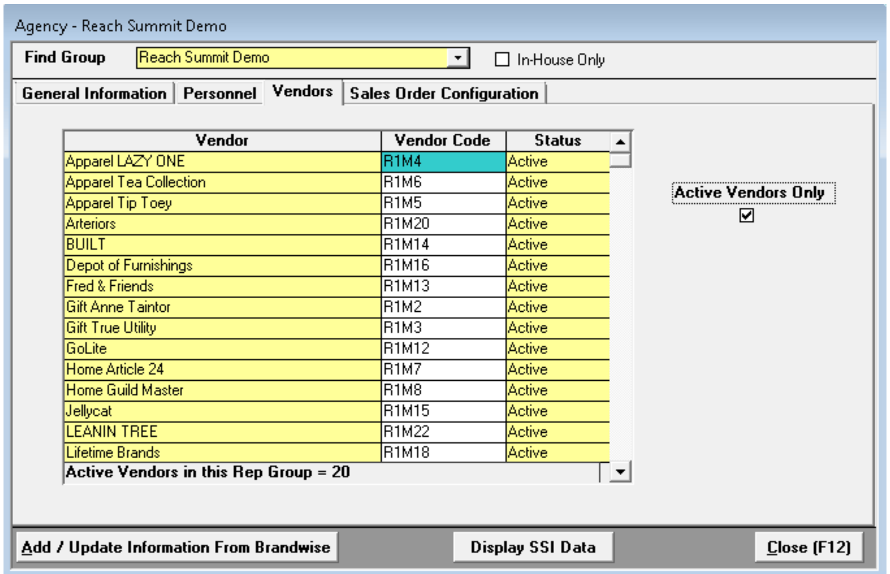
Personnel Tab



Personnel are all the users' setup in the system that have access to login for different purposes. Personnel consist of sales reps, back office administrators, data entry, showroom managers, sales managers, etc. . The assignment and setup of personnel is under the personnel setup section.

The personnel tab is a quick way to view all personnel assigned to this rep group. You can activate or inactivate a personnel record by checking or unchecking the box on this screen.

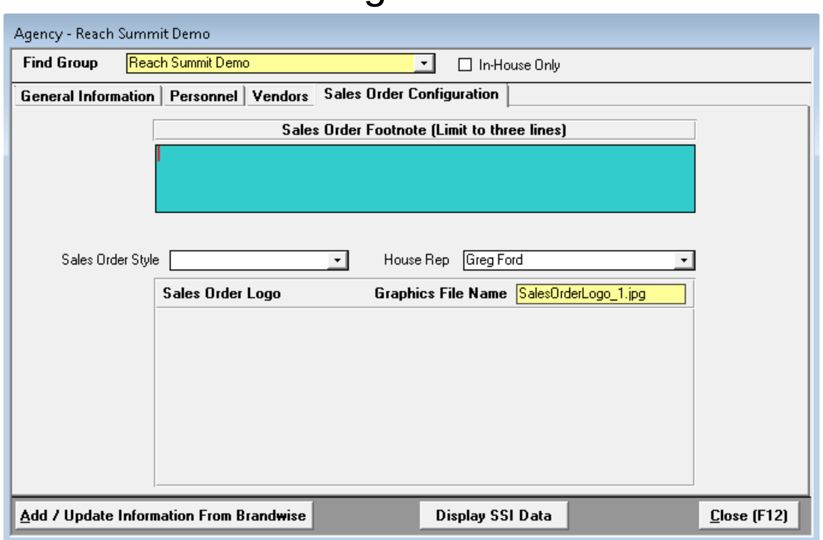
Vendors Tab



List of vendors assigned to the rep group. The assignment of vendors to a rep group is managed thru the submission of a new vendor request to Brandwise.

The vendors tab will display all vendors assigned to the rep group and allow you to enter a vendor code for each.

Sales Order Configuration Tab



An order footnote and logo can be added per rep group. This information will then print on the sales order printout for the rep group.

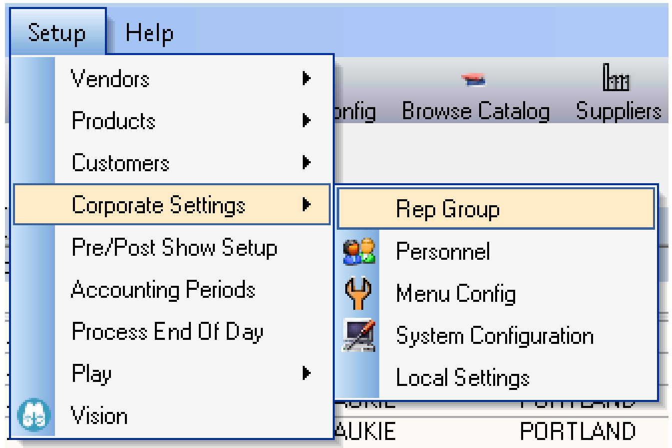
The sales order configuration tab allows you to set a default logo, house rep, and sales order footnote, for each rep group. All of which will show up on the sales order.

NOTE: *Each rep group will need to be set up individually and can have its own logo. However, vendors and personnel can be assigned to multiple rep groups.*

Rep Group

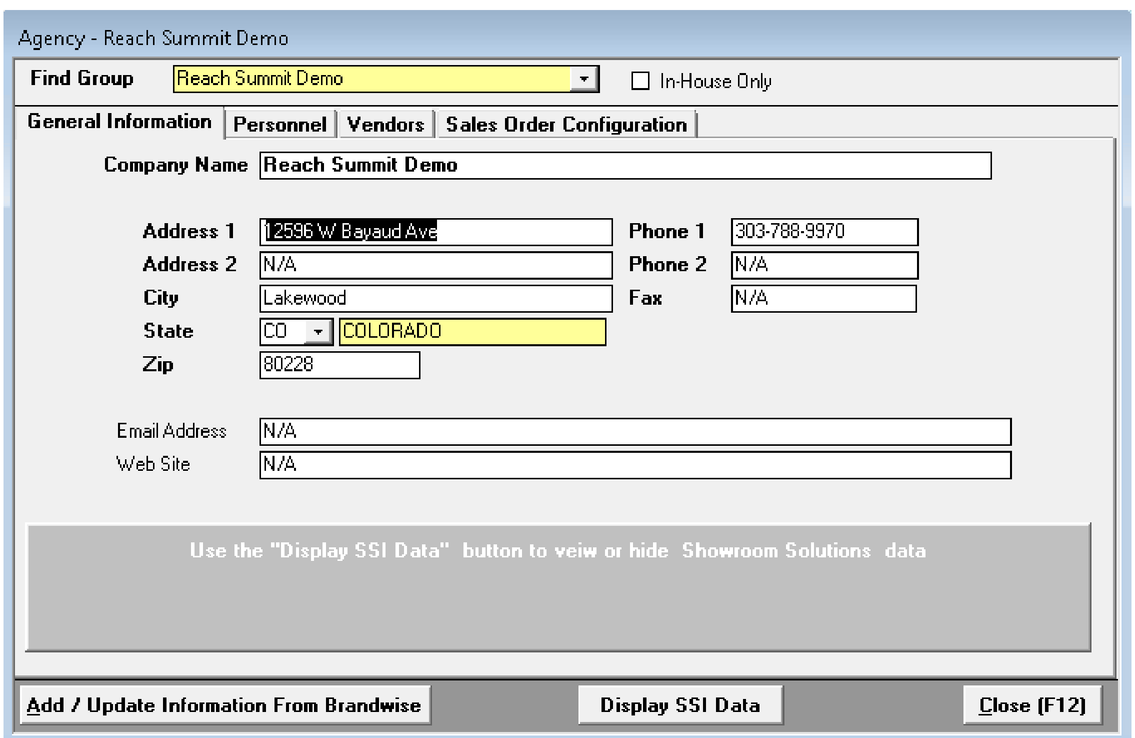
Rep Group is used to identify what information displays on the orders and to quickly view a list of personnel and vendors assigned to each rep group.

To enter rep group data go to: ***Setup> Corporate Settings> Rep Group***



General Information Tab

The Rep Group general information is the information which prints on all sales order copies.



If you have multiple rep groups, you can select the correct one from the dropdown. This tab allows you to edit the information that will show up on the sales orders.

Personnel Tab

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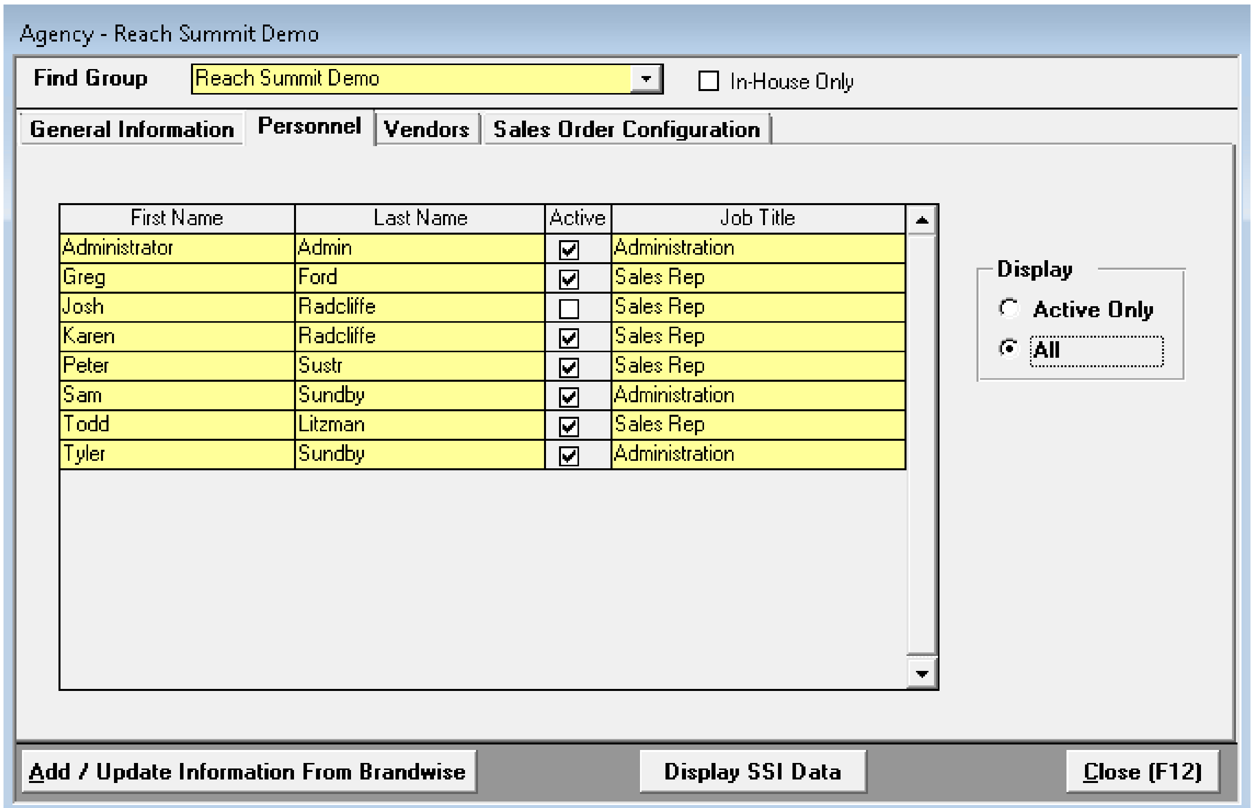

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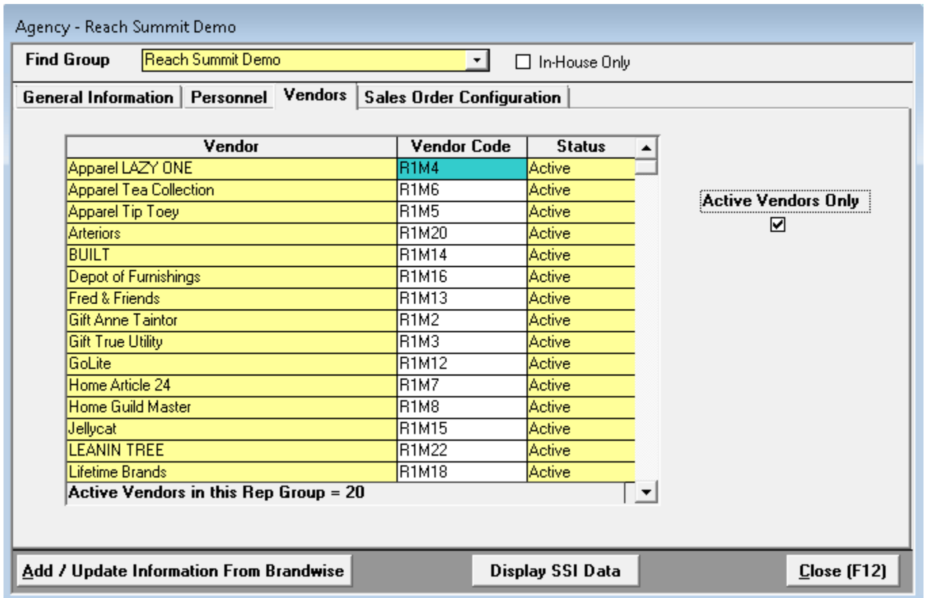
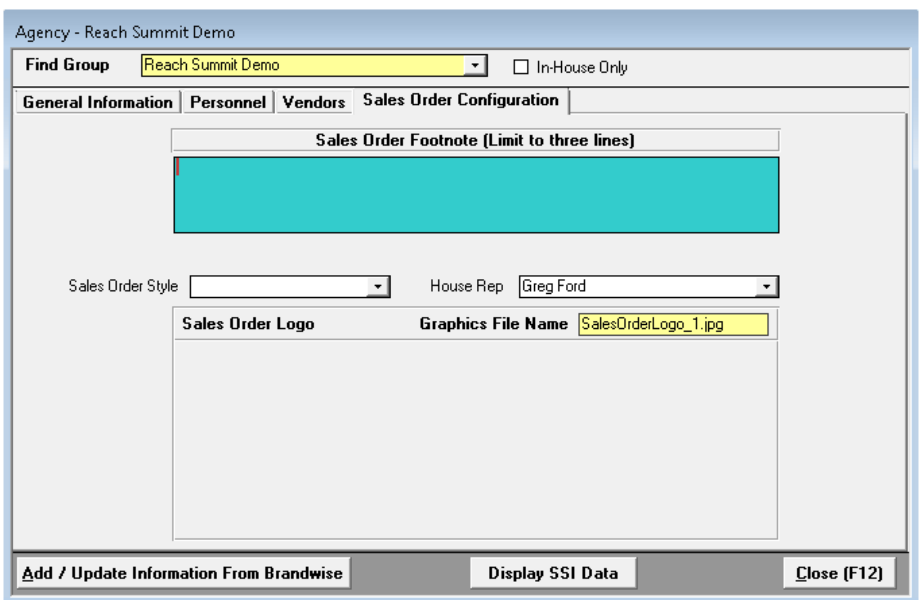


The vendors tab will display all vendors assigned to the rep group and allow you to enter a vendor code for each.

Sales Order Configuration Tab

An order footnote and logo can be added per rep group. This information will then print on the sales order printout for the rep group.

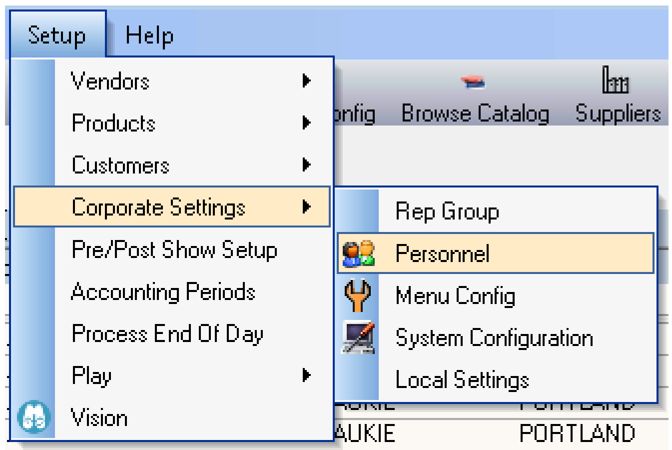


The sales order configuration tab allows you to set a default logo, house rep, and sales order footnote, for each rep group. All of which will show up on the sales order.

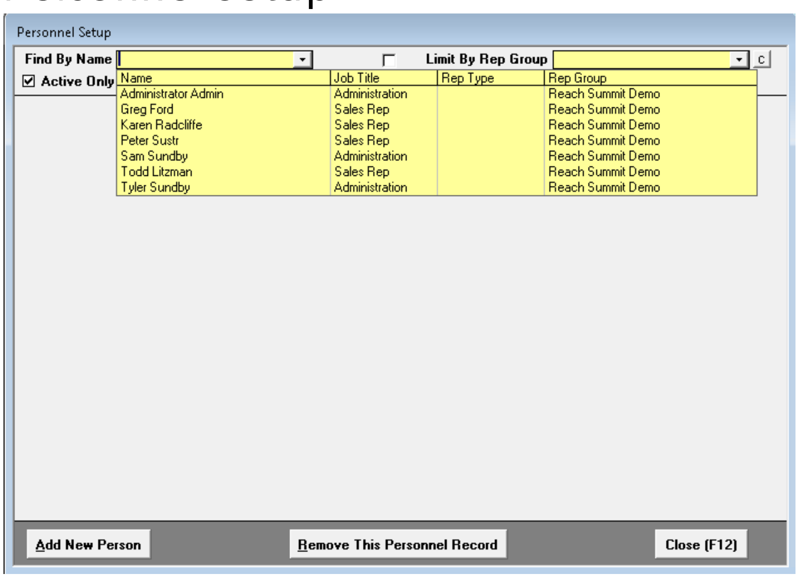
Personnel

Personnel setup consists of adding all users that have the ability to log into the system. These users can be sales reps, managers, administrators, data entry etc. Anyone who will log into the system should be setup as a personnel record. There are several pieces of important data that needs to be setup for each user (personnel record) on the system. The following is information which pertains to each personnel record in the system.

To enter personnel data go to: ***Setup> Corporate Settings> Personnel***

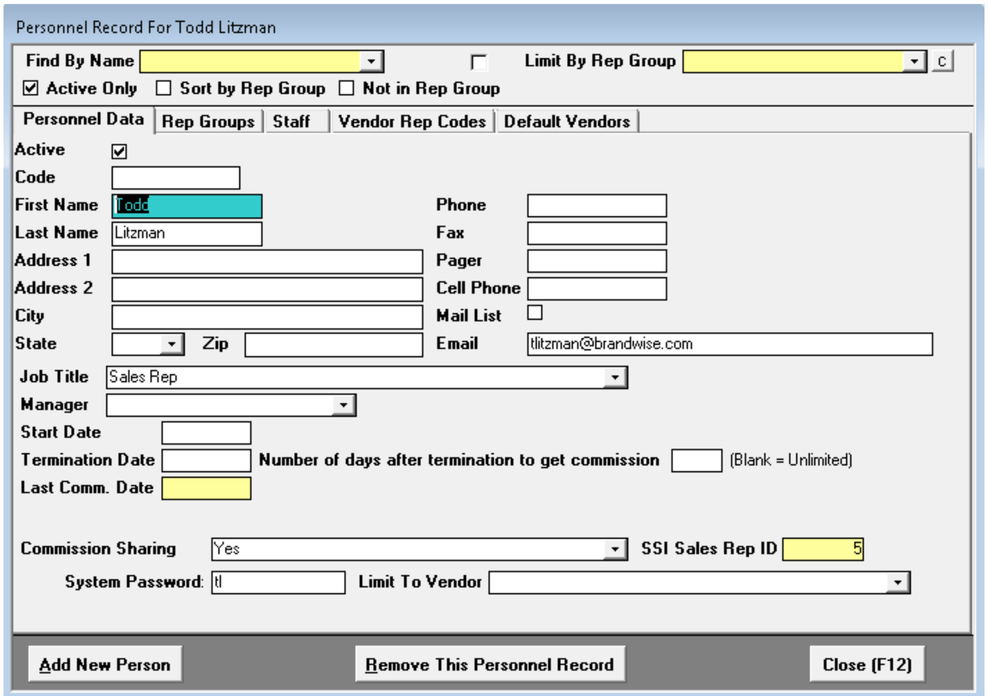


Personnel Setup



Click on the ***Find By Name*** dropdown to locate current personnel records. Once you select a person, their information will be loaded into the personnel data screen.

Personnel Data



General Information

General information consists of the personnel address, phone, fax, email etc. This information prints on the sales order so it is important that is accurate.

Job Title: The job title describes how the user will use the system and if the user is entitled to commissions.

- **Administration:** An administrator is users which will administrator data or is a data entry person. User's setup as administration will not be paid commissions.
- **Manager:** Manager is used only if a user needs Play for PC for reporting purposes only. If a sales manager also has assigned customers or a territory then their job title should be sales rep.
- **Order Taker:** An order taker is a user which is not assigned a territory or customers and only writes orders. The order taker can receive commissions based on the commission rules setup for the sharing rep. An order taker cannot receive commissions as a main territory rep.

- **Principle:** A principle is a user which will have rights to see data for reporting purposes only. A principle will not be assigned to a territory or customer, nor will they be paid any commissions.
- **Sales Rep:** A sales rep is a user which is assigned a territory or customers and is paid commission based on these assignments. Sales reps will then be assigned to the appropriate commission rule.

NOTE: *Different security access levels can be assigned based on the user level and are not assigned based on the job title*

Manager: Personnel can be assigned a manager, the manager is then able to view and edit all the personnel that is assigned to them.

Start Date: Date the sales rep started with your agency.

Termination date: Date rep has been terminated. This date can then be used to determine how many days the rep receives commission after their terminated date.

Number of days after termination to get commission: The number of days after the termination date of when the rep receives commission can be entered in this field. If this field is populated then part of the end of day process will determine if there are any open invoices to be paid to this sales rep and change the rep to the current rep in the territory.

Commission Sharing: Commission sharing is used if the person who writes the order has the rights to share commission with the main sales rep on the order or the agency house rep. Commission sharing does not apply to the main territory rep on the order. The commission sharing is based on the rules setup under the commission setup section.

Types of Sharing

Yes: The order receives commission sharing; the commission will be shared with the territory rep.

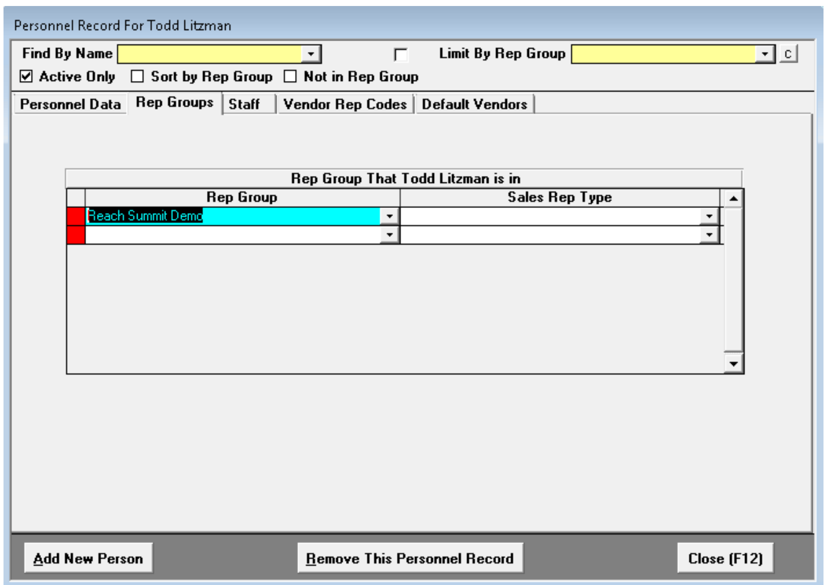
Commission goes to rep group house: The order taker share goes to the house rep rather than the order taker. *(Ex: Show temp writes an order for a road rep's account and there is a commission split that gets paid to the house rather than to the temp rep)*

No: The order taker does not get any commission share on orders. This only applies to the rep as an order taker and not as the main rep on orders.

System Password: The system password for each personnel record is the password the user will use to log into the application on their local database as well as in the showroom. The password defaults to be the word 'password' when the system is initially setup and can be changed by the administrator at any time. It is highly recommended that you change each personnel record's password

Limit to Vendor: Limit to vendor allows you to assign only one vendor to a user. This will limit the user to only seeing one vendor's data for ordering and reporting purposes. An example of when to use this is for vendors that come to your showroom can be setup on the system to take orders but only see their own data.

Rep Groups Tab



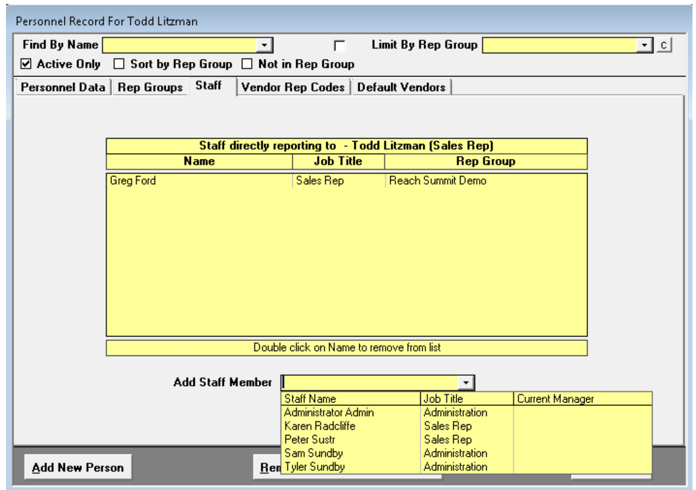
All personnel records need to be assigned to a rep group even if there is only one rep group. Then a user can also be assigned a rep type per group for reporting purposes.

All personnel records need to be assigned to a Rep Group. You can select multiple rep groups for a single user.

Staff Tab

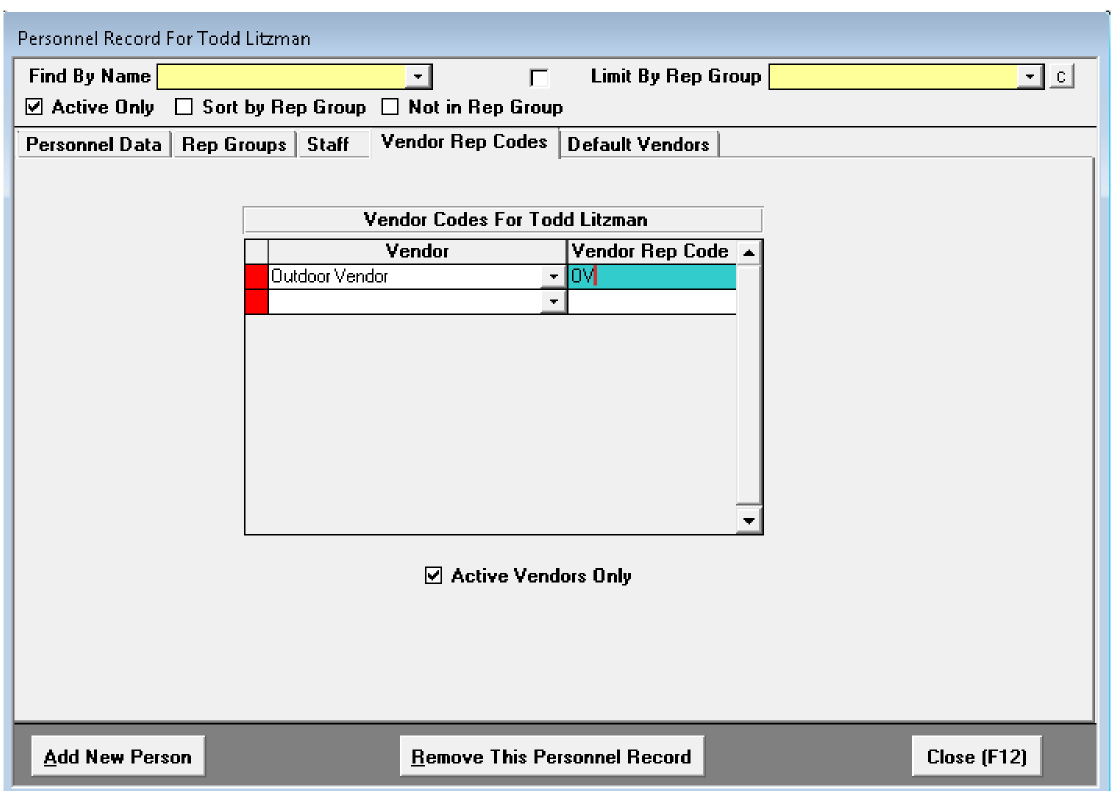
The staff section will list any personnel a manager is assigned. Personnel can also be added from this page if the manager has multiple people reporting to them.

The staff tab will allow you to add a staff member to this user. To add staff members select them from the Add Staff Member dropdown. The user will be able to see all orders from their staff members.



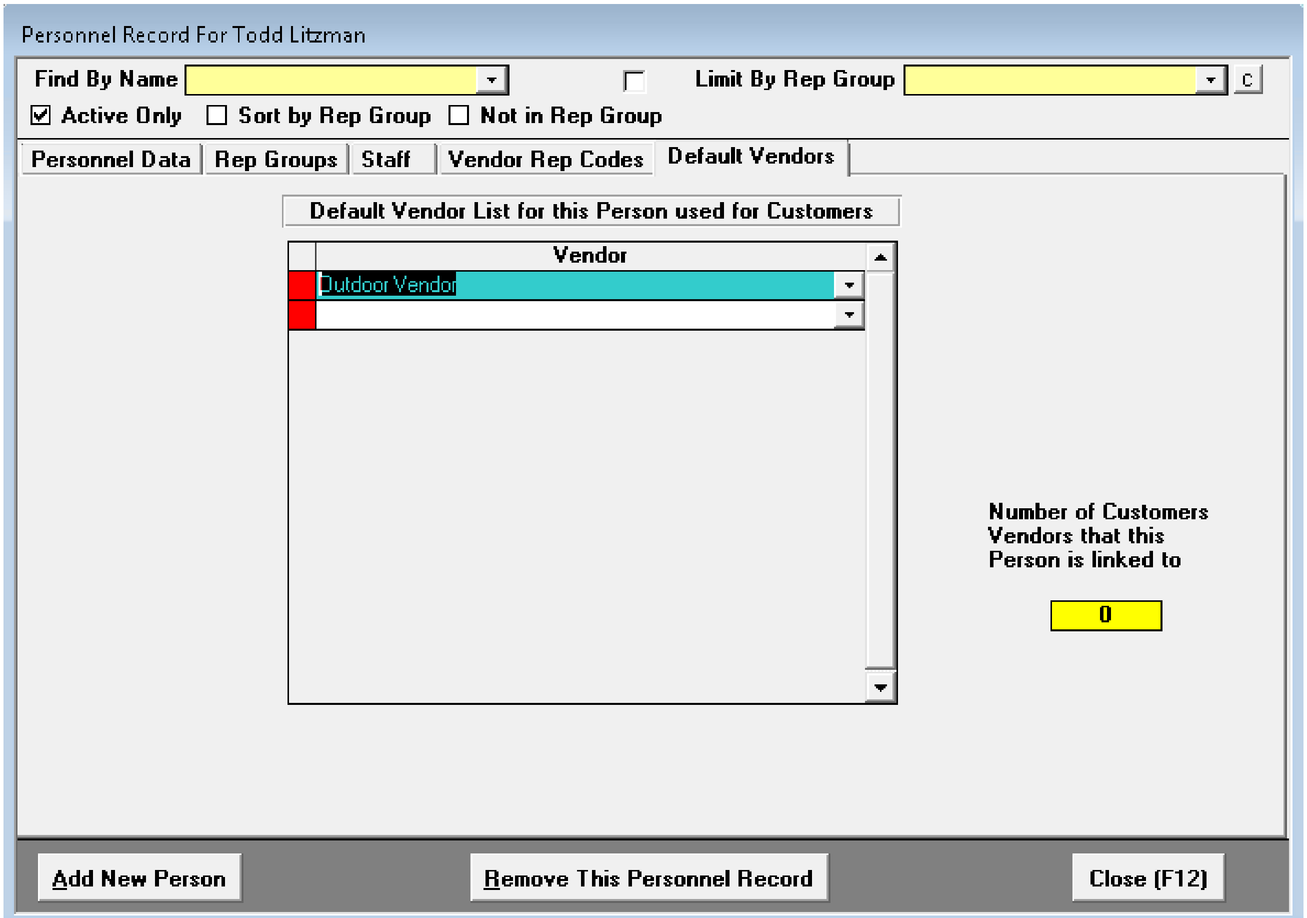
Vendor Rep Codes Tab

A vendor rep code can be added to the personnel record to track each vendor/sales rep number if one is assigned. This number will then be listed on the sales order printout and be sent to the vendor as part of the order transmission.



Default Vendors Tab

Default vendors are used if you have reps assigned directly to customers for a group of vendors.

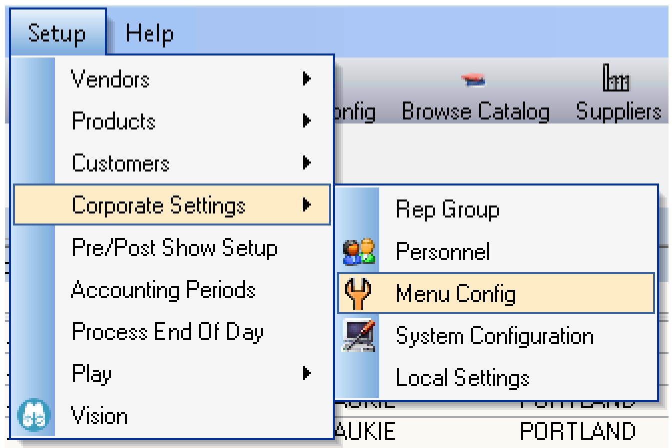


When new vendors are added to the reps package then you can add the vendor in the default vendor it the system will then update all the customers assigned to the rep with the rep's default vendor list.

Menu Configuration

Security and access levels will be setup under ***Menu Config***. Access levels are setup by user group definitions. The system can have unlimited number of user groups, defined by the agency. All active users are assigned to a user group to determine what the user can see and do on the system.

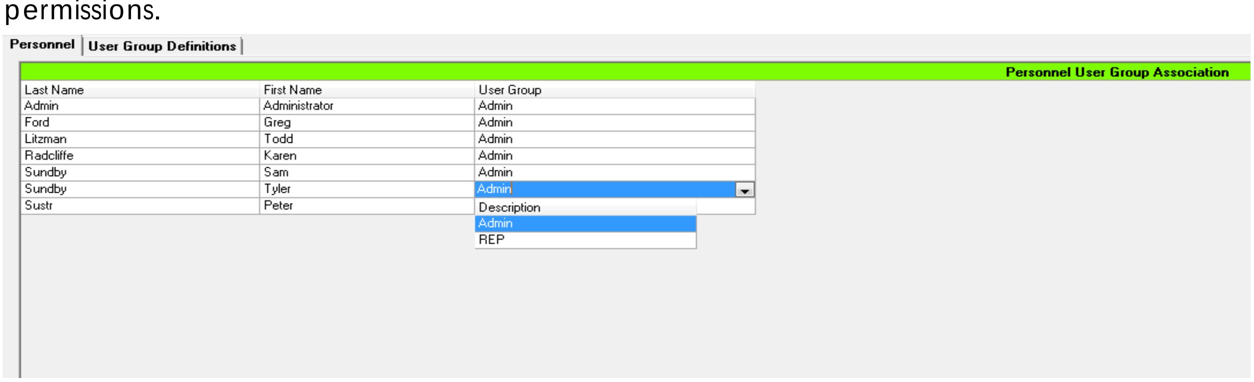
To open Menu Configuration go to: ***Menu Config*** in the menu bar or ***Setup> Corporate Settings> Menu Config***



Menu Config has two aspects to the setup of the user permissions; user group definitions and menu settings. Each of these are explained in the next two sections.

Personnel

This is where you assign a user to a specific group. Each group has its own specific permissions.



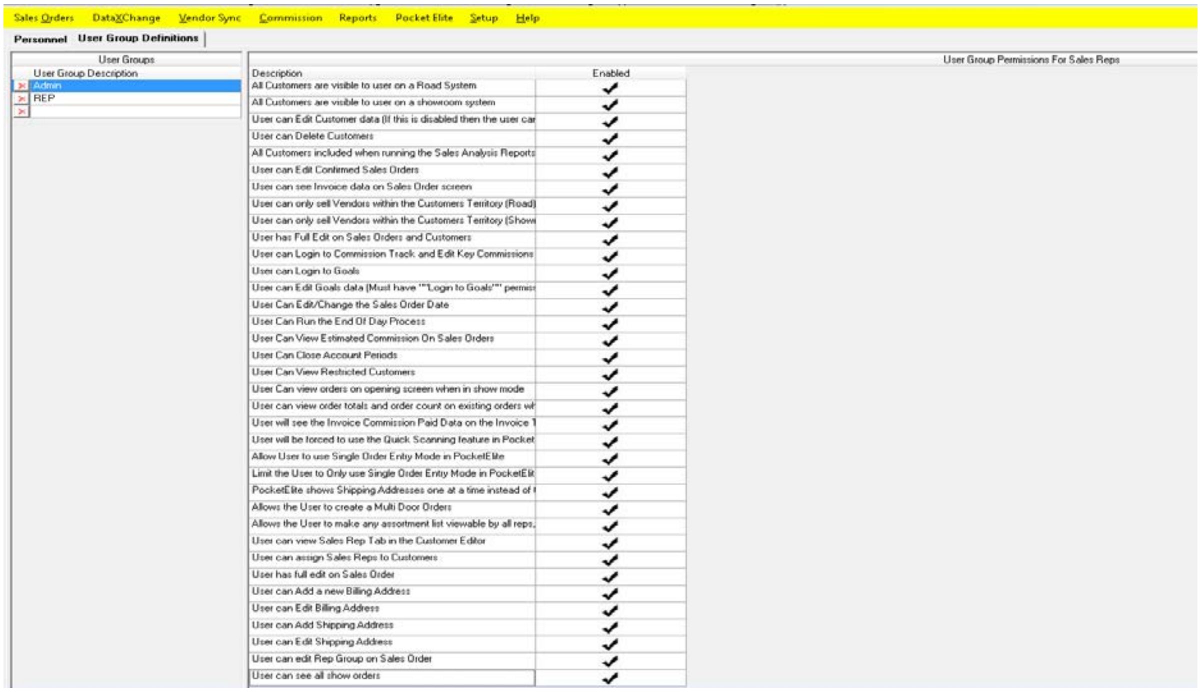
A user must be added in personnel and active to be assigned to a group.

Click on the User Group to display the dropdown to assign the User Group.

User Group Definitions

User group definitions define are settings to give different permissions on what data a user can see and have access to edit etc.

An unlimited number of user groups can be created and assigned to different permissions settings. Once user groups are set up then each personnel record will be assigned a user group accordingly.



View Permission Settings for the details on each permission.

Adding/Deleting User Group

Adding a new User Group is done in the User Group Description section on the left.

- Click on a field to type in your User Group Description.
- Click the delete icon to remove User Group

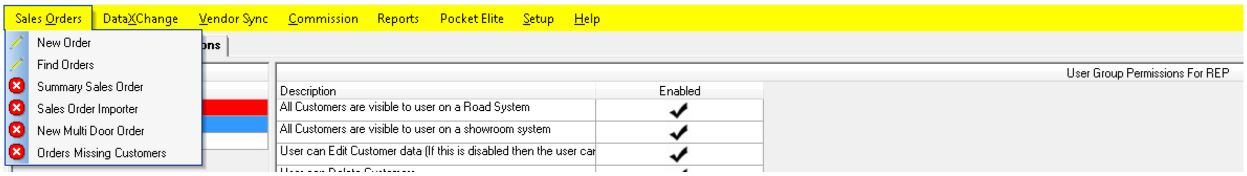
Enabling/Disabling Group Menu Permissions

To turn on a permission setting click in the enabled box.

-  Permission Enabled
-  Permission Disabled

User Group Menu Permissions

The User Group Menu Permissions will assign the group to have Edit privileges for the selected editor.



Edit: A pencil icon  will appear next the editor name

Revoked: A red icon  will appear next to the editor name

NOTE: *Each user group must be setup before you can assign personnel to the group.*

Permission Settings

All customers are visible to user on a road system
When user logins to their road system they will have the ability to see all customers. The user will be able to see all customers even if the customer does not fall into the user's customer assignments and/or territory.

All customers are visible to users on a showroom system
When user login to the showroom system they will have the ability to see all customers.

User can Edit customer data
User can edit customer data for the customer they have permission to see on their systems. Customer information that can be edited includes: bill & shipping addresses, phone, fax, email, contact, credit card information, customer references.

User can delete customers
User has the ability to delete a customer. However, a customer can only be deleted from the system if there is not data history for the customer in the system. If a user deletes a customer and does a data transfer and that customer has data on the main agency system the customer will not be deleted and be sent back to the user on their next data transfer.

All customers included when running the sales analysis reports
The user can see all customers when they run sales analysis reports. Road reps on their local systems will still only see their order history for reports, however when they login to the system in the showroom they will have the ability to see all history.

User can edit confirmed sales orders
This allows users to make changes to make changes to orders after they have been confirmed.

User can see invoice data on sales order screen
This allows invoice data to be transferred to the user's system and they can see invoice data against an order on the invoice tab of an order.

User can only sell vendors within the customer territory (road)
This limits the vendors a user can see based on the territory settings in *Reward* when they are using their local system on the road.

User can only sell vendors within the customer territory (show)
This setting will limit what a user can see based on the territory settings in *Reward* when they are logged into the showroom or back office system. Generally when reps come in to the shows they are allowed to see all vendor information to have the ability to write orders throughout the full showroom.

User has full edit on sales orders and customers
This will allows the user to change all fields to include rep assignments on orders. This setting is usually turned off for sales reps and on for back office personnel.

User can login to Reward and edit key commissions
This allows the user to have access to the Reward program.

User can login to goals
If the agency is using goals this allows the user to login to the goal program.

User can edit goals data (must have login to goals permission)
If the agency is using goals this allows the user to make changes and setup goal records.

User can edit/change the sales order date
This allows the user to change the sales order date on sales orders. If the user cannot change the sales order date the current date the order is entered in the system will be the order date. This does not apply to the back office when direct orders or summary orders are being entered.

User can run the end of day process
This is a back office function and should not be turned on for reps. See End of day process for more details of this functionality.

User can view estimated commission on sales orders
This allows the user to see the estimated commission splits on an order under the invoice tab on an order.

User can close account periods
This is a back office function only and will only apply to the main agency system (100 server). See accounting periods for more details on this functionality.

User Can View Restricted Customers
This allows user to view customers that are marked as restricted. (See customer information for more details on restricted customers).

User can view orders on the opening screen when in show mode
This allows user to view orders from the welcome page. Usually during a show for temps and vendors you will setup a user login that does not have this permission set.

User can view order totals and count on existing orders when in show mode
This allows user to view order totals and counts when looking up orders in existing order screen.

User will see the invoice commission paid data on the invoice tab of an order
This allows user to view commission information in *Play* when viewing an order.

Play for PPC shows Shipping Addresses one at a time instead of the default Multi Grid View
Defaults shipping address view to one at a time.

Allows the User to create a Multi Door Orders
Users can create Mutli Door Orders.

Allows the User to make any assortment list viewable by all reps, also allows user to see all private lists
User can create an assortment list that will shared by all reps. Allows user to see all private assortment lists.

User can view Sales Rep Tab in the Customer Editor
User will have the ability to view the assigned Sales Rep in the Customer Editor.

User can assign Sales Reps to Customers
User can hard code Sales Reps in the Customer Editor.

User has full edit on Sales Order
Allows the user to have full edit permission for Sales Orders.

User can Add a new Billing Address
Allows the user to create a new Billing Address in Play.

User can Edit Billing Address
Allows the user to edit the Billing Address in Play.

User can Add Shipping Address
Allows the user to create a new Shipping Address in Play.

User can Edit Shipping Address
Allows the user to edit the Shipping Address in Play.

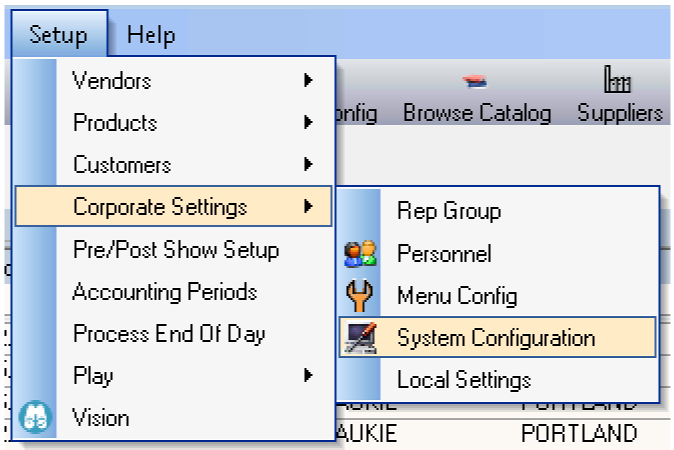
User can edit Rep Group on Sales Order
Allows the user to change the Rep Group assigned in the Sales Order.

