brandwise
Your Modern Sales Studio

THE BRANDWISE GUIDE TO SFA ADMIN

THE COMPLETE GUIDE TO THE EDITORS THAT MAINTAIN **SHOWROOMELITE, REACH, PLAY** AND **VENDORELITE**

Play
Vision
Reward
Reach
Stream

WELCOME

SFA Admin Editors are online tools to help you set up and maintain ShowroomElite, Reach, Play and/or VendorElite.

This guide will help you understand every facet of SFA Admin to manage your Modern Sales Studio quickly and efficiently.

As always, if you have any questions please feel free to contact our Customer Service by calling 877.435.3225 option 1.

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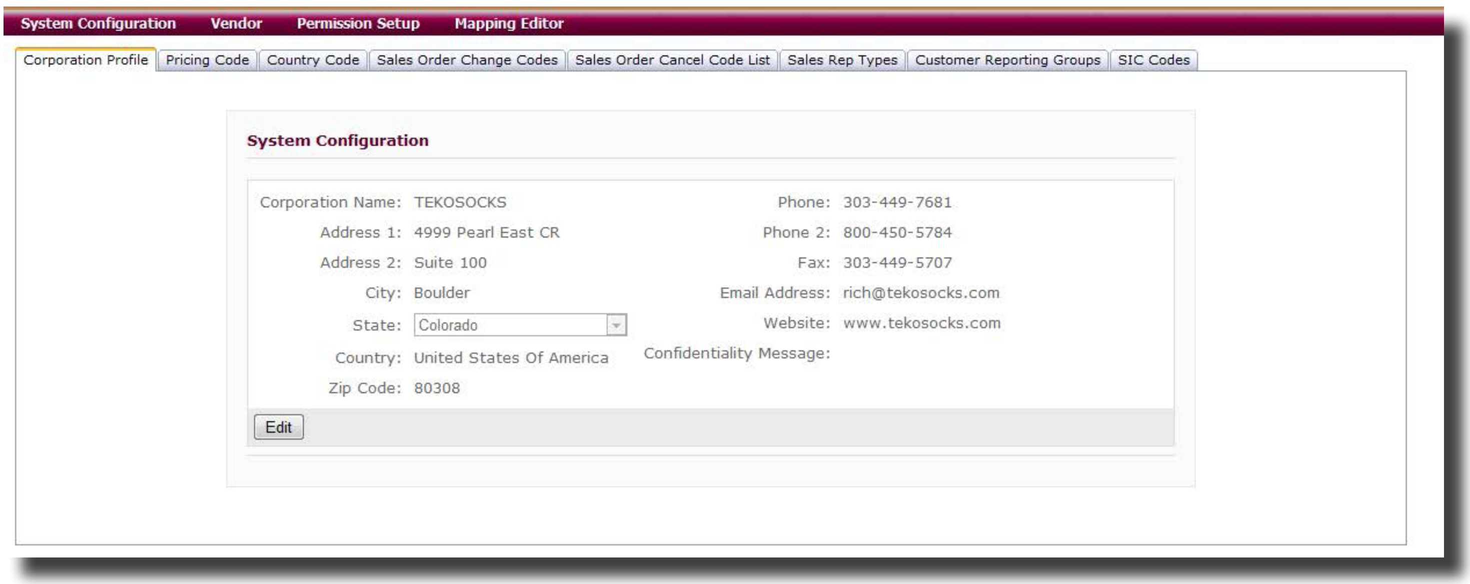
CORPORATION

The Corporation contains the main billing and contact information about your company. The Corporation Name will display in the Data Transfer on any 200 or 500 licensed install. All of the information will be used to update Brandwise main contact information.



PAYMENT TERMS AND SHIPPING METHODS

The Payment Terms & Shipping Methods section contains 4 tabs of information used when placing orders using the Brandwise Systems.

PAYMENT TERMS

The payment terms tab is to setup all terms that available for all vendors setup for your system. Each term will then need to be assigned to your individual vendors under the vendor menu.

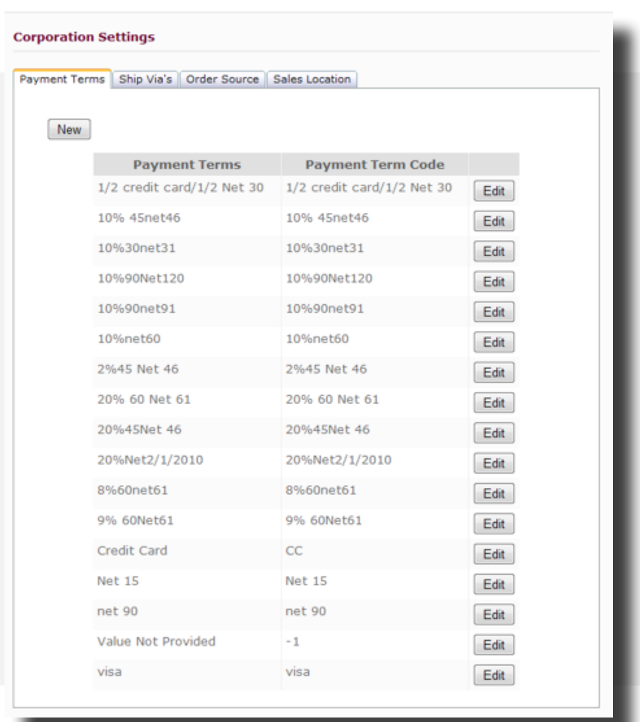
To add a payment term click on the "New" button:

1. Enter the new payment term name
2. Click "New" and enter the new payment term.
3.

To edit a payment term click on the "Edit" button next to the payment term name.

1. Edit the payment term
2. Click "Update" to save the changes.

Note: Payment terms are not deleted. Do not remove a payment term from the selection. To control which payment terms are viewable when writing a sales order, please remove the payment term from the vendor selection.



Payment Terms	Payment Term Code	
1/2 credit card/1/2 Net 30	1/2 credit card/1/2 Net 30	Edit
10% 45net46	10% 45net46	Edit
10%30net31	10%30net31	Edit
10%90Net120	10%90Net120	Edit
10%90net91	10%90net91	Edit
10%net60	10%net60	Edit
2%45 Net 46	2%45 Net 46	Edit
20% 60 Net 61	20% 60 Net 61	Edit
20%45Net 46	20%45Net 46	Edit
20%Net2/1/2010	20%Net2/1/2010	Edit
8%60net61	8%60net61	Edit
9% 60Net61	9% 60Net61	Edit
Credit Card	CC	Edit
Net 15	Net 15	Edit
net 90	net 90	Edit
Value Not Provided	-1	Edit
visa	visa	Edit

SHIP VIAS

The Ship Via's tab is used to setup all shipping terms that available. Please keep in mind that this is for all vendors setup for your system. Each term will then need to be assigned to your individual vendors, under the vendor menu.

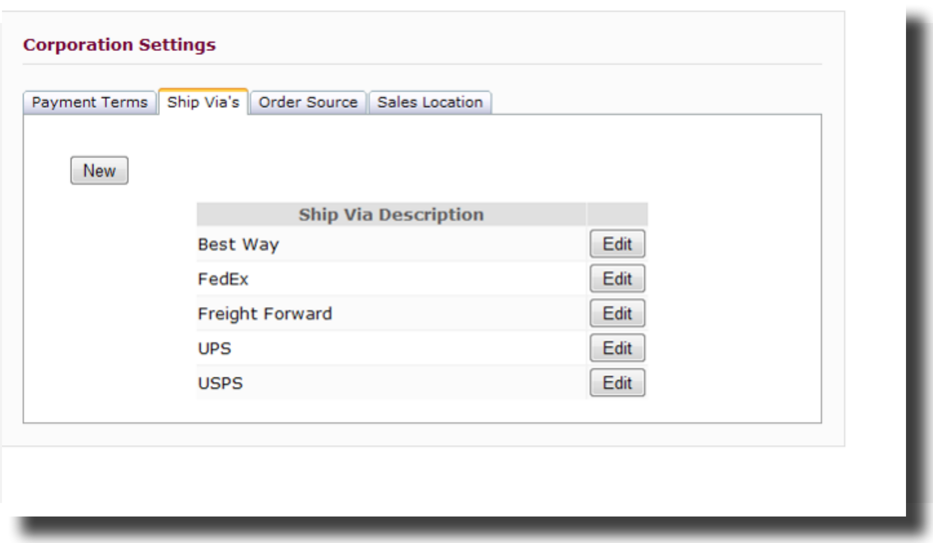
To add a Ship Via's.