User can see all show orders
Allows the user to view all show orders.

System Configuration

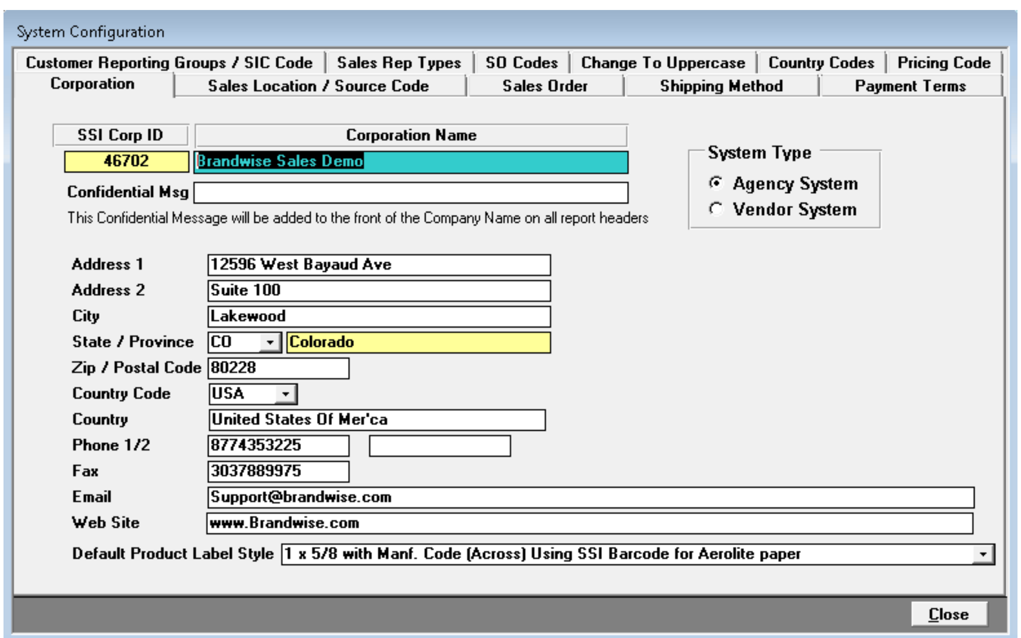
Under the system configuration menu all of the system settings will be set with regards to how the Play will work for your company. This will establish system defaults that will be assigned in the other editors.

To access system configuration go to: ***Setup> Corporate Settings> System Configuration***



Corporation

The corporation information is general information about the main company of the system. This information is shared with Brandwise only and will not print on the sales orders.



The information that prints on the sales orders is located under the rep group information.

General Information: Basic contact information for your company share with Brandwise only.

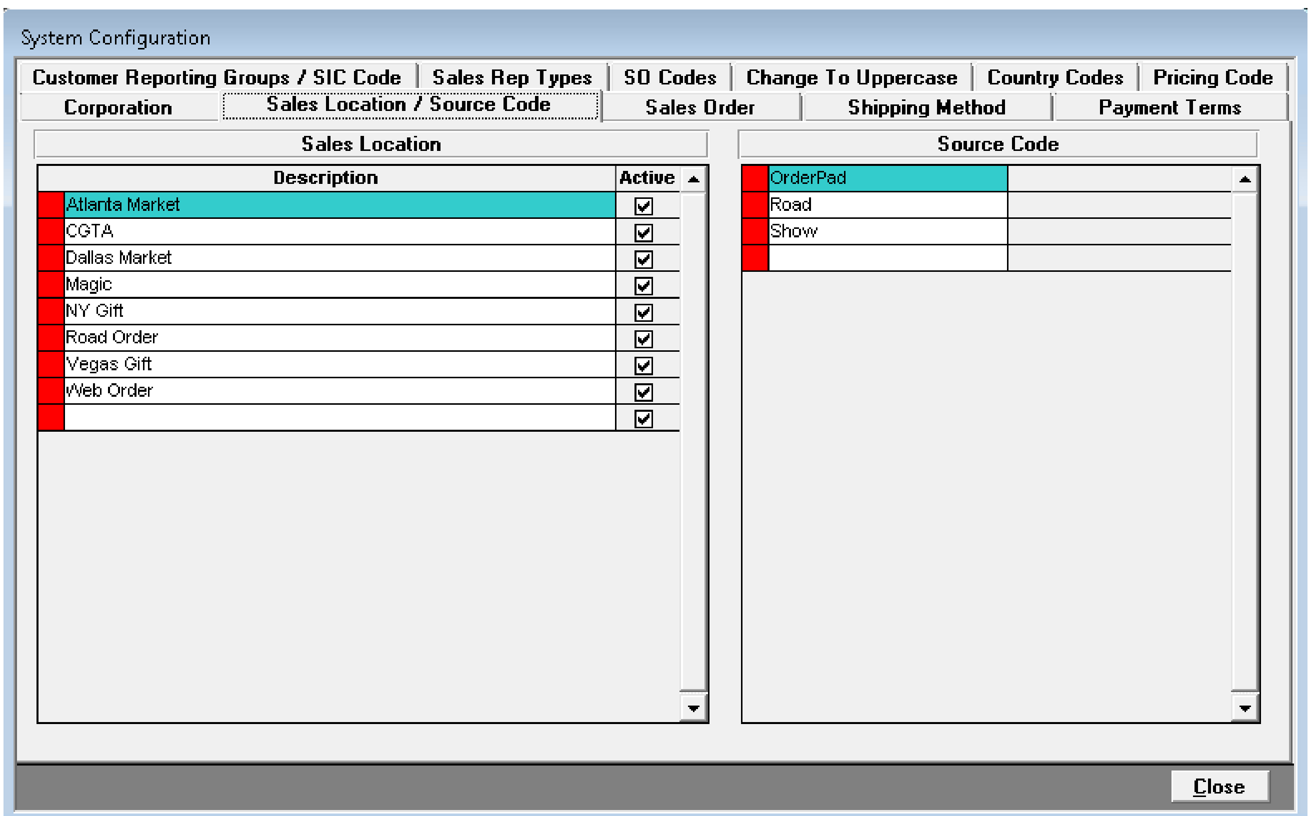
Confidential Message: This confidential message will be added to the front of the Company Name on all report headers.

Default Product Label Style: You can also set the label style for your printing product labels.

Sales Location / Source Code

There are two sets of source data that can be tracked on the order, sales order location and source code. The sales order location which is where the order was generated, ex: July Gift Show or High Point Show, etc. The source code is how the order was generated, ex. Phone, mail, email, etc.

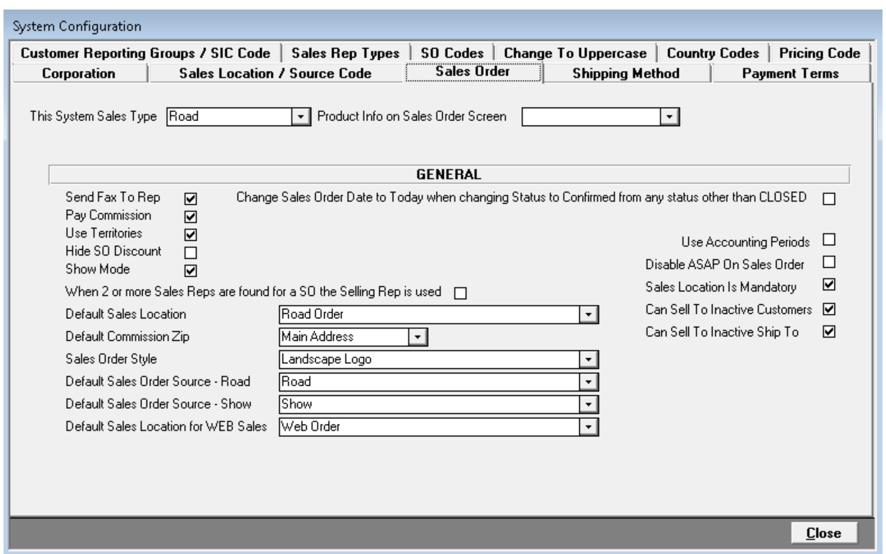
Both the sales order location and the source code will be available per a drop down box on the sales order header when a new order is added to the system. Reports can then be generated by only the location.



The sales order type is driven from the system the order was generated on and also is the code that determines the appropriate commission rules to the order. Each system has a default sales order type that can only be overridden by an administrator. The five sales order types are: ***Road, Showroom, Show, Direct, Other, Key***.

- **Road:** The sales rep systems default to the sales order type of road and can only be overridden by an administrator.
- **Showroom:** If there is a separate showroom system then the system will default to showroom as the sales order type or if the main back office system is also the same system in the showroom then the system can be set to default to showroom as the sales order type.
- **Show:** The show sales order type is set by setting the system in the showroom to be in 'show mode'. When the system is in show mode it will override any default sales order types setup.
- **Direct:** Direct is set on orders when a direct invoice is added in the commission system.
- **Other:** Can be used for other miscellaneous types, the only way "other" will populate on the order is by manually selecting it from the drop down box.
- **Key:** The key sales order type is set on the customer record. If key is set on a customer record then when an order is generated for that customer key is the default sales order type.

Sales Order



There are several settings that take place for the sales order rules, all are very important to understand what they do in the system to insure your system is setup.

System Sales Type: This is the default sales type on the order when an order is placed on the main system. The sales type is important because it drives the commission rules. The only two types that can be defaulted on the system are Road or Showroom. To set the system to default to “Show” during show time the show mode box must be checked. The type can also be changed on an order if the user is authorized.

NOTE: *All sales rep system types default to “Road”.*

Product Info on Sales Order Screen: This determines what data prints on the sales order print out.

Send fax to rep: Check if the sales order fax confirmations (receipt of order from the supplier) are to be sent to the sales reps, rather than the head office. If the sales reps will be faxing their own orders, then you will want to check this so the confirmations are sent back to the rep from the vendors.

Pay Commission: Check this box if you are using the *Reward* system. This indicates that commission data will be part of the orders.

Use Territories: Check this box if you have territories setup in the *Reward* system. This indicates the sales rep on the order will be determined by the data setup under territory setup.

Hide SO Discount: The Hide SO Discount allows you to hide any discounts and not print them on the order.

Show Mode: This will need to be checked at the start of the show, when show mode is checked, laptops attached to the network database will be allowed to see all customers and products. When in show mode the system will also default the commission order type as show on all orders.

When 2 or more sales reps are found for a Sales Order the selling rep is used: This setting allows the system to determine the order taker (selling rep) as the main territory rep on the order if there are overlapping territory/division assignments.

EXAMPLE: IF YOU HAVE A SCENARIO IN WHICH TWO REPS IN THE SAME TERRITORY CAN SELL THE SAME MANUFACTURER.

NOTE: *The writing rep must be one of the reps that are assigned to the territory/vendor assignment for the customer on the order. If the writing rep is not then the current rep will not be determined during the order process.*

Change Sales Order date to Today when changing the Status to Confirm form any status other than close: This will change the sales order date to today's date. If unchecked, it will display the date the sales order was created.

Default Sales Location: The sales location indicates where the order was generated; ex: Atlanta Show, High Point show, etc. You can set each system to have a default sales location on the default sales location can be changed on any orders when they are added to the system.

Default Commission Zip: The system can be set to either use the main address (billing) or the shipping address as the default commission zip code to determine rep assignment for the order and commission payment. This setting can be changed at the time the sales order is added or under the customer editor for a customer.

Sales Order Style: Allows you to choose the style of your logo on the sales order. This is also done under rep groups.

Change Sales Order Date to Today when Changing the Order Status to Confirmed: If this is checked then the order date will change when the status is changed from HFC or Pending to Confirmed to the current computer system date.

Use Accounting Periods: If this is checked then this will allow order accounting periods to be set. Accounting Periods allow order months to be closed and order numbers to be locked at the end of each month.
Sales Location is Mandatory: If this is checked then users will not be allowed to save an order without a sales location.

Default Sales Location for WEB Sales: Set the default Sales Location for *Reach*.

Disable ASAP on Sales Orders: *Play* users will have to select the sales order date from a calendar

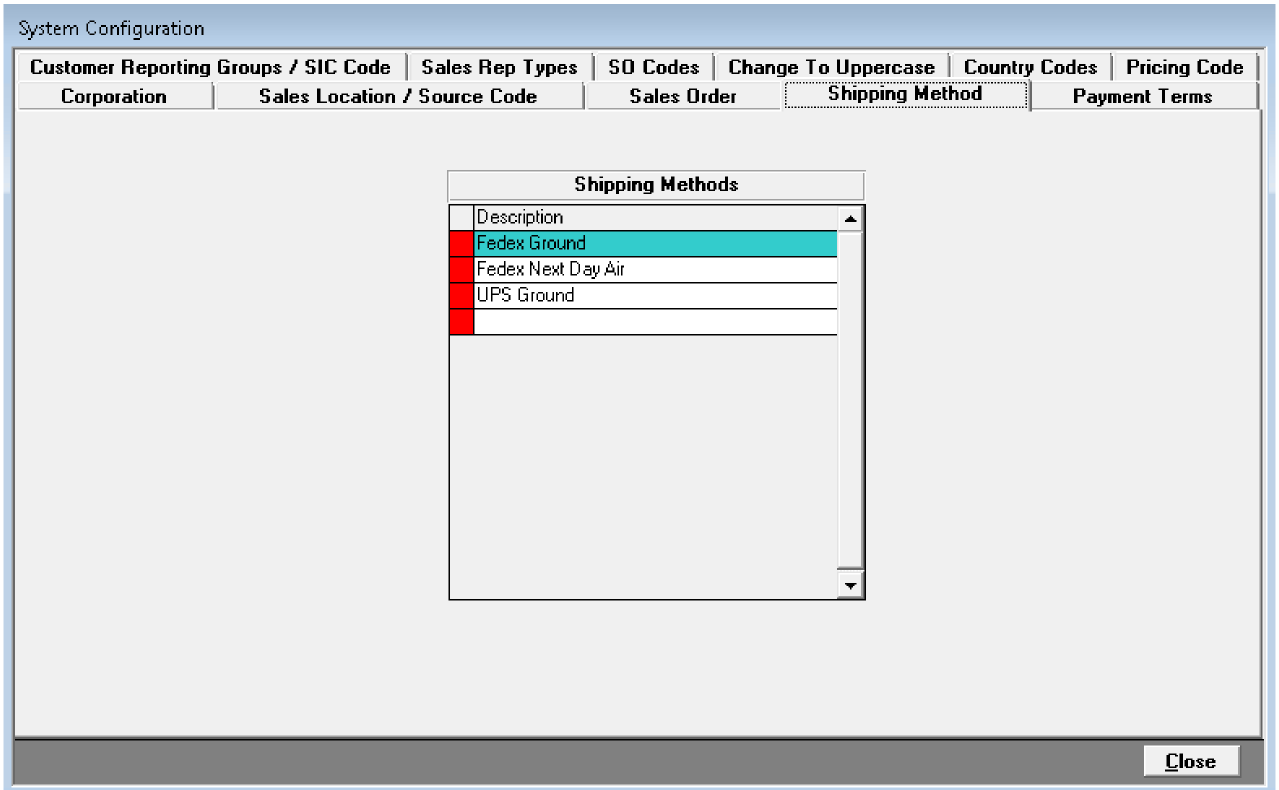
Sales Location is Mandatory: Defaults the Sales Location to a required field.

Can Sell to Inactive Customers: *Play* users can sell to Inactive Customers.

Can Sell to Inactive Ship To: *Play* users can sell to Customers that have Inactive Ship To addresses.

Shipping Methods

Shipping methods are the different ship via's your suppliers offer to your company.
The Shipping Method tab will allow you to enter in all shipping methods that will be assigned to your Supplier in Vendor Setup and setting your defaults in the Sales Order tab. Examples of shipping methods are: *UPS, Best Way, etc.*



Adding Shipping Method: Type a Shipping Method in a blank field.

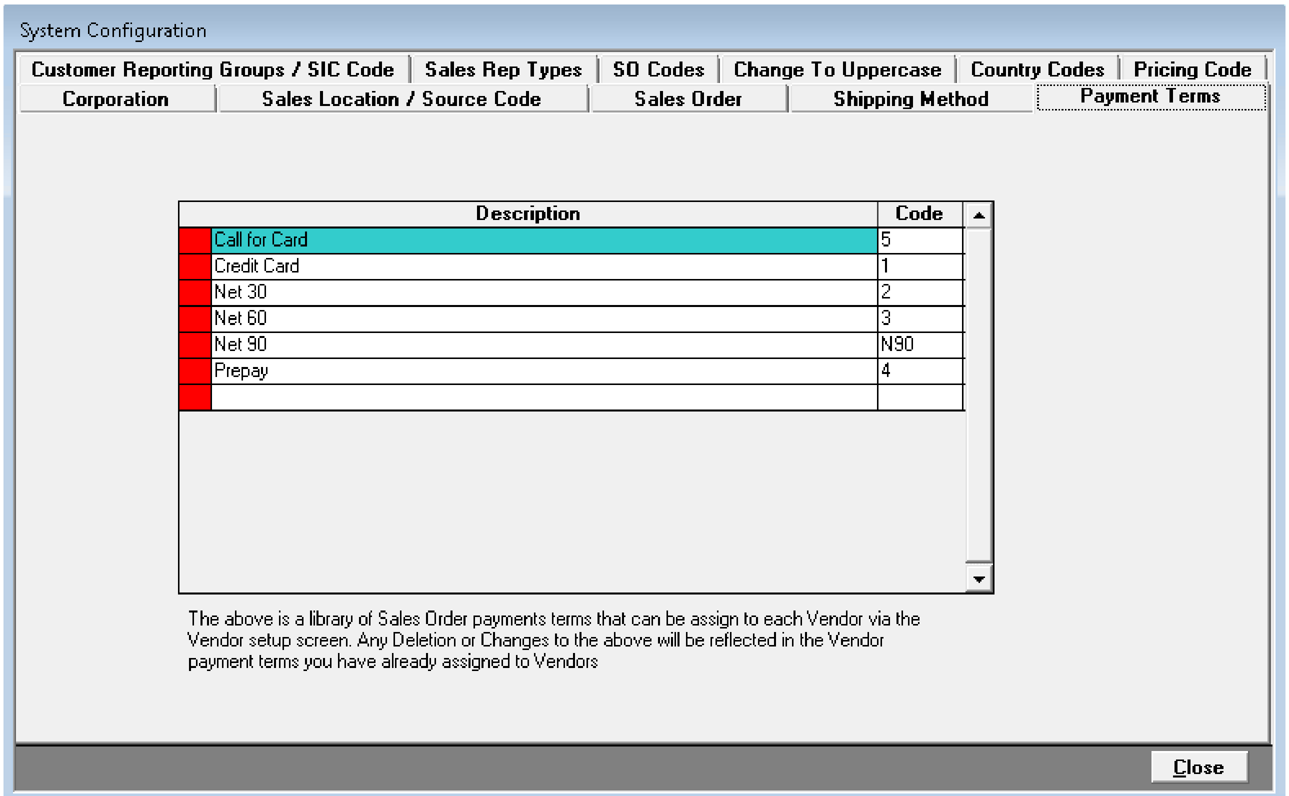
Edit Shipping Method: Click in the text field to edit the Shipping Method text.

Delete Shipping Method: Click on the Red block to remove Shipping Method. You can only remove Shipping Methods that are not used in a Sales Order.

Payment Terms

The system payment terms are setup and then are available for the vendor setup and also the sales order screens.

***NOTE:** A term must be added under the payment terms for it to be available to assign to a vendor and then to sales orders.*



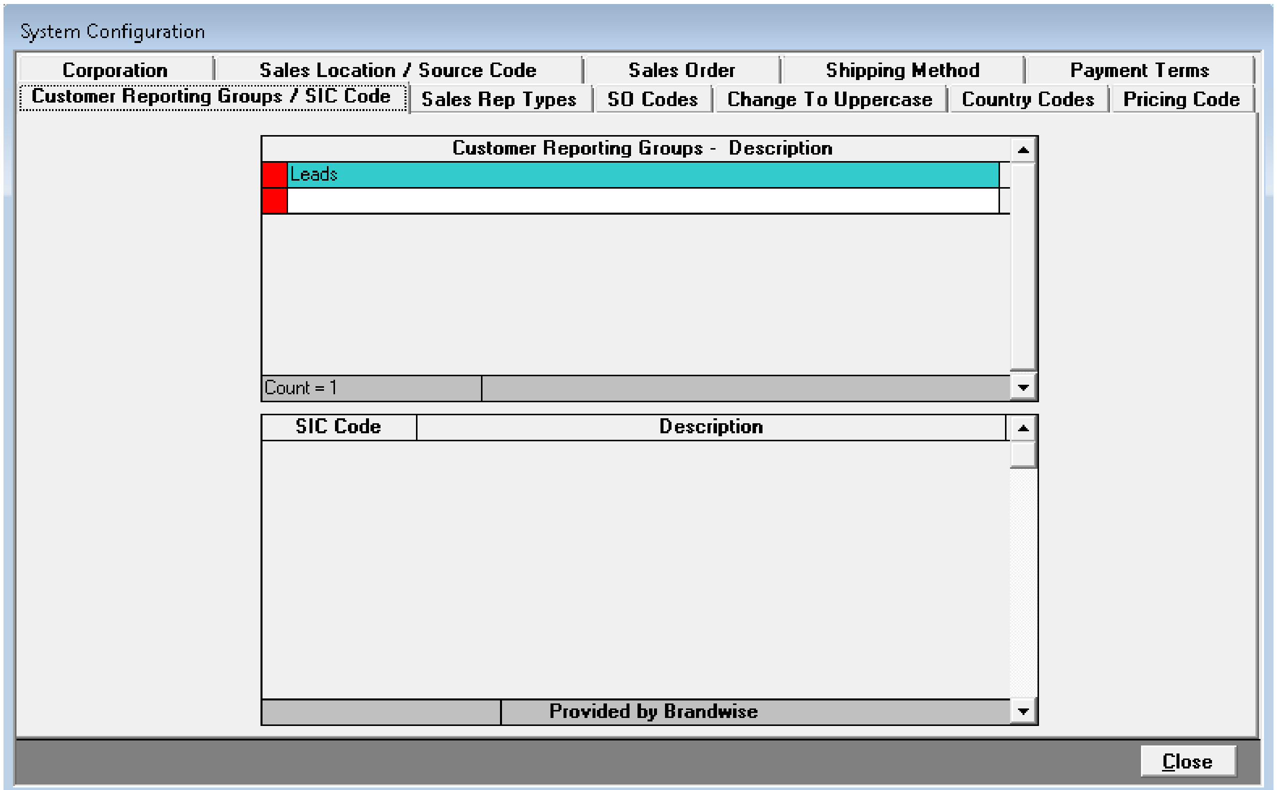
Adding Payment Term: Type a Payment Term in a blank field.

Edit Shipping Method: Click in the text field to edit the Payment Term text.

Delete Shipping Method: Click on the Red block to remove Payment Term. You can only remove Payment Terms that are not used in a Sales Order.

Customer Reporting Groups

Customer Reporting Groups are customer codes that can be used to categorize your customers for reporting. This data will then be available on the customer edit and customer setup screens to assign a customer to the appropriate customer groups for reporting purposes.



Customer reporting groups can be a customize list of groups that you create, customers can be assigned to multiple groups and can be categorized by manufacturer and also a customer can be removed from a reporting group at the time an orders is placed. A good example of a Customer Reporting Group is “Leads”

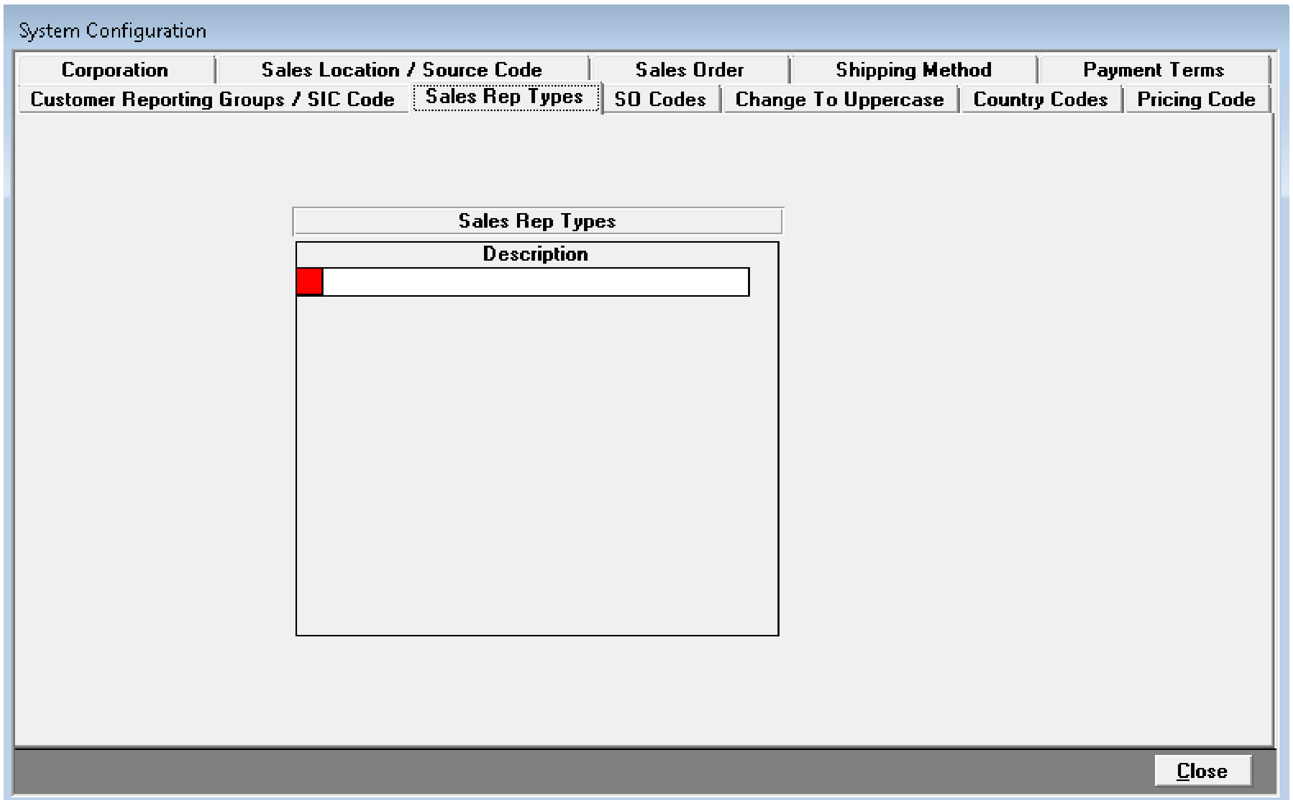
Adding Customer Reporting Group: Type a Customer Reporting Group in a blank field.

Edit Shipping Method: Click in the text field to edit the Customer Reporting Group text.

Delete Shipping Method: Click on the Red block to remove Customer Reporting Group.

Sales Rep Types

Sales rep types can be used to categorize sales reps for reporting purposes only. Example of rep types are: *Road, Key Account, Independent Rep, etc*. There are an unlimited number of rep types that can be added to the system. Once rep types are added to the system these types are then available to assign to each personnel record by rep group. Rep types are optional and do not have to be used or assigned to reps.



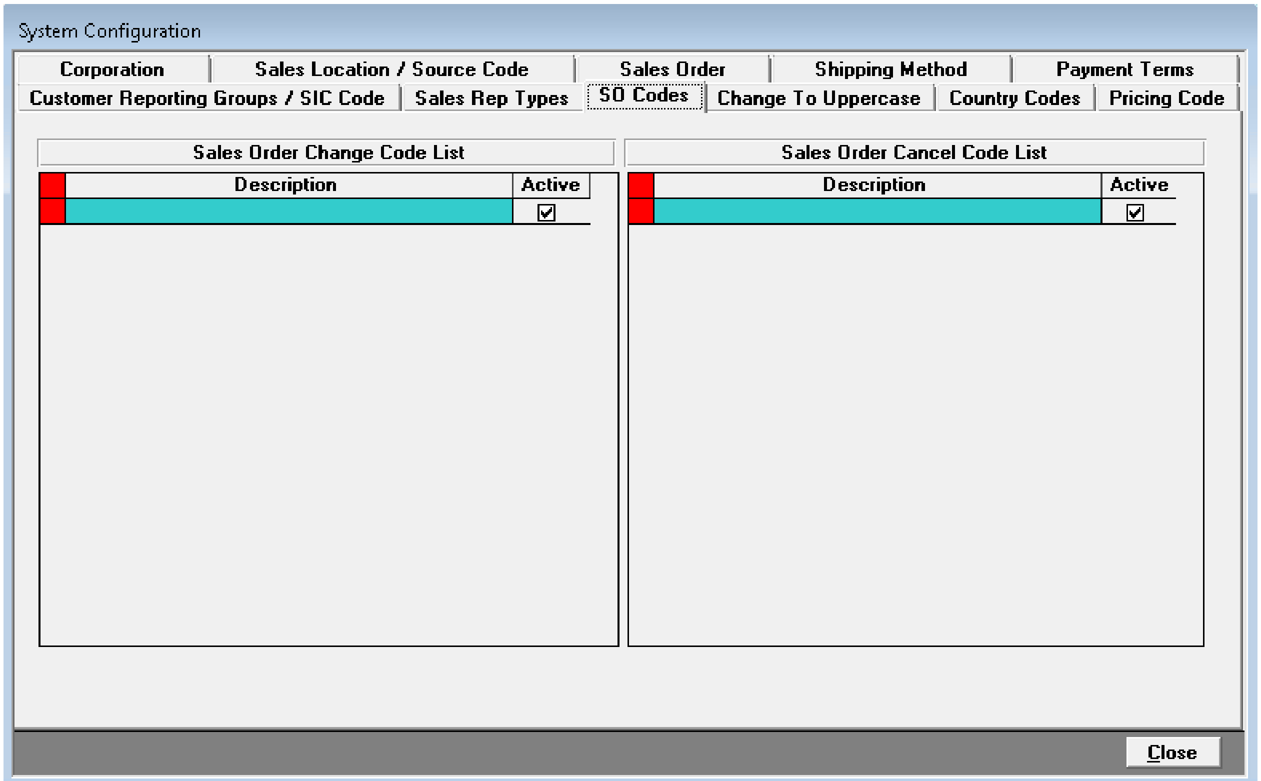
Adding Sales Rep Type: Type a Sales Rep Type in a blank field.

Edit Shipping Method: Click in the text field to edit the Sales Rep Type text.

Delete Shipping Method: Click on the Red block to remove Sales Rep Type.

Sales Order Change Codes

Sales order codes are codes that can be setup for a changed or cancelled order. When an order is changed or cancelled in the system the user will be prompted to select one of the SO codes as to the reason for the change or cancellation. These codes will share with the rep systems and can only be managed at the main agency level.



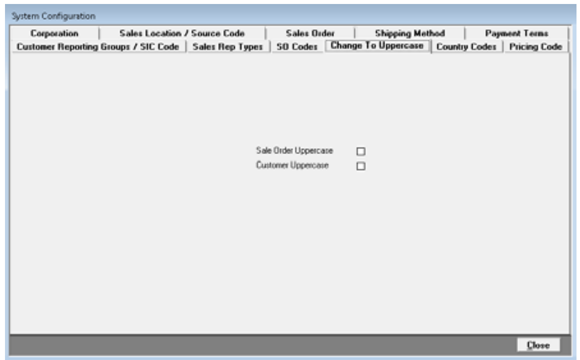
Adding Sales Order Change/Cancel: Type a Sales Order Change/Cancel Description in a blank field.

Edit Shipping Method: Click in the text field to edit the Sales Order Change/Cancel text.

Delete Shipping Method: Click on the Red block to remove Sales Order Change/Cancel Description.

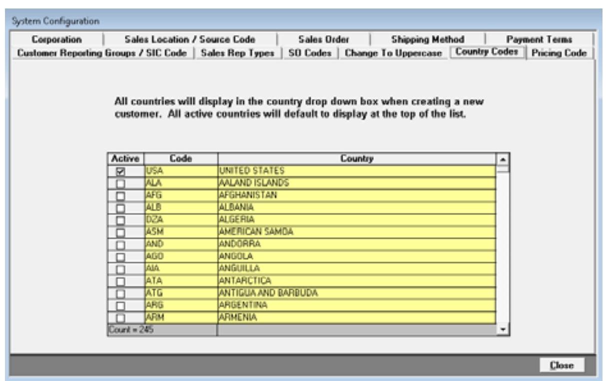
Change to Uppercase

This allows the agency to control how data is entered in the system and if customer and order data should automatically be saved in all uppercase.



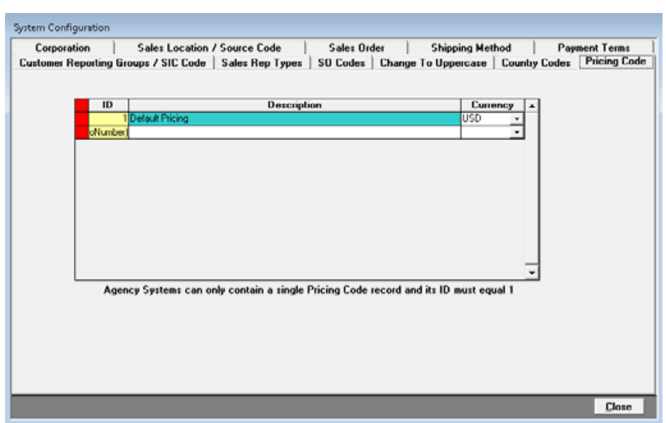
Country Codes

The country codes allow you to activate a country code for any country that you have customers in. All countries will display in the country drop down box when creating a new customer.



Pricing Code

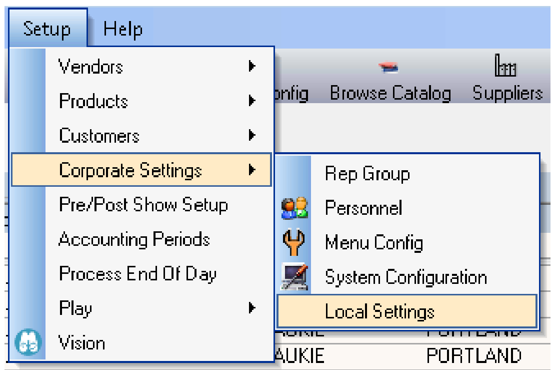
The pricing code allows you to assign a currency to your system so on reports and the sales order print out the correct currency symbol reflect in the dollar fields.



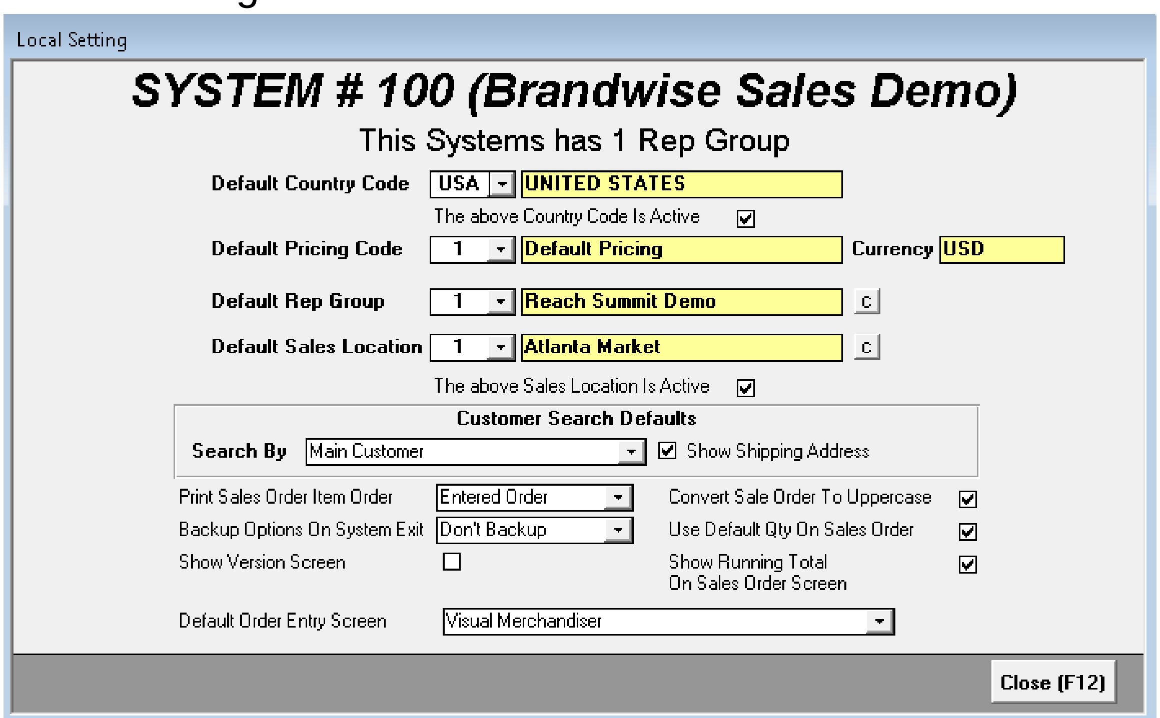
Local Settings

Local settings allow defaults to be set while placing orders and adding new customers. Local settings do not share across all systems these are settings only for the system they are set on. Most defaults can be changed during the order entry process.

Local Settings is accessed from: ***Setup> Corporate Settings> Local Settings***



Local Settings



System Number: Your system number should display here. A server will be 100 or 500's. This number is also used to determine your sales order numbers for orders.

Default Country Code: This allows the system to default the country when adding a new customer in the system.

Default Pricing Code: The agency only has one system therefore the one price list will default as the system default.

Default Rep Group: If multiple rep groups are setup for an agency then a default group should be identified for each system.

Default Sales Location: The default sales location will automatically be assigned to sales orders written on the system. The sales location can be changed if it needs to on the order header screen.

Customer Search Defaults: When doing a customer search you can default how you want them to display. Since the show ship address flag is NOT checked, shipping addresses will not display during a customer search.

Print Sales Order Item Order: This allows the system to default the order items print on the sales order.

Print Order Options:

- ***Entered Order:*** Prints in the order the items were added to an order.
- ***Sku:*** Prints in sku number order.
- ***Sku Descriptions:*** Prints in sku description order
- ***Barcode:*** Prints in order by barcode or upc number order; note the barcode will only display on the order if it is selected.

Backup Options on System Exit: This allows the system to perform a backup when doing a data transfer. The backup will be stored on your local hard drive. It is highly suggested to either do an automatic or prompt for backup.

Backup options:

- ***Automatic Backup:*** Will automatically create a backup at the completion of every data transfer
- ***Prompt for Backup:*** Will popup a message at the end of every data transfer if you want to perform a backup.
- ***Don't Backup:*** Will not perform a backup of data.

Show Version Screen: This will display a current version/update recap upon logging into *Reward*.

Convert Sales Order to Upper: This allows customer data and sales order data to convert to upper case alpha.

Use Default On Sales Order: This should be checked however the system will automatically default to the minimum quantity of an item while placing orders.

Show Running total on sales order screen: This allows the order to calculate the total as items are being added to the order.

Supplier

The **Vendor Menu** is where all the general information about a vendor is setup. This information is very important to setup to insure the accuracy of orders and to help expedite the order process.
There are several tabs under the vendor record and each one has important information.

Vendors need to be added by Brandwise, however once a supplier is added to your system any data can be changed and all vendor settings are specific to your agency and all your users only. It is not shared with other agency's which represent the same agency.

Requesting a New Supplier

1. Navigate to MyBrandwise https://e.brandwise.com/brandwiseSuite/login.aspx
2. Use your 100 or 500 login credentials
3. Go to ***Request Forms > New Vendor***
4. Complete ***All*** data for the supplier
5. You will then be notified by Brandwise when your vendor information is ready

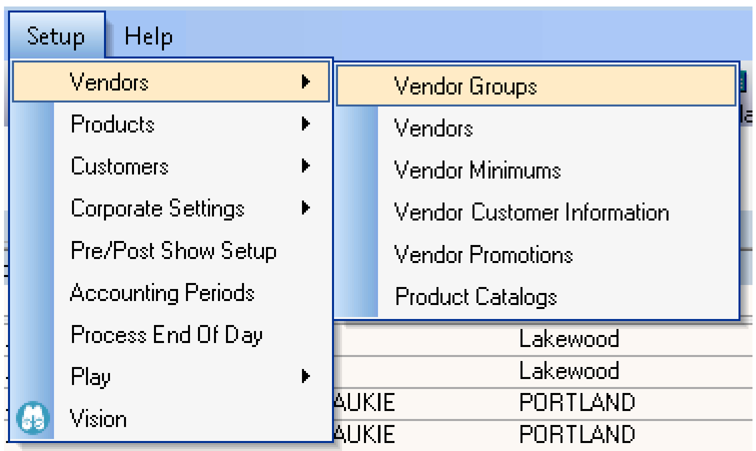
Vendor Groups

Vendor groups have two functions in the system:

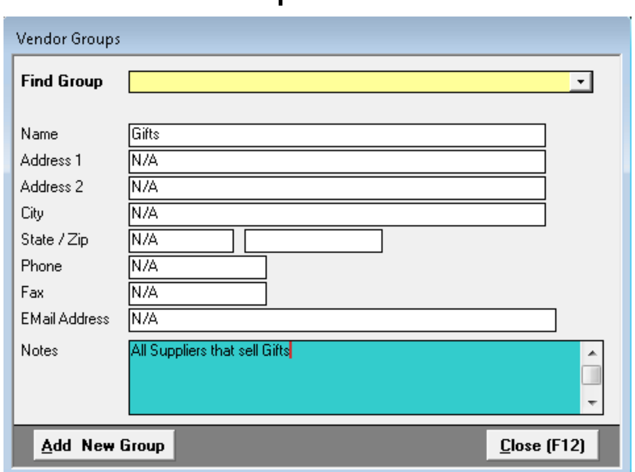
Vendor Group Reporting: Allows you to categorize vendors by their classification ie: Foods, Home Décor, and Gift strictly for reporting purposes.

Vendor Group Commission Payment: Allows you to group multiple vendors together for commission payment. If you have a vendor that has to be split out multiple times because of order writing purposes, these vendors can be put into a vendor group to then pay commissions together.

To create a vendor group go to: ***Setup> Vendor> Vendor Groups***



Vendor Groups



If you want to use vendor groups then you must go to the vendor group menu option to create the vendor groups prior to assigning them to vendors. Once vendor groups are added to the system they will be available to select on the vendor general tab.

Name the vendor group and any information that you would like. Only the Name is required.

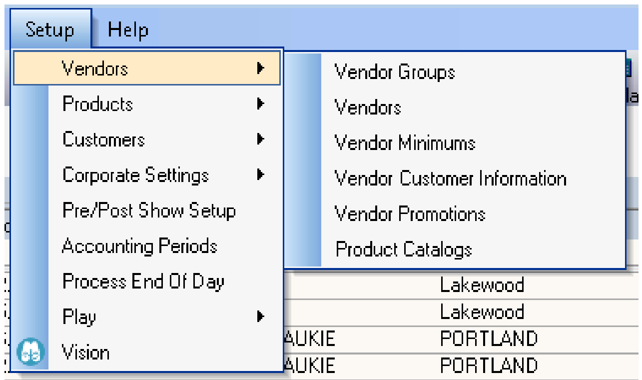
NOTE: *A vendor can only be added to a single vendor group.*

Vendors

The vendor menu is where all the general information about a supplier is setup. This information is very important to setup to insure the accuracy of orders and to help expedite the order process.

There are several tabs under the vendor record and each one has important information.