1. Click on the "New" button:
2. Enter the new Ship Via's name
3. Click "Add"

To edit a Ship Via's

1. Click on the "Edit" button next to the Ship Via's name:
2. Edit the Ship Via's Description
3. Click "Update"

Note: Ship Via's are not deleted. To remove a Ship Via's from the dropdown when adding sales orders, remove the Ship Via's from the vendor assignment



ORDER SOURCE

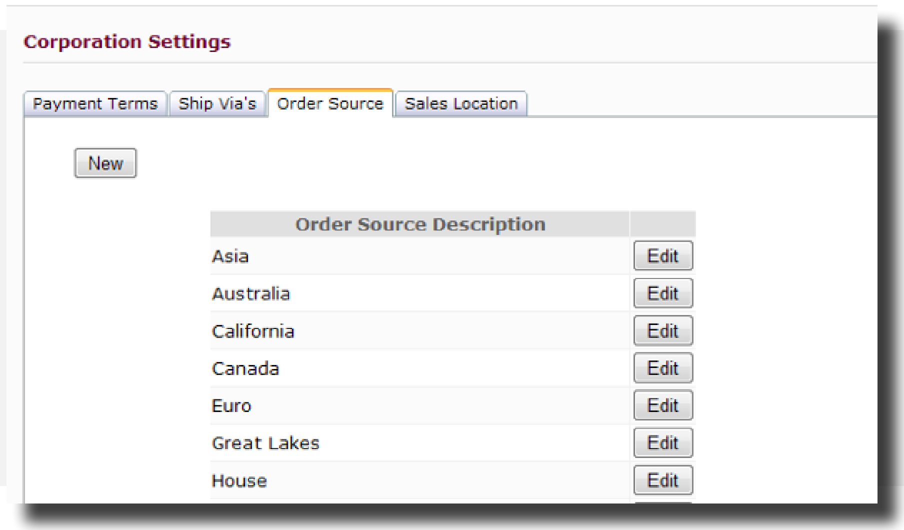
The order source is used to track how an order has been communicated to the order taker. Example of Order Source is: Phone, Fax, and Email. Order Source is an optional field on the sales order and does not have to be used if it is not needed for reporting purposes.

To add an Order Source:

1. Click on the "New" button
2. Add the order source
3. Click Update.

To edit an order source:

1. Click on the "Edit" button next to the order source name
2. Edit the Order Source Name
3. Click "Update"

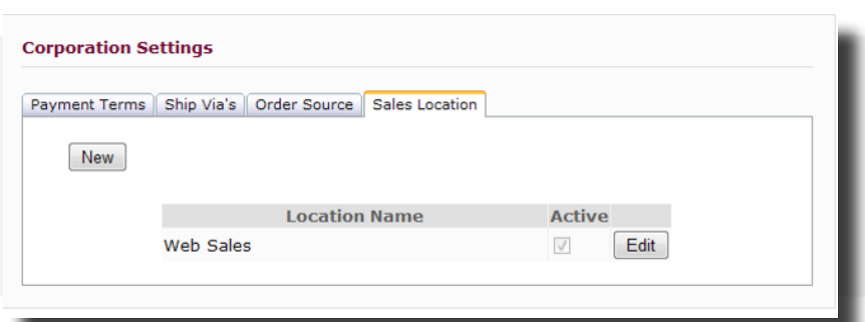


SALES LOCATION

The sales location is used to track where an order has been generated for reporting purposes. Example of sales locations is: Atlanta Show, Outdoor Show, Halloween Show, and Road. Sales Location is an optional field on the sales order and does not have to be used if not needed for reporting purposes.

To add a Sales Location, click on the "New" button:
1. Enter the new Sales Location Name
2. Click "Add"

To edit the Sales Location, click on the "Edit" button next to the Sales Location name:
1. Edit the Sales Location Name
2. Click "Update"

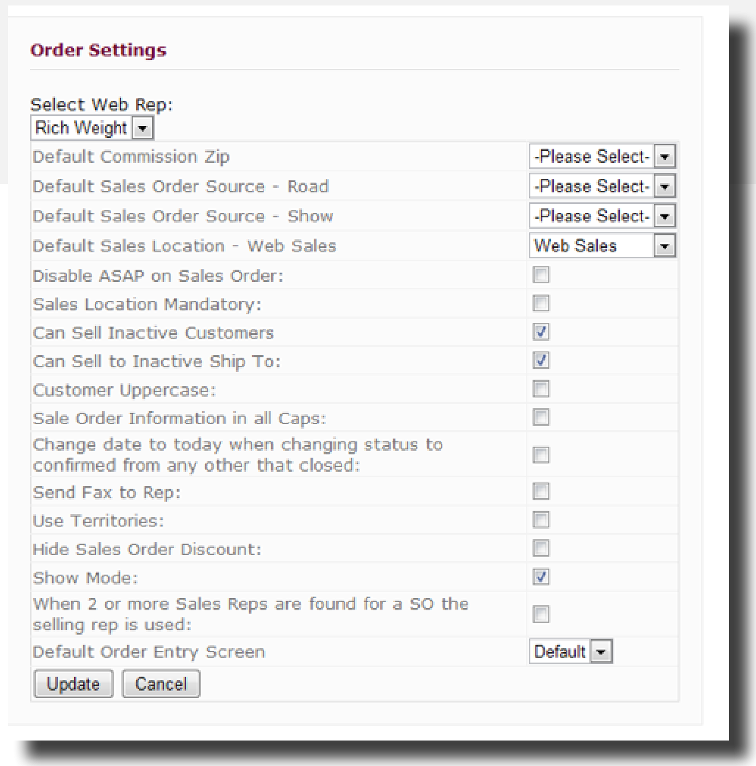


ORDER SETTINGS

Order Settings are system sales order rules that can be set based on your business needs.

The following are the Order Settings:

1. To enable a setting click on "Edit" at the bottom of the list
2. Insert a check box next to the setting.



Order Settings

Select Web Rep: Rich Weight

Default Commission Zip	-Please Select-
Default Sales Order Source - Road	-Please Select-
Default Sales Order Source - Show	-Please Select-
Default Sales Location - Web Sales	Web Sales
Disable ASAP on Sales Order:	☐
Sales Location Mandatory:	☐
Can Sell Inactive Customers	☑
Can Sell to Inactive Ship To:	☑
Customer Uppercase:	☐
Sale Order Information in all Caps:	☐
Change date to today when changing status to confirmed from any other that closed:	☐
Send Fax to Rep:	☐
Use Territories:	☐
Hide Sales Order Discount:	☐
Show Mode:	☑
When 2 or more Sales Reps are found for a SO the selling rep is used:	☐
Default Order Entry Screen	Default

Update Cancel

Disable ASAP on Sales Orders: This will not allow the end user to select ASAP as the sales order ship date. If this is enabled, the end user will be prompted when starting an order to enter a ship date greater than the date the order is being generated.

Sales Location is Mandatory: If this is enabled the user will not have the ability to save an order without selecting a sales location on the order. Default sales locations can be set on each machine that is used for order taking.

Can Sell Inactive Customers: If this is enabled the user will be allowed to view and select inactive customers when starting a new order.

Note: If an order is taken for an inactive customer the system will automatically re-activate the customer.

Can Sell to Inactive Ship To: If this is enabled the user will be allowed to view and select inactive ship to addresses when starting a new order.

Note: If an order is taken for an inactive ship to address the system will automatically re-active the ship to address.

Customer Uppercase: If this is enabled when a new customer is created the system will default to save all customer information in uppercase letters.

Sales Order Information in all Caps: If this is enabled when a new order is created the system will default to save all order information in uppercase letters.

Change Sales Order Date to Today when Changing the Order Status to Confirmed: If this is checked, the order date will change to the current date when the order is confirmed. Otherwise the order date will be the date the order was started.