To enter the Vendor Setup go to: ***Setup > Vendors***



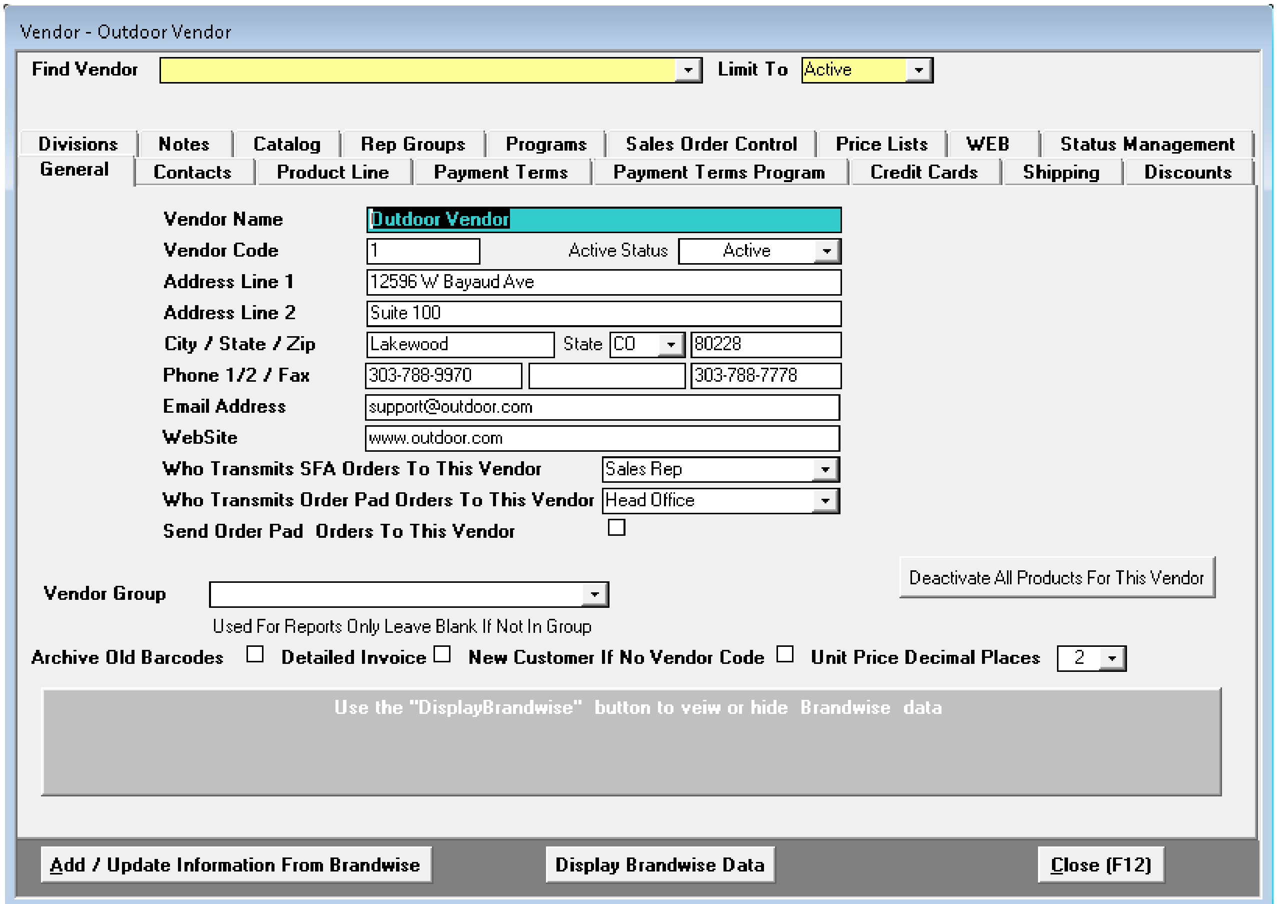
Suppliers need to be added by Brandwise, however once a supplier is added to your system, any data can be changed and all supplier settings are specific to your agency and all your users only. It is not shared with other agencies which represent the same agency.

Adding a New Supplier to you system:

1. Go to http://e.brandwise.com/brandwiseSuite/login.aspx
2. Use your 100 login credentials
3. Go to ***Request Forms > New Vendor***
4. Complete ALL data for the Supplier
5. You will then be notified by Brandwise when your supplier information is ready

General

The general information is main information about a supplier such as vendor name, address, etc and also includes the following:



Active Status

Status management allows you to change the status of the supplier to limit reps from receiving product data when a supplier is terminated but commissions are still being paid. There are three statuses for a supplier:

- **Active:** The supplier is active and all products will go to the sales reps.
- **Invoice Only:** The supplier is still active for commission purposes only. Product will not go to reps.
- **Inactive:** The supplier is no longer active and will not display for commission purposes nor will product go to the reps.

Who Transmits to this Vendor

Suppliers that are not set to receive orders electronically can be set to either of the following options for *Play* and *Reach* sales orders:

- ***Sales Rep:*** Each sales rep will be responsible for getting the orders to the vendor using DataXchange
- ***Home Office:*** All orders will transmit to the main agency system and then be sent to the vendor using the agency's system DataXchange.

Send OrderPad (Reach) Orders to this Vendor

If your supplier is receiving orders electronically through Stream or Stream Lite, this will send the orders directly from Reach to your Supplier.

Vendor Groups

The vendor groups have two functions in the system:

- ***Vendor Group Reporting:*** Vendor Groups allows you to categorize your suppliers by their classification ie: Foods, Home Décor, Gift strictly for reporting purposes.
- ***Vendor Group Commission Payment:*** Vendor Groups allows you to group multiple suppliers together for commission payment. If you have a supplier that has to be split out multiple times because of order writing purposes, these vendors can be put into a vendor group to then pay commissions together.

If you want to use vendor groups then you must go to the vendor group menu option to create the vendor groups prior to assigning them to vendors. Once vendor groups are added to the system they will be available to select on the vendor general tab.

NOTE: *A supplier can only be added to a single vendor group.*

Deactivate all products for this vendor

This will mark all products associated with the supplier as inactive.

Archive Old Barcodes

This option allows barcodes to be stored in history so if a UPC number changes on product for this vendor both the old barcode and the new barcode will scan. This would be used if a supplier changes their UPC numbers on product or if a supplier does not have registered UPC numbers.

Detailed Invoice

This will allow line item detail to be entered when entering invoices in the *Reward* system.

New Customer if no vendor code

If this is selected then if a new customer is added to the system and the vendor customer number is not added the system the customer will automatically be marked as “new” at the end of the first order placed for this supplier.

Unit Price Decimal Place

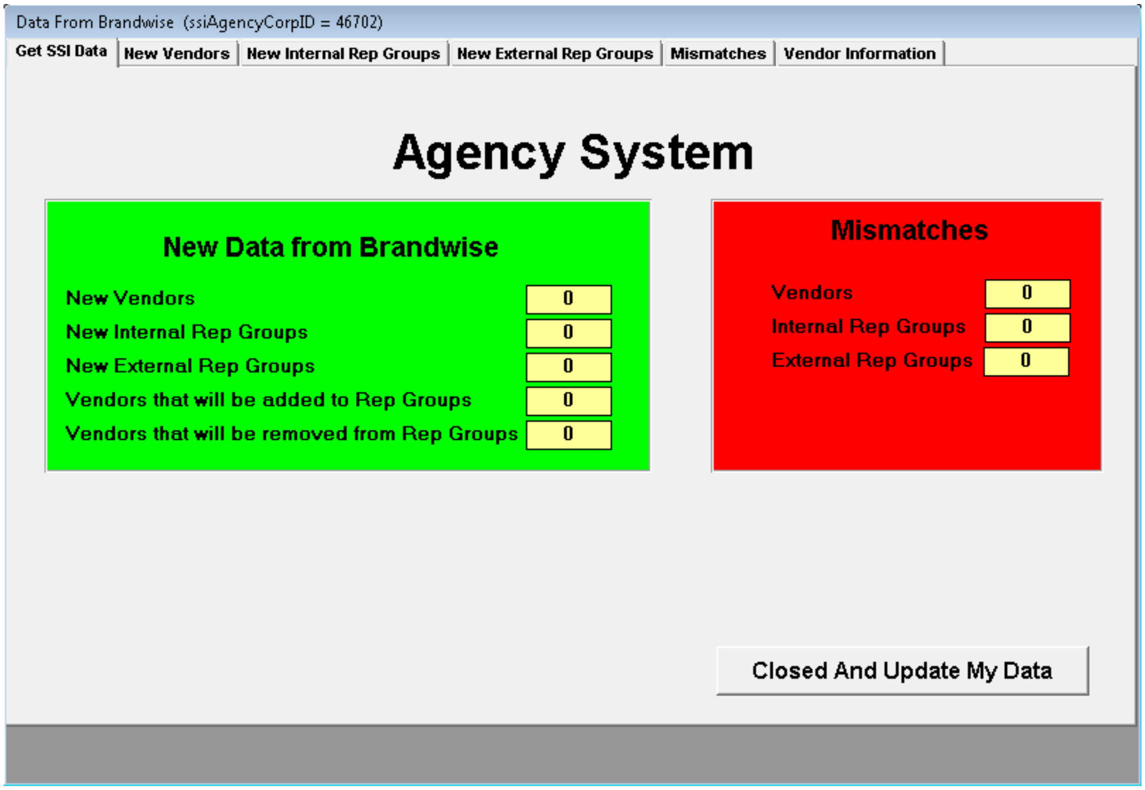
This determines how the item price is displayed on the sales order. The system defaults to 2 but can be changed to go out to up to 4 decimals.

Add/Update Information from Brandwise

This pulls vendor data from Brandwise when a new supplier is added to your system.

Add/Update Information from Brandwise

This utility will pull supplier data from Brandwise when a new supplier is added to your system. Here you will view what supplier is being added as well as new rep groups.



Get SSI Data
This view will display the count of what will be added to your system.

New Vendors
List of the new supplier(s) being added to your system.

New Internal Rep Groups
List of the new internal rep group(s) being added to your system.

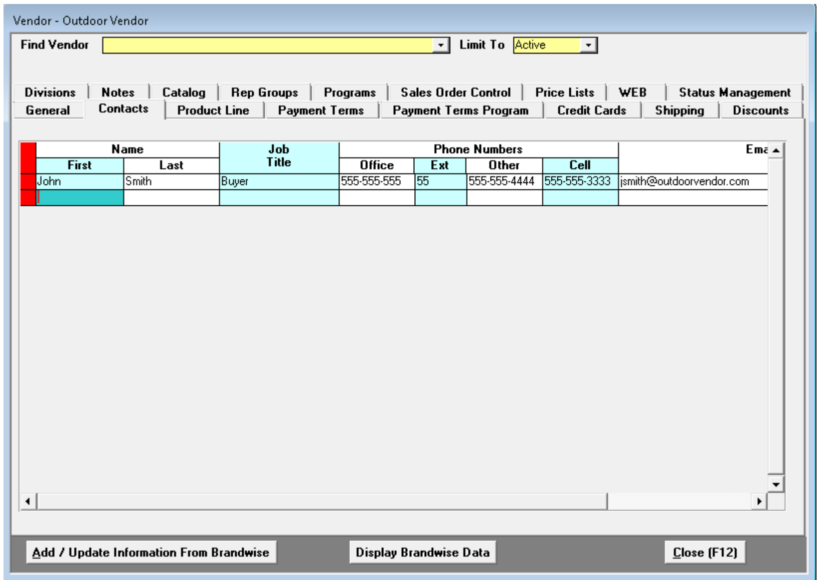
New External Rep Groups
List of the new external rep group(s) being added to your system.

Mismatches
This will display mismatches of based on the new supplier or rep groups.

Vendor Information
Displays the supplier information currently in your system and compared to Brandwise supplier list.

Closed And Update My Data
Click this button to pull down the new supplier or rep group into your system.

Contacts

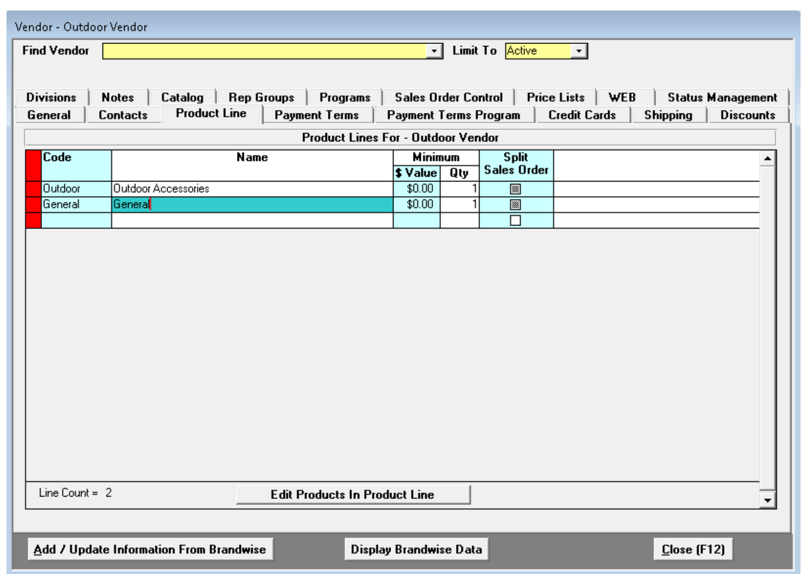


Multiple contacts can be added to a vendor and each contact can be assigned a job title. Vendor contact information is shared with all your agency's systems.

Adding New Contact: Type the new contact information in a blank field.
Edit Contact: Click in the text field to edit the contact text.
Delete Contact: Click on the Red block to remove the contact.

Product Line

A supplier can have multiple product lines, product lines can be added to the supplier here or under the product menu.



Adding New Product Line: Type a new product line in a blank field.
Edit Product Line: Click in the text field to edit the product line text.
Delete Product Line: Click on the Red block to remove product line. You can only remove a product line that doesn't have products associated to it.

Product Lines

Code: Apply a Product Line Code to be sent to your supplier electronically via *Stream.*

Name: Apply a Product Line Description to be sent to your supplier electronically via *Stream.*

Minimum

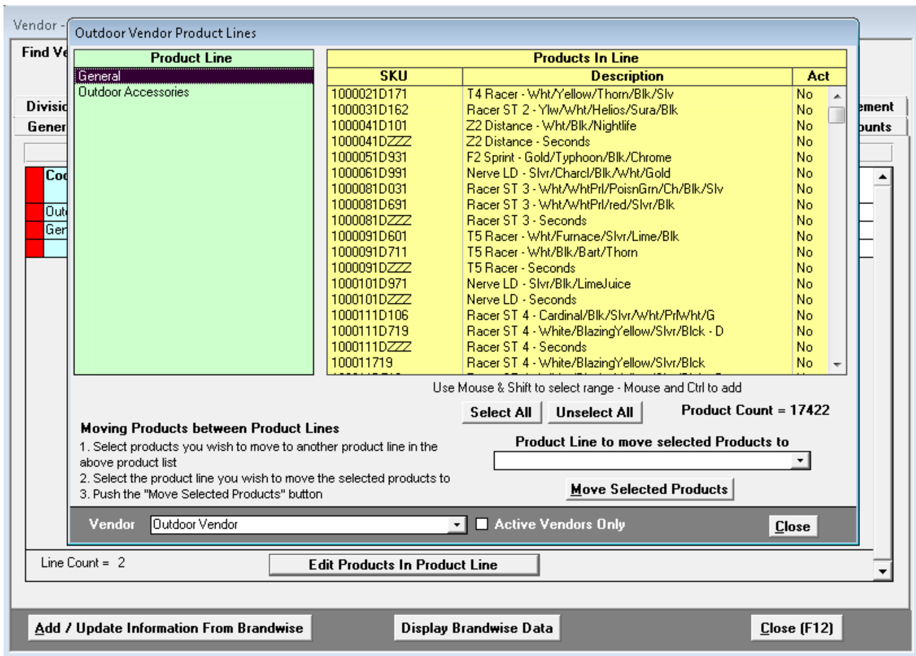
- $ Value
- Qty

Split Sales Order

Splits the sales order based on Product lines

Edit Products in Product Line

Edit Product in Product Line will allow you to manage products that are in product lines.



Product Lines: Select the current product line.

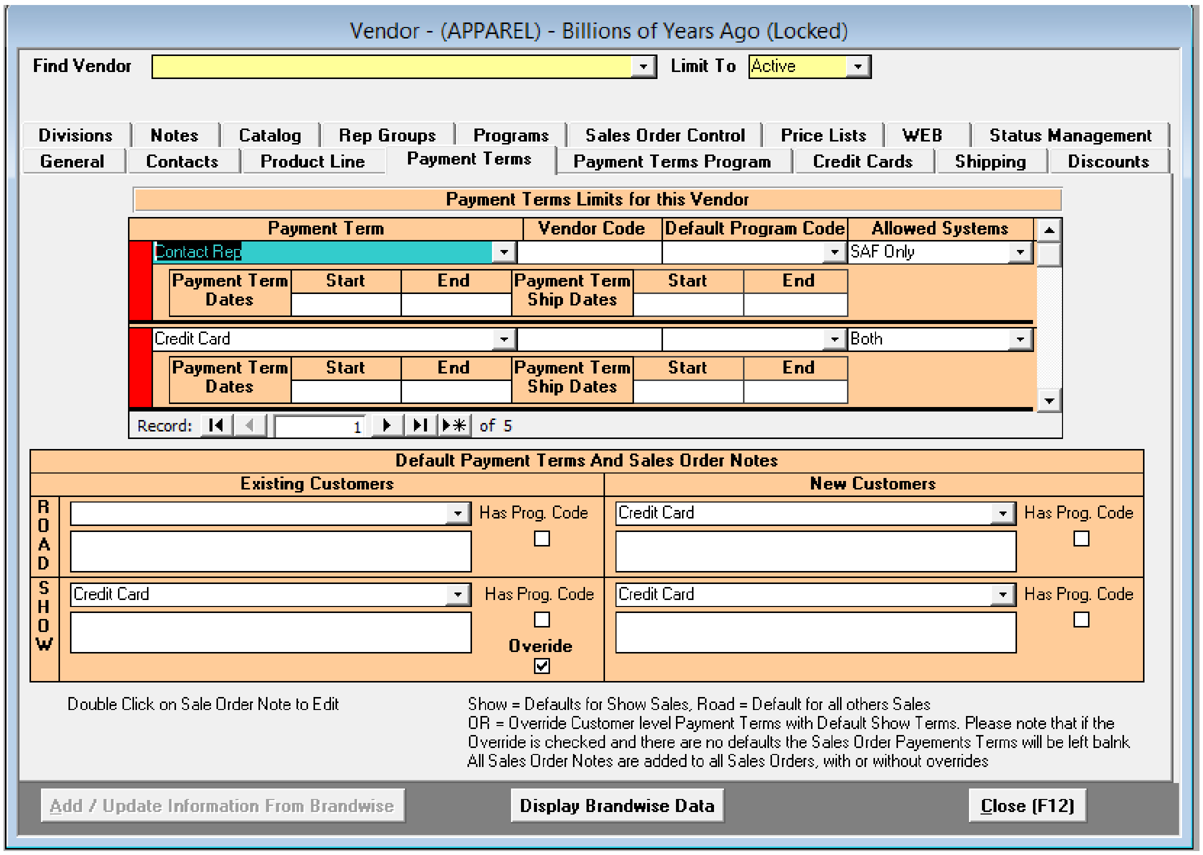
Products in Line: Highlight (single or multiple products) to be selected and moved into another product line.

Product Line to move selected Products to: Select the new line to move the products to.

Move Selected Products: Moves the selected products to the new product line.

Payment Terms

Suppliers can be assigned payment terms that a specific to the supplier. During the order process the user will only be allowed to select payment terms assigned to the supplier by eliminating the user selecting terms that don't apply to the supplier. The payment terms are selected from the master list created under ***Setup > Corporate Settings > System Configuration***.



Adding New Payment Term

Select a payment term from the Payment Term dropdown in a blank field. Click on the  to begin with a new record.

Edit Payment Term

Click in the text field to edit the payment term text.

Delete Payment Term

Click on the Red block to remove product line.

Allowed Systems

Determines where these terms can be used. For example Net30 and Credit Card may want to be for the Web only.

Payment Terms Limit for this Vendor

Payment Terms

Select all the payment terms that apply to this vendor in the payment term drop down box. The number of payments terms assigned to a vendor is unlimited.

Vendor Code
The Vendor Code is the vendor's code for the term being selected. This is used if a supplier is receiving their orders via an electronic file.

Default Program Code

Associate a default program code to this term.

Payment Term Dates

Activate the payment term through specific dates

Payment Term Ship Dates

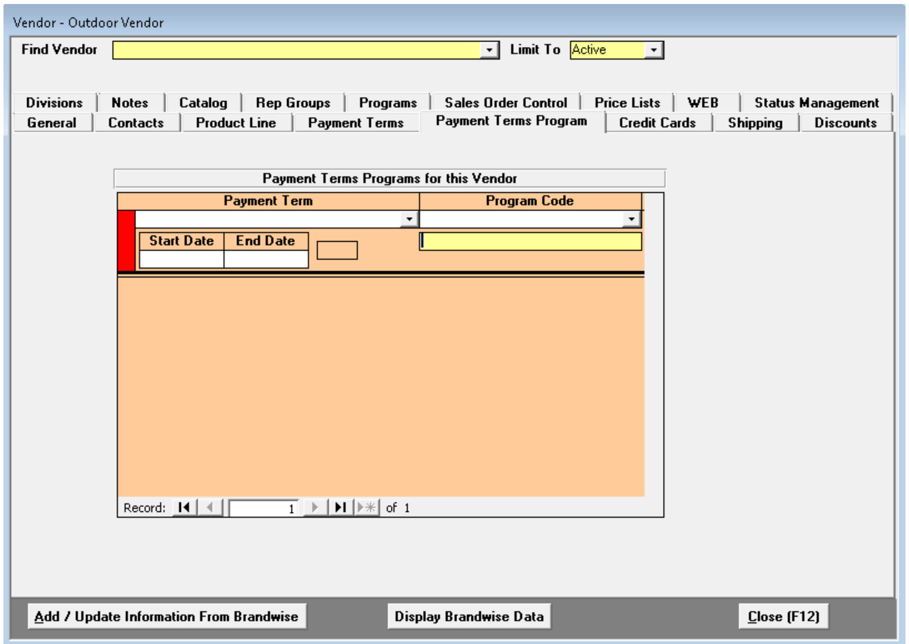
Active the payment term through specific ship dates

Default Payment Terms and Sales Order Notes

Select a default payment term for road, show, existing, and new customers for each order. You can also enter a sales order note, specific to each situation, which will print on each order for this supplier.

Override
The override flag is for the show terms only and will replace any terms assigned to a customer with the show terms.

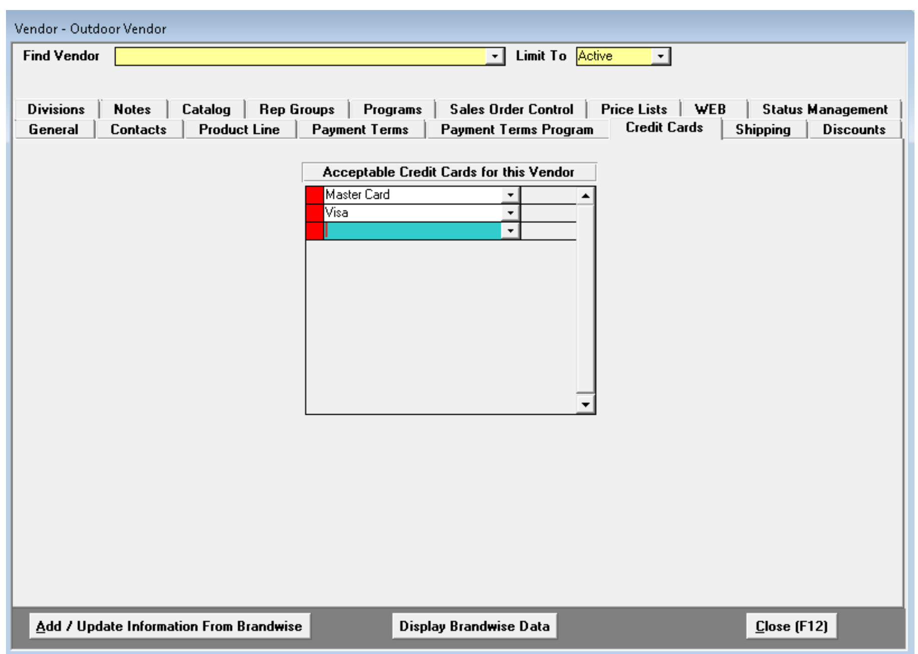
Payment Term Programs



Payment Term Programs will display all terms that have a program associated with it in a consolidated view.

Credit Card

Select the appropriate credit cards that the supplier accepts, these will be the only cards that can be selected for this supplier’s orders.



Adding New Credit Card: Select a card from the Credit Card dropdown in a blank field.

Delete Credit Card: Click on the Red block to remove credit card.

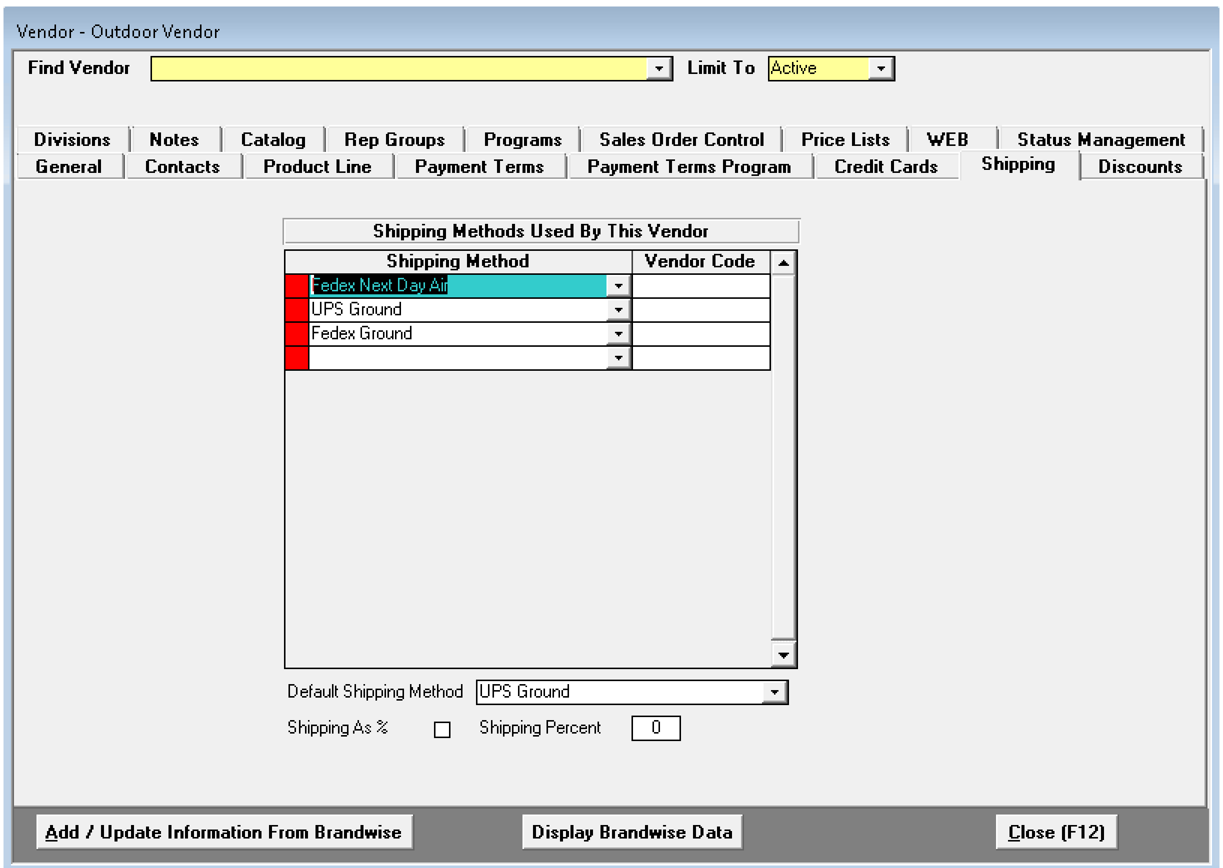
Credit Cards Available

▪ American Express ▪ Carte Blanche	▪ Maestro ▪ Master Card

▪ Diners Club ▪ Discover ▪ Enroute ▪ JCB	▪ Solo ▪ Switch ▪ Visa

Shipping

Shipping is where the different shipping methods accepted by the supplier will be added to the supplier. The shipping methods are selected from the master list under ***Setup > Corporate Settings > System Configuration***.



Adding Shipping Method: Select a shipping method from the Shipping Method dropdown in a blank field.

Delete Shipping Method: Click on the Red block to remove Shipping Method.

Shipping Methods Used By This Vendor

Shipping Methods Used by this Vendor

Select the appropriate shipping methods for the vendor.

Default Shipping Method

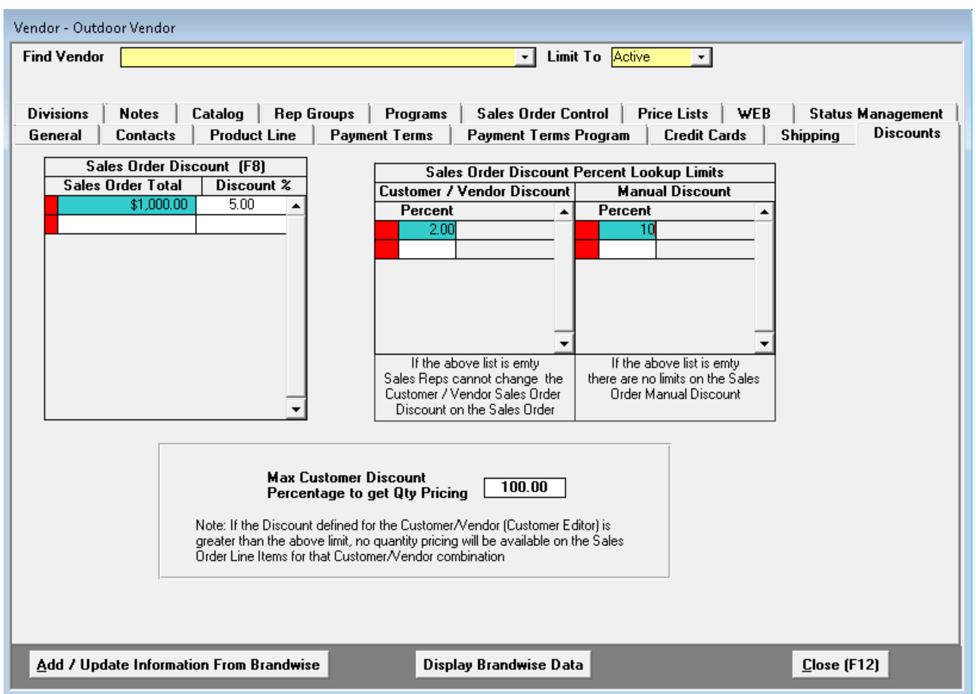
The default shipping method will automatically apply to each order for the supplier. The default can be changed at the time of an order. The default setting eliminates the user to have to select the shipping method on every order.

Shipping as %

The shipping percent assigned will insert a shipping cost based on the total order times the shipping percent.

Discounts

Automatic vendor discounts and discount limits can be setup for the vendor.



Adding Discount: Type in a blank field.

Edit Discount: Click in the text field to edit the Discount text.

Delete Shipping Method: Click on the Red block to remove the Discount.

Sales Order Discount:

A sales order total and discount can be setup to automatically apply a discount if the order reaches a certain total.

Sales Order Discount percent lookup limits:

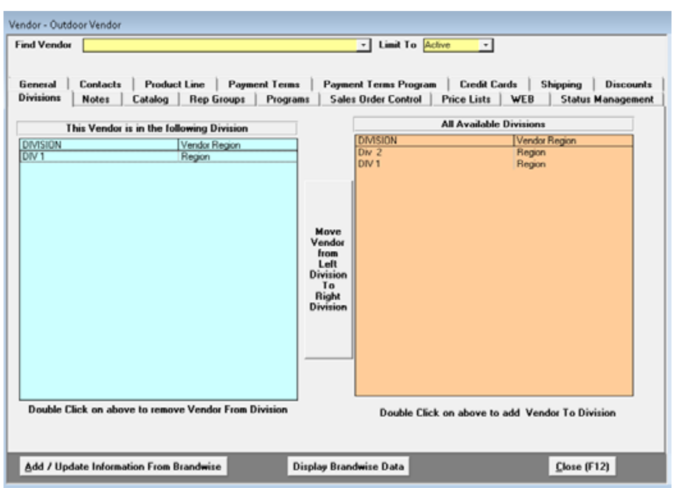
This allows you to setup limits to what percent discount can be selected on an order for the supplier.

- ***Customer/Vendor Discount:*** If a percent is entered in this section then the user will be allowed to select different discount percent to change a customer/vendor discount that has been setup on the customer record. If no limits are entered then the user will not be allowed to change any customer/vendor discounts setup in the system.
- ***Manual Discount:*** This limits how much of a discount can be offered for this supplier. If no limits are entered then the user will be allowed to apply any discount amount if the system is set to allow discounts on orders for this vendor.

Max Customer Discount Percentage to get Qty Pricing:

If the discount on the order is greater than this percentage then quantity pricing will not be available for that order.

Divisions



Divisions allows you to manage the divisions the supplier is currently assigned. Under divisions you can remove the supplier from a division, add the vendor to a new division and move the supplier to a different divisions.

Remove Supplier from a Division

Double click to remove supplier from This Vendor is in the following Division

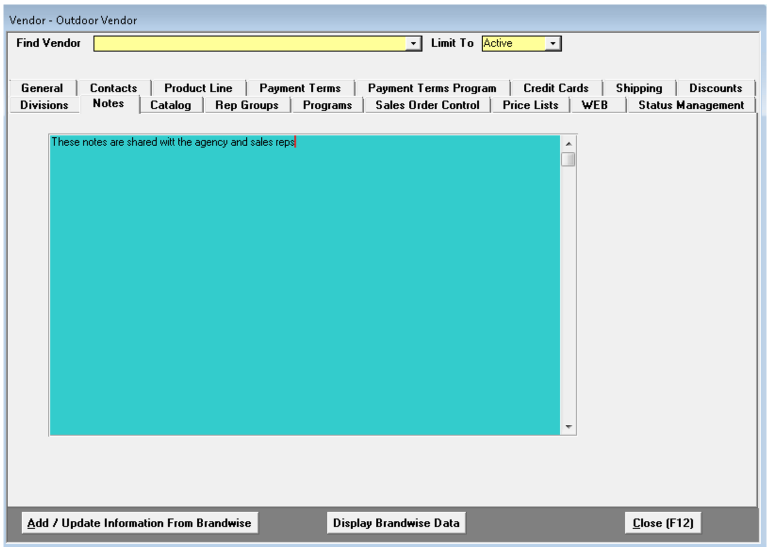
Move Supplier to another Division

Highlight the selected supplier to move from left division to right division

Add Supplier to a Division

Double click to move supplier from ***All Available Divisions*** to ***This Vendor is the following Division.***

Notes



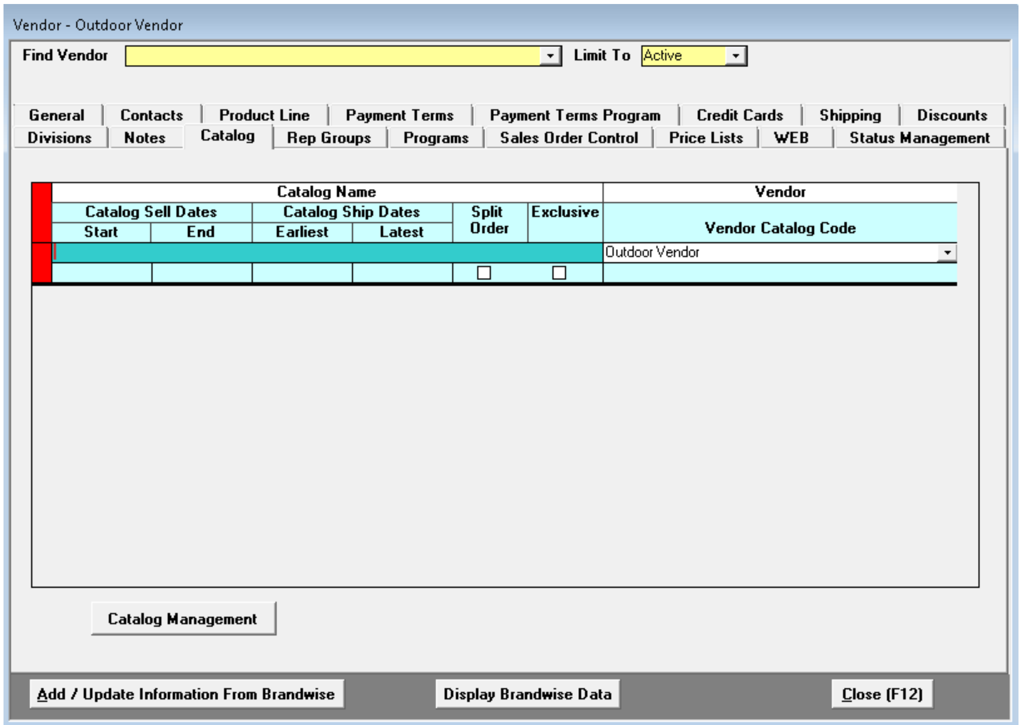
Notes are internal notes about the vendor that are shared with the agency and the sales reps.

Catalogs

You can setup catalogs within the system for printing labels and splitting orders.

The Catalogs tab allow you to create and name your catalogs. You have to create one here before you can add product to it. You can add an item at a time here or you can import catalogs in ***Import from Vendor.*** By checking the **Split Order** box, catalog information will display on the order and orders will split accordingly. Any catalog that is checked as ***Exclusive*** will contain products that cannot be added to any other catalog.

Catalog Name



Catalog Sell Dates
Set the catalog sell date range.

Catalog Ship Dates
Set the catalog ship date range.

Split Order
Catalog information will display on the order and orders will split accordingly.

Exclusive
Products marked as exclusive cannot be added to any other catalog.

Vendor

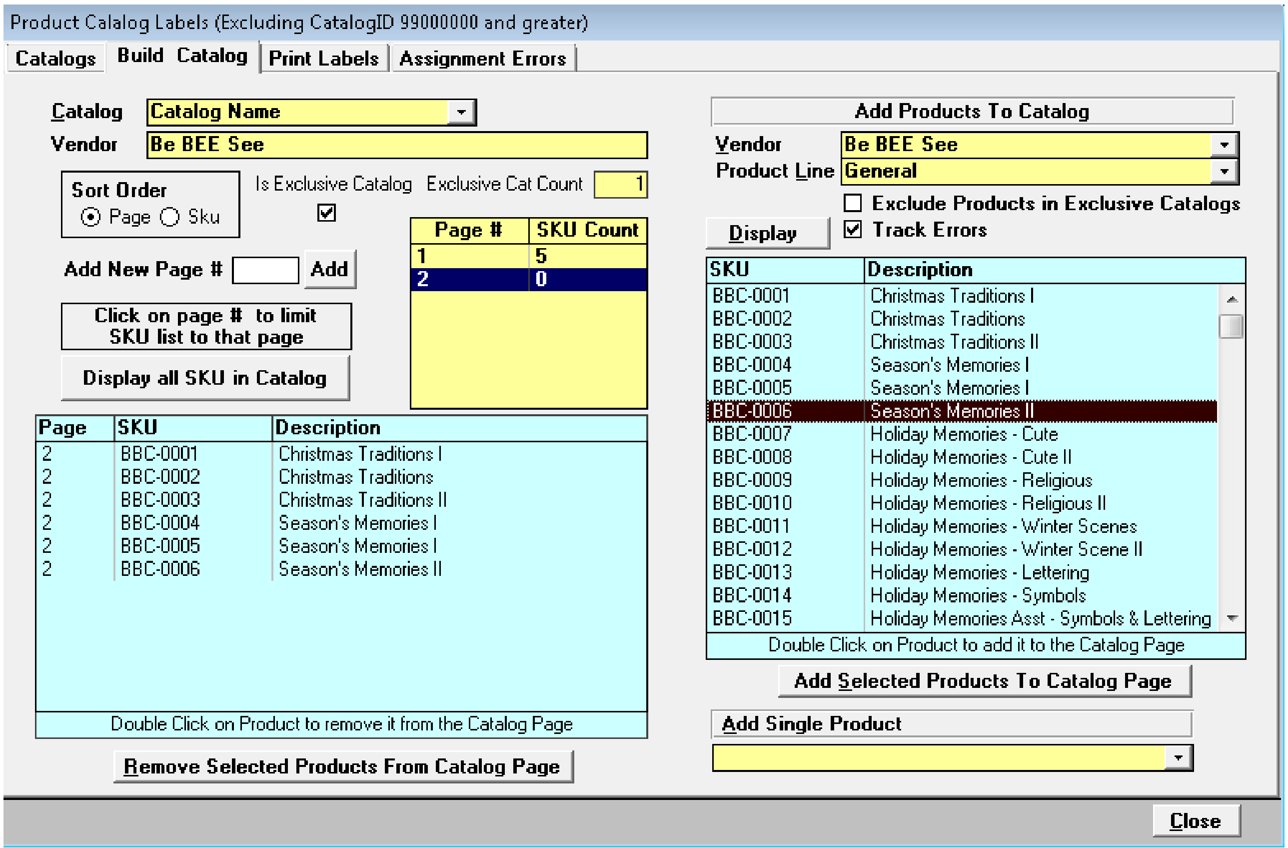
Vendor Catalog Code
Vendor Code for the catalog.

Catalog Management
Click Catalog Management to open the Catalog Editor. Here you are able to:

- Create Catalogs
- Build Catalogs
- Print Catalogs

Build Catalogs

To assign products to your catalog pages, you will use the **Build Catalogs** utility.

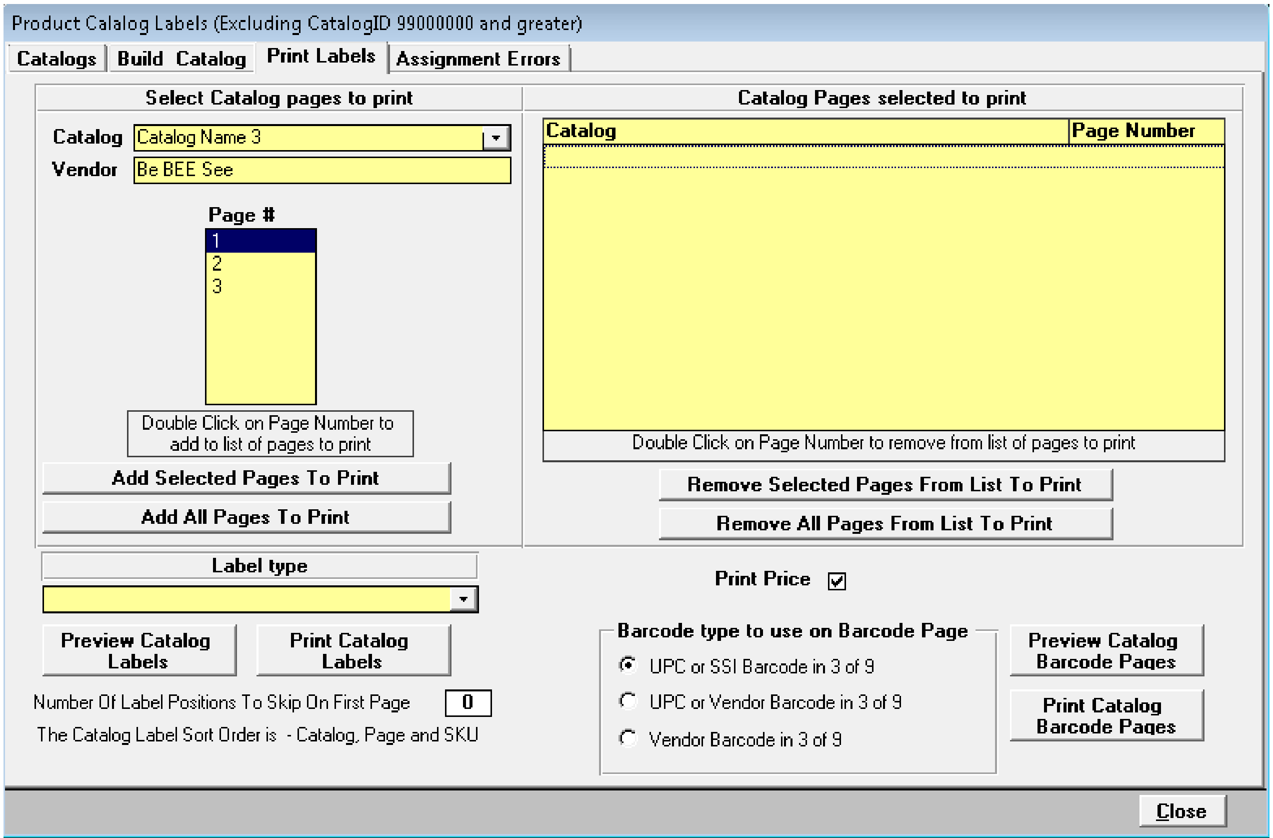


Assigning Products to Catalog Page

1. Select your catalog (created in Catalogs) from the **Catalog** dropdown.
2. Verify your supplier in the **Vendor** field.
3. Create your page using **Add New Page #.**
4. In **Add Products to Catalog,** select your **Vendor** and **Product Line.**
5. Add products to the page by highlighting multiple products numbers or use **Add Single Product**.
    - Adding multiple products
        - Ctrl+Left mouse click to highlight multiple products
        - Shift+Left mouse click to highlight a block of products
6. Click **Add Selected Products to Catalog Page**

Print Labels

Print Labels will allow you to print catalog labels and catalog barcode pages based on the selected catalog.



Printing Catalog Labels

Catalog Labels will use a specified label type to print labels.