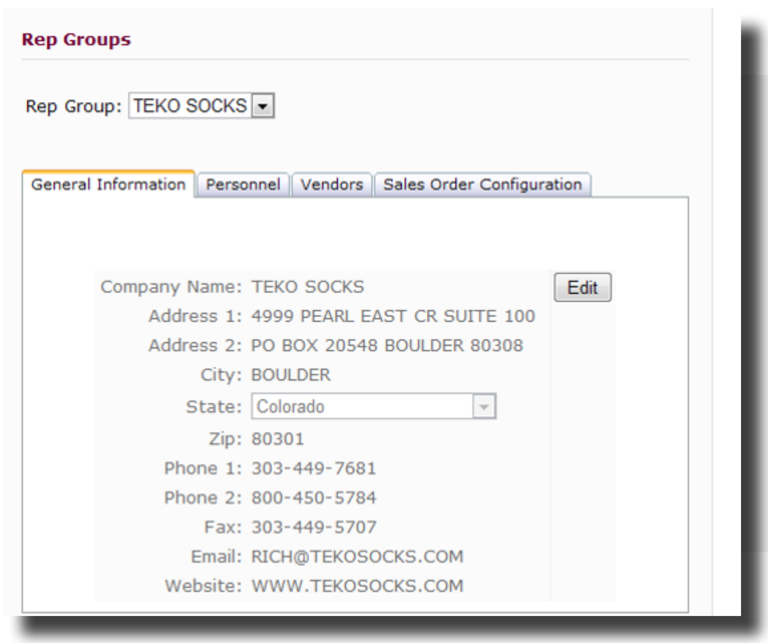
REP GROUP EDITOR

The Rep Group editor is used to identify what information displays on reports and sales order printouts. You can also quickly view a list of personnel and vendors assigned to each rep group.

The Rep Editor contains 4 tabs of information:

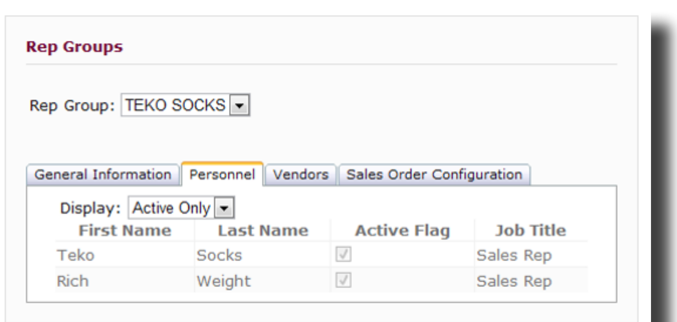
GENERAL INFORMATION

If you have multiple rep groups, you can select each rep group from the drop down and select the appropriate rep group to edit. The general information tab allows you to edit the main company information that will display on reports and sales orders printouts.



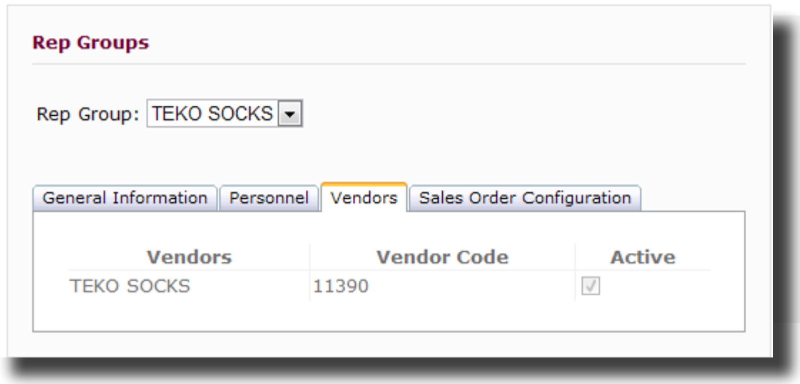
PERSONNEL

The Personnel tab displays a list of users that are assigned to the rep group. You will not have the ability to edit the personnel information here. To edit personnel information, go to the personnel editor located under the Permission Setup Menu.



VENDORS

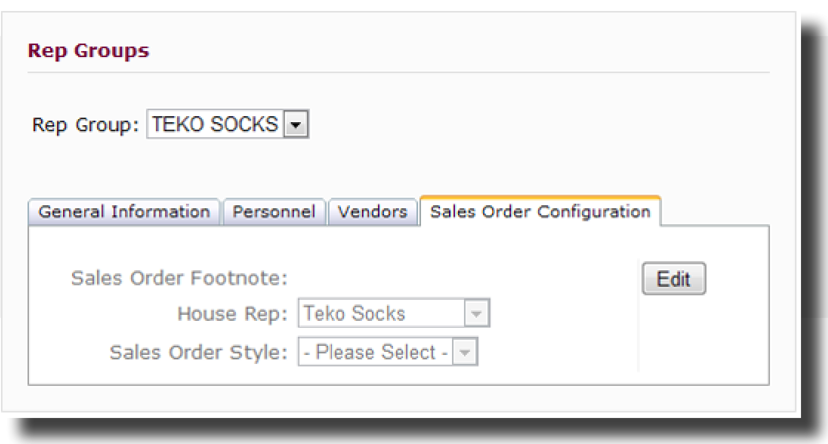
The vendors tab will display all vendors assigned to the rep group, and allow you to enter a vendor code for each rep group. The vendor code will print on sales orders and will be transmitted to the vendor on electronic orders.



SALES ORDER CONFIGURATION

The sales order configuration tab allows you to set a Sales Order Footnote, House Rep, and Sales Order Style for each rep group. This information will display on reports and sales order printouts.

NOTE: Each rep group will need to be set up individually and can have their own logos. Select a sales order style that matches the logo format. Vendors and personnel can be assigned to multiple rep groups.



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The Vendor menu allows you to edit all vendor(s) information as well as set system functions based on specific vendors. The Vendor menu contains 5 sections:

MAIN INFO & ORDER SETTINGS

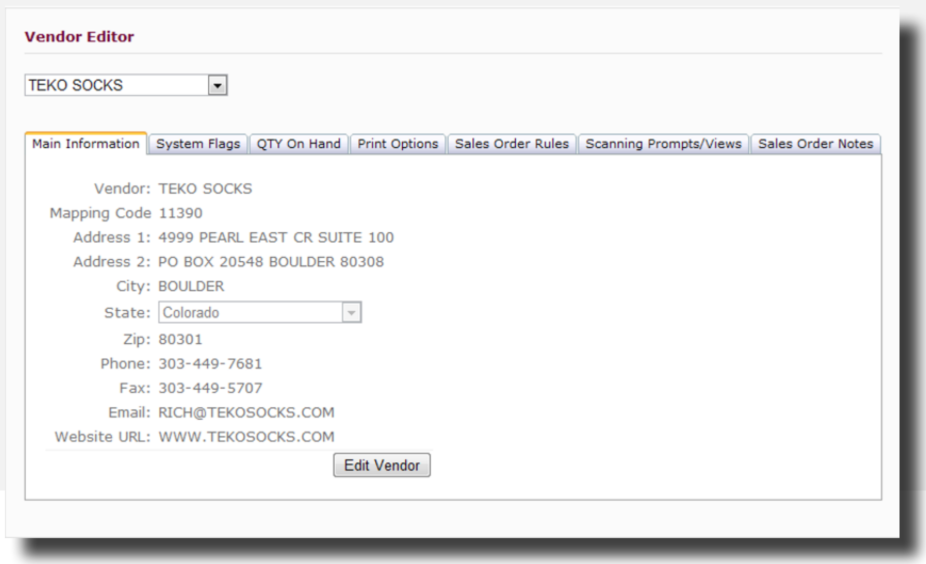
The vendor Main Information & Order Settings is where all general information about the vendor is setup. This information is very important to setup to insure the accuracy of orders and to help expedite the order process. There are several tabs under the Main Information & Order Settings; each one has important information.

MAIN INFORMATION

The main information tab contains the main address, phone, fax and email address of the vendor. This information will print on sales orders.