1. Select a catalog form the **Catalog** dropdown.
2. Verify the supplier from the **Vendor** field.
3. Add pages to be printed using **Page #**, **Add Selected Page ToPrint**, or **Add All Pages To Print**.
   - Double click the page number to add to list of pages to print from **Page #.**
   - Ctrl+Left Mouse click to highlight multiple
   - Shift+Left Mouse click to highlight a block

4. Select Label Type
    - 1in x 5/8in Catalog Label
    - Ann McGilvray with SSI Barcode
    - Ann McGilvray with UPC Barcode
5. Click **Preview Catalog Labels** or **Print Catalog Labels**

Example: Catalog Labels with Ann McGilvray with UPC Barcode

Print Catalog Barcode Pages

1. Once you have added your pages to the **Catalog Pages selected to print** section, you can print barcodes using:
    - UPC or SSI Barcode in 3 of 9
    - UPC or Vendor Barcode in 3 of 9
    - Vendor Barcode in 3 of 9
2. Click **Preview Catalog Barcode Pages** or **Print Catalog Barcode Pages**

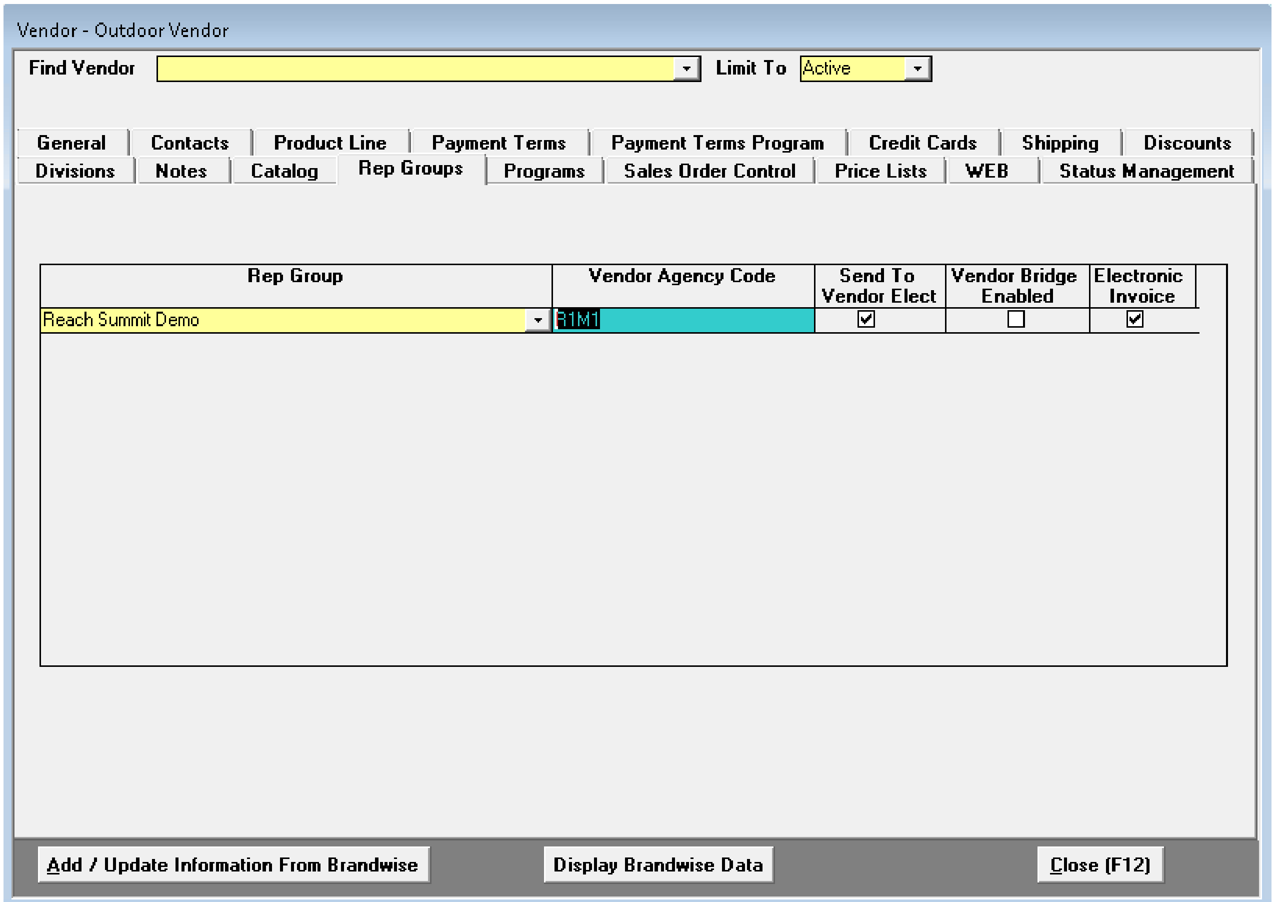
Example: Catalog Barcode Pages using UPC or SSI Barcode in 3 of 9

Catalog Name 3 (P# 1)

BBC-0009 Holiday Memories - Religious $1.69 Min 48	BBC-0011 Holiday Memories - Winter Scenes $1.69 Min 48	BBC-0012 Holiday Memories - Winter Scene II $1.69 Min 48

Rep Groups

Rep groups is a list of rep groups this supplier is assigned to. Assigning suppliers to rep groups has to be done by Brandwise.



Rep Group
Displays the Rep Group Name.

Vendor Agency Code
Displays the Agency Code.

Send to Vendor Elect
Displays that the supplier is using *Stream* or *Stream Lite* to retrieve sales orders.

Vendor Bridge Enable
Displays that the supplier is using *VendorXchange* retrieve sales orders.

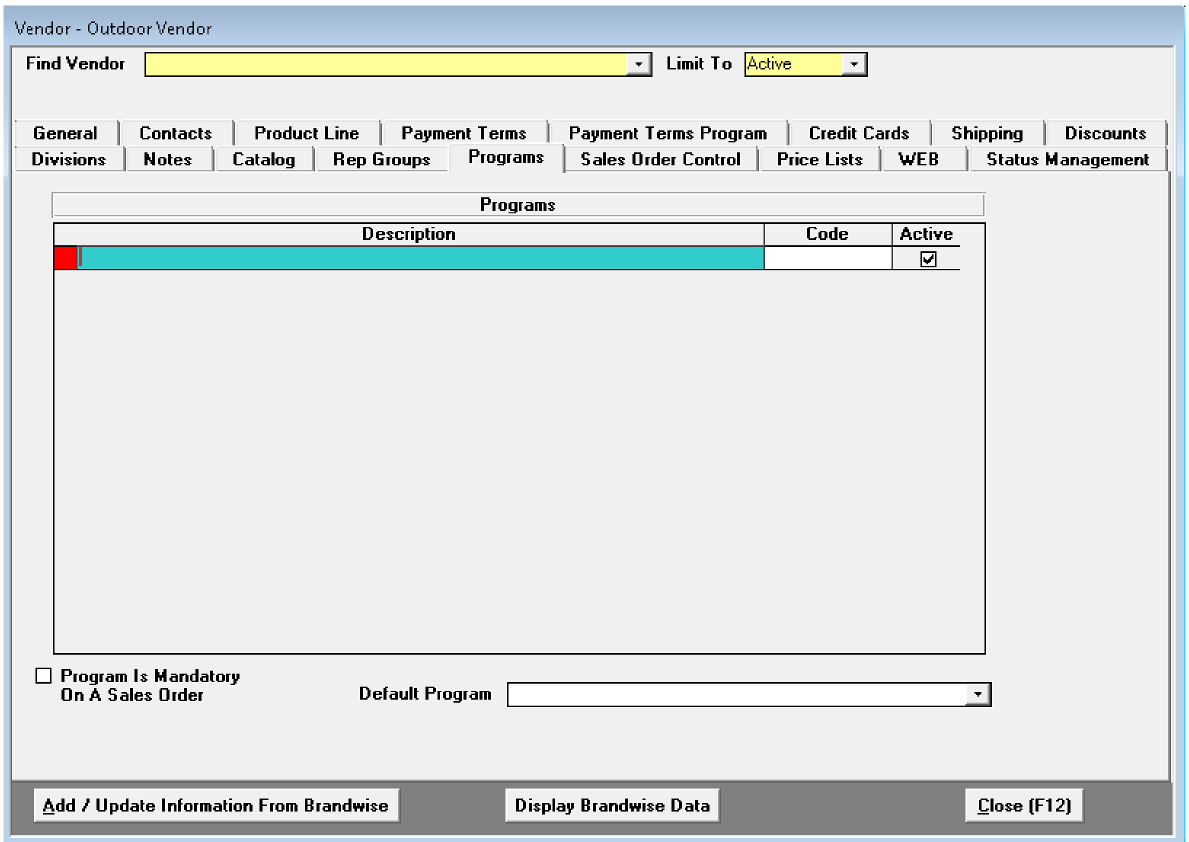
Electronic Invoice
Displays that your company is using *InvoiceXchange* with the supplier.

Programs

Vendor programs can be added to each vendor. Each program added will be available at the end of the order to be selected by the user.

Programs

Enter a description of the program and the program code. The program code is used if a supplier is receiving their orders via an electronic order file using *Stream* to match the program back in their back office system.



Program is mandatory on a sales order

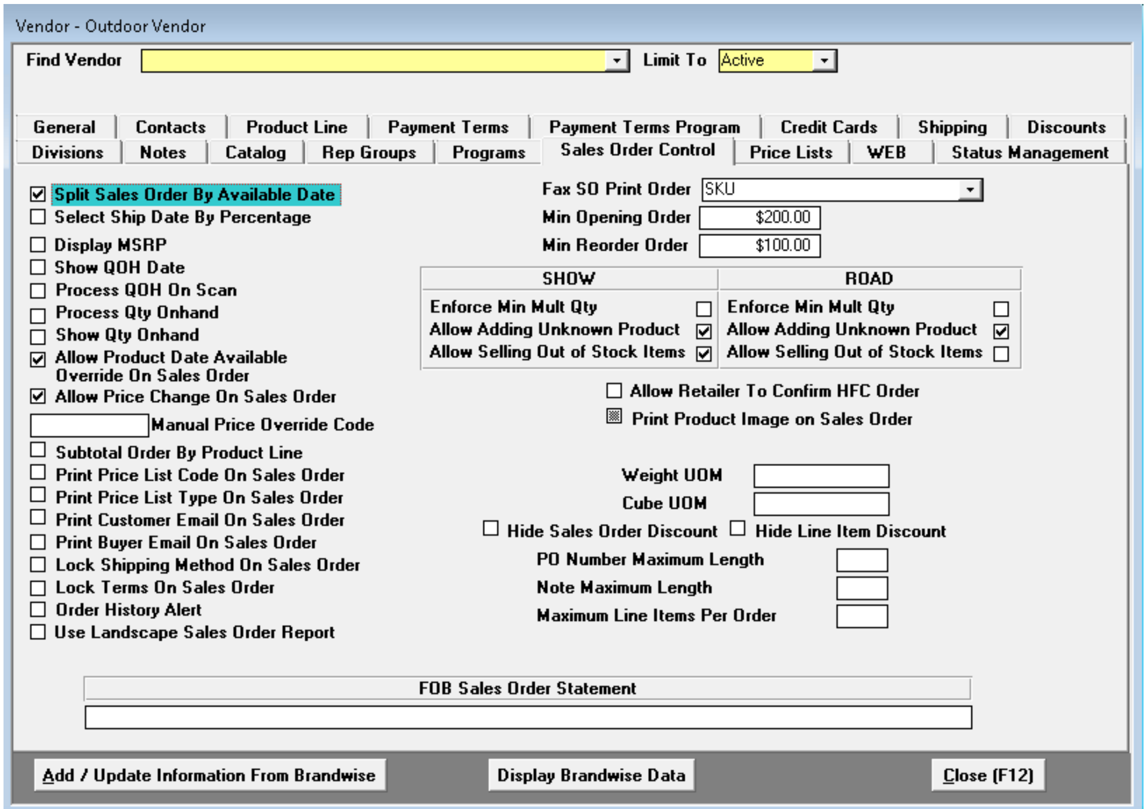
If this is checked then the user will be forced to select a program at the end of the order prior to being able to confirm the order.

Default Program

The default program will automatically apply to all the suppliers' orders without the user having to select the program.

Sales Order Control

Sales order controls are the different settings/limits that can be set to assist in the order process.



Split Sales Order By Availability Date: will split orders by product available date.
Select Ship Date By Percentage: allows the ship date on an order to be applied based on the available date of the products on the order. The user will be prompted to select a ship date based on the how many products (broken out by shipping/dollar percentage) will be available on that ship date. See more below for further information about Ship Date by Percentage.

Display MSRP: will display the MSRP on a order
Show QOH Date: will display quantity on hand availability dates in PocketElite.
Process QOH on Scan: will deduct from the qty on hand as soon as an item is scanned.
Process Qty Onhand: will deduct from the qty on hand once the order is confirmed.
Show Qty Onhand: will show qty on hand information when an item is added.
Allow Product Date Available Override On Sales Order: this allows the user to change the date an item is available when adding items to the order if the supplier is providing the available date.
Allow Price Change On Sales Order: will allow users to change prices of products.

Manual Price Override Code: is a code that can be used to have visibility of a discount when it is applied to a line item on the order. This code will get applied to an order and display on the order printout.
Subtotal By Product Line: will break out the sales order printout by product line.
Print Price List Code on Sales Order: this allows the price list code to print on the sales order printout under each item so you can see which price list was used on each line item.

Print Price List Type on Sales Order: this allows the price list type to print on the sales order printout under each item so you can see which price list was used on each line item.
Print Customer Email On Sales Order: will print the customers email on the order.
Print Buyer Email On Sales Order: will print the email of the selected buyer on the order.
Lock Shipping Method on Sales Order: if this is checked, the user is not allowed to override the shipping methods assigned to the customer for the supplier on the sales order.
Lock Terms on Sales Order: If this is checked, the user is not allowed to override the terms assigned to the customer for the supplier on the sales order.
Order History Alert: this allows the system to be set with different threshold beeps, when using PocketElite, to notify the user of the last time the product has been ordered.

- **Warning**: This process can slow down the scanning speed based on the number of products/ orders in your system. Please consult Brandwise prior to using this functionality.

Use Landscape of Sales Order Report: Changes Sales Order Report to Landscape.

Fax SO Print Order:
Select the order in which the supplier will receive the line items on the orders sent to them.

- **Entered Order** - prints in the order that the items were added to an order.
- **SKU** - prints numerically by SKU.
- **SKU Description** - prints alphabetically by item description.
- **Barcode** - prints numerically by UPC or barcode number.

Min Opening Order: Minimum opening order is the total dollar amount that the supplier requires for a new customer to order. The minimum opening amount is for reference only, the system does not force this to be met to complete an order.
Min Reorder: Minimum reorder is the total dollar amount that the supplier requires for an existing customer to reorder. The minimum reorder amount is for reference only, the system does not force this to be met to complete an order.
Show: Product settings when the system is in show mode.

- **Enforce Min Mult Qty**: If this is checked, the user will not be able to break the min/ mult on product being added to an order.

- **Allowing Adding Unknown Product**: if this is checked, the user can add items to an order that are not in the system. If this occurs, the item will only be added to the order and not the system.
- **Allow Selling out of Stock Items**: if this is checked, the user can sell items even if they are out of stock. This is only used if the supplier sends stock information in their product files.

Road: Product settings when the system is in road mode.

- **Enforce Min Mult Qty**: if this is checked, the user will not be able to break the min/ mult on product being added to an order.
- **Allowing Adding Unknown Product**: if this is checked, the user can add items to an order that are not in the system. If this occurs, the item will only be added to the order and not the system.
- **Allow Selling out of Stock Items**: if this is checked, the user can sell items even if they are out of stock. This is only used if the supplier sends stock information in their product files.

Print Product Image on Sales Order: If you have images from the supplier, you can select this option to print thumbnails on the sales order printout.
Weight UOM: enter the units of measure that will be used for weight (if applicable)
Cube UOM: enter the units of measure that will be used for cube (if applicable)
Hide Sale Order Discount: If this is checked, the user will not be allowed to apply a discount at the end of the sales order for this supplier.
Hide Line Item Discount: If this is checked then the user will not be allowed to insert a line item discount while adding items to the order for this supplier.

PO Number Maximum Length: Sets a character limit on PO Numbers

Note Maximum Length: Sets a character limit on Sales Order Notes

Maximum Line Items Per Order: Sets a line item limit per sales order
FOB Sales Order Statement: The FOB statement will print at the bottom of all orders for this supplier.

Split by Percentage

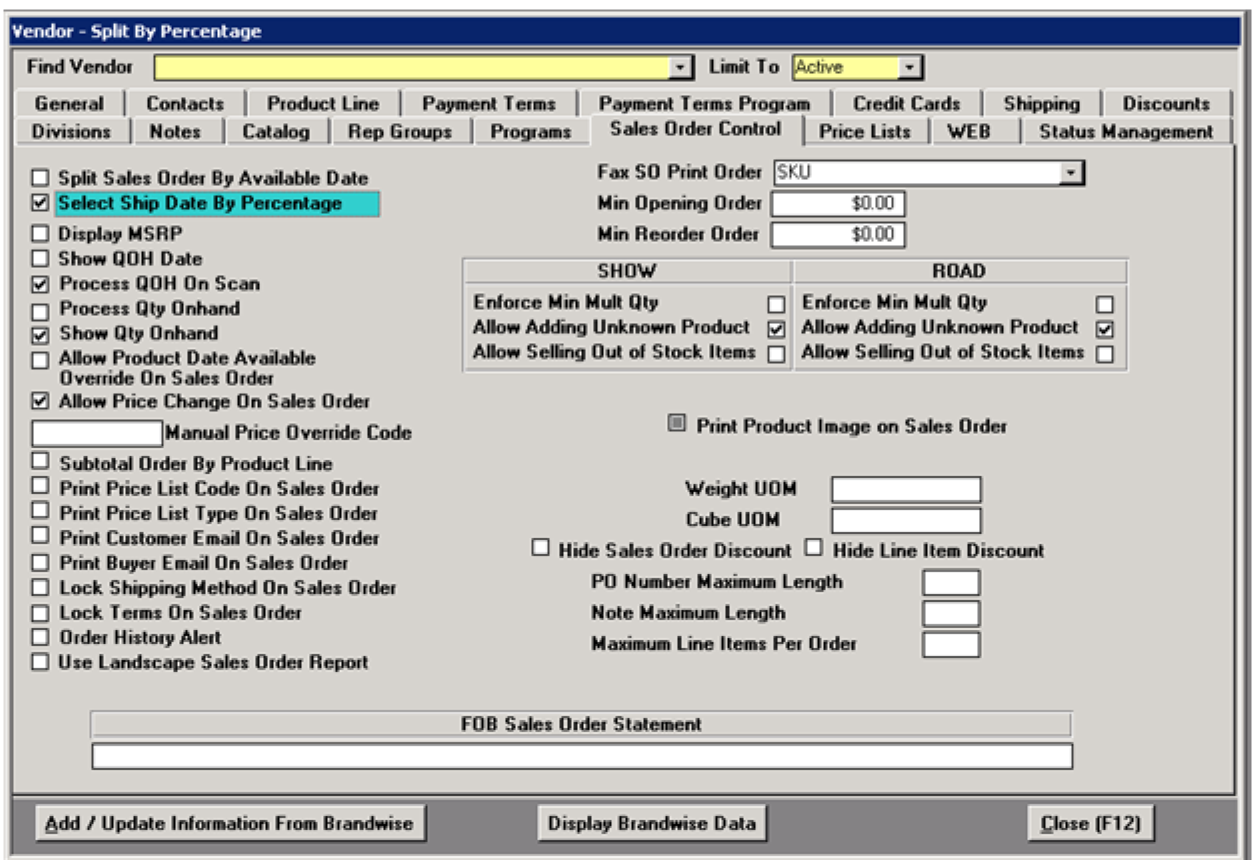
Split by Percentage allows the ship date on an order to be applied based on the available date of the products on the order. The user will be prompted to select a ship date based on the how many products (broken out by shipping/dollar percentage) will be available on that ship date. This will reassign the selected ship date to the order. Keep in mind if you select an order that is not 100%, it is up to your supplier to determine if they can ship those products.

Split by Percentage is only available for systems that have Sprint 171 or higher. Please contact Brandwise Support to upgrade.

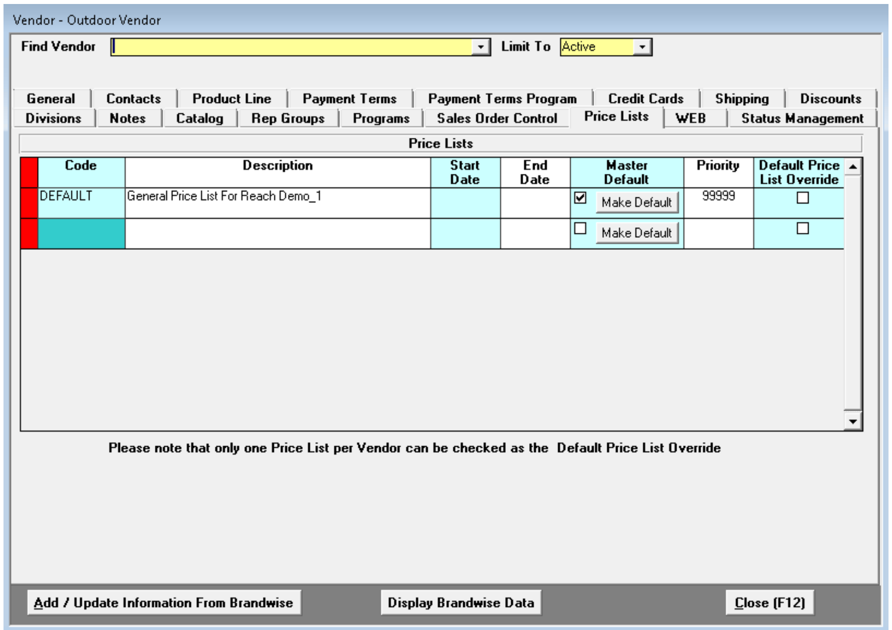
To enable Split by Percentage:

- **Agency 100 System**

    1. Navigate to the supplier that you wish to enable using ***Vendors*** > ***Vendors***
    2. Navigate to ***Sales Order Control*** and enable ***Select Ship Date By Percentage*** and ***Process QOH On Scan***
        - This feature is not recommended with ***Split Sales Order By Available Date*** enabled



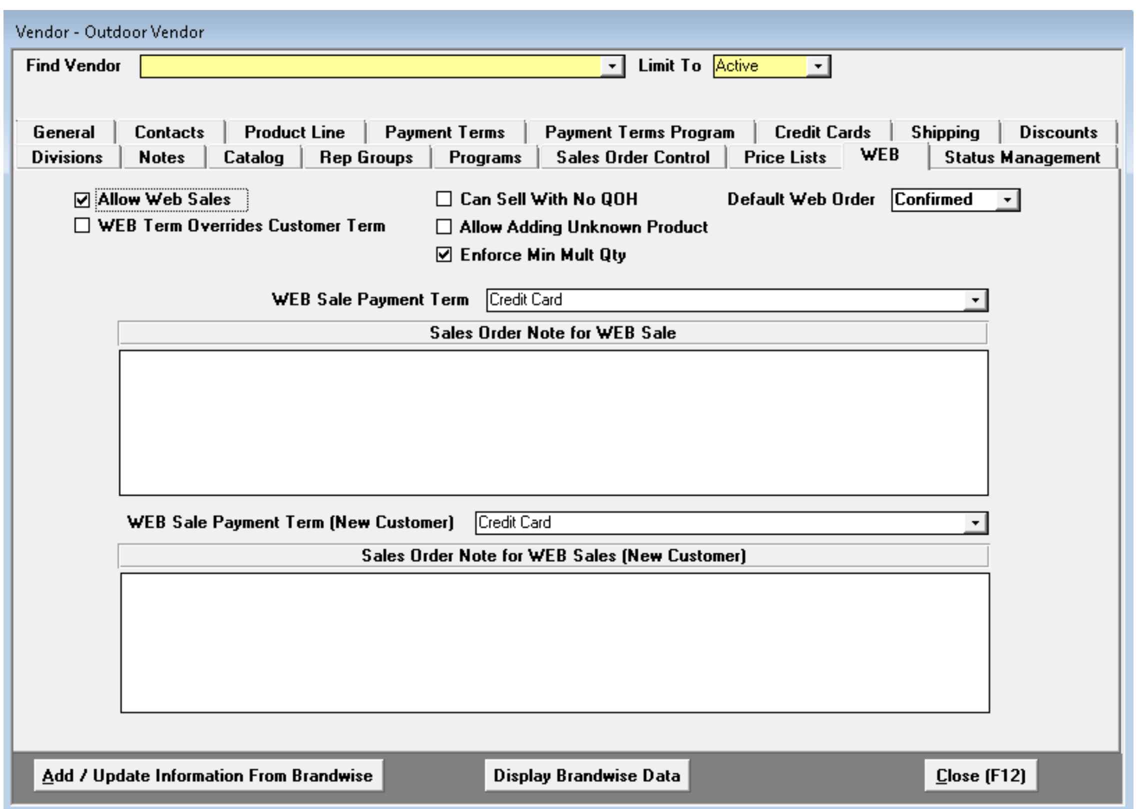
Price Lists



Multiple price list can be built as subsets of product from the main supplier price list. These price lists can be used to limit the products that are offered to a customer. There can only be one master default price list per supplier. This is generally the price list which contains all products from the supplier and the standard product prices.

Web

The Web tab will be used to setup sales order control and other features for *Reach.*



Allow Web Sales
Must be checked if your company has *Reach*.

WEB Term Overrides Customer Terms
This will override any terms associated with a customer and use the Web Sales Payment Terms.

Can Sell with No QOH
This will enables the ability to override QOH if enabled in Sales Order Control.

Allow Adding of Unknown Product
Allows the retailer to add unknown product.

Enforce Min Mult Qty
Enforces your product minimum and multiple quantity in your product database.

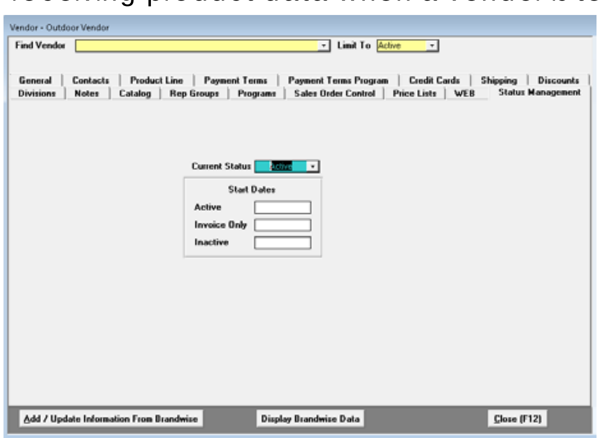
Default Web Order
Sets the default web order to *Confirmed* or *HFC.*

Web Sales Payment Term
Sets the default payment term for *Reach* for New or Existing Customers.

Sales Order Notes for Web Sales
Creates a Sales Order Notes for *Reach* sales orders for New or Existing Customers.

Status Management

Status management allows you to change the status of the supplier to limit reps from receiving product data when a vendor is terminated but commissions are still being paid.



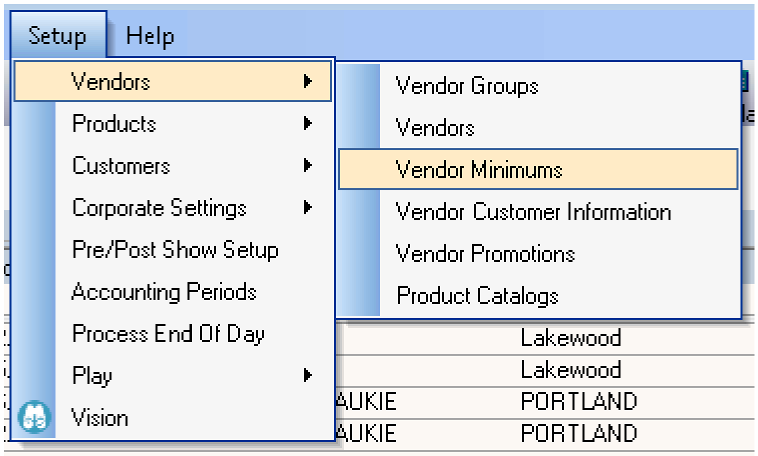
There are three statuses for a supplier:

- **Active:** The vendor is active and all products will go to the sales reps.
- **Invoice only:** The vendor is still active for commission purposes only; product will not go to reps.
- **Inactive:** The vendor is no longer active and will not display for commission purposes nor will product go to the reps.

Vendor Minimums

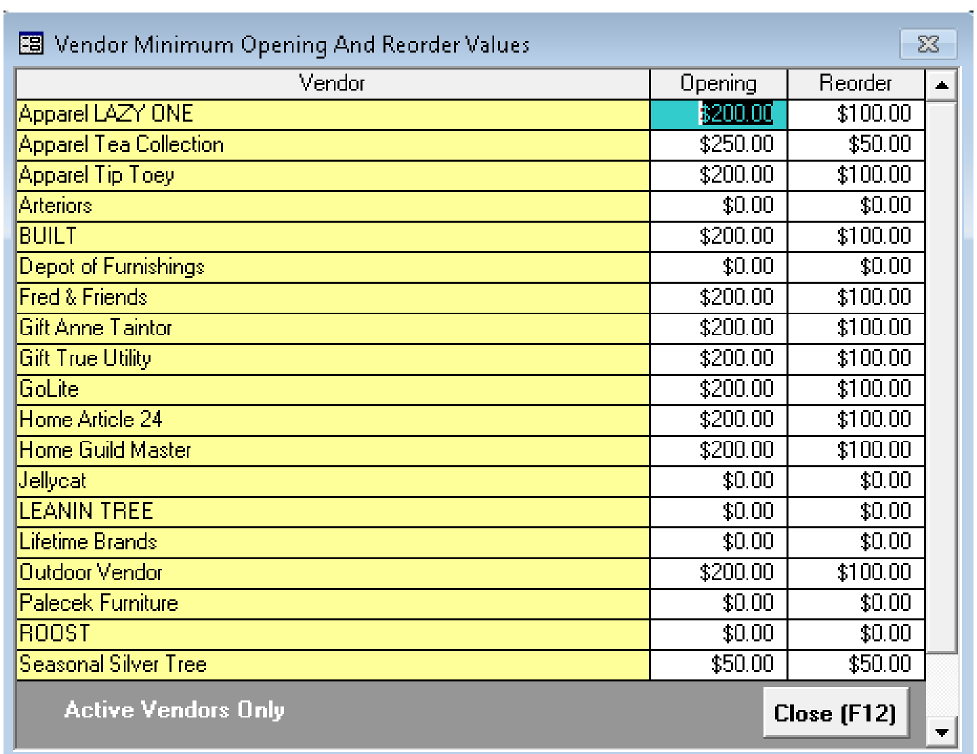
Vendor order minimums and reorder minimums can be entered under the vendor minimums menu. These minimums will be displayed during the order process to help insure minimums are met while placing orders.

To access vendor minimums go to: ***Setup > Vendors > Vendor Minimums***



Vendor Minimum Opening and Reorder Values

This will display the Supplier Name, Opening Order Amount, and Reorder Amounts.

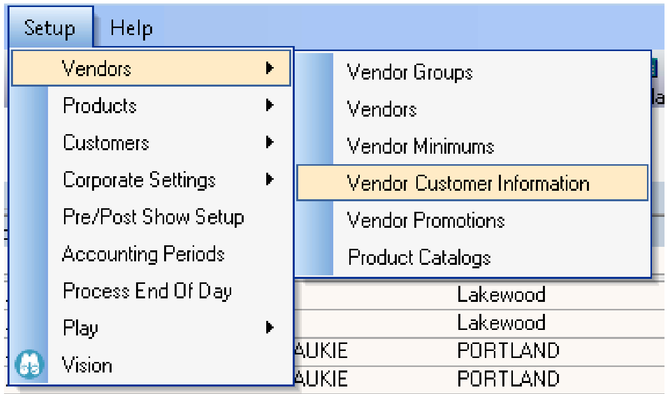


Vendor	Opening	Reorder
Apparel LAZY ONE	$200.00	$100.00
Apparel Tea Collection	$250.00	$50.00
Apparel Tip Toey	$200.00	$100.00
Arteriors	$0.00	$0.00
BUILT	$200.00	$100.00
Depot of Furnishings	$0.00	$0.00
Fred & Friends	$200.00	$100.00
Gift Anne Taintor	$200.00	$100.00
Gift True Utility	$200.00	$100.00
GoLite	$200.00	$100.00
Home Article 24	$200.00	$100.00
Home Guild Master	$200.00	$100.00
Jellycat	$0.00	$0.00
LEANIN TREE	$0.00	$0.00
Lifetime Brands	$0.00	$0.00
Outdoor Vendor	$200.00	$100.00
Palecek Furniture	$0.00	$0.00
ROOST	$0.00	$0.00
Seasonal Silver Tree	$50.00	$50.00

Vendor Customer Information

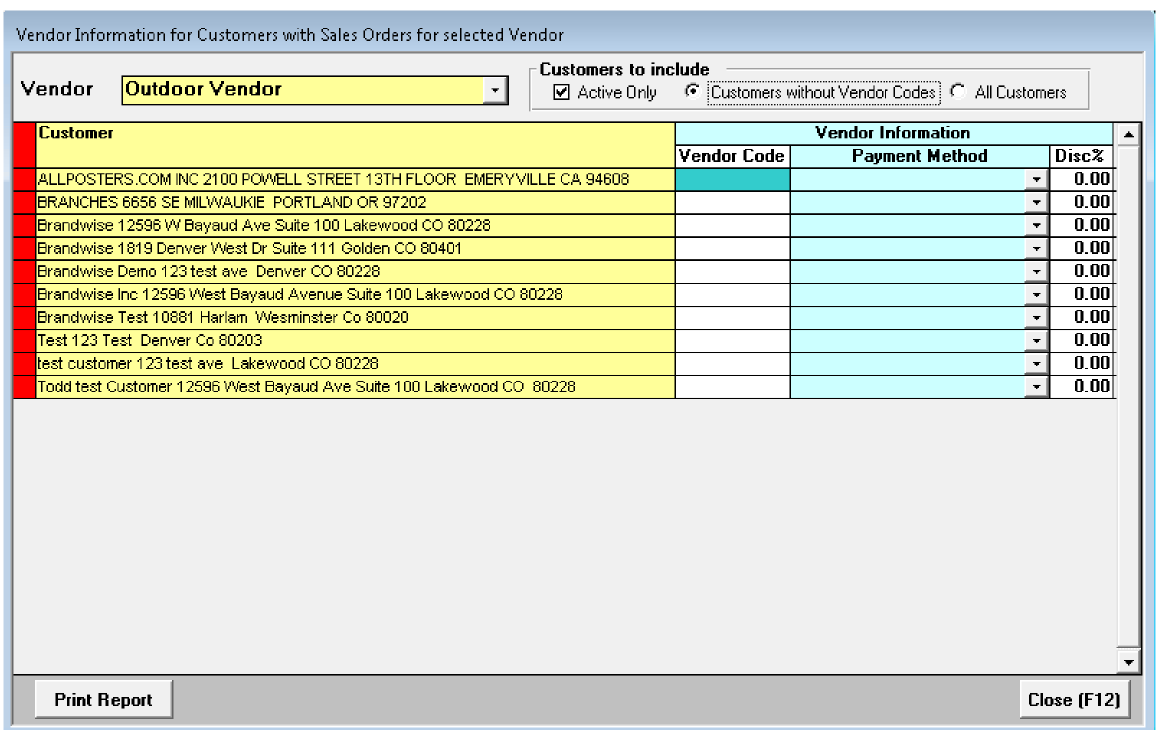
Vendor Customer Information will allow you to view and edit all customers that have been hard coded to a vendor from the vendors tab in the customer record.

To access vendor minimums go to: ***Setup > Vendors > Vendor Customer Information***



Vendor Information for Customer with Sales Orders for selected Vendor

By selecting a vendor, you can view all customers that are hard coded to them. You can also edit their vendor code, default, payment terms, discount, and the price list that they are assigned to



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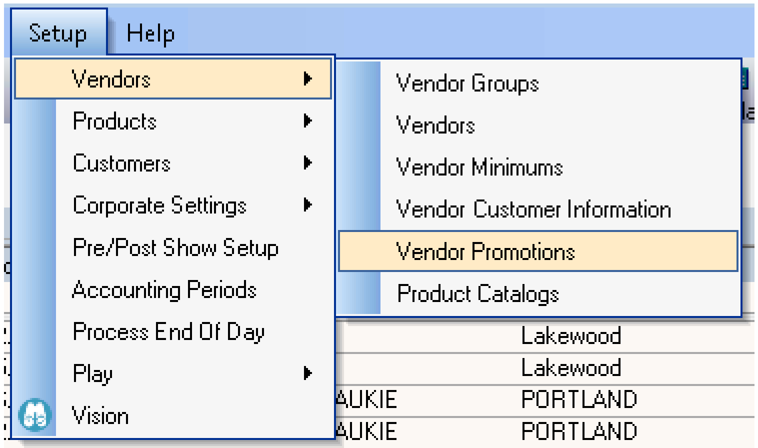
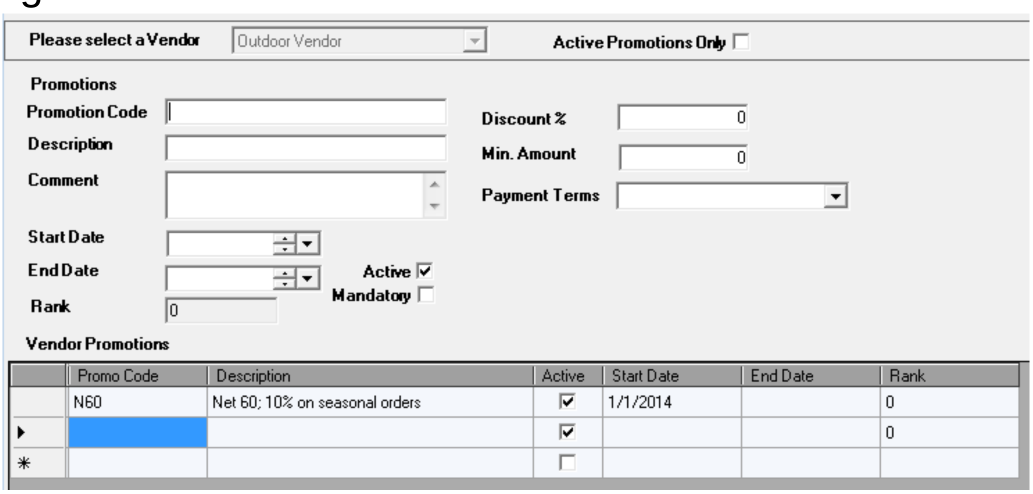
Vendor Promotions

Vendor Promotions can be set by the back office to discount orders based on order amount, or both amount and payment terms.

From main menu go to: ***Setup > Vendors > Vendor Promotions***



Adding a Vendor Promotion

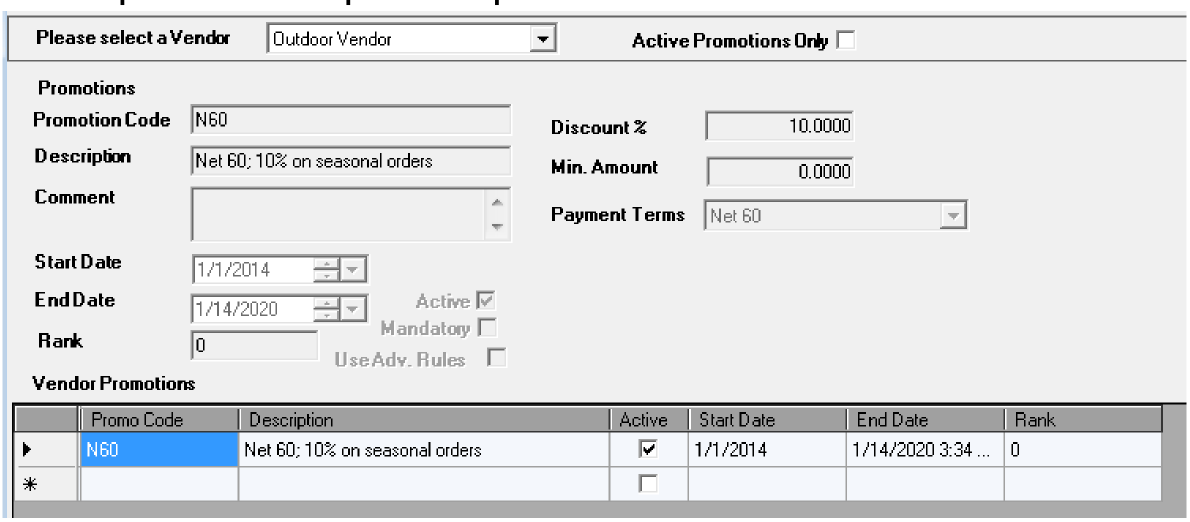


1. Select a supplier from the **Please select a Vendor** dropdown.
2. Click **New** located on the bottom of the screen
3. Enter in the **Promotion Code** and **Description**. These will display in the dropdown on the orders screen.
4. Select the **Start** and **End** date for the promotion

5. Enter the **Percent Discount** that the customer will receive.
6. Enter the **Minimum Amount** required to qualify for the promotion
7. Select the **Payment Terms** required to qualify for the promotion
8. Set **Rank** - This is used if only one promotion can be applied to an order and if there is more than one available the system will apply the promotion with the lowest number.
9. If the promotion is mandatory, then check the Mandatory checkbox
10. Hit **Save**

NOTE: *You can make dollar amount or both dollar amount and payment as the criteria for your promotion*

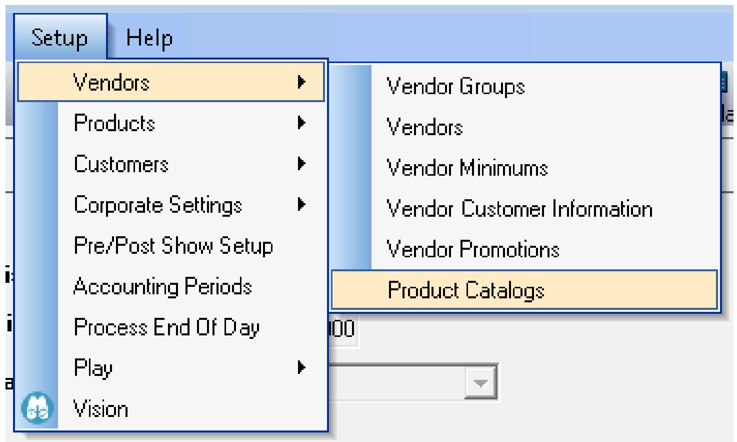
Example of completed promotion



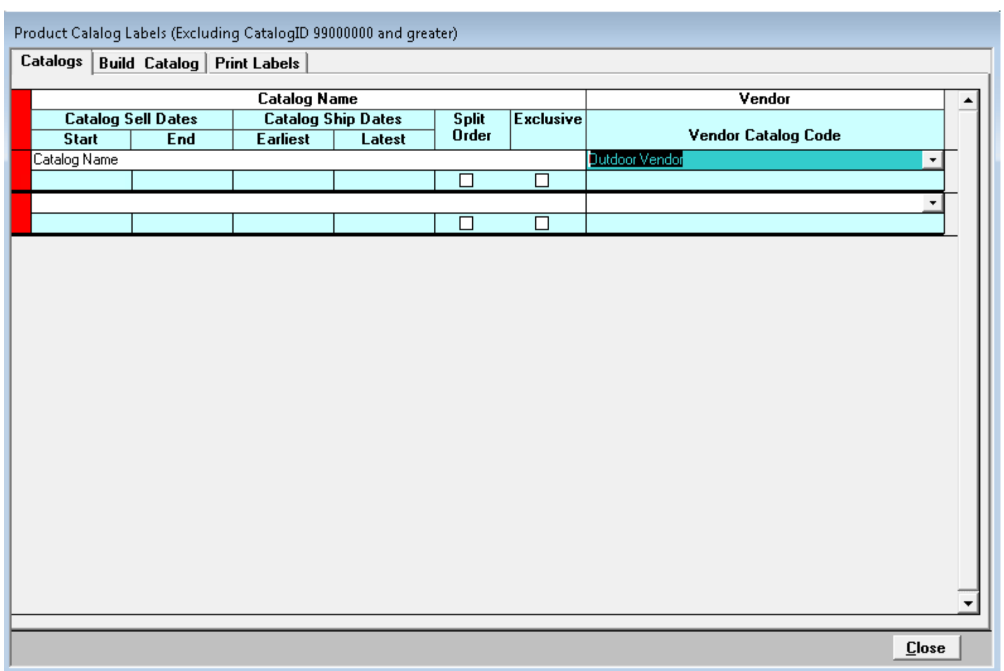
Product Catalogs

You can setup catalogs within the system for printing labels and splitting orders.

From the main menu go to: ***Setup > Vendors > Product Catalogs***



The Catalogs tab allow you to create and name your catalogs. You have to create one here before you can add product to it. You can add an item at a time here or you can



import catalogs in ***Import from Vendor.*** By checking the **Split Order** box, catalog information will display on the order and orders will split accordingly. Any catalog that is checked as ***Exclusive*** will contain products that cannot be added to any other catalog.

Catalog Name

Catalog Sell Dates
Set the catalog sell date range.

Catalog Ship Dates
Set the catalog ship date range.

Split Order
Catalog information will display on the order and orders will split accordingly.

Exclusive
Products marked as exclusive cannot be added to any other catalog.

Vendor

Vendor Catalog Code

Vendor Code for the catalog.