To edit vendor information:

1. Click the "Edit Vendor" button.
2. Complete information on the form
3. Click "Update"

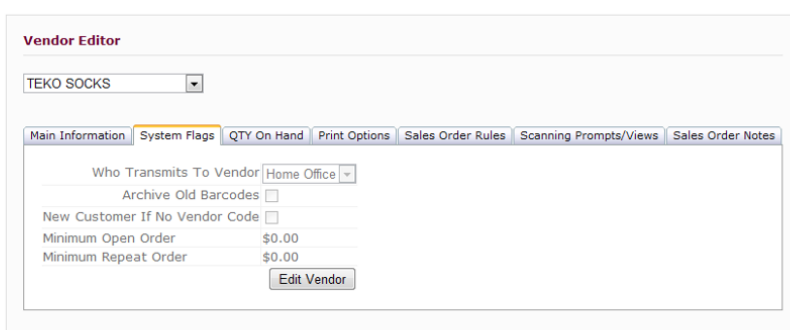


SYSTEM FLAGS

The system flags tab contains general system settings:

To update any system flags:

1. Click "Edit Vendor" button.
2. Set flags
3. Click "update"



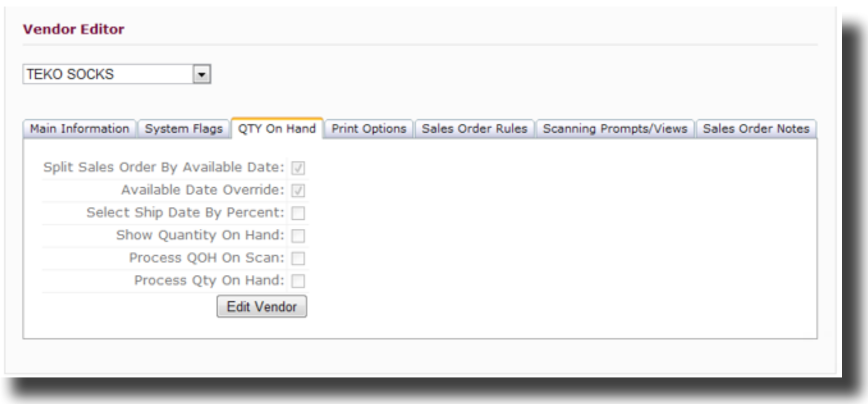
VENDOR

QUANTITY ON HAND

The Qty. on Hand tab contains settings if you are using the system to track qty. on hand for your products.

To update any Quantity on Hand flags:

1. Click "Edit Vendor" button.
2. Set flags
3. Click "Update"



Split Sales Order By Availability Date: If this is enabled orders will be split by product available date.

Available Date Override: If this is enabled the end user will be allowed to change the date an item is available when adding items to the order.

Select Ship Date By Percentage: If this is enabled the ship date on the order will be applied based on the majority available date of products on the order.

Show QOH Date: If this is enabled the quantity on hand availability dates will display in PocketElite.

Show Qty Onhand: If this is enabled the qty. on hand information will display when an item is added to the order.

Process QOH on Scan: If this is enabled the qty. on hand will decrement at the time an item is scanned.

NOTE: if this flag is checked, Find Products (F10) will not work for rep systems.

Process Qty OnHand: If this is enabled the qty. on hand will decrement at the time an order is confirmed.

WHO TRANSMITS TO SUPPLIER?

Home Office: If home office is selected all orders will be transmitted directly to the vendor from Reach or the Rep System.

Sales Rep: If sales rep is selected all orders will be transmitted to the vendor from each sales rep system. If you have an Reach site then all orders will go the sales rep local system and the sales rep will be responsible to confirm and send the orders to the vendor.

Archive Old Barcodes: If you are using the scanning functionality this setting will allow all barcodes to be stored. If a UPC number changes, both the old barcode and the new barcode will scan.

New customer if no vendor code: If this is enabled and the customer record does not have a vendor customer number the system will automatically mark the customer as "new" on the sales order.

Minimum Open Order: Minimum opening order is the total dollar amount that the vendor requires for a new customer to order. The minimum opening amount is for reference only on the rep system. On Reach, all order minimums must be met before an order can be completed.

Minimum Repeat Order: Minimum reorder is the total dollar amount that the vendor requires for an existing customer to reorder. The minimum reorder amount is for reference only on the rep system. On Reach, all order minimums must be met before an order can be completed.