For more information about Build Catalog and Print Labels, please view these links:

Build Catalog

Print Labels

Products

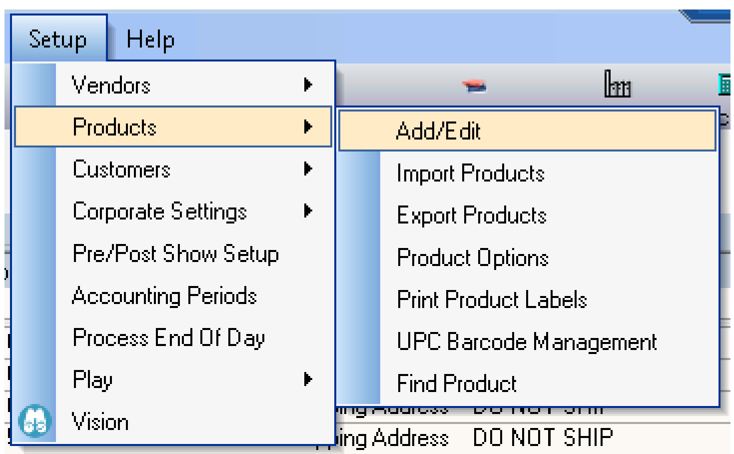
Product management will be done within ***Setup > Products***. We have found that the suppliers respond on a more consistent basis when requests for data come directly from you. Therefore, you will be responsible for communicating with the suppliers with regards to collecting the data.

Brandwise will assist in product file cleanup by emailing your files to ssidata@brandwise.com. If a supplier cannot provide a spreadsheet in a format that can be used by Brandwise then you will be responsible to either enter the data into Brandwise or provide a spreadsheet to be loaded into the system.

Add/Edit Products

Add/Edit product will allow you to change individual items in the system

From main menu go to: ***Setup > Products > Add/Edit***



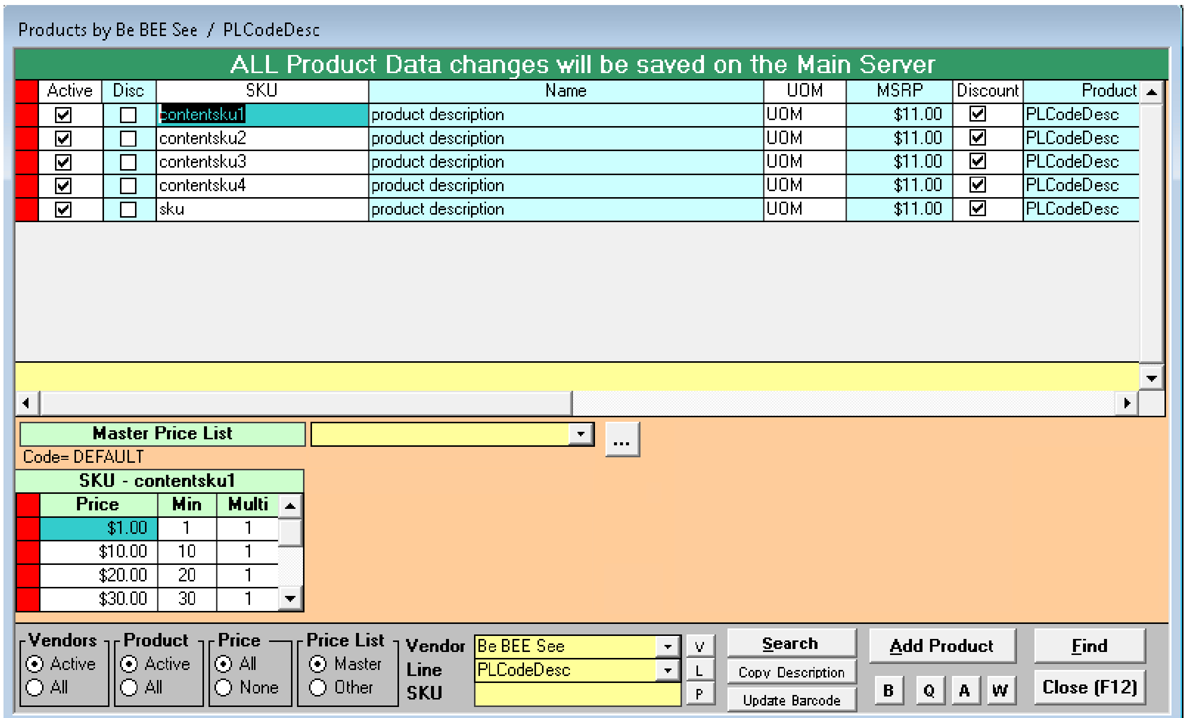
Product Search

1. Select a supplier form the **Vendor** dropdown and click **Search** to pull up all items. You can also limit by **Product Line** or type in an individual **SKU.**
   - Use the V, L, or P to clear the text from the search fields.
2. Additional criteria may be added to your search using the following:
   - Vendors
     1. Active
     2. All
3. Product
   - Active

- All

4. Price
    - All
    - None
5. Price List
    - Master
    - Other
6. Click **Search**

Example of Search Criteria

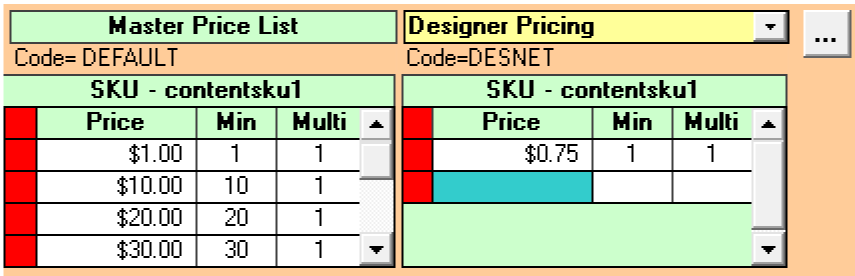


Product Search Results

All products will display where you can edit each SKU, price, qty, etc... As soon as a change is made, it is saved. You can also check the item as **Active**, **Discontinued**, or click the red block to **Delete** the product.

Product Price, Product Price Breaks, and Price Lists

Product Price, Product Quantity Price Breaks and Price Lists will display below the search results once you click on a product row. If you don't have a Product Quantity Price Breaks, this section will display your Price, Minimum Quantity and Multiple Quantity for the selected product.



Add/Edit Pricing

1. Click on the **SKU** section to edit the **Product Price**, Min, or **Multi.**
2. Click in a blank row to add **Product Quantity Pricing.**
3. To **Delete**, click on the red box and confirm deletion.

Master Price List

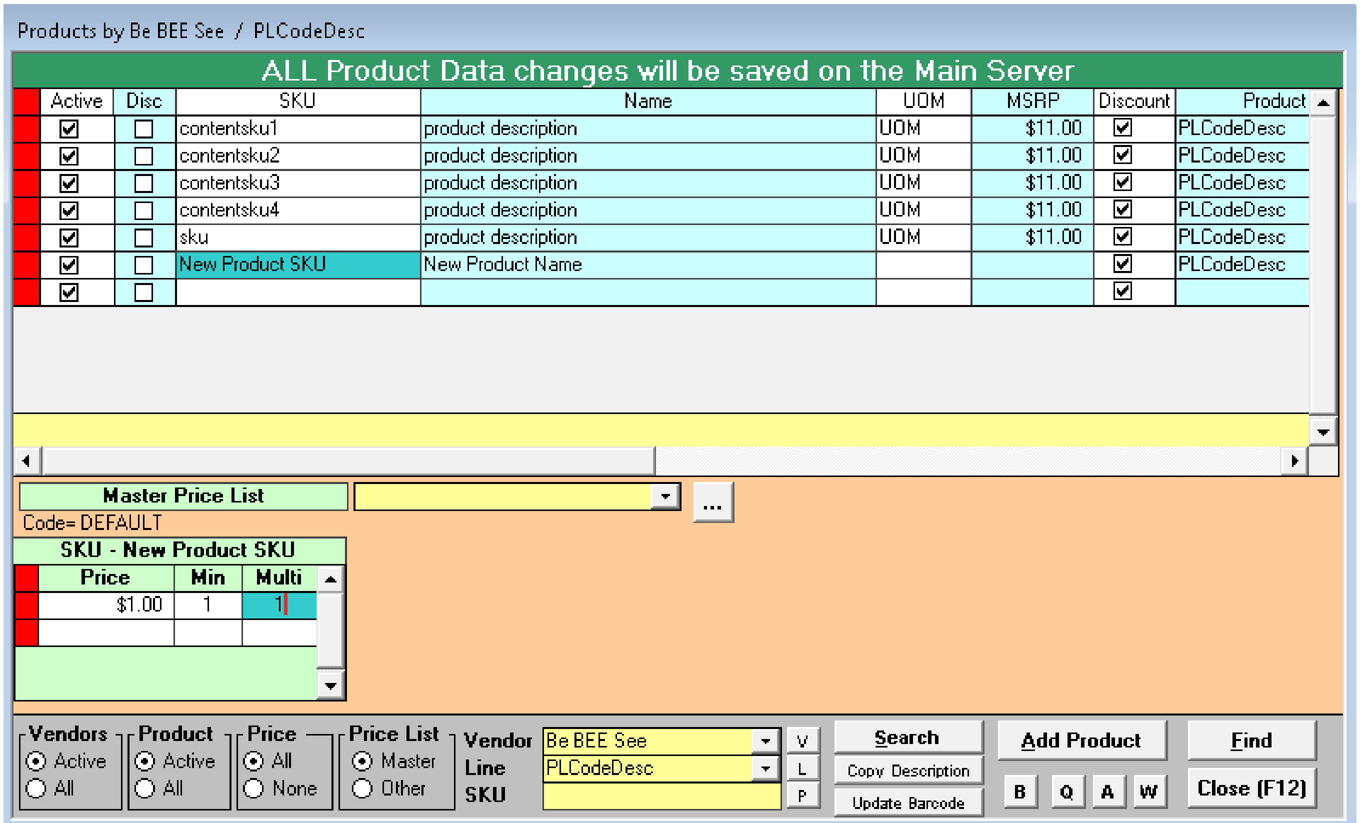
1. Click on the dropdown next to **Master Price** List to view available price lists.
2. To add additional **Price Lists**, click on the next to the price list to open the **Price List** tab for that supplier.

Adding New Product

To add a new product to your system:

1. Limit the Vendor search to your supplier.
2. Click **Add New Product.**
3. A new line will be inserted into the **Product Search Results.**
    a. Required Fields
        - SKU
        - Product Name
4. Click into another field to save your changes. This will also unlock the Pricing option for the product
5. Add the Product Price, Min, and Multi - ***All Fields are Required***

Example of New Product



Additional Features

Copy Description

This process will copy the first 15 characters of the product name to the short product name (Label Name Line 1) on all records in the group where the short name is blank.

Update Barcode

This process will update the product barcodes to equal the SSI Product ID for the supplier.

Barcode

Product Barcode For
upc

By clicking the **'B'** located by the Search options, this will display the Product Barcode for the selected item. If you have multiple barcodes, you are Archiving Old Barcodes.

Quantity

By clicking the **'Q'** located by the Search options, this will display the Quantity on Hand, Product Availability Date, Full Product Number.

SKU - sku		
Quantity	Avail Date	Full Product #
100	12/12/2015	sku-FullProductNumber

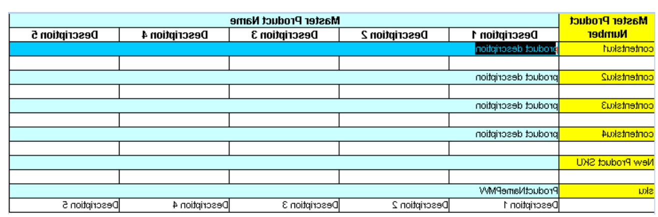
Assortments

Assortment (sku) Contents		
SKU	Qty	Description
contentsku1	1	product description
contentsku2	1	product description
contentsku3	1	product description
contentsku4	1	product description
	1	

By clicking the **'A'** located by the Search options, this will display the Assortment Contents.

Product Master Web

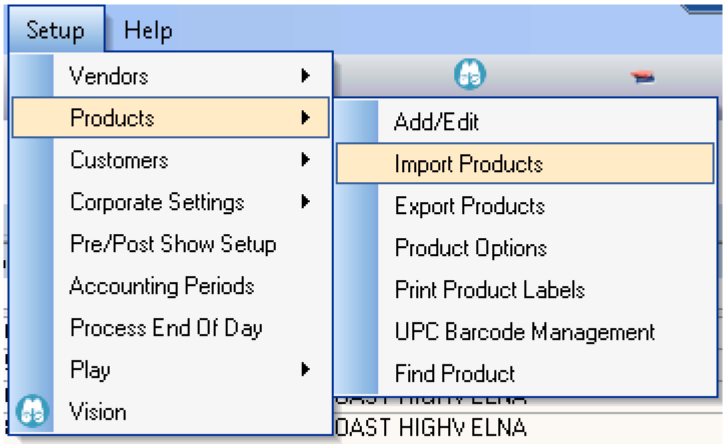
By clicking the **'W'** located by the Search options, this will display the Product Master Web which will display the product selling description and features.



Import Products

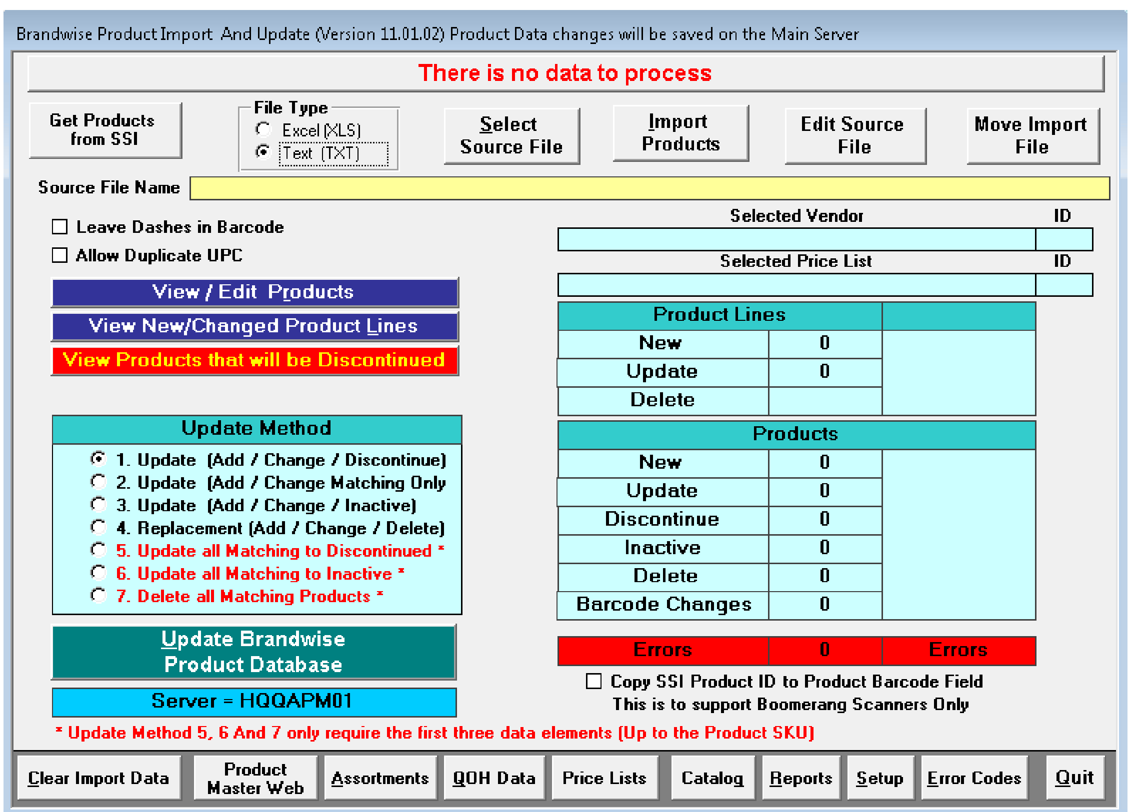
Import from Vendor allows you to import an entire product file that is received from the supplier. The file must be in the required format.

From the main menu go to: ***Setup > Products > Import Products***



Importing Products

To import products into your Play system, please follow the steps below:

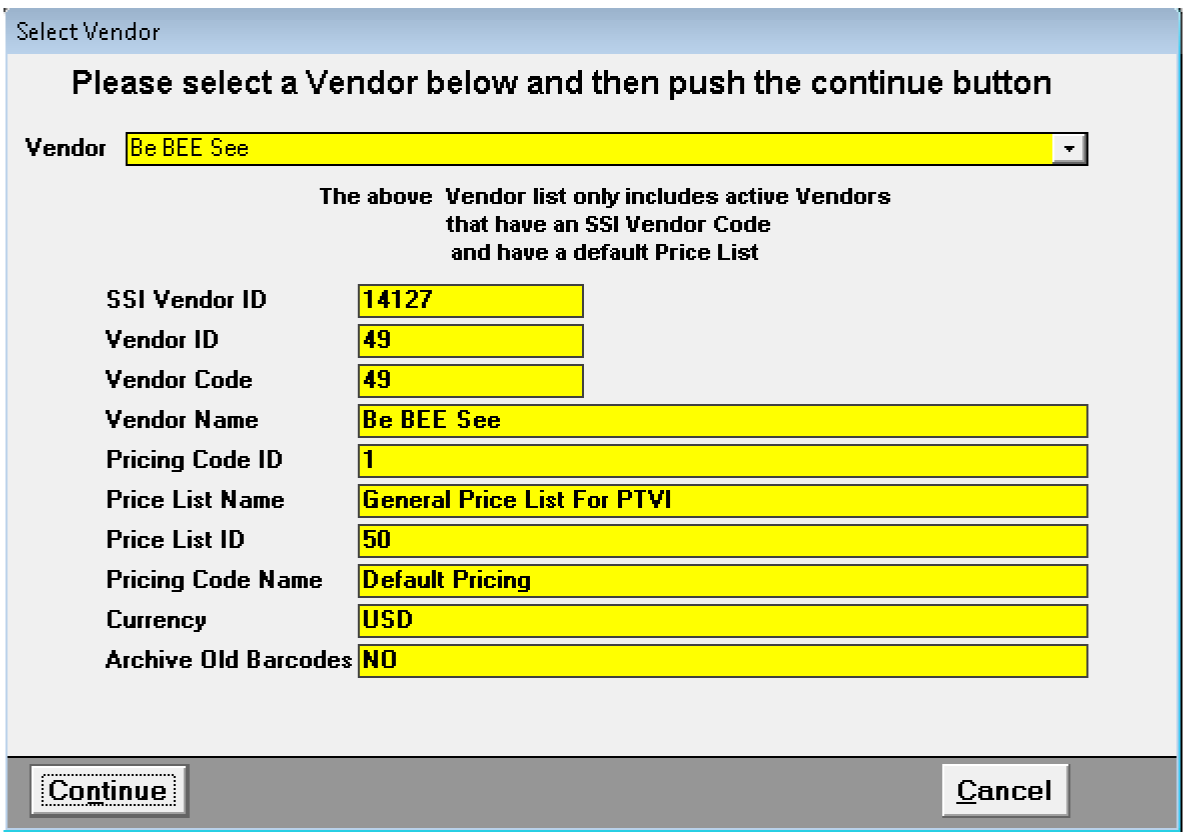


Importing a File

1. Select the **File Type** of the file that you are going to import. Make sure the file is in the following format:
   - Text (.txt)
   - Excel (Excel 97-2003 .xls)
2. Click **Select Source File**, this will allow you to browse for your file using File Explorer. Once you have selected your file, it will show up in the yellow **Source File Name**.
3. Click **Import Products** to begin the import process.

Selecting a Supplier

1. If your files does not have a **Supplier Code** in *Column 2*, you will be prompted to **Select a Vendor**.
2. Once you have selected your supplier from the **Vendor** dropdown, all of their information will fill in.
3. Click **Continue** to proceed with the import



Data Validation

Once you have clicked continue to proceed with the import, the system will validate your product file. If you receive an error during this process, check your file format. You may have a data field in the wrong column. You may be able to correct them from the product editor.

Select File Options

Once you file has been validated, you can select the following file options (*not required*):

- Leave Dashed in Barcode
- Allow Duplicate UPC
- Archive Old Barcodes (From Vendor Record)

Product Status

Discontinued

If an item is discontinued, you can still sell it but discontinue will appear.

Inactive

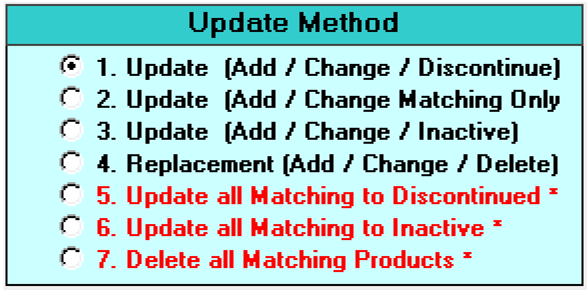
If an item is inactive, you cannot sell it.

Deleted

If an item is deleted, the it will no longer be in the system.

Select Update Methods

There is **7** different update methods that you can select to update your product database.



1. ***Update (Add / Change / Discontinue)***

    - This option will add or change the products in the file and discontinue the rest in the product database.

2. ***Update (Add / Change Matching Only)***

    - This option will only add or change the products in the file with the matching products in the database.

3. ***Update (Add / Change / Inactive)***

    - This option will add or change the products in the file and inactivate the rest in the product database.

4. ***Replacement (Add / Change / Delete)***

    - This option will replace all products in your product database with the product in the file. This will delete all products not in the file in your product database.

        - ***NOTE:*** *If you reenter these deleted products at a later date and you use SSI Barcodes, your older labels will not scan. You will need to reprint these product labels.*

    - This requires assistance from Brandwise to unlock this option. Please call Brandwise Support at 877-435-3225 option 1.

5. ***Update All Matching to Discontinue***

    - This option will discontinue all products in your file in the product database.

6. ***Update All Matching to Inactive***

    - This option will discontinue all products in your file in the product database.

7. ***Delete all Matching Products***

- This option will delete all products in your file in the product database.
    - ***NOTE:*** *If you reenter these deleted products at a later date and you use SSI Barcodes, your older labels will not scan. You will need to reprint these product labels.*
- This requires assistance from Brandwise to unlock this option. Please call Brandwise Support at 877-435-3225 option 1

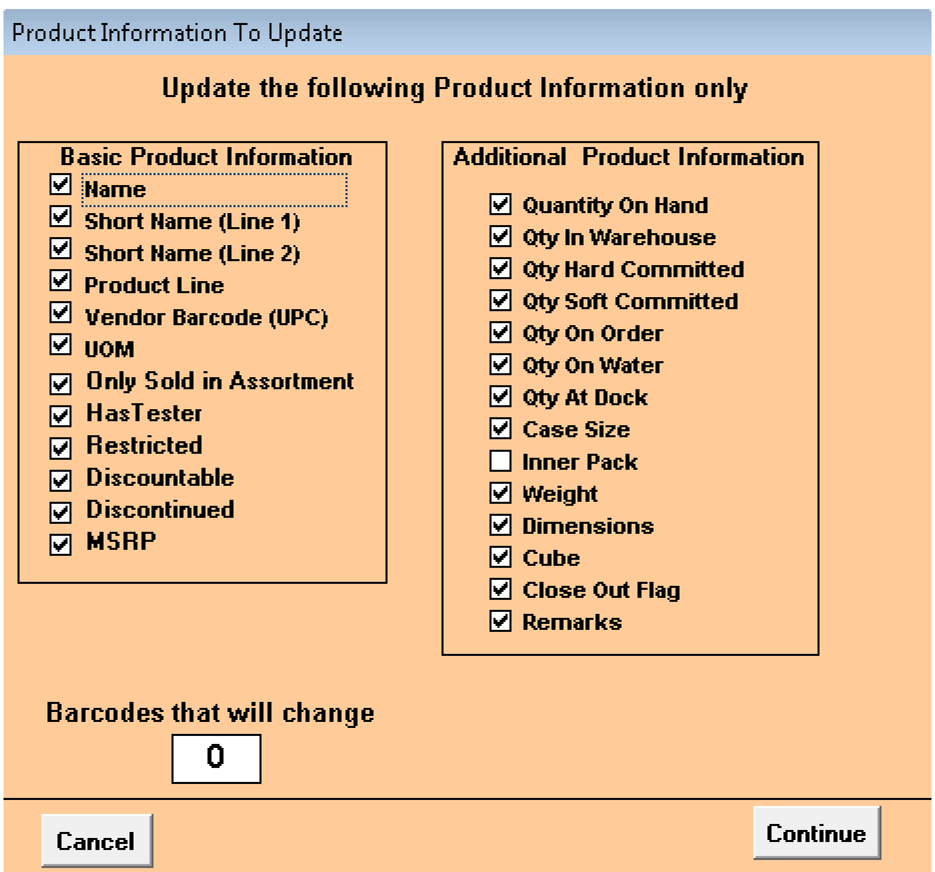
Update Brandwise Product Database

Once you have chosen your update method, click 

. You will be asked to enter the administrator password. Click **Continue** to import your products.

Product Information to Update

You can select what to update information by checking the following options:



Products Additional Features

Get Products from SSI

This process will download any New or Updated Product Information from Brandwise for your suppliers.

- The files will be stored in C:\ShowroomSolutions\ProductFiles\
- These files will be a pipe delimited (|) text file (.txt)

Edit Source File

Edit Source File

This will open the selected product file so you can edit directly from **Import from Vendor**.

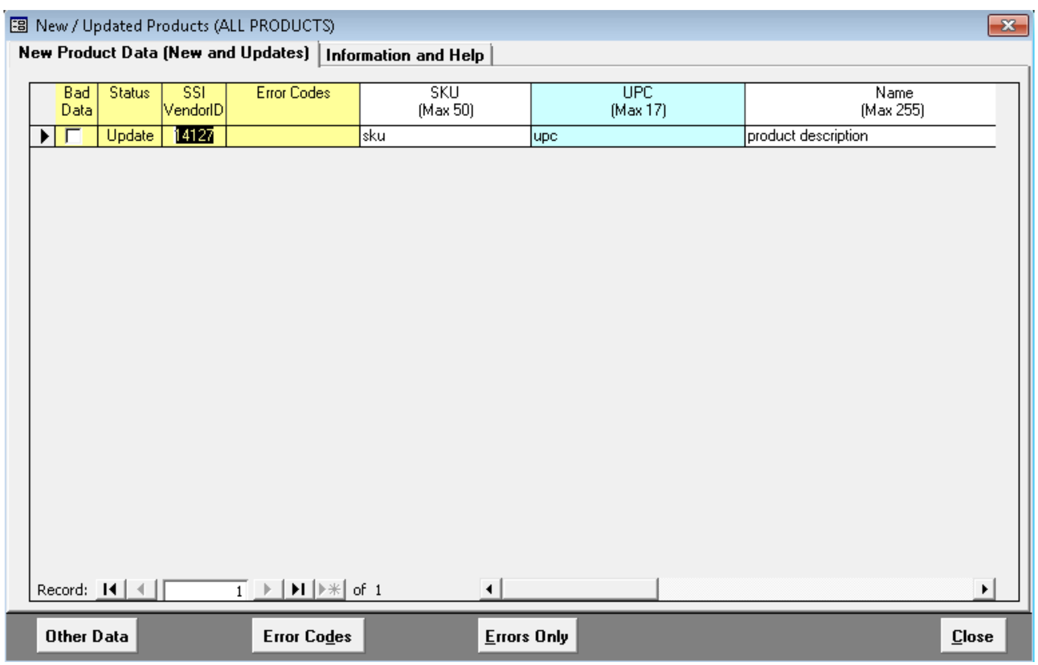
Move Import File

Move Import File will move your selected file into the Import Files Backup Directory. To select a backup directory:

1. Click **Setup**
2. Enter your file path in **Import Files Backup Directory**

VIew/Edit Products

View/Edit Products will display all products in the file with the Brandwise field names.



Here you are able to edit the fields directly to correct any issues that may occur during the import process.

Other Data

- Displays optional file fields

Main Data

- Displays the main file fields

Error Codes

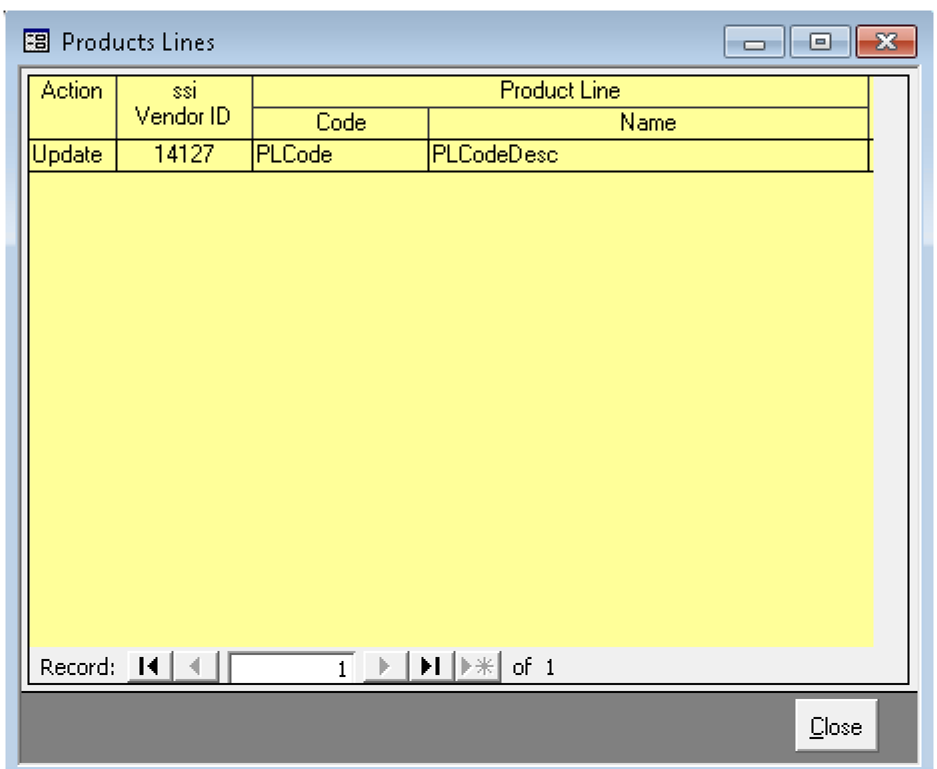
- Displays Error Codes.

Errors Only

- Display products with Errors Only.

View New/Changed Product Lines

View New/Changed Product Lines will display Product Lines that will be added or changed in your product database.



View Products Based on Update Method

Once you have selected your Update Method, click on the red button above to view the products that will be made discontinued, inactive, or deleted.

Clear Import Data

Clears all criteria in Import from Vendor.

Reports

Reports will give you the ability to print or preview the following:

- New and Updated Products
- New and Updated Products (With Errors Only)
- Product and Assortment File Import Specification
- Products that will have Barcode changed by this import
- Product Master Web File Import Specification
- Product Quantity on Hand Import Specification

Setup

Setup will allow you to specify what program you will use for the Excel and Text files. You can also specify what backup directory you want to use for your product files.

Error Codes

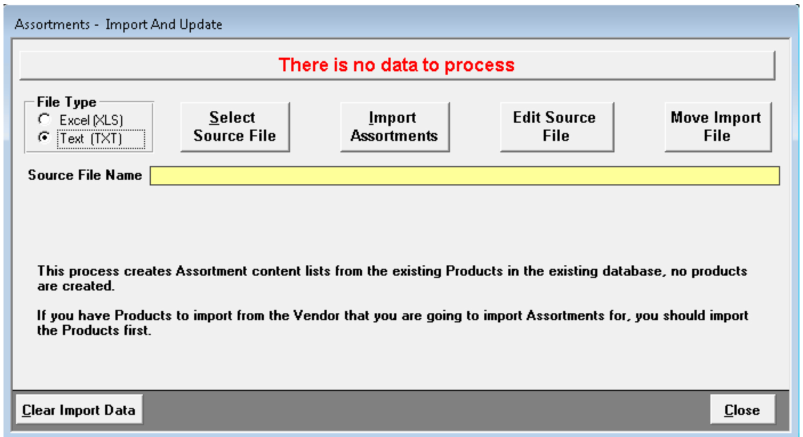
Error Codes will list all Error Codes and Descriptions.

Quit

Closes Import from Vendor

Import Products: Assortments

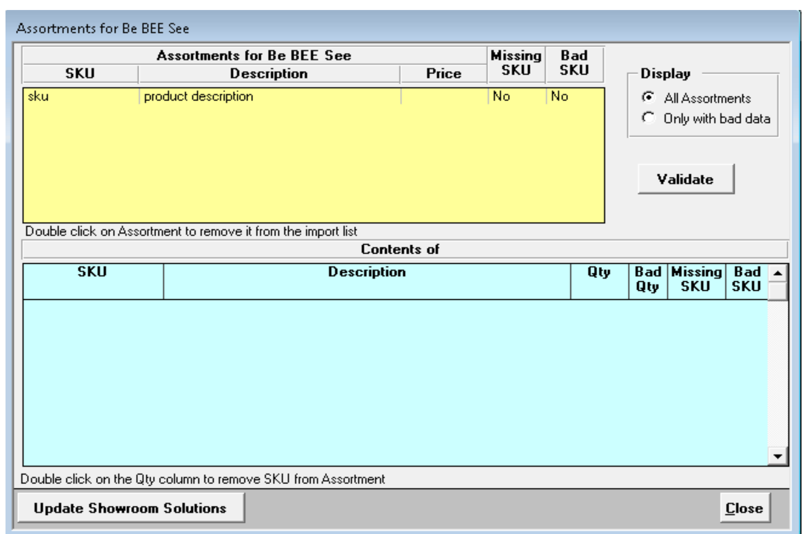
Assortments are a grouping of products that can be added to an order with one click. Assortments can be setup from the main office and shared with the individual reps through the data transfer. This process creates assortments from existing products in the database, no products are created. Make sure your products exist in the product database before importing assignments.



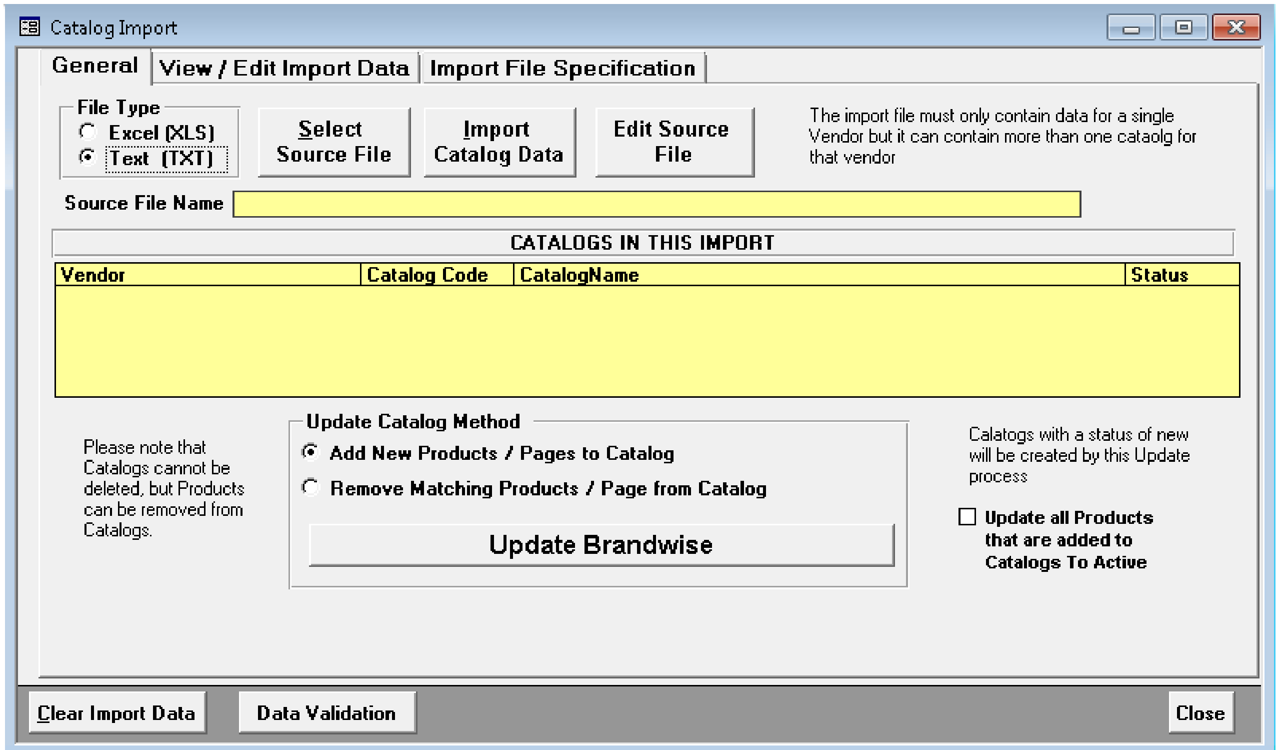
The import process is the same as **Import from Vendor** except the file is in a specific format.

1. Select the **File Type.**
2. Click **Select Source File** to locate your file.
3. Click **Import Assortments.**
4. Click **Review and Update Showroom Solutions Assortments.**

5. Review product data. Errors will also display in this section.
6. Click Update Showroom Solutions to import Assortment file.

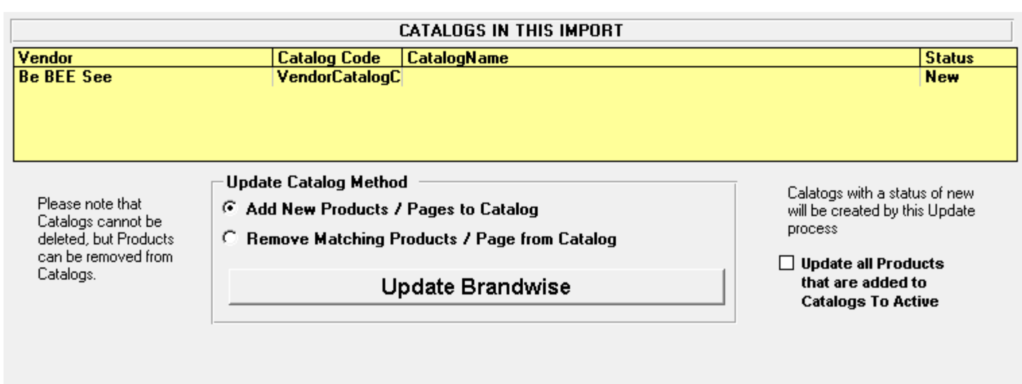


Import Products: Catalog



The import process is the same as **Import from Vendor** except the file is in a specific format.

1. Select the **File Type.**
2. Click **Select Source File** to locate your file.
3. Click **Import Catalog Data.**

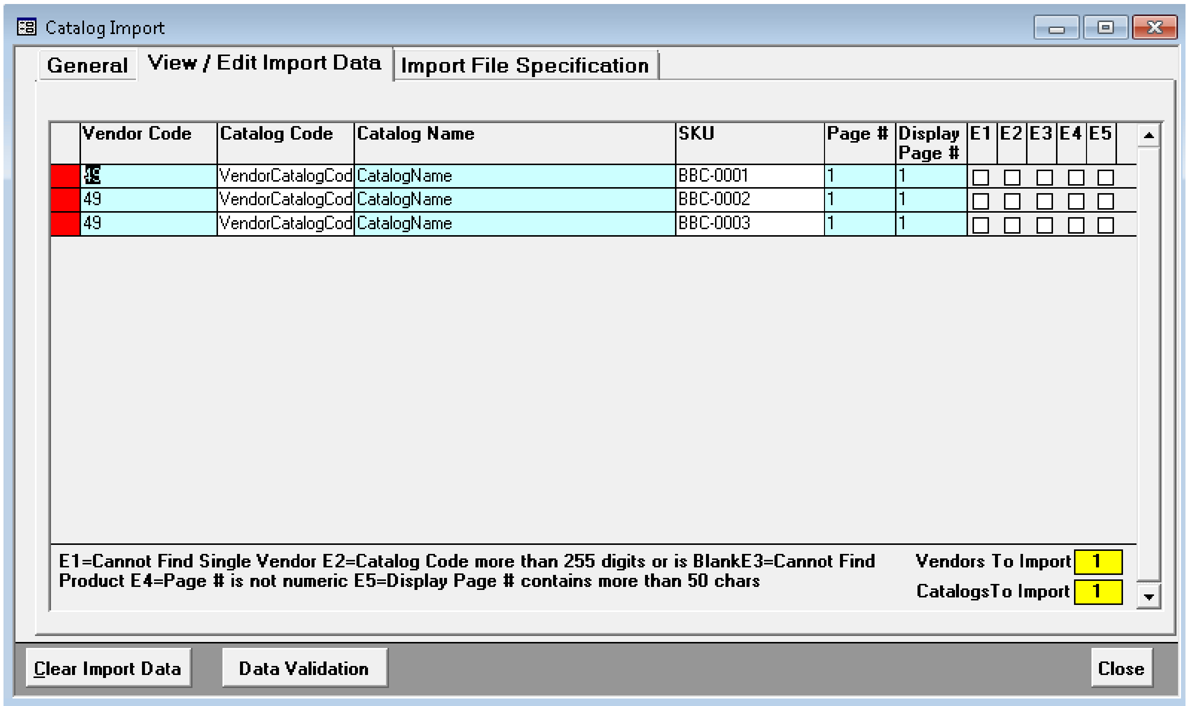


4. Review **Catalogs in Import**
5. Select Catalog Update Method

6. Add New Products / Pages to Catalog
7. Remove Matching Products / Page from Catalog
8. Click **Update Brandwise** to import Catalog file.

View / Edit Import Data

The View / Edit Import Data tab will display the data that will be imported. Errors will also be displayed with the Error codes listed on the bottom.



Error Codes

Error Code	**Error Description**
E1	Cannot find single Supplier
E2	Catalog code is more than 255 characters or is Blank
E3	Cannot find Product
E4	Page # in not numeric
E5	Display Page # contains more than 50 characters

Import Products Errors

You may encounter some errors when you are importing a product file. You will get a notification if your file has errors during the import process. You are able to view the errors in the main console and use View/Edit Products to correct most errors.

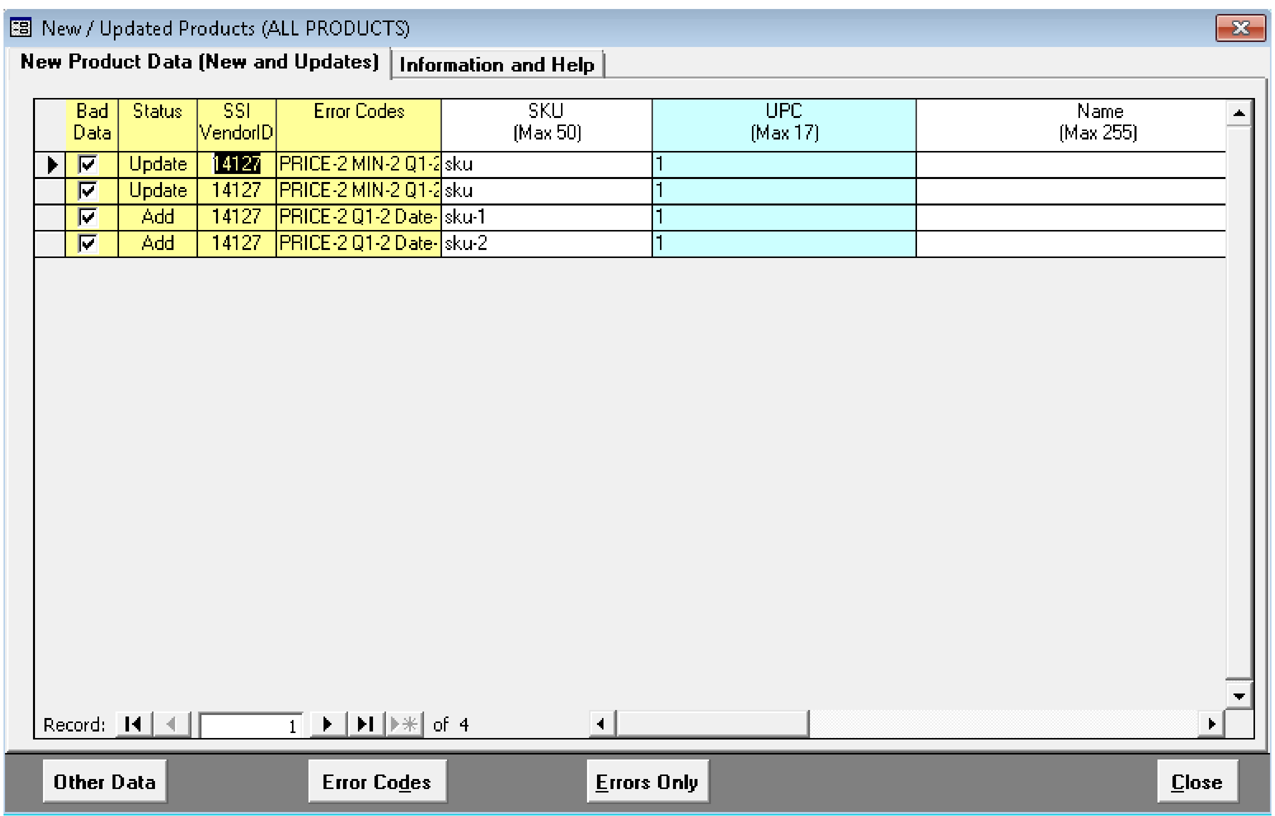
Error Count

The error count is available in the main console on the lower right:

Correcting Errors in View/Edit Products

1. Click on **View/Edit Products.**
2. Click **Errors Only** to view the input file limited to errors.

Example of Errors Only



3. All errors will have a check in the **Bad Data** column.

    - ***NOTE:*** Make sure that your file fields match to the Brandwise Field Names. If you data is not aligned *(see above example),* this will cause the whole file to error. It is recommended to fix the alignment issue and reimport the file.

4. Error Codes will be displayed in the **Error Codes** column.

5. Click on **Error Codes** *(see below)* to view the corresponding error.

6. Each field is editable so you can correct errors direct in **View/Edit Products**.

7. Once you have corrected the error(s), click on **Data Validation** to rerun the validation. This will remove the error code or display any new errors.

8. Click **Close** when you have no checks in the **Bad Data** column.

9. You are able to import your files once all errors have been corrected.

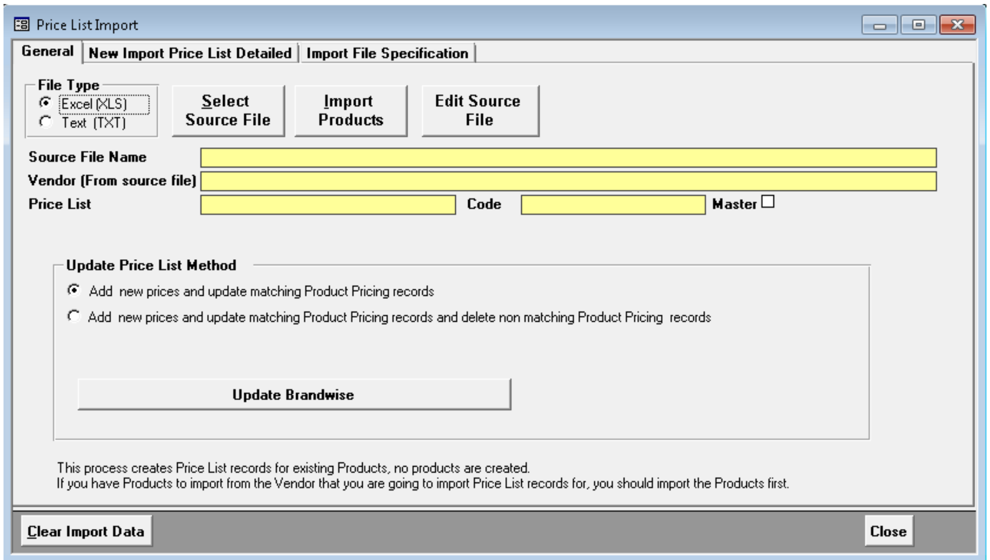
Error Codes and Description

BCODE-1	No Barcode (UPC)
BCODE-3	Space in Barcode (UPC)
BCODE-4	Barcode (UPC) longer than 17 characters
BCODE-5	Duplicate Barcode (UPC) in input
BCODE-6	Product Number on input Barcode is assigned to another
DATE-1	Incorrect Date Format - should be (MM/DD/YY)
MAN-1	No ssiVendorID
MAN-3	Space in Manufacturer Code
MAN-4	Manufacturer Code longer that 15 characters
MIN	Minimum Qty must be greater than 0
MIN-2	Minimum Qty contains non-numeric characters
MINMULT	Multiple Qty is larger than Minimum Qty
MPN-2	Master Product Number contains unacceptable character (X) = The first position of the unacceptable character
MSRP	MSRP contains non-numeric characters
MUL-2	Multiple Qty contains non-numeric characters
MUL-4	Multiple Qty must be greater that 0
NAME-1	Name is blank (null)
P1-2	First Price contains non-numeric characters
P1-3	First Price is blank (null)
P2-2	Second Price contains non-numeric characters
P2-3	Second Price is blank (null)

P3-2	Third Price contains non-numeric characters
P3-3	Third Price is blank (null)
P4-2	Fourth Price contains non-numeric characters
P4-3	Fourth Price is blank (null)
P5-2	Fifth Price contains non-numeric characters
P5-3	Fifth Price is blank (null)
PLC-3	Space in Product Line Code
PLC-4	Product Line Code is longer than 15 characters
PRICE-1	Price is blank (null)
PRICE-2	Price contains non-numeric characters
PRICE-4	Price is greater that $999,999.99
Q1-2	First Quantity contains non-numeric characters
Q1-3	First Quantity must be greater than Minimum Qty
Q1-4	First Quantity must be greater than 0
Q1-5	First Quantity has a Price but no Qty defined
Q2-2	Second Quantity contains non-numeric characters
Q2-3	Second Quantity must be greater than Minimum Qty
Q2-4	Second Quantity must be greater than 0
Q2-5	Second Quantity has a Price but no Qty defined
Q3-2	Third Quantity contains non-numeric characters
Q3-3	Third Quantity must be greater than Minimum Qty
Q3-4	Third Quantity must be greater than 0
Q3-5	Third Quantity has a Price but no Qty defined
Q4-2	Fourth Quantity contains non-numeric characters
Q4-3	Fourth Quantity must be greater than Minimum Qty
Q4-4	Fourth Quantity must be greater than 0
Q4-5	Fourth Quantity has a Price but no Qty defined
Q5-2	Fifth Quantity contains non-numeric characters
Q5-3	Fifth Quantity must be greater than Minimum Qty
Q5-4	Fifth Quantity must be greater than 0
Q5-5	Fifth Quantity has a Price but no Qty defined
QTY-5	Two or more Quantities are the same
SKU-1	SKU is blank (null)
SKU-4	SKU is longer than 50 characters
SKU-5	Duplicate SKU in input
SKU-6(X)	SKU contains unacceptable character (X) = The first position of the unacceptable character
SN-4	Short Name 1 or 2 is longer than 18 characters
U-4	UOM is longer than 15 characters

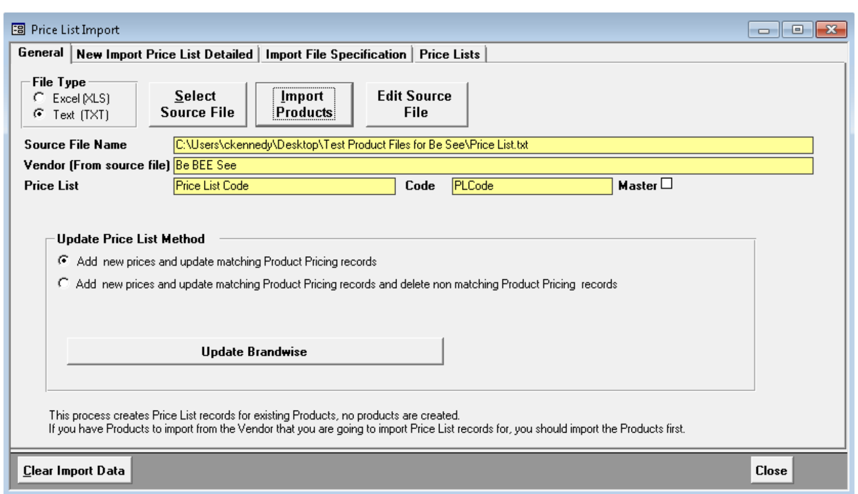
Import Products: Price List

Multiple price list can be built as subsets of product from the main supplier price list. These price lists can be used to limit the products that are offered to a customer. There can only be one master default price list per supplier. This is generally the price list which contains all products from the supplier and the standard product prices.



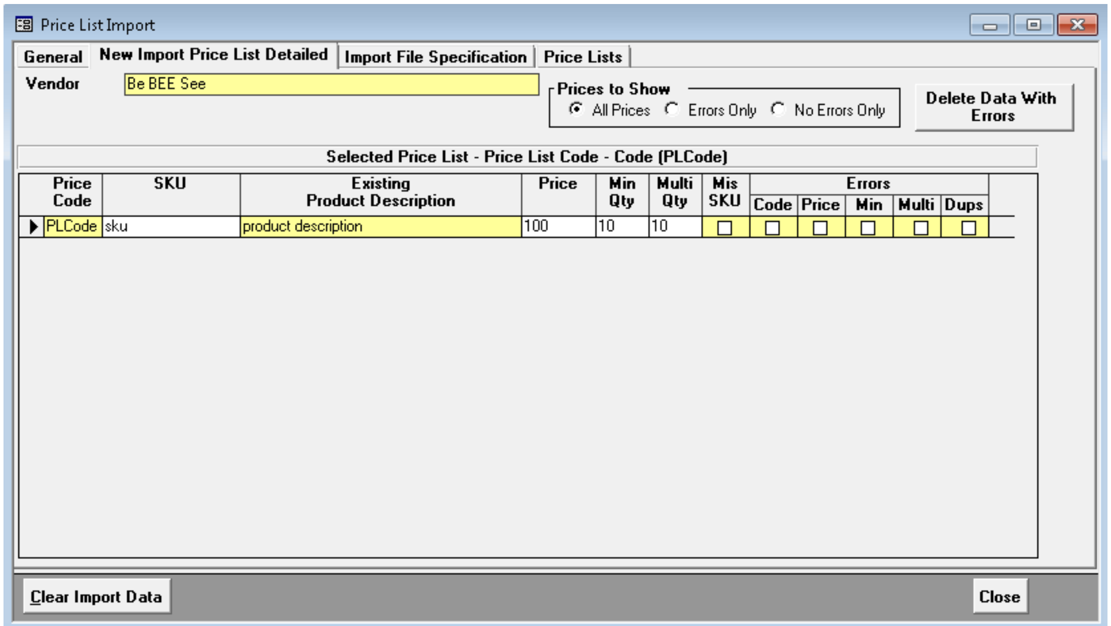
The import process is the same as **Import from Vendor** except the file is in a specific format.

1. Select the **File Type.**
2. Click **Select Source File** to locate your file.
3. Click **Import Products.**
4. Select Price List Method



- Add new prices and update matching Product Pricing records
- Add new prices and update matching Product Pricing records and delete non matching Product Pricing records

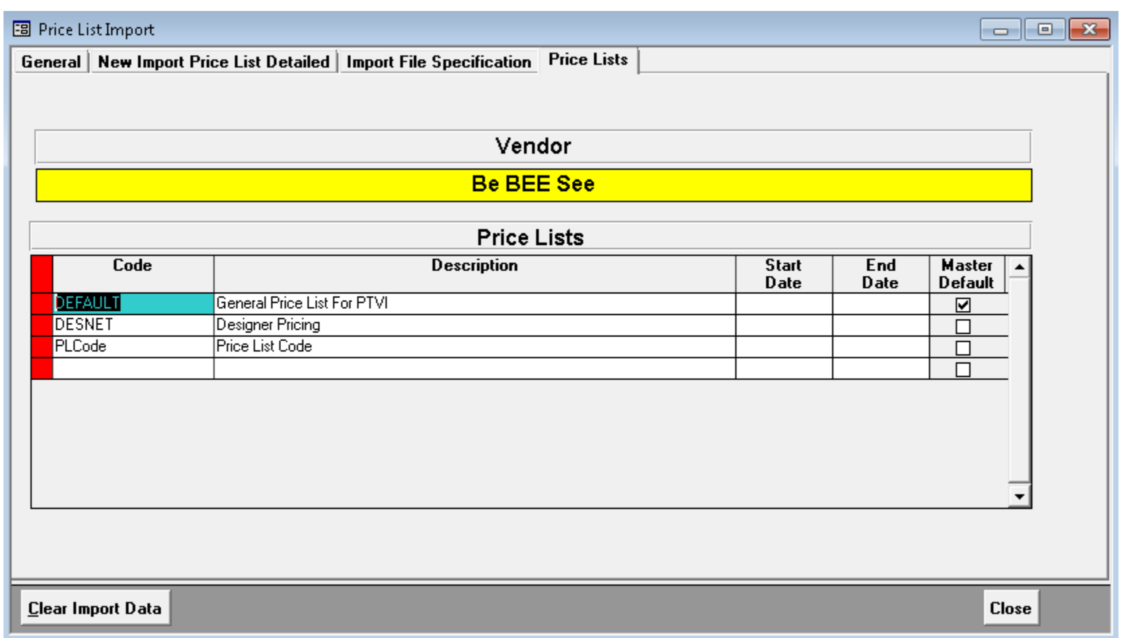
5. Review **New Import Price List Detailed** to view products that are going to be imported into this price list



6. Errors will be listed in the Errors section. You can also **Delete Data with Errors.**

7. Click **Update Brandwise** in the **General** tab to import your Price List file.

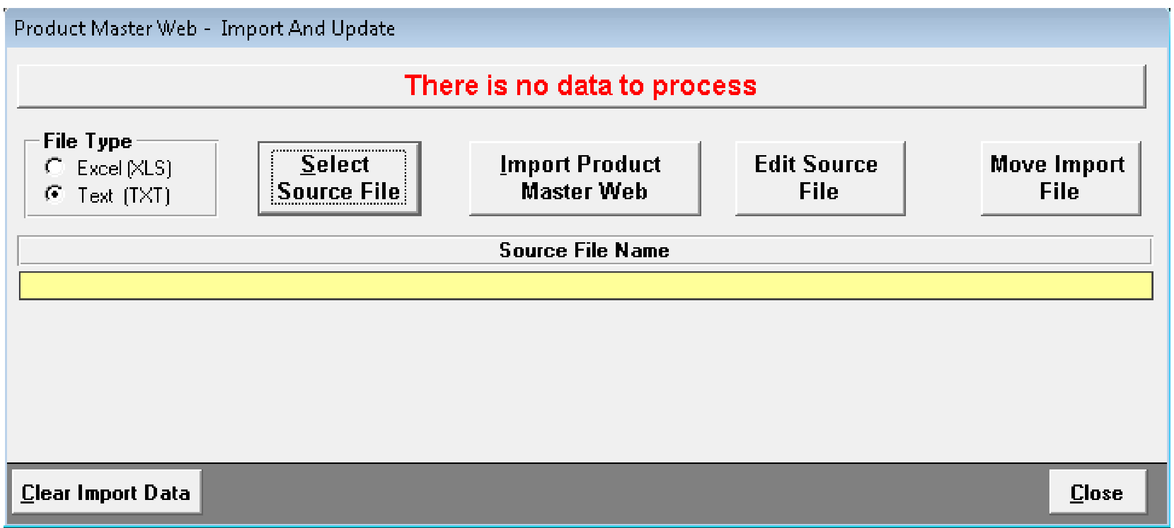
Price List Tab

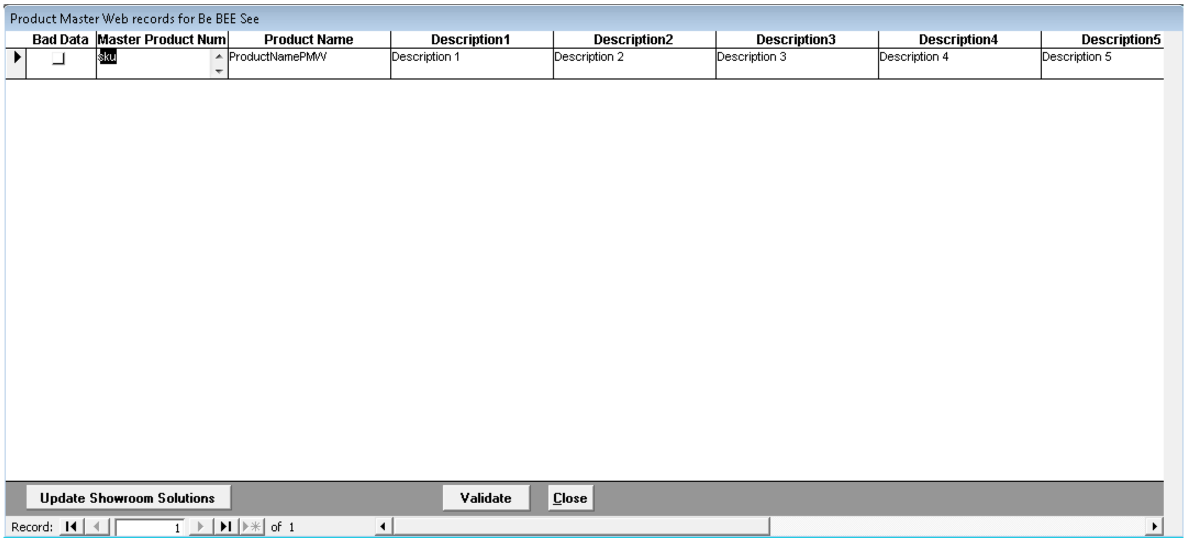


The Price List tab allows you to create Price Lists. Each price list must be created and have a code to be able to import products into it.

Import Products: Product Master Web

Incorporated into details about each product master web record is the ability to display long paragraph copy, feature lists, and attributes surrounding each product. These associations are made at the Master
Product Number level so that all products that share the same Master Product Number will share their Selling Description 1 (long paragraph copy), Selling Description 2 (feature list), and associated Attributes. The Product Master Web file will contain one record for each Master Product Number and may contain, MasterProductNumber, SellingDescription1, SellingDescription2, DisplayProductNumber, DisplayStartDate, and
DisplayEndDate. In this file, the display product number specifies the product that will be shown in instances where items are being displayed in a grid format.





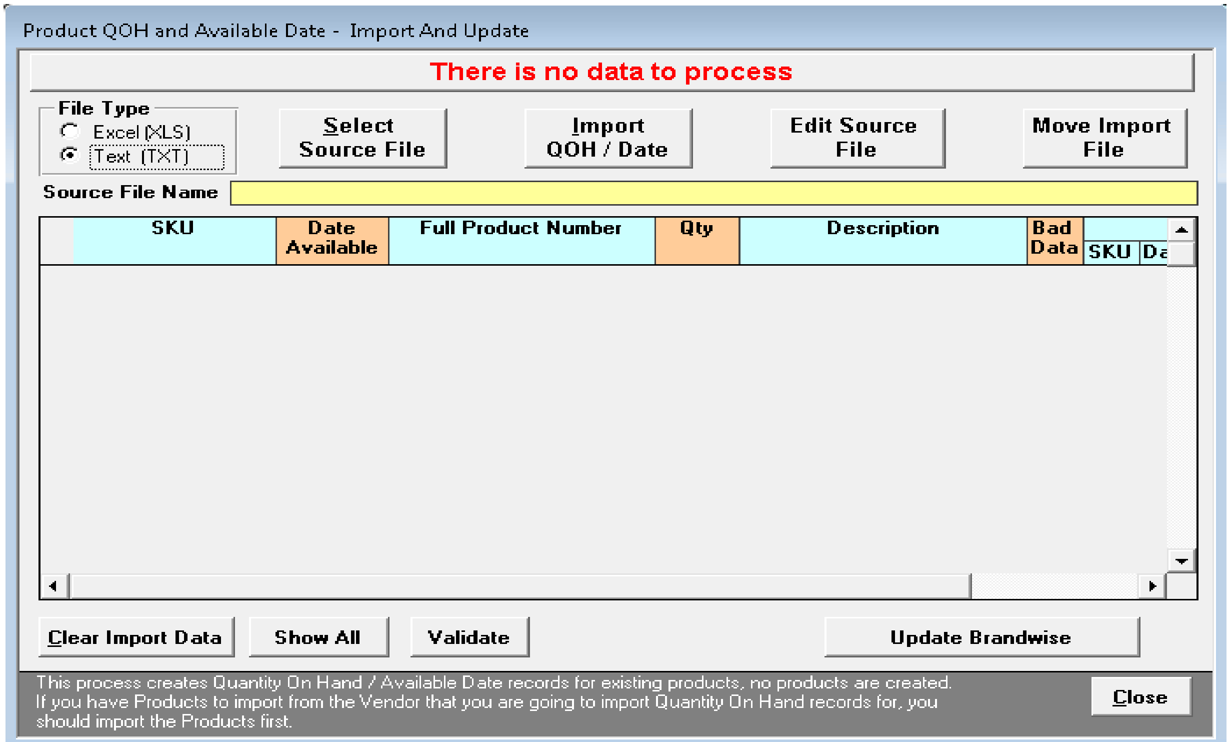
The import process is the same as **Import from Vendor** except the file is in a specific format.

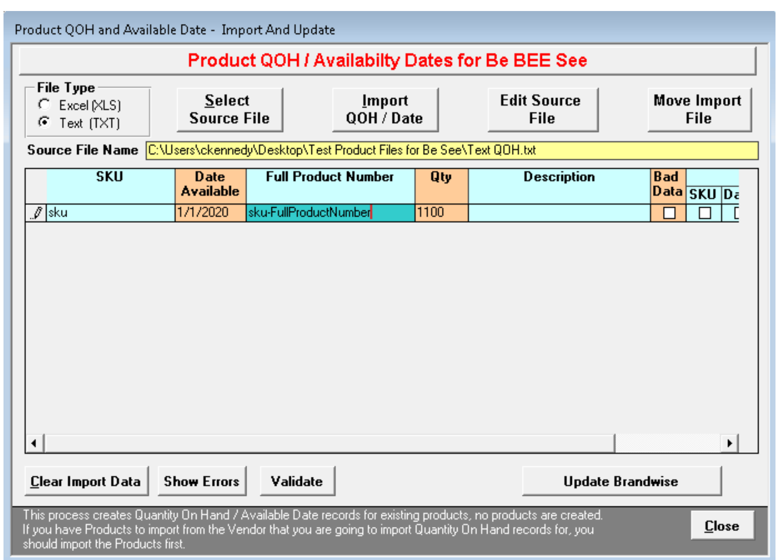
1. Select the **File Type.**
2. Click **Select Source File** to locate your file.
3. Click **Import Product Master Web.**
4. Select your supplier if no vendor code is being supplied in the file.
5. Click **Review and Update Brandwise Product Master Web Files**
6. Click **Update Showroom Solutions** to import the Product Master Web file.

__NOTE:__ Errors will be displayed with a check in the Bad Data column. Error Message is located in the last column of the editor

Import Products: QOH

QOH will give you the ability to share Quantity on Hand and set Date Availability dates for each products with your company. You can choose to enforce these values during the ordering process.





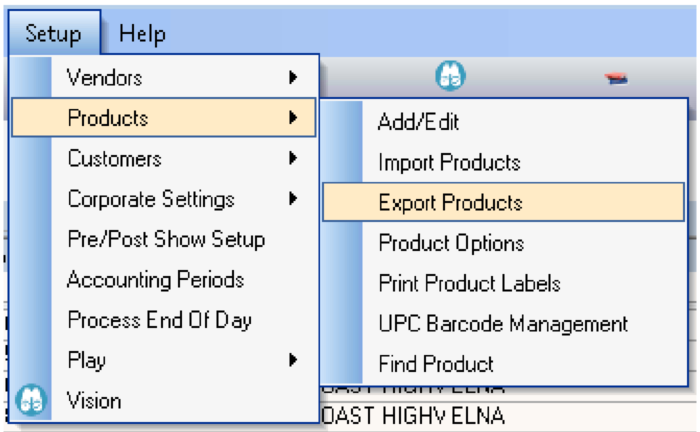
The import process is the same as **Import from Vendor** except the file is in a specific format.

1. Select the **File Type.**
2. Click **Select Source File** to locate your file.
3. Click **Import QOH / Date.**
4. Select your supplier if no vendor code is being supplied in the file.
5. Click **Update Brandwise** to import the QOH file.

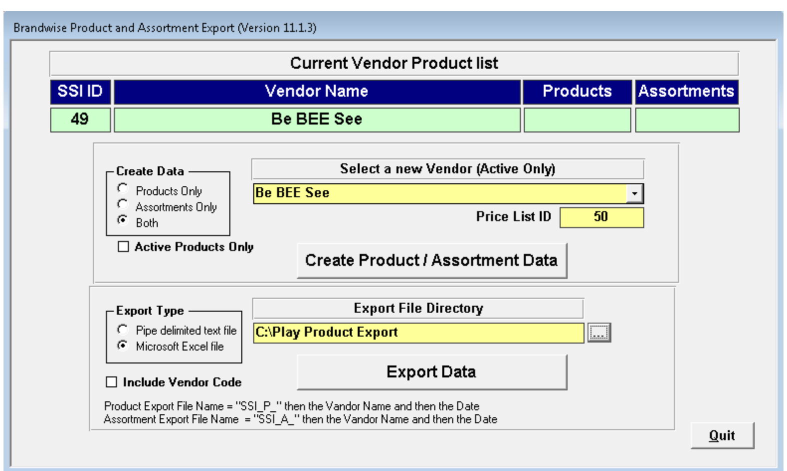
Export Products

Export products allows you to export your product files from your product database. You can save these files as pipe delimited text or Microsoft Excel.

From the main menu go to: ***Setup > Products > Export Products***



Exporting Products



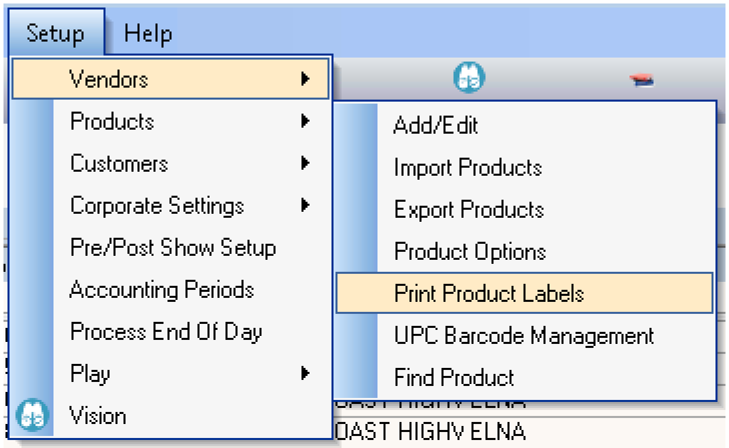
1. Select a Supplier from the Select a new Vendor (Active Only) dropdown.
2. Select your Create Data criteria.
   - Products Only
   - Assortments Only
   - Both
   - Active Products Only
3. Click Create Product/Assortment Data
4. Select an Export Type.
   - Pipe delimited text file
   - Microsoft Excel
5. Check if you want to Include Vendor Code.
6. Select your Export File Directory
7. Click on Export Data to export your product list.
8.

Product Export File Name: "SSI_P_" then the Supplier name followed by the date.
Assortment Export File Name: "SSI_P_" then the Supplier name followed by the date.
Navigate to your export data folder to retrieve the file.

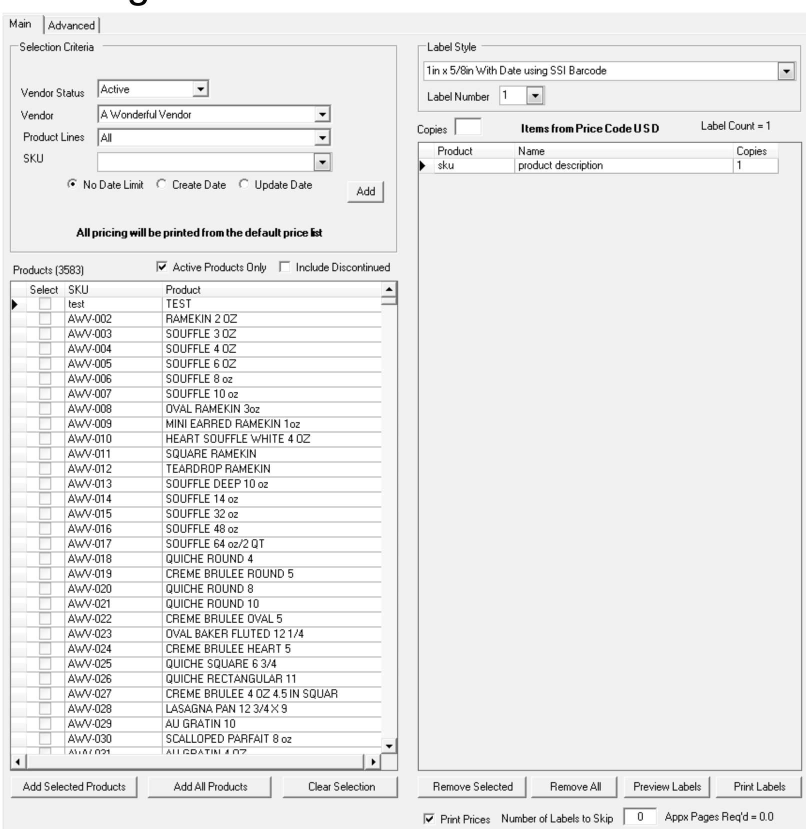
Print Product Labels

There are several different product label formats that can be selected within the print product labels section of Play.

From the main menu go to: ***Setup > Products > Print Product Labels***



Printing Product Labels



The **Main tab** lists all products for a selected supplier and allows you to add them to the print list.

Selection Criteria

1. Select your supplier status in the **Vendor Status** dropdown.

2. Select your supplier from the **Vendor** dropdown.

3. Select your product line form the **Product Lines** dropdown.

4. Use the **SKU** dropdown to add a single product to the **Print Label Queue** on the right.

- Select the product from the dropdown or type in the SKU to search. Click **Add** to move to product in the print queue.

5. Use the Date limits to limit your data by an option below and select your date. If a date range is not needed, use **No Date Limit**.
    - Create Date
    - Update Date

Product Results

Based on your criteria, items will list the product section. Check each product that you would like to print a label for. You can limit the view by selecting **Active Products Only** and/or **Include Discontinued.**

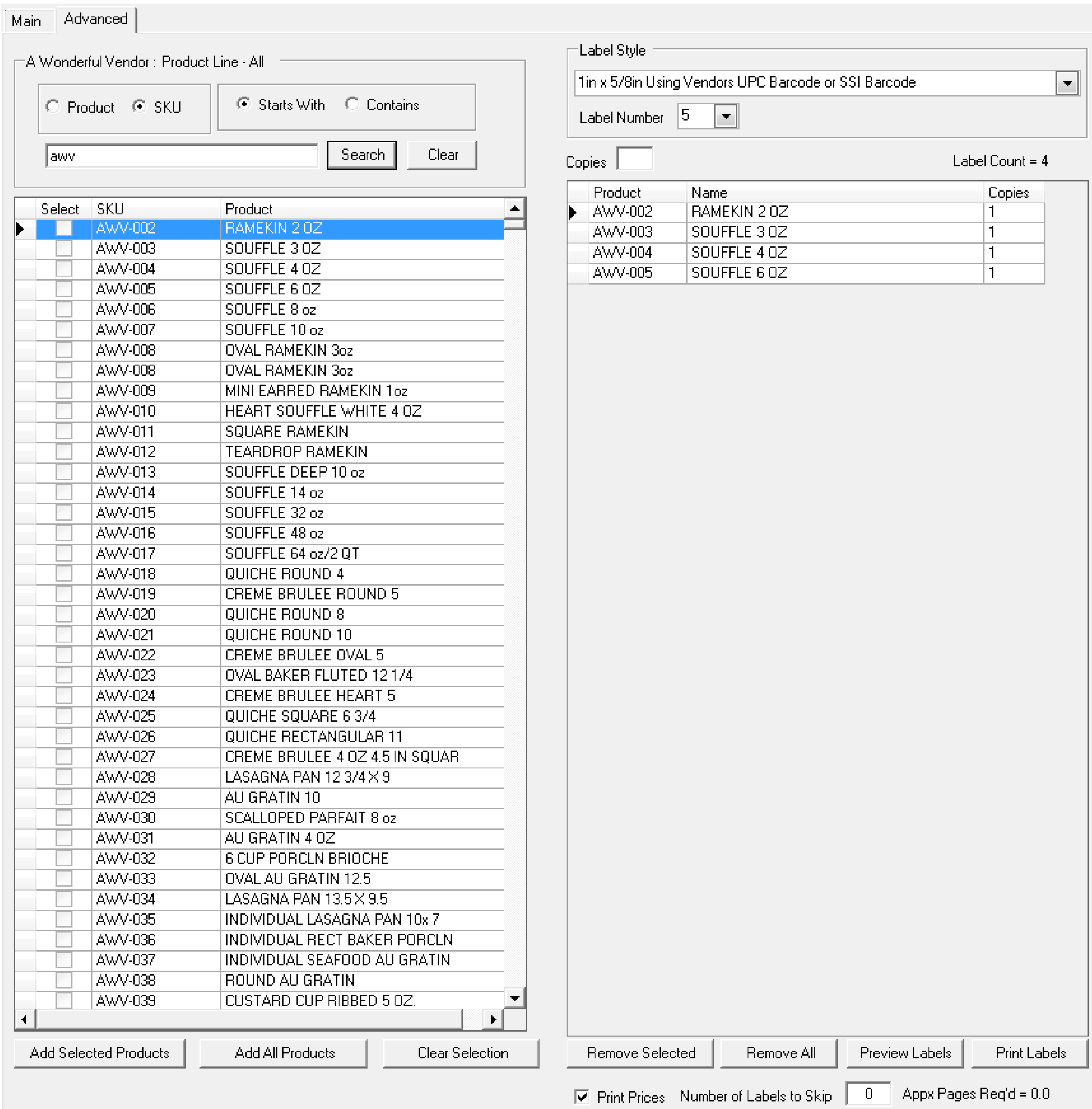
- **Add Selected Products:** Add all items that are checked to the print list
- **Add All Products:** Adds all products listed to the print list
- **Clear Selection** : Clears all items that are checked

Label Print List

1. Select your label style you would like to use from the **Label Style** or **Label Number** dropdowns**.**
2. If you want to print multiple copies, enter in the number of copies in the **Copies** field.
3. Choose the following options
    - ***Remove Selected:*** *Removes the item selected from the print list*
    - ***Remove All:*** *Removes all items from the print list*
    - ***Preview Labels:*** *Previews how print list items will print*
    - ***Print Labels:*** *Prints all items in the print list*
4. Print Options
    - ***Print Prices:*** Displays Prices on labels
    - ***Number of Labels to Skip:*** Allows you to skip labels on the sheet you are printing them on
    - ***Pages Required: Shows*** you how many pages are required to print the list

Advanced

The Advanced tab will allow you to search for items and add them individually to the print list.

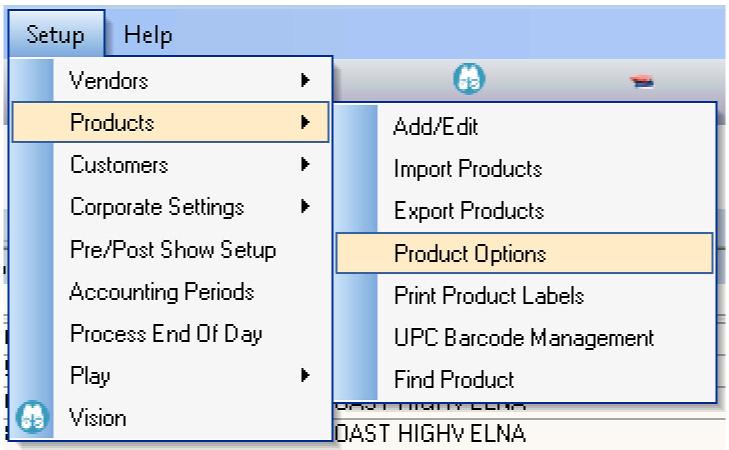


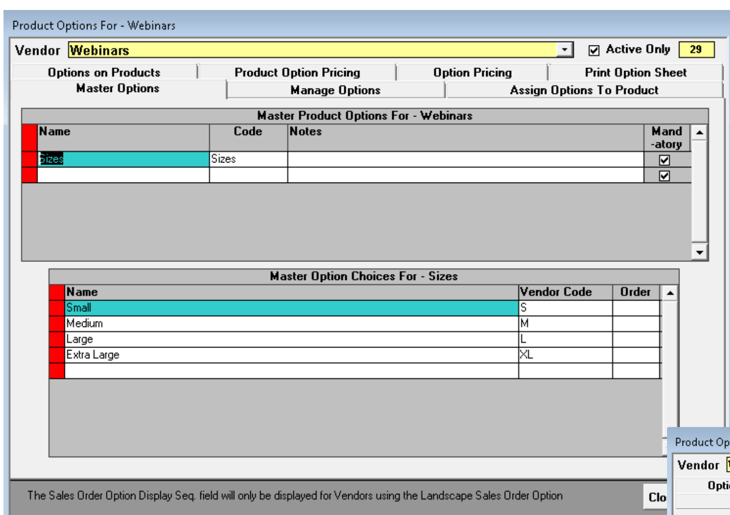
You can search by combinations of Product or SKU using Starts With or Contains. Once your results is listed below, you add the products to the print list the same, by checking the boxes and clicking Add Selected or Add All Products.

Product Options

Product options allow you to add options to each product so that when it is scanned, the user is prompted to choose an option.

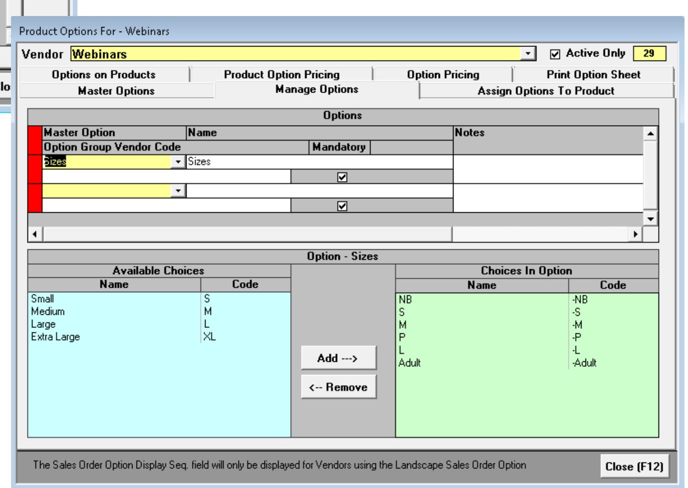
From the main menu go to: ***Setup > Products > Product Options***





Master Options

The Master Options tab is where you will enter in the category of the options and then all of the options in that category.

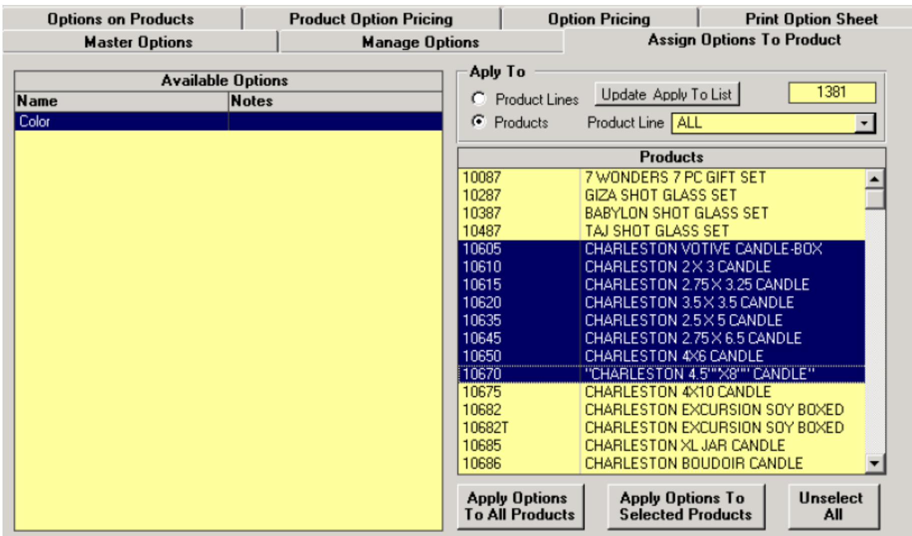


Manage Options

The Manage Options tab allows you to add the options that you want to make active.

Assign Options to Product

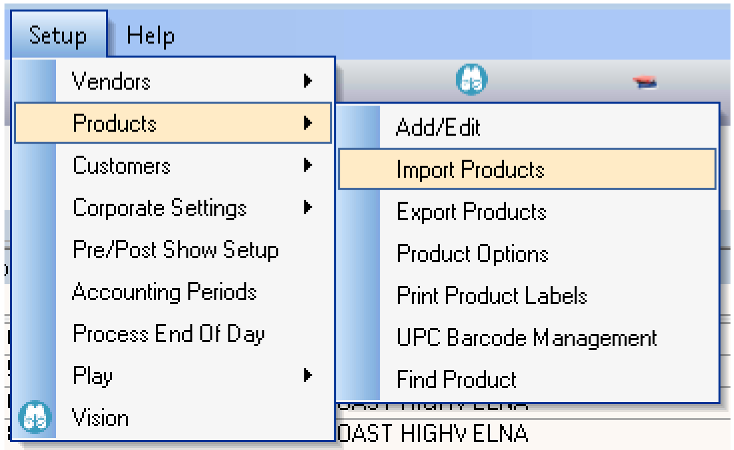
The Apply Options to Product tab is where you add the options to the product. Select the option from the left, then select all of the items from the right and click **Apply Options to Selected Products**.



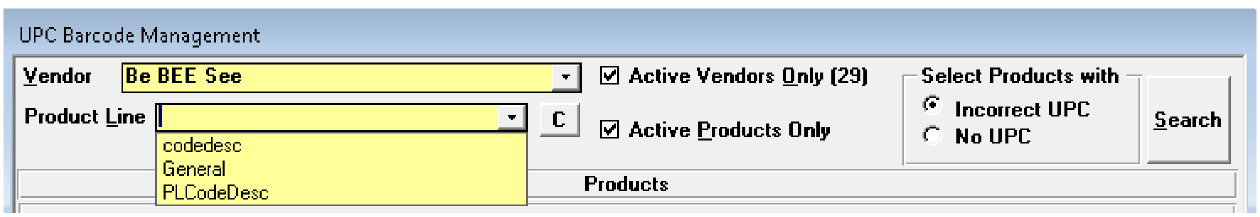
UPC Barcode Management

UPC Barcode Management can be used to find products that don't have a UPC Barcode or Incorrect Barcodes.

From the main menu go to: ***Setup > Products > Print Product Labels***



UPC Barcode Search

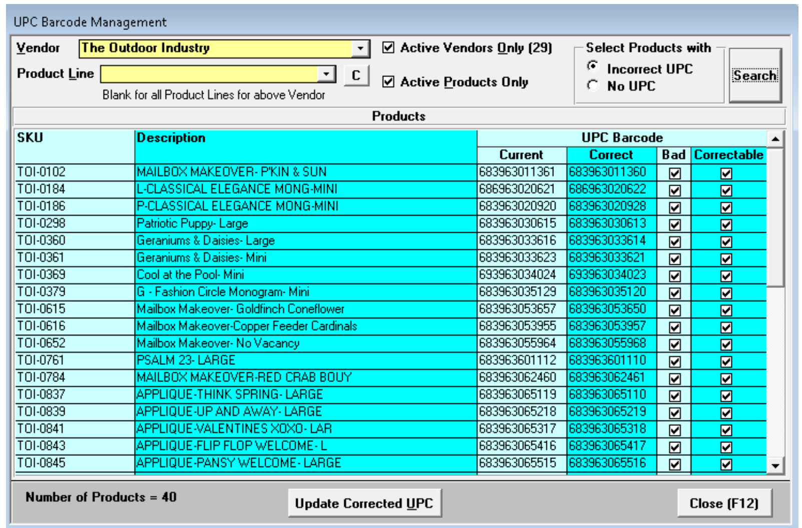


1. Select your supplier from the **Vendor** dropdown.
2. Limit by **Product Line** if needed. Leave blank for all product lines.
3. Select if you want to search by active suppliers and/or products.
4. Use the **Select Products** to filter by **Incorrect UPC** or **No UPC**.
5. Click **Search** to get the product results.

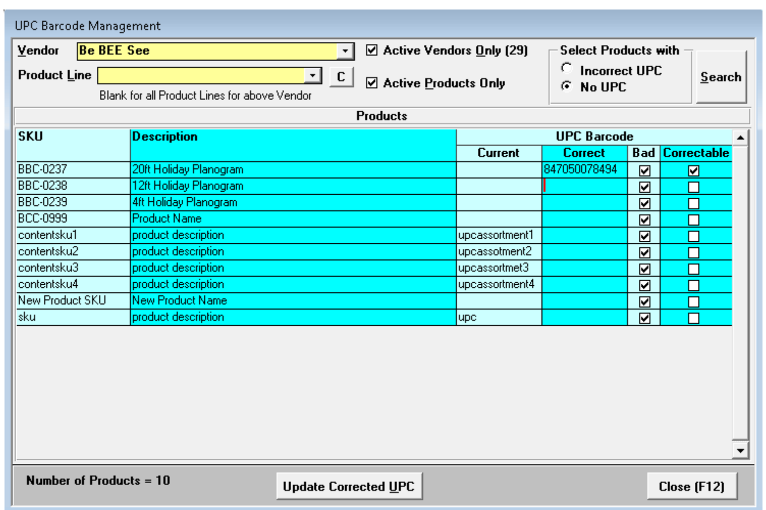
Incorrect UPC Search

The Incorrect UPC Search will return products that have incorrect UPC Barcode. You can correct the UPC directly in the editor.

1. Verify the UPC in the ***Correct*** column. You are able to edit the UPC directly in the editor.
2. Click **Update Corrected UPC** to change the **Current UPC** to the **Correct UPC**.



No UPC Search



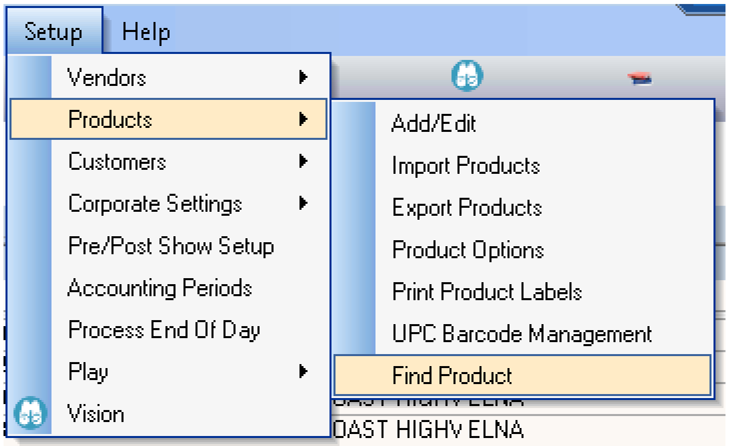
The **No UPC** will return products that have no UPC Barcode. You can correct the UPC directly in the editor.

1. Type in the correct UPC in the ***Correct*** column. Click in another field to save.
2. A check will appear in the **Correctable** column.
3. Click **Update Corrected UPC** to save.

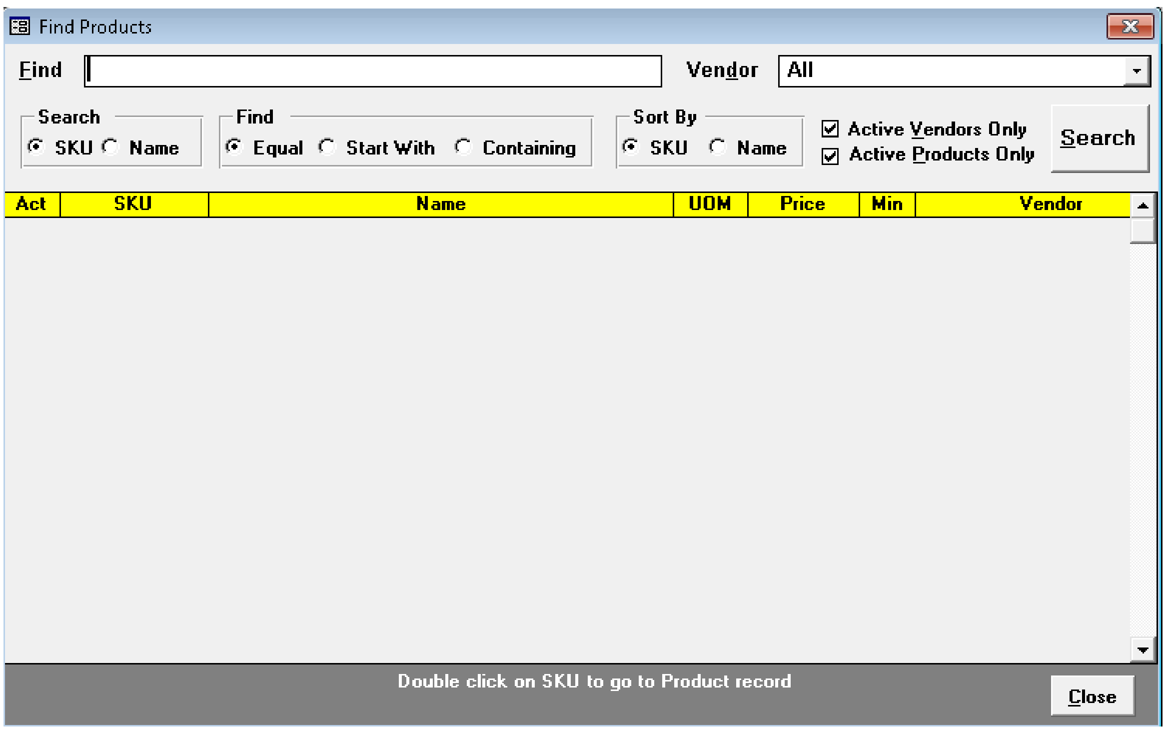
Find Products

The fastest way to look up a product without being in an order.

Open Find Products: ***Setup > Products > Find Products***



Find Products Search



Select a Supplier and enter in a Product Number

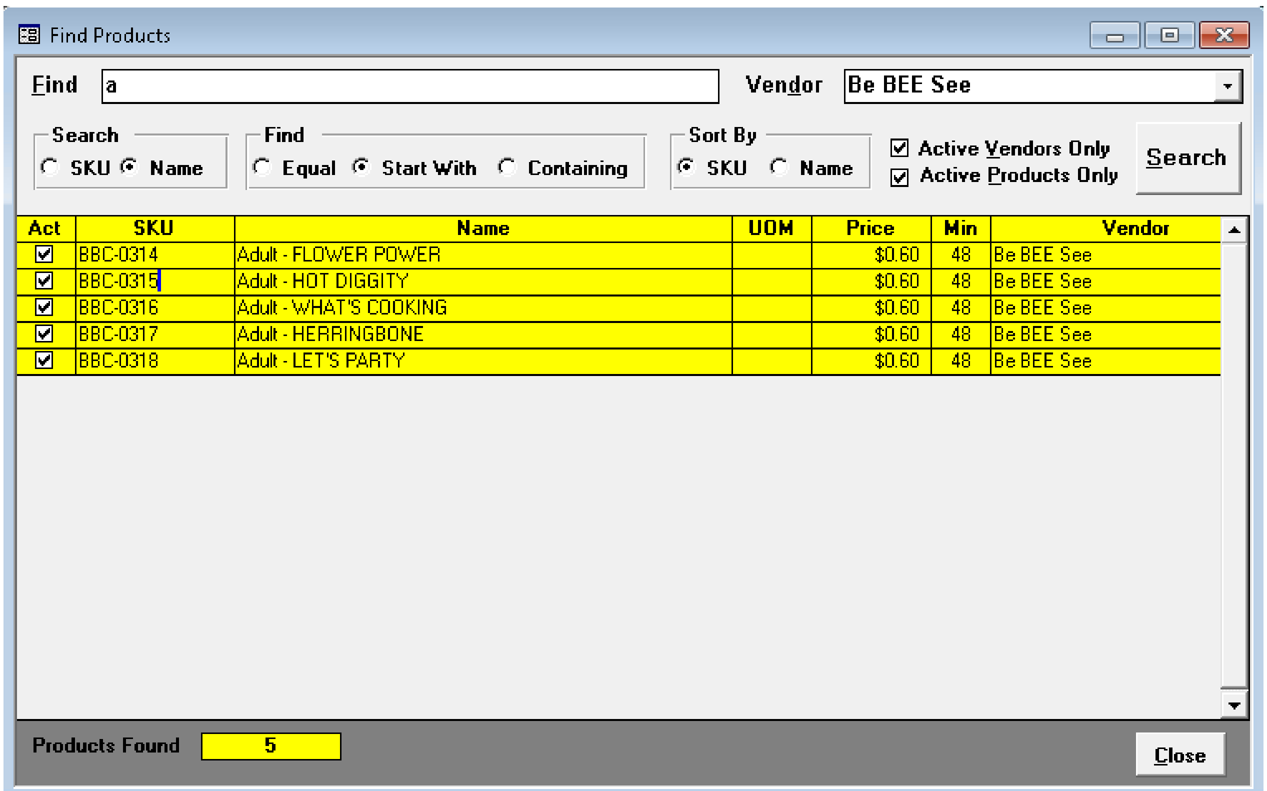
Find
Search by SKU or Description.
Vendor
Limit search to a specific supplier.

Search Criteria

Search
Limit Find field by SKU or Name
Find
Find field will search by Equals, Starts With, or Containing
Sort By
Results will sort by SKU or Name
Active Vendors Only
Limit Vendors by active status

Active Products Only
Limit products by active status
Search
Once you entered your search criteria, click on the *Search* button to display the results.

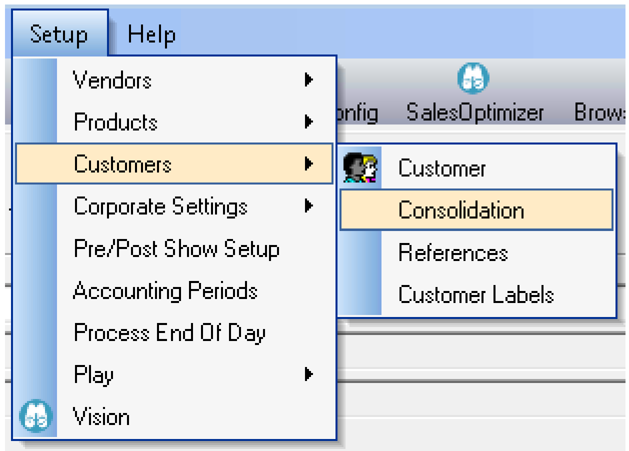
Example of Search Results

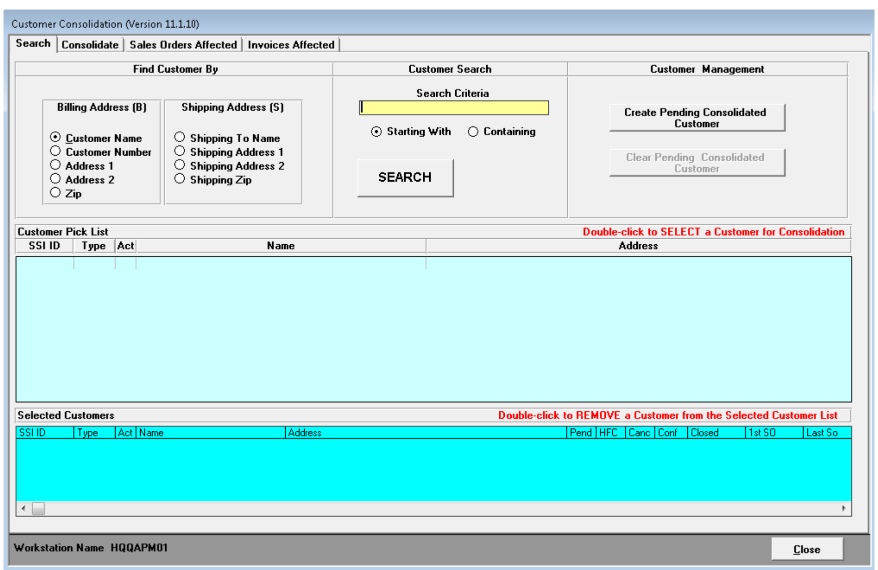


Customer Consolidation

Customer consolidation allows data from all customers to be retained when merging multiple customers together. After selecting the customers to be merged all data can be reviewed and determined what to keep and what not to keep on the final customer record.

From the main menu go to: ***Setup > Customers > Customer Consolidation***





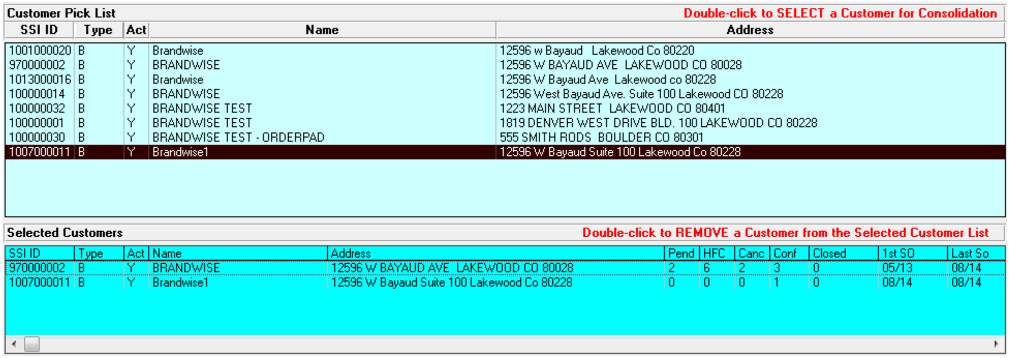
Search

Step 1: Search Customers

Select to find customer by billing address or shipping address.

Search for the customers that you wish to consolidate by typing in the beginning of the customer's name

- Select either starting with or containing
- Click **Search**



Step 2: Select Customers

- Customers that match your selection will be displayed in the **Customer Pick List** section.
- Double click on the customers you wish to consolidate.
- Selected customers will appear in the **Selected Customer** section of the screen; this will build the list of customers you would like to consolidate.

NOTE:

You can do several different searches to find and select customers. If you have a customer with multiple duplicate shipping addresses you can select only that customer to then consolidate only the shipping addresses.

Step 3: Create Pending Consolidated Customer

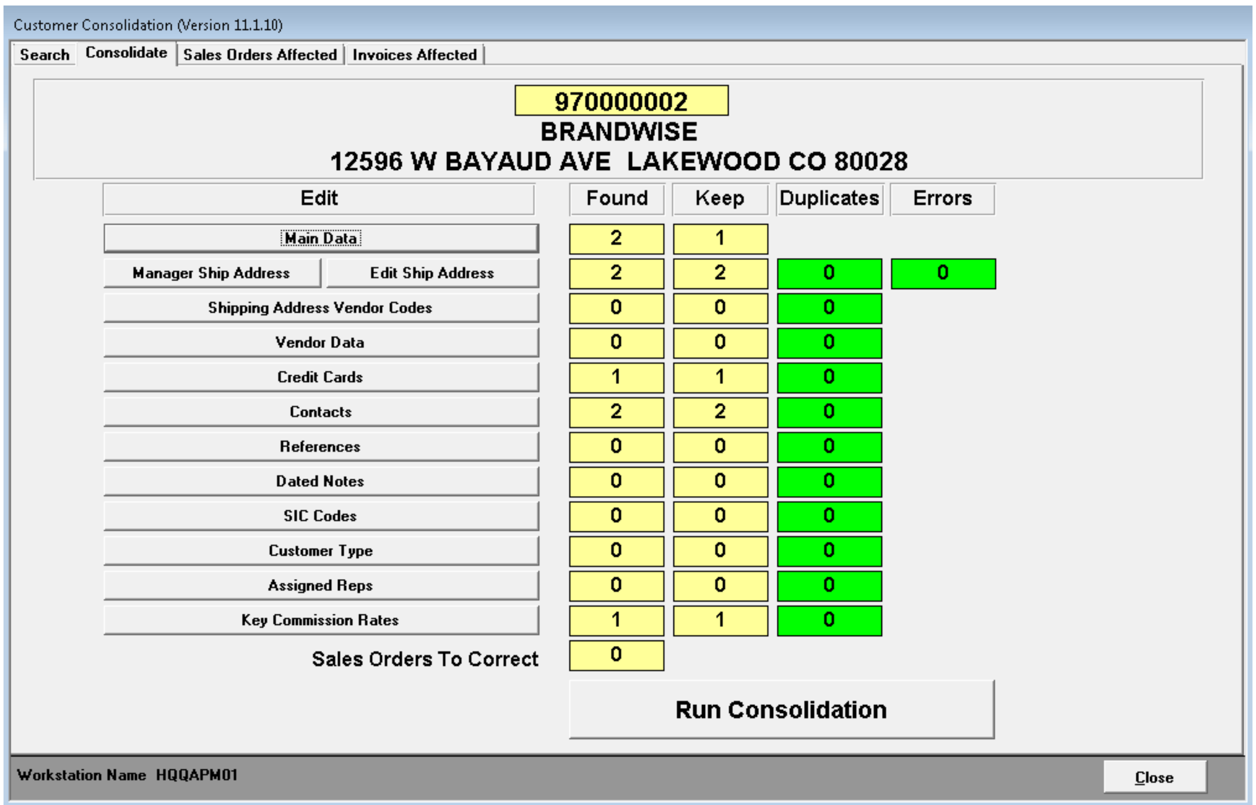
- Create the pending customer consolidation file by clicking on the **Create Pending Consolidated Customer** button on the top right hand side of the form.
- This will generate the consolidated customer and allow you to view all the data saved on each customer that was selected to consolidate.

Step 4: Review Consolidated Data Snapshot

The pending consolidated customer will generate a snap shot of the data that is being consolidated. Each section of the customer data will return a count under the different columns.

- **Found:** Total number of records found on all of the customers selected to consolidate.

- **Keep:** Total number of records that are going to be kept. The system will default to keeping all data with the exception of the main data. With the main data the system will only keep one customer record which can be edited.
- **Duplicate:** Total number of records that are duplicate between the customers that were selected. All duplicates will need to be cleaned up prior to consolidating the customer.
- **Error:** Total number of records that have an error on them. The only records that can have an error are the shipping addresses where an address was selected not to keep however a record to merge that shipping address into was not selected.



Step 5: Run Consolidation

You do not have to review any data then you go directly to **Run Consolidation** to consolidate your customer.

NOTE: *If you have duplicate data or want to review data then go to "Step 4A: Review Data" to walk through reviewing the customer data prior to consolidating.*

Step 6: Finish Consolidation

To finish consolidating the customer: Click on **Run Consolidation.**
You will receive the prompts:

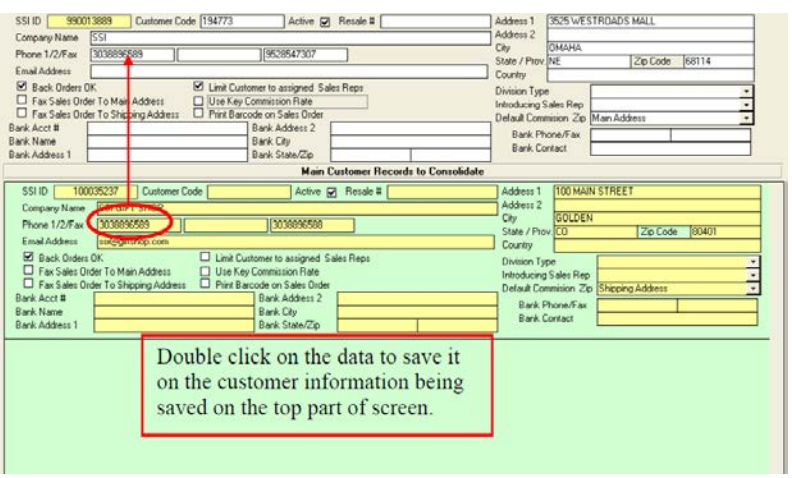
- SSI Customer Consolidation Message 1
    - Confirm that the customer you are consolidating will remain and all other customers will be merged into it.
- SSI Customer Consolidation Message 2
    - This is a LIVE update that will permanently change data for all selected customers. Are you certain you are ready to continue?
- Consolidation Completed Successfully
    - Click **Close**

CUSTOMER REVIEW

NOTE: On all data edit pages when finished editing and selecting what data to keep click the “x” in the top right hand corner of the page to close the form.

Main Data

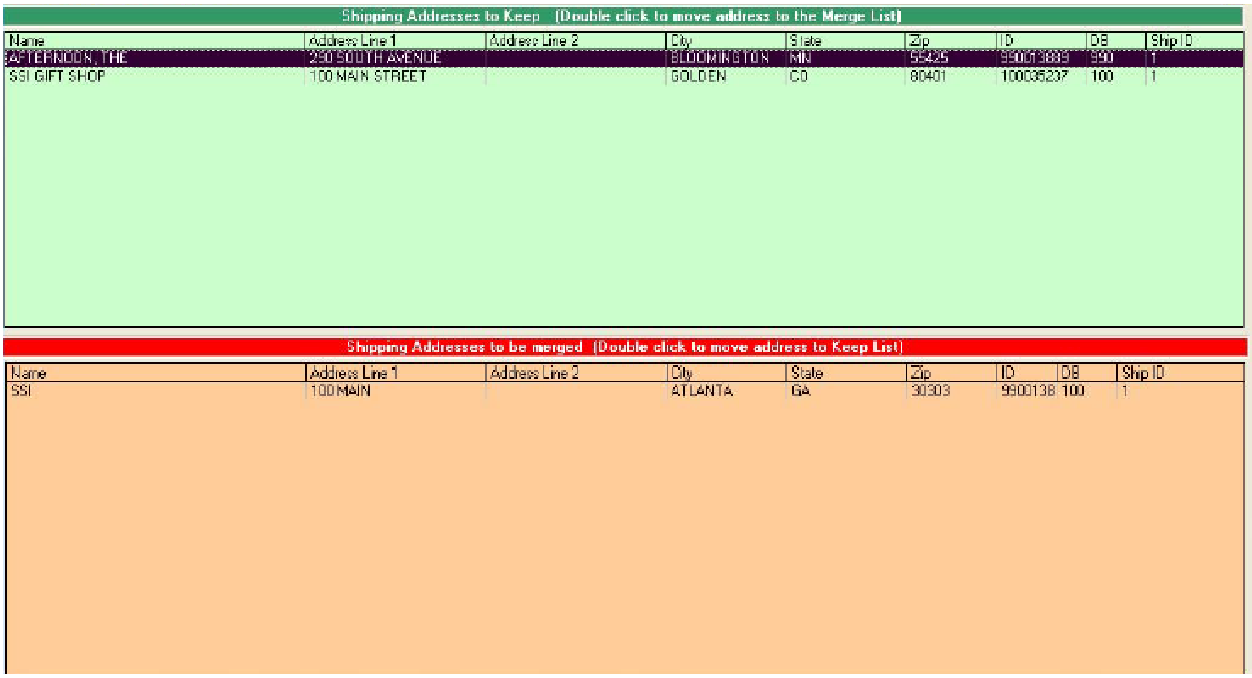
The Main data is the main billing address of the customer. The top of the page will be the data that is being saved on the customer when the consolidation is complete.
To copy data from the customer’s information that is not being saved, double click on the field the bottom green part and it will save that information to the top record that is being kept.



Example: The Phone Number in the bottom part is the phone number you want to save – double click on that phone number and it will save to the top section.

Manage Shipping Address

In the shipping address manager you can select all the shipping address you want to keep.

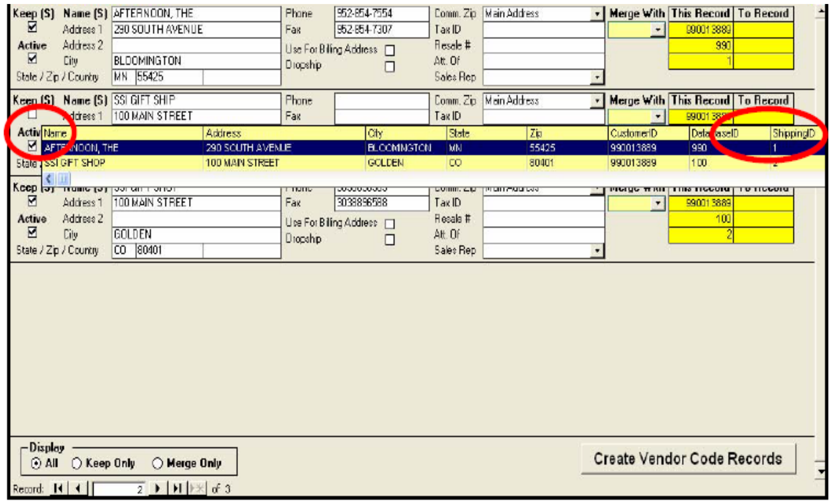


- ALL the shipping addresses for ALL the customers selected to be merged will be listed in the top section of the page and default to keep on the consolidated customer record.
- Double click on any shipping address that you do not want to keep. This will move the address to the bottom of the page.
- Once you have determine which addresses you want to keep and which ones you want to remove click the “x” in the top right hand corner to close the form.

NOTE: if you are removing any shipping addresses you must then go to “Edit Shipping Address”.

Edit Shipping Address

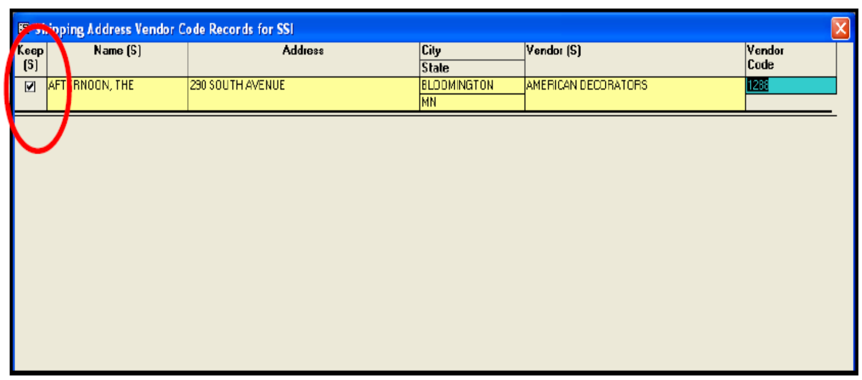
In the edit shipping address page any shipping address that is not being kept must be merged with an address that is being kept on the customer record. This will merge any history data that is assigned to the address to the kept address.



NOTE: Any shipping address where the “keep” is not checked must be merged with an address that is checked to “keep”. Only addresses checked as “keep” will be in the merge drop down list.

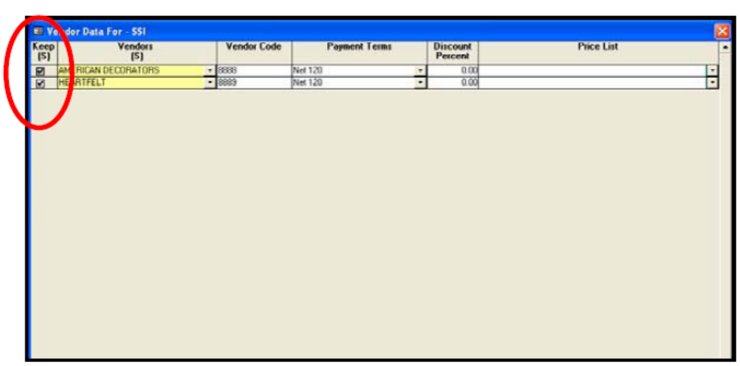
Shipping Address Vendor Code

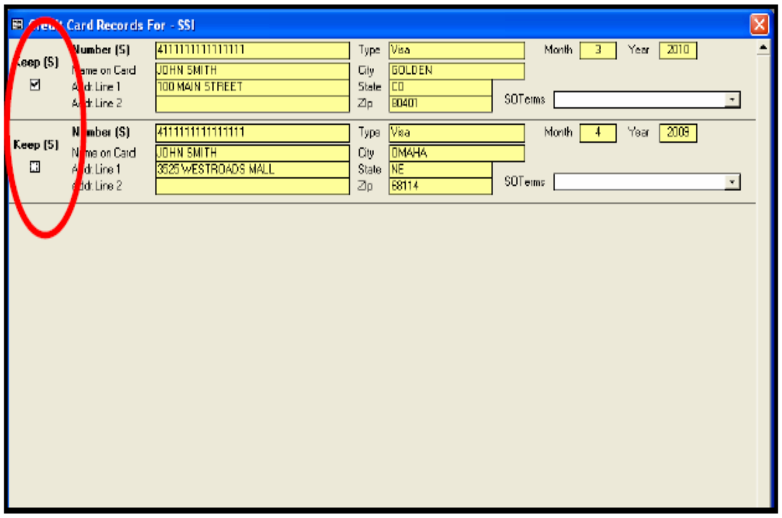
View all “shipping address vendor codes”. All shipping address vendor codes will default to being checked as “keep”; uncheck “Keep” next to any data that you do not want to save on the consolidated customer record.



Vendor Data

View all vendor data saved on each customer. All vendor data will default to being checked as “keep”; uncheck “Keep” next to any data that you do not want to save on the consolidated customer record.





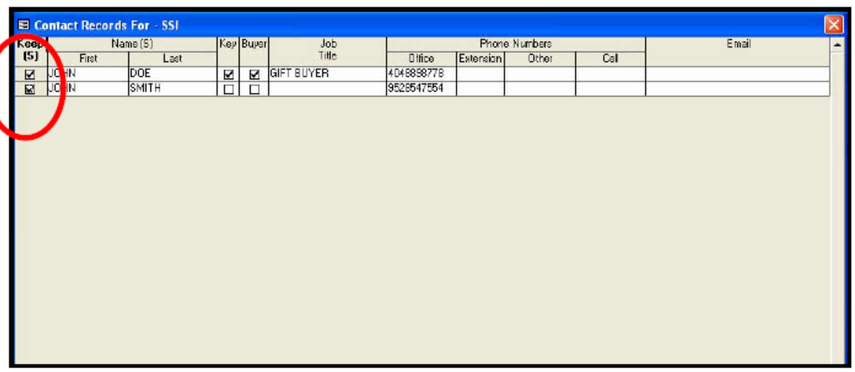
Credit Card

View all credit card data saved on each customer. All credit card data will default to being checked as “keep”; uncheck “Keep” next any data that you do not want to save on the consolidated customer record.

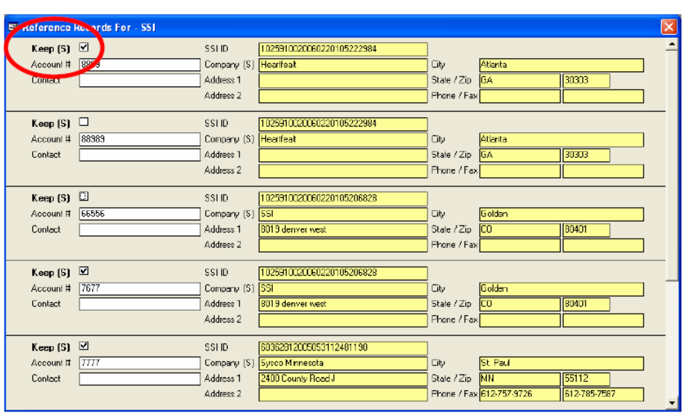
NOTE: *One record is unchecked to keep because it is a duplicate of the first record.*

Contacts

View all contact data saved on each customer. All contact data will default to being checked as “keep”; uncheck “Keep” next to any data that you do not want to save on the consolidated customer record.



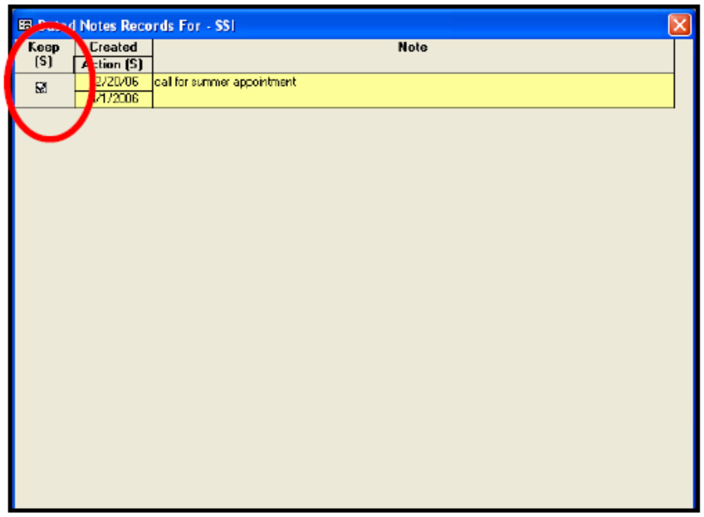
References



View all reference data saved on each customer. All reference data will default to being checked as “keep”; uncheck “Keep” next to any data that you do not want to save on the consolidated customer record.

__NOTE:__ You can update contact and account #'s directly on this form.

Dated Notes

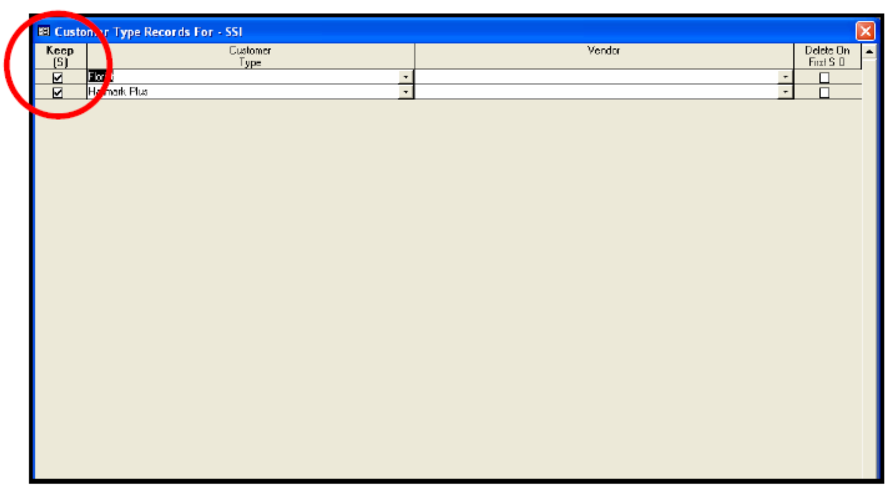


View all data notes data saved on each customer. All dated notes data will default to being checked as "keep"; uncheck "Keep" next to any data that you do not want to save on the consolidated customer record.

SIC Codes

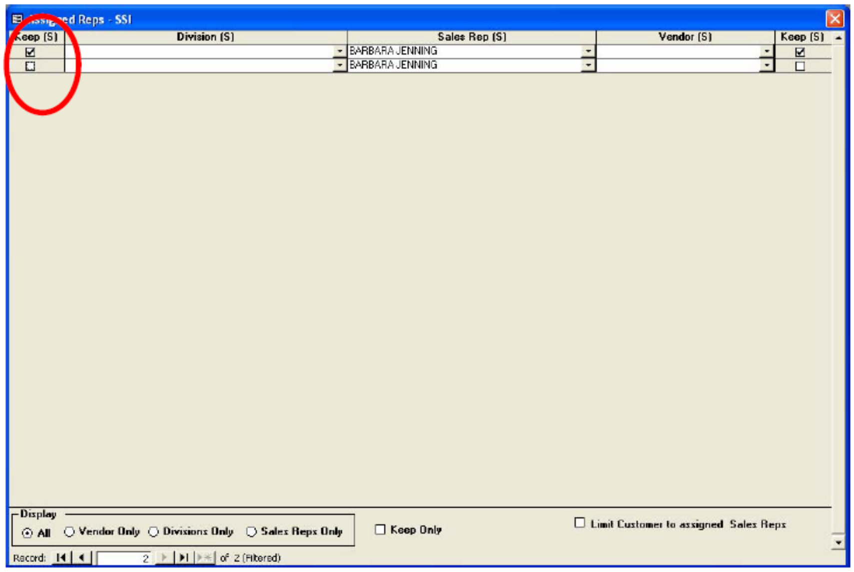
View all SIC codes data saved on each customer. All SIC Codes data will default to being checked as "keep"; uncheck "Keep" next to any data that you do not want to save on the consolidated customer record.

Customer Types (Or Report Groups)



View all Report Groups data saved on each customer. All Report Groups data will default to being checked as "keep"; uncheck "Keep" next to any data that you do not want to save on the consolidated customer record.

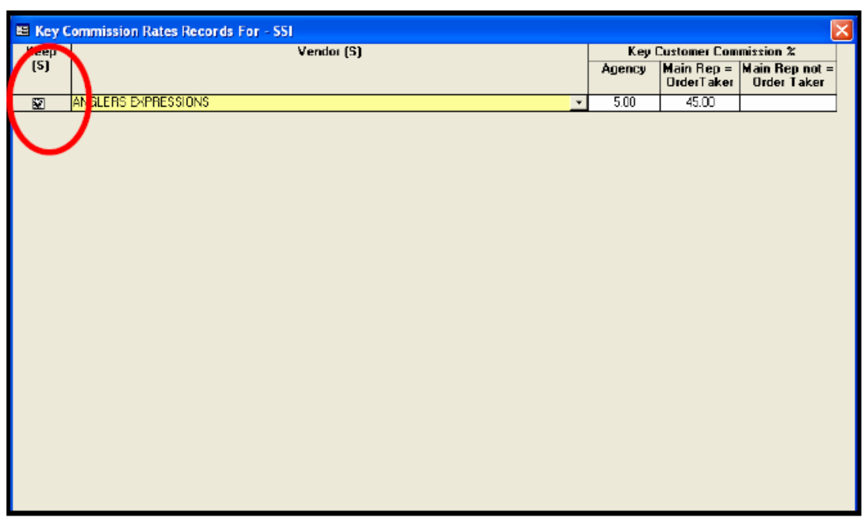
Assigned Sales Reps



View all Assigned Reps data saved on each customer. All Assigned Sales Reps data will default to being checked as “keep”; uncheck “Keep” next to any data that you do not want to save on the consolidated customer record.

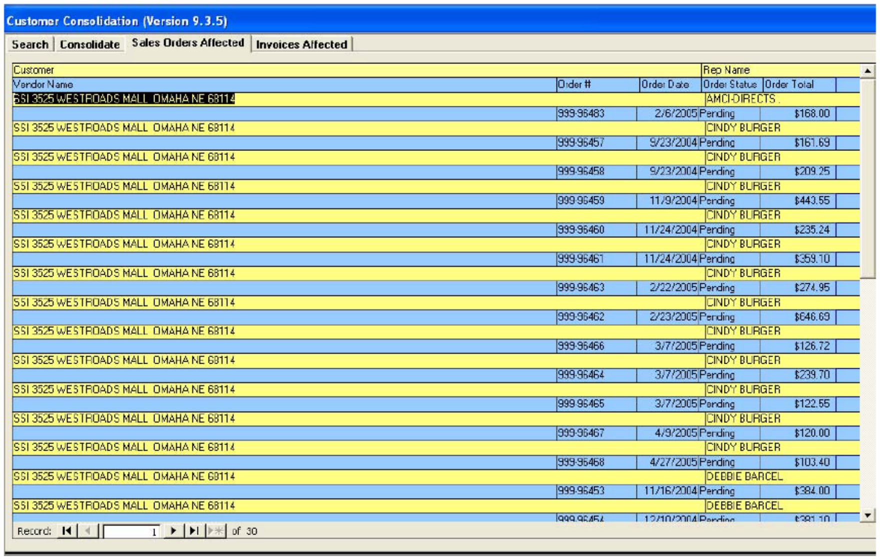
Key Commission Rates

View all Key Commission Rates data saved on each customer. All Key Commission Rates data will default to being checked as “keep”; uncheck “Keep” next to any data that you do not want to save on the consolidated customer record.



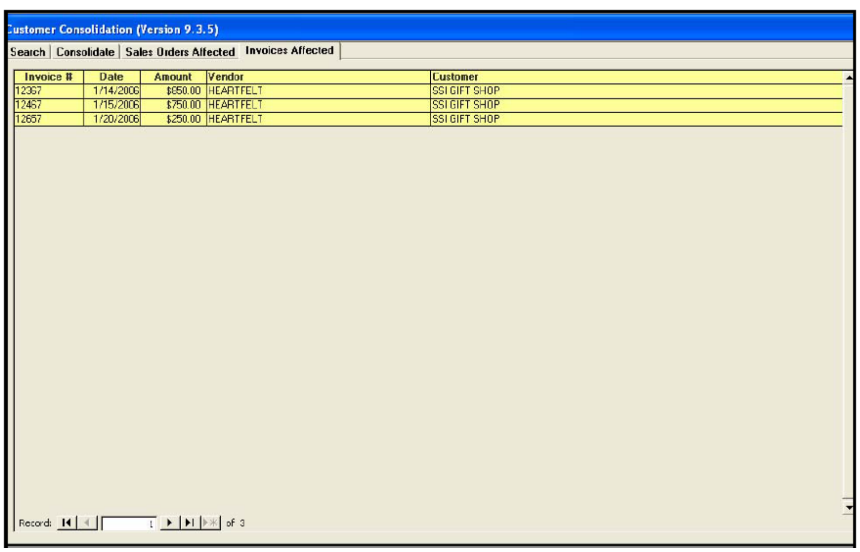
View Sales Order Data

Click on the “Sales Order Affected” tab to view the sales orders that will be part of the new consolidated customer.



View Invoice Data

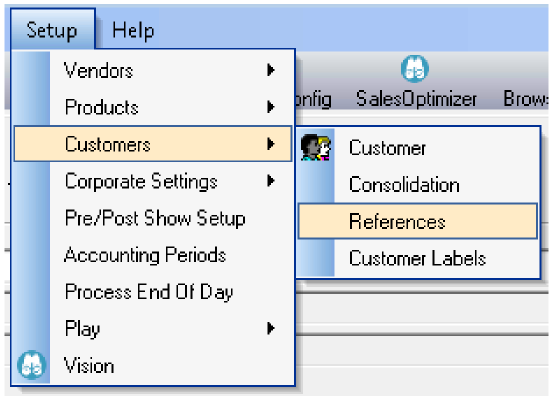
Click on the “Invoices Affected” tab to view the sales orders that will be part of the new consolidated customer.



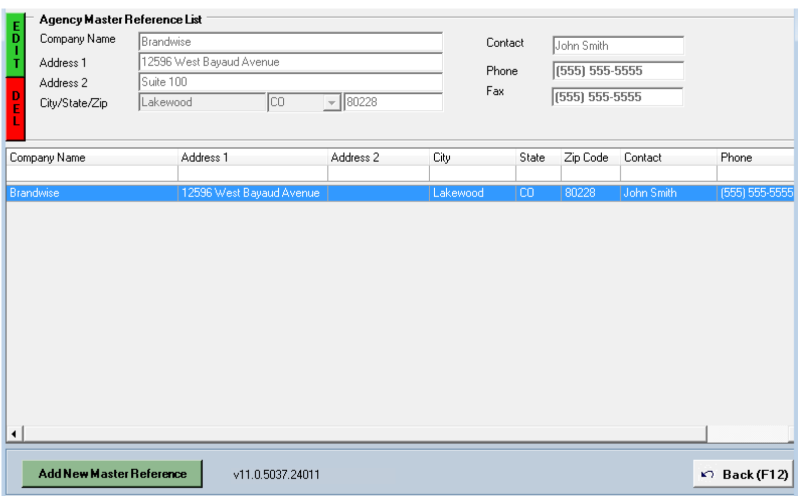
CUSTOMER REFERENCES

Customer References allows you to store credit references for a customer. You are able to create an **Agency Master Reference List** in this section.

From the main menu go to: ***Customer > References***



Agency Master Reference List



1. Click **Add New Master Reference.**

2. Enter in the contact information in the form above.

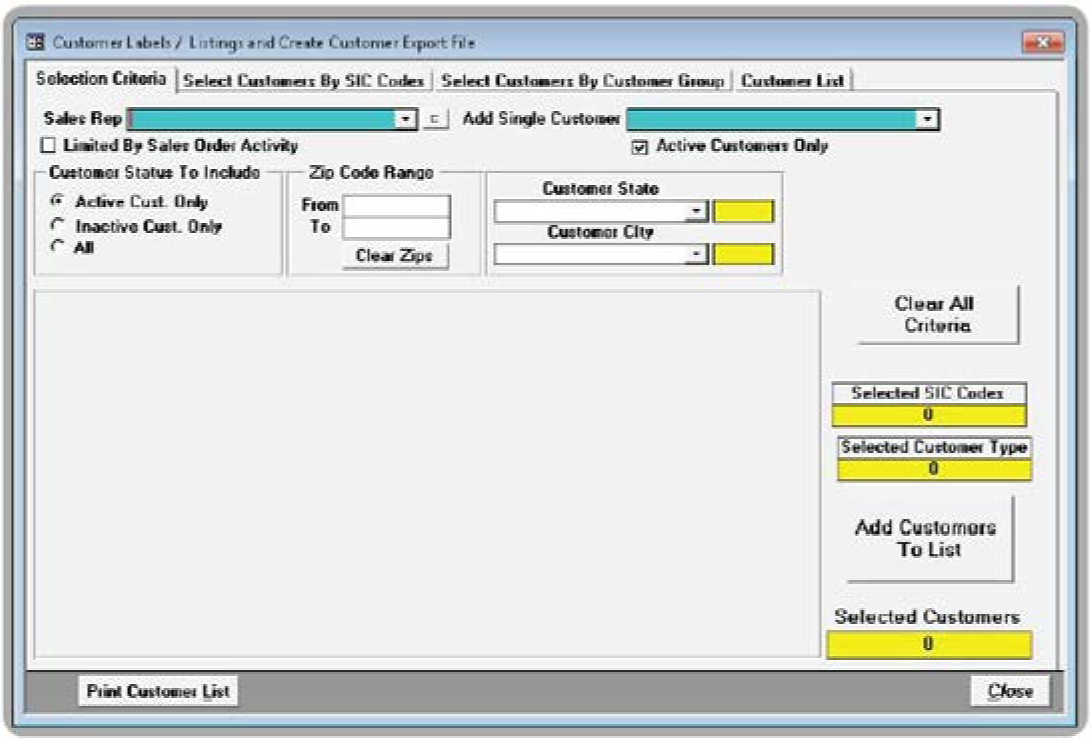
3. Click **Save** when completed.

Assigning Master Reference List

1. Open your customer in the **Customer Record.**
2. Click on the **Reference Tab.**
3. Click **New Reference** button to unlock the record.
4. Click on **Add New Master Reference** button.
5. Highlight the reference record and **Click Assign Selected Reference to Customer**.

CUSTOMER LABELS

The Customer Label utility will allow you to create customer mailing labels and customer lists that you can export into Excel spreadsheets.



To begin printing your customer labels, go to ***Setup > Customers > Customer Labels***

Customer Search Criteria

You can list customers by any of the following:

1. Sales Rep
2. Active or Inactive
3. Zip Code Range
4. City or State
5. Territory or Hard Coded Reps

Once you have selected your criteria, you will need to add you customers to the Customer List by clicking the Add Customers to List Button.

Limited by Sales Order Activity

By checking Limited by Sales Order Activity, you can limit your Confirmed or Closed sales orders with the following criteria:

1. Date Range
   - Sales Orders within date range
   - No Sales Orders within date range
2. Sales Location
3. Sales Order Dollar Amounts Limits
   - Above
   - Below
   - No Limit
4. Top Customers
   - All
   - Count
   - Percentage

Customer List

This is the list of customers that was created from the previous screens. You can verify all customer information here. Information cannot be edited from this screen. It must be edited from the Customer Record.

Click Print Customer List to print the list generated.

Sort By:

- Name
- Zip, Name
- Status, Name
- Status, Zip, Name

- Click Print Labels to print mailing labels
- Click Create Export File to export the list into Excel

Sales Rep Replacement

Sales Rep Replacement will allow you to distribute orders to the correct reps based on territory and hard coded customers.

To open go to: ***Commission > Sales Rep Replacement***

Sales Rep Reassignment

This function updates the Sales rep on Sales Orders where the Sales Order Date is between the Sales Order Date selected by you. This function only updates the Sales Order Sales Rep, it does not change the Sales Order Commission, Original Sales Rep, or the Sales Order Rep Group.

NOTE: Territories are ***not*** update.

Territory

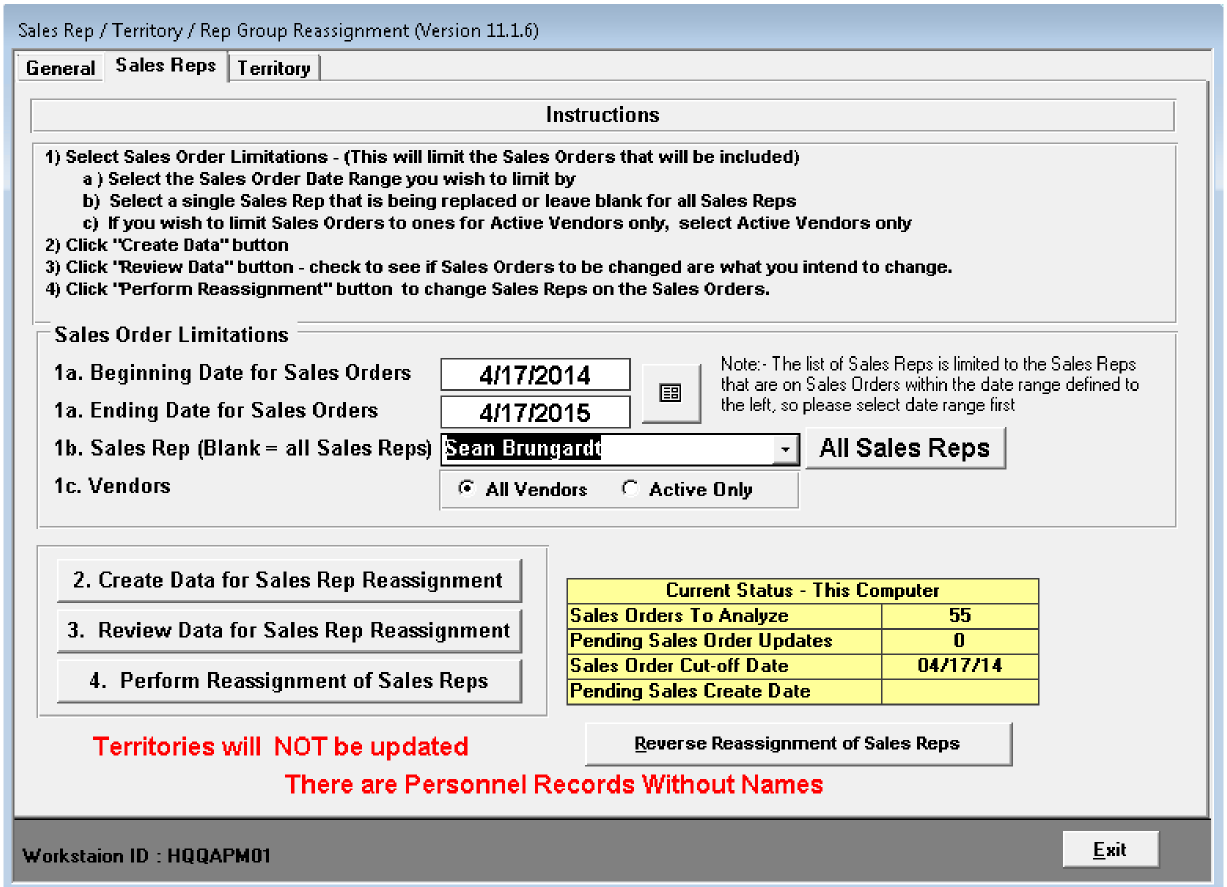
This function updates the Territory on Sales Orders where the Sales Order Date is between the Sales Order Date selected by you.

There are 2 options:

1. Update all Sales Order Territories. This will update the Territory when a new is found and remove the Territory in none is found.
   - Example: Sales Order Sales Rep is now assigned directly to the customer.
2. Only updates the Sales Order Territory where a new territory is found. This will not remove the Territory if on e is not found.

*NOTE: Sales Reps are **not** updated.*

Sales Rep Reassignment

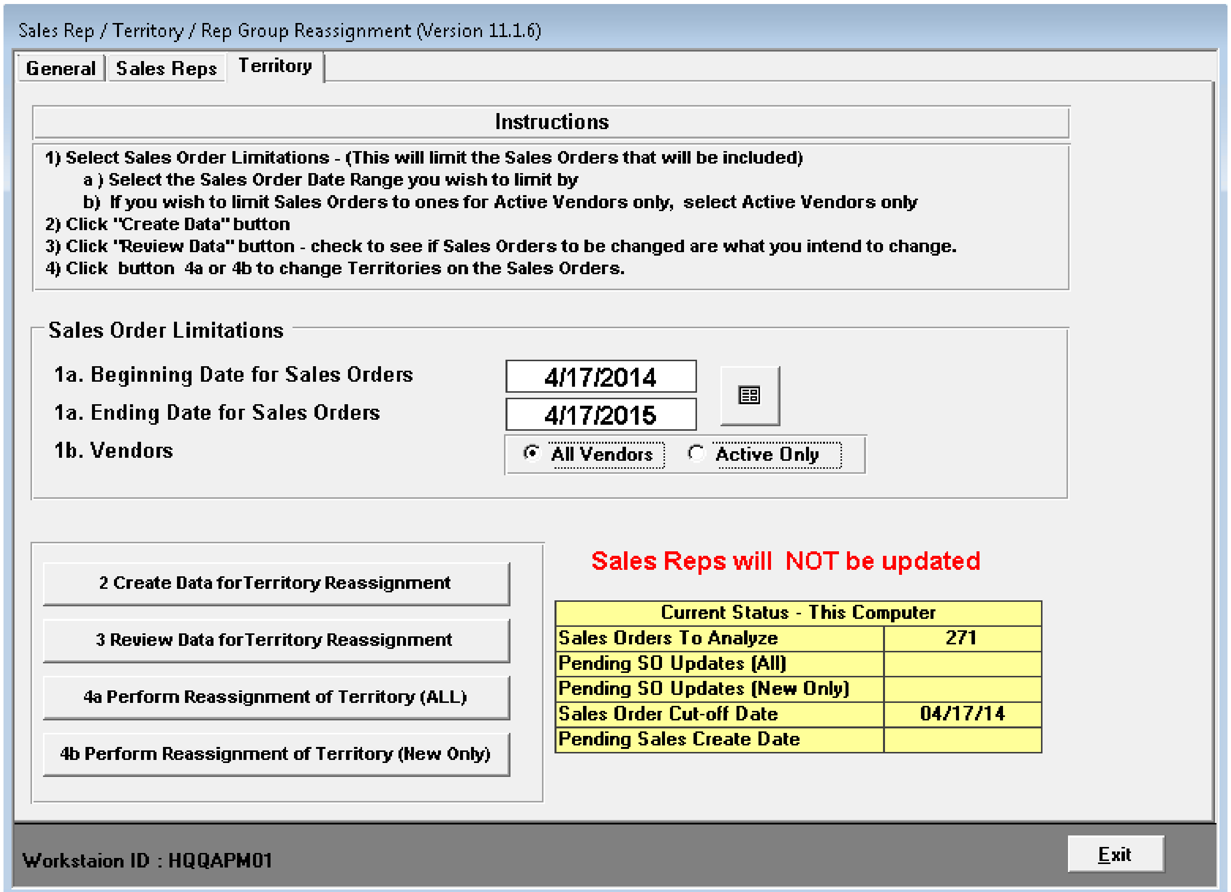


1. Type in the beginning and ending dates for the sales order reassignment. Any order between these dates will be reassigned to new reps. If you want all history to be reassigned, set the beginning date as 1/1/1900.
2. Select the Sales Rep who has left.
3. Click **Create Data for Sales Rep Replacement** to analyze the orders and determine which ones fall into the existing territories.
4. Click Review Data for Sales Rep Reassignment to preview the orders being reassigned.
5. Click Perform Reassignment of Sales Rep to update the current sales rep with the old reps orders.

NOTE: *This will not affect commissions at all. The commissionable reps never changes. This process just allows reps to see order and customer history*

Territory Reassignment

Territory Replacement will change the actual territory that displays on the sales order.



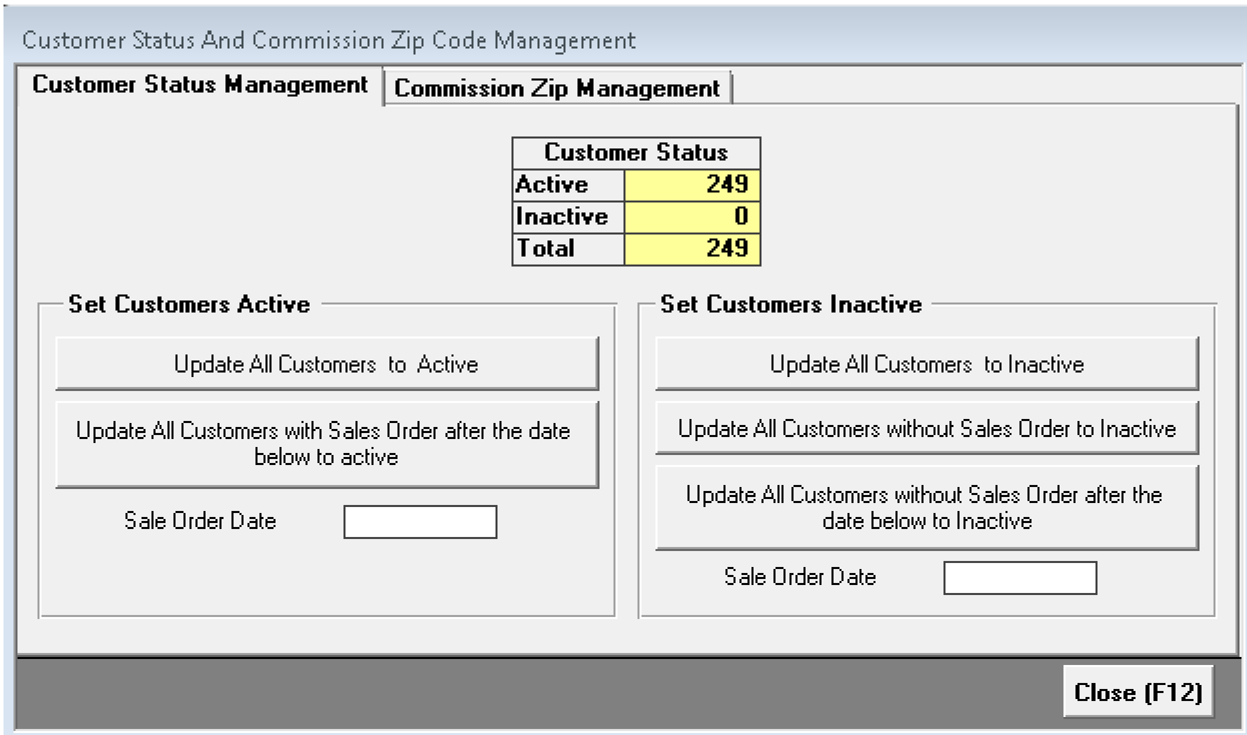
1. Type in the beginning and ending date for the sales order reassignment. Any order between these dates will be reassigned to the correct territory.
2. Click **Create Data for Territory Replacement** to analyze the orders and determine which ones fall into existing territories.
3. Click **Review Data for Territory Reassignment** to preview orders being reassigned.
4. Click **4a Perform Reassignment of Territory (ALL)** to update orders for all territories
5. Click 4b Perform Reassignment of Territory (New Only) to update the orders for new territories only.

> ***NOTE:*** *This will not affect commissions. The commissionable rep will never change. This process just displays the correct territory on the orders.*

Customer Status and Commission Zip Management

Customer Status

This utility will allow you set customers to active or inactive by using a date and/or sales orders associated.



Set Customers Active

1. **Update All Customer to Active:** Updates all customers to a status of Active.

2. **Update All customer with Sales Orders after the date below to Active:** Updates all customers with sales order after the set date to Active.

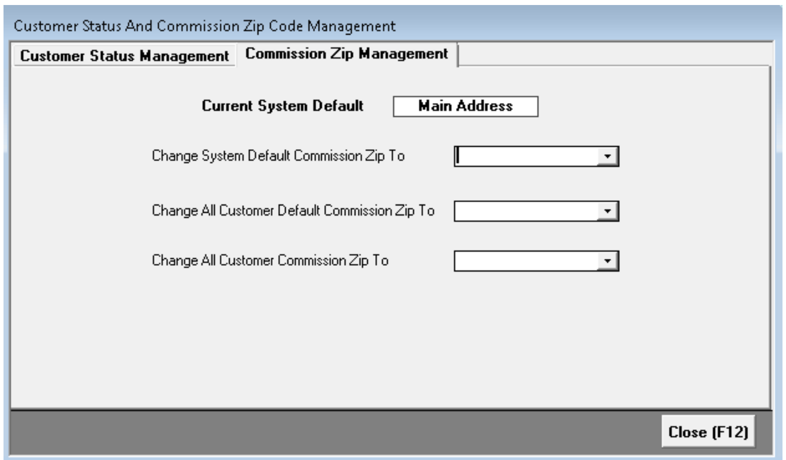
Set Customer Inactive

1. **Update All Customers to Inactive:** Updates All customers to a status of Inactive.

2. **Update All Customer without Sales Order to Inactive:** Updates all customers without a sales order to a status of Inactive.

3. **Update All Customers without Sales Order after the date below to Inactive:** Updates all customers without sales orders after the set date to Inactive.

Commission Zip Management

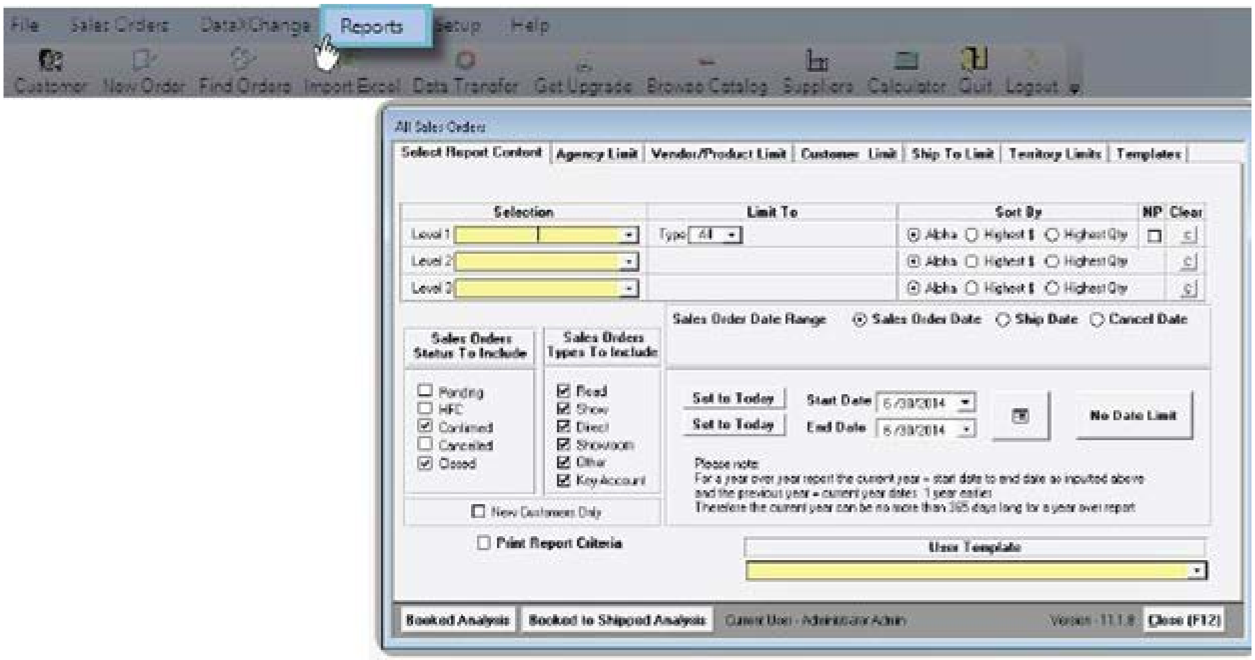


This utility will allow you to change the current system defaults for the **Commission Zip** of **Main Address** or **Shipping Address**.

1. **Change Default Commission Zip** to the following:
   - Main Address
   - Shipping Address
2. **Change All Customer Default Commission Zip** to the following:
   - Main Address
   - Shipping Address
3. **Change All Customer Commission Zip** to the following:
   - Main Address
   - Shipping Address

Sales Analysis

Sales Analysis is a custom reporting tool that will give you the ability to create reports based on all sales that have been entered into your Play system.



To open Sales Analysis, go to ***Reports > Sales Analysis*** located on the tool bar.

Click Yes to clearing the limiting criteria.

Clearing the limiting criteria will give you a brand new report. Sales Analysis will allow you to customize reports and save them so that you can run the same report again and again. The Sales Analysis Screen has a series of tabs across the top. Each tab will allow you to limit certain aspects of your report. This will be covered in the Advanced Reporting Section of this document.

Basic Reporting

1. Select the levels that you want to show up on the report. No matter what levels you choose, you will be given a sales total. The levels break down the total into the choices that you have made. You only need to select Level 1 to run a report.
2. Select a Date Range that you want the report to cover.
3. Click Booked Analysis
4. Click Preview

Date Range

- Single Date Range will run the dates you selected.
- Year over Year will compare previous years.

***NOTE:** You do not have to choose all levels, just level 1.*

Advanced Reporting

1. Instead of viewing all customers, you can switch to Best or Worst. Then, you can select how many you want to display and whether you want them to display by $ or by Qty. This is for level 1 only.
2. You can sort any of the levels alphabetically, by highest dollar amount, or highest quantity by selecting the sort option you want.
3. "NP" stands for New Page and will start every Level 1 on a new page.
4. The "C" will clear out the level that is currently selected from the drop-down. If you have accidentally selected a product for Level 3, you can clear it by clicking on the corresponding "C".
5. You can also select which sales order statuses and sales order types you want to include in the report.
6. You can create templates for reports that you run frequently (See the Templates Section of this page).

Sales Analysis allows you to limit certain aspects of your report so that you can run a more specific report. If you want to run a report on a specific customer or on a specific zip code, then you can limit that data so that you don't have to run a large report and search for the individual one you wanted. Once a report is limited, it stays that way until you clear the limitation. That is done by removing the limit from the blue portion of the screen or clicking *Yes* to this message, when you first enter Sales Analysis.

Agency Limit: Allows you to limit your report to a specific rep agency, sales rep, order taker, or sales location. All options in the yellow boxes are criteria that you can limit by. When you double-click one of these, they will drop into the blue section. The report is limited to the selections in the blue section. After you have limited your report, go back to the Select Report Criteria Tab to run your report. You still need to select dates and a Level 1.

Vendor / Product Limit: This tab allows you to limit a report by specific products.

1. Select a Supplier
2. Select a Product Line
3. Double-click the products that you want to limit to

Customer Limit: This tab allows you to limit a report to a certain customer.

1. Type in the first few letters of the customer's name
2. Click Search
3. Double click the customer(s) you want to limit to

Ship To & Territory: These two tabs allow you to limit by City, State, Zip, or an entire Territory.

Double-click on the information that you want to limit to.

Whenever you have a report limited, you will see a message in the bottom left of the Sales Report Criteria Tab that reads, "Report Data Limitations Set".

Templates: This tab allows you to build a template for a report that you run frequently. You will notice that the Template Tab is a compact version of the Select Report Criteria Tab. You can create a report here, just like you would normally, then give it a name. You have the ability to create as many templates as you like. There are two templates created: an End of the Week and a Best Products Report. Notice that the End of the Week Report only shows the top 10, by supplier and the Best Products Report shows the top 25, by quantity.

Vendor / Product Limit: This tab allows you to limit a report by specific products.

1. Select a Supplier
2. Select a Product Line
3. Double click the products that you want to limit to

Now that you have created your templates, anytime you go into Sales Analysis, you can select a template from the bottom right of the screen to see your report populate automatically. The only field that will need to be changed, each time you run the report, is the date range.

Year over Year: This feature will allow you to compare this year's numbers to last year's numbers, using the date range that you have selected.

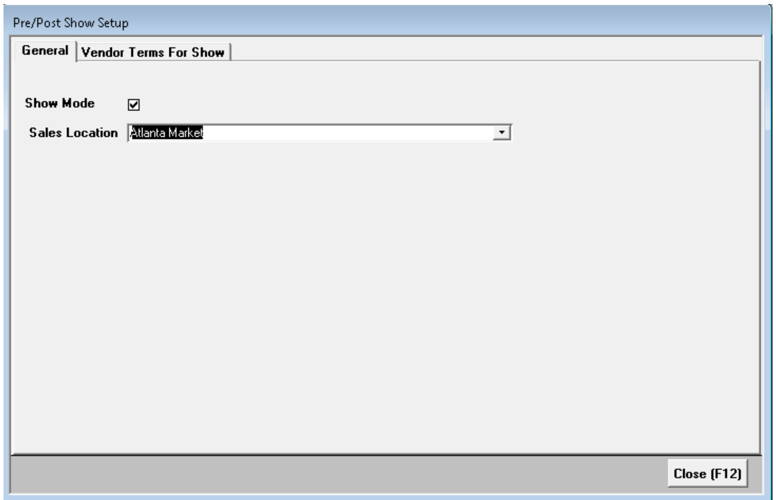
After you setup your report and click on Booked Analysis, you can switch from Single Date Range to Year Over Year. Then, click on Preview.

Note: You can also save any report in Word or Excel by clicking on the Word icon at the top of the screen. Then, select the format that you want to save in.

Pre/Post Show Setup

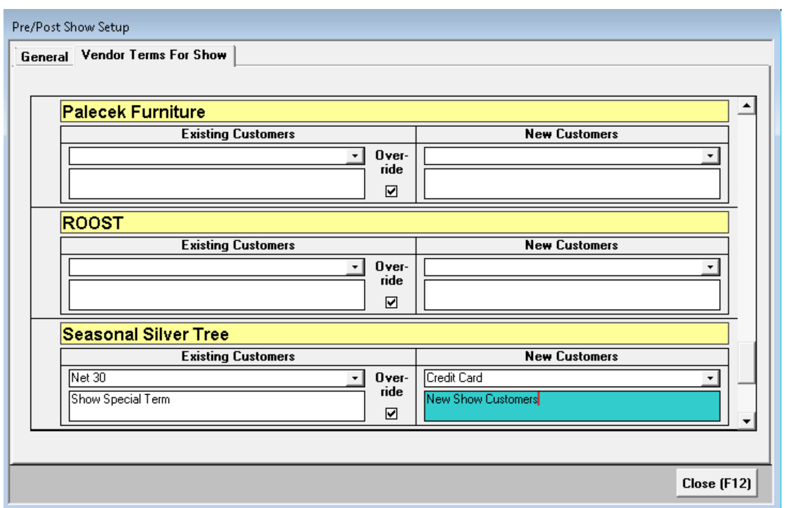
Pre/Post Show Setup allow you to set the system in Show Mode and define the Sales Location. You can also set specific supplier terms for that particular show.

General



1. Check **Show Mode** when you are in a show.
2. Select a **Sales Location** for the show.

Vendor Terms for Show



1. Select your supplier and add your terms from the dropdown for **Existing Customer** and **New Customer.**
2. Enter in a **Sales Order Note** that you want displayed on the Sales Order.
3. Check **Override** to override the other terms that you may have defined in the system.

Summary Sales Order

Say a customer calls in an order. You don't want to re-key all of the line items, but you want your sales numbers to reflect this order. What can you do? The answer is create a Summary Sales Order. It is an order that will include all information except line item detail. You're welcome!

If you enter in Summary Sales Orders, you will not be able to use order history or run accurate reports on product, because summary sales orders do not include SKU's.

To start a Summary Sales Order, go to Sales Orders>Summary Sales Order located on the tool bar.

1. Fill in every field that has an asterisk (*) next to it.
2. Click Create Summary Sales Order (or use your F10 key on your keyboard)
3. If you are entering multiple Summary Sales Orders, one after another, you can lock any field by clicking on the lock. Any field that is locked will save the information for the next order.

NOTE: *Information is not saved and a Summary Sales Order is not created until you click on Create Summary Sales Order (F10).*

Agency Show Order Flow

Show Order Management

Say goodbye to the days of being tethered to a show server requiring a strong and constant network connection. You can now put any Play rep system in show mode and access all show orders, from all Play devices, immediately from the Brandwise Cloud. Play PC and Play iPad devices can run independent of a show server and still have access to all show orders when necessary. When the device is in show mode and has internet connection, all orders will auto transmit to the Brandwise Cloud upon closing the order. All show orders will then be available to any Play device that is in show mode by using the find orders to pull the orders from the Brandwise Cloud.

Please keep in mind that you do ***NOT*** need an internet connection to create orders. If you create orders on your iPad or PC they will remain on your device only until you connect to the internet.

Getting orders from the cloud

When the device is in show mode and has an internet connection, the find order screen searches against the Brandwise Cloud and will pull any show order regardless of the device that wrote the order originally. When the order is opened, that order will be immediately downloaded from the Brandwise cloud and opened on the device. If you are in show mode and do not have an internet connection the search will return orders written on your device only. If the customer on the order has changed, that new customer information will also be immediately downloaded to the sales rep's device.

Be sure to check your permissions! There is a permission titled "Users can see all orders in show mode" that will allow users to access all sales orders on the find orders screen of iPads and PCs alike. When this permission is on, users will get to see all orders regardless of who wrote them. When this permission is on, and the device is in show mode and connected to the internet, users will get to see all orders regardless of who wrote them. When this permission is off, users will be able to see only sales orders for which they are the order taker or the sales rep.

Pushing orders to the cloud

Whenever you close out of a sales order on a PC or iPad that is in show mode and connected to the internet, that order will immediately upload to the cloud. Sales reps and administrators will be able to immediately see all HFC & Confirmed orders and access them from across any device (other than a 100 server) that is in show mode.

Brandwise Cloud

All show orders are transmitted to the Brandwise Cloud when they are closed no matter what the status of the orders are, however..

- **Pending Orders:** Are only visible and editable on the device the order was created on.

HFC Orders: Can be pulled and edited on any device (except the 100) in show mode, that has internet access and has permission to view the order.

Confirmed Orders: Can be pulled and edited on any device (except the 100) in show mode, that has internet access and has permission to view the order and the order is not currently not being transmitted to the supplier.

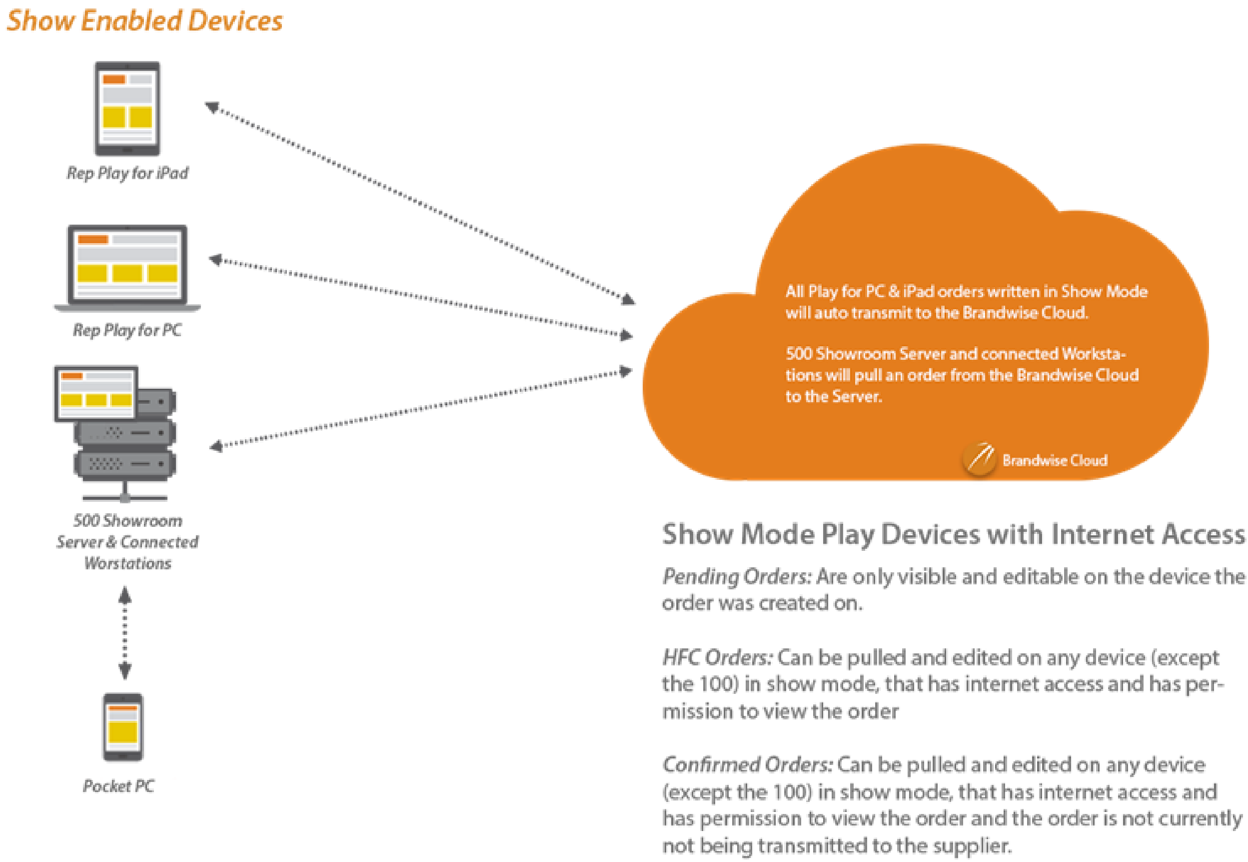
Pocket PC –Still Using Them?

Pocket PCs will search the local show server. Orders written on other devices will only be available to the Pocket PC once they have been downloaded to the show server. Orders written on Pocket PCs will not be uploaded automatically to the Brandwise Cloud. If you want to update your showroom to the latest and greatest that Brandwise has to offer, please view our website and learn how to upgrade to Play.

Brandwise Process to Send order to the Supplier

When orders are sent to the supplier using the Web Show Management tool, a Brandwise process runs every 20 minutes that sends the orders to the appropriate supplier Stream system. During this process you may not see immediate results or have ability to edit these orders for up to 20 minutes.

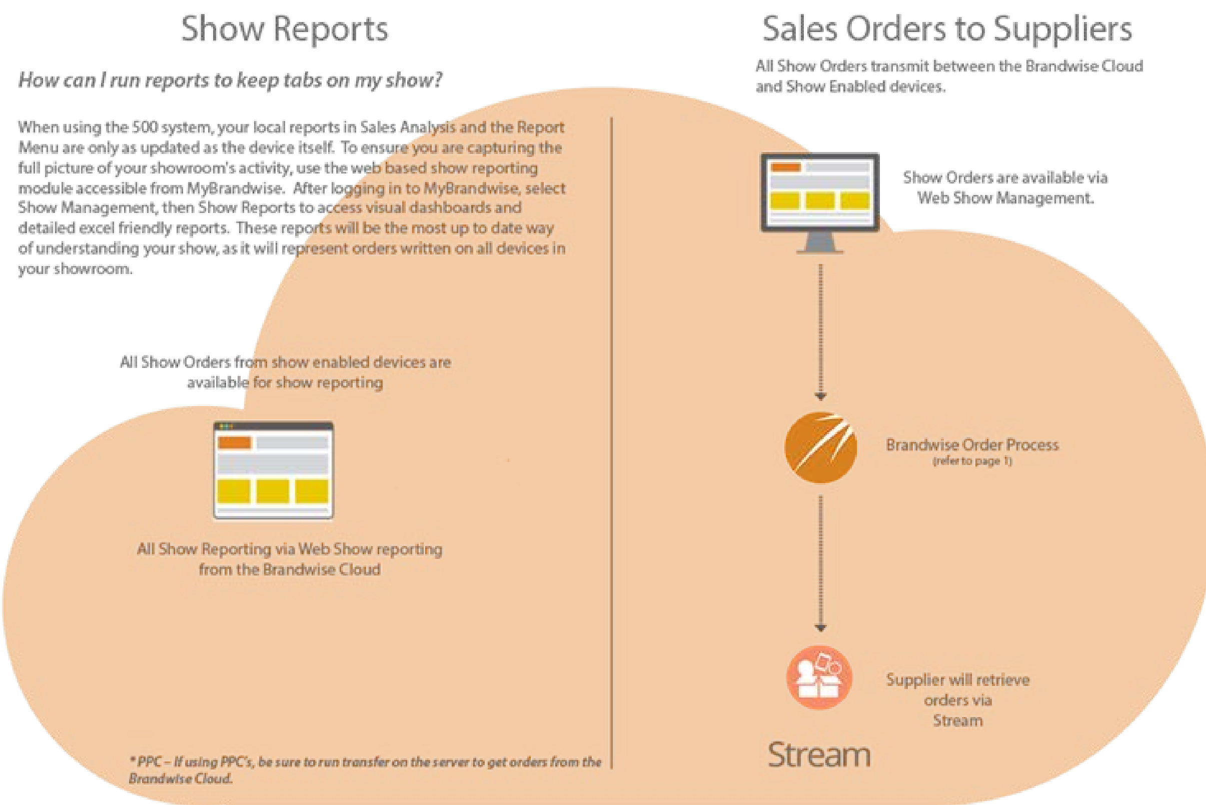
Agency Show Sales Order Flow – Brandwise Cloud



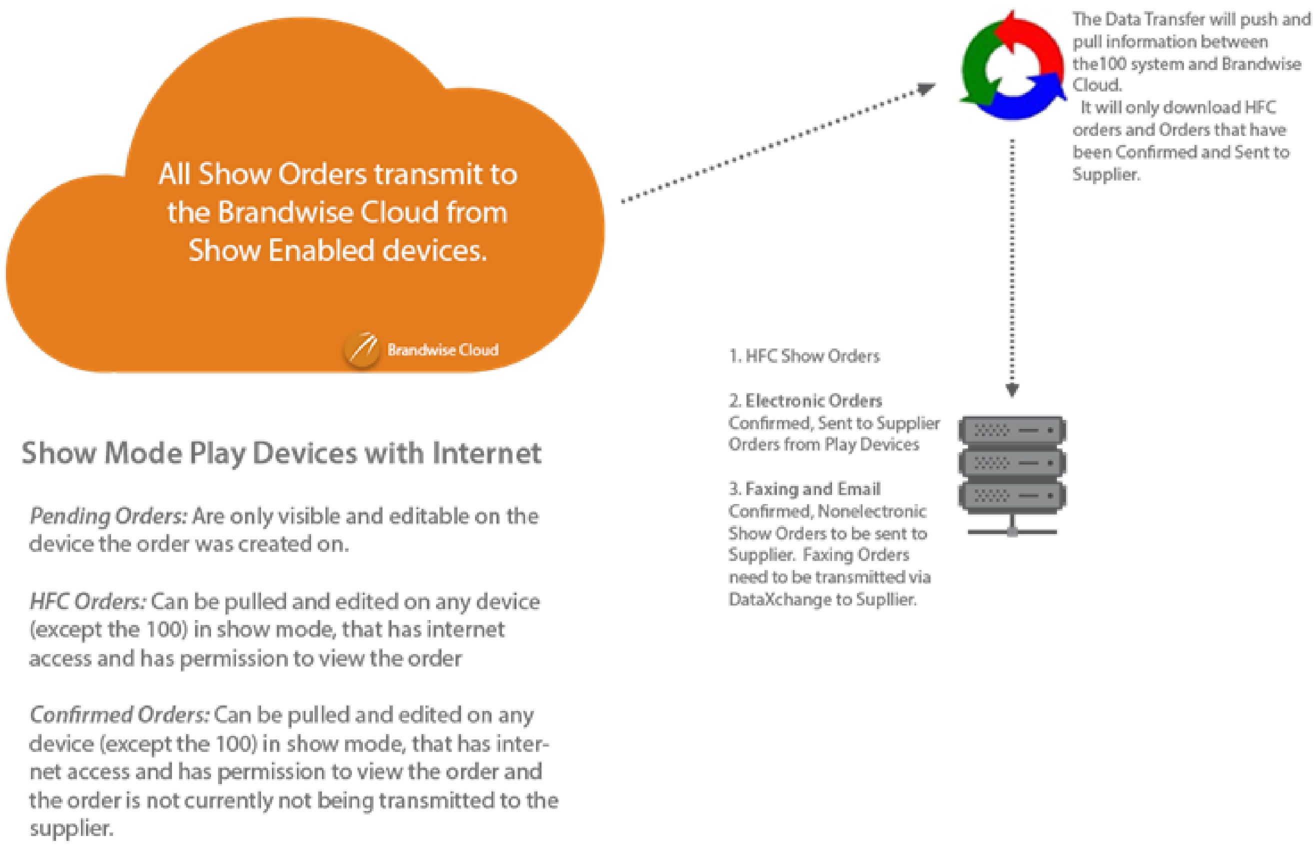
* Shows using 100 system – Showrooms using the 100 Server for their show will not be able to Auto Send/Pull Orders to/from the Brandwise Cloud.

** PPC orders do not transmit directly to the Brandwise Cloud - Server must perform a Data Transfer

Brandwise Cloud – Reports & Sales Orders to Suppliers



Agency Brandwise Cloud – 100 System

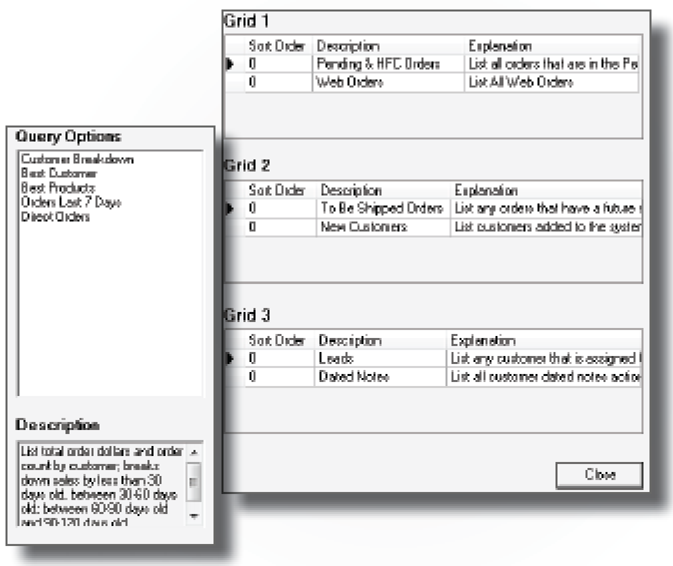


Note: *Showrooms using the 100 Server for their show will not be able to Auto Send/Pull Orders to/from the Brandwise Cloud.*

Home Page

Data Grid

On your Home Page is the Data Grid, which is broken into three sections. Each section can be personalized with the results of the queries that you want to see. There are several queries to choose from and you can have multiple queries in each section.



Pending & HFC Orders

This query lists all orders that are in a Pending or HFC status. A Pending Orders is any order that has not been completed. HFC (Hold for Confirmation) Orders are marked as HFC by the user because more information is needed before the order can be confirmed. This gives you quick visibility to orders that still need to be completed. Double click any order to open it.

Orders to be Shipped

The second query lists any orders that have future ship dates. This gives you visibility to orders that are going to be shipped in the future. Confirmed orders with ASAP ship dates will not appear in this display. Double click on any order to open the order.

Dated Notes

Dated Notes are customer notes with an action date within the next 30 days. This feature can be used as a reminder note to contact a customer. This is a view- only query. You cannot double click a dated note.

New Customer

Allows you to view any new customer added to the system in the last 30 days (with order[s]).

Leads

Lists any customer that is assigned to the 'Lead' reporting group.

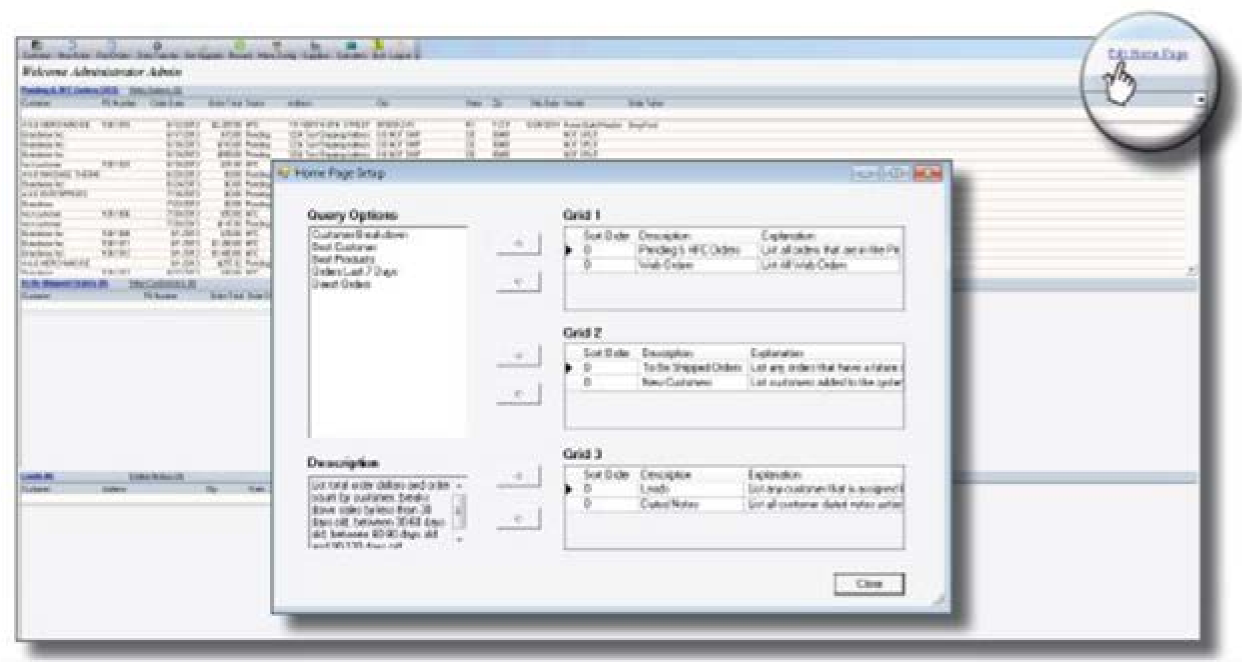
Customer Search

Lists total order dollar amounts and order count by customer. Breaks down sales by: less than 30 days old, 30 to 60 days old, and 90-120 days old.

Orders Last 7 Days

Lists orders that have an order date within the last 7 days.

Edit Home Page



These pre-defined data queries are found in Edit Home Page at the top right of the screen. This link is only available to the user assigned to the machine. Please notice that the example below has 6 queries selected. After clicking the ***Edit Home Page*** link, you will be able to select queries from the left and add them to one of the three grids on the right by clicking the corresponding arrow for that grid. The sort order column will allow you to sort your grid. The option with the smallest number will show up first on the welcome screen.

Customize Home Page Selections

In each section, you can customize the order of the columns, change the sort of the column, and filter the columns.

- To sort a column, click on the column heading. The column will sort in ascending order. To reverse sort in descending order, click the column header again.

To change the order of the columns, click on the column heading and drag it to where you want it to display.

To save your layout, right click on any column header, select Edit Layout, then Save Layout.

To filter the list for certain criteria, type in the data criteria at the top of the column. The list will be limited to what you enter.

Menu Hotkeys

The menu across the top (hot keys) can be used to get to different parts of Play quickly. You can customize your menu to add additional icons. To customize your menu hot keys, click the arrow at the right end of the menu bar and select ***Add or Remove Buttons***, then select ***Customize***.

1. For the customized tool bars, click on the Commands tab.

Select the category.

Within the category, highlight the items you want to create a hot key for.

Drag the command to the hot key tool bar where you want to insert it