PCI COMPLIANCE & SENDING ORDERS

IN THE UPCOMING FALL 2013 RELEASE OF VERSION 11, THE EMAIL ORDER ATTACHMENT OPTION WILL NO LONGER BE AVAILABLE DUE TO BRANDWISE COMPLIANCE WITH PCI REGULATIONS. WHEN OUR CLIENTS ACCEPT AN UPGRADE TO VERSION 11 THE ORDER SUBMISSION PROCESS WILL LOOK LIKE THIS...

After a credit card has been entered and validated, order takers or reps won't have to enter that credit card again. It will be kept on file for next time, accessible from your PC or iPad.

You will not be able to enter new credit cards without an internet connection. Existing cards will continue to be accepted with and without an internet connection.

Credit card information cannot be sent to suppliers using fax or PDF through DataXChange, effective with Version 11 upgrades.

Suppliers who want to retrieve credit card information from agencies on Version 11 will require electronic transmission through Brandwise Stream.

New credit cards cannot be entered using PocketPCs and the PocketElite applications, effective with Version 11 upgrades. Existing cards will continue to be accepted using PocketElite.

Click here for information on Brandwise Stream.

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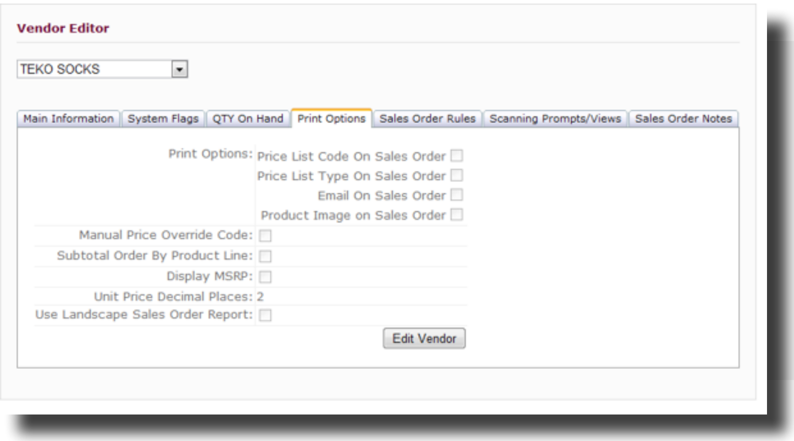
PRINT OPTIONS



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 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 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.

Print Product Image on Sales Order: If images from the vendor are loaded, select this option to print thumbnails on the sales order printout.

Manual Price Override Code: 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.

Unit Price Decimal Places: Insert the number of numbers after the decimal to display on the sales order printout. The system will allow up to 4 numbers after the decimal.

Display MSRP: Will display the MSRP on an order printout.

Use Landscape Sales Order Report: Prints orders in Landscape rather than Portrait style.

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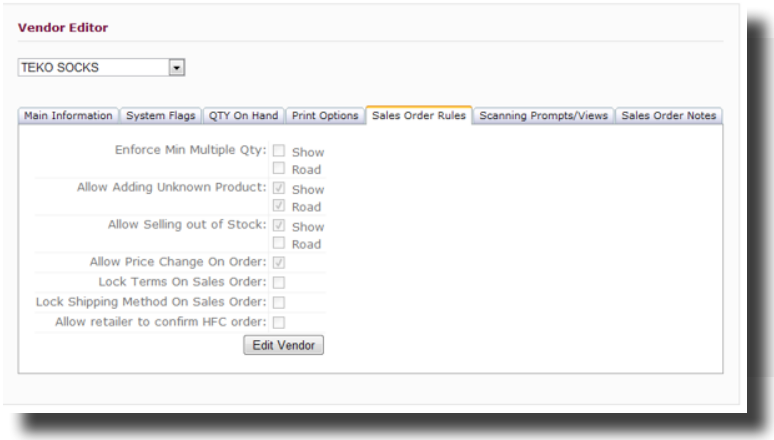
SALES ORDER RULES

The Sales Order Rules section allows settings for system defaults while end users are placing orders using ShowroomElite or Reach.

To set Sales Order Rules:

1. Click on "Edit Vendor"
2. Set Flags
3. Click "Update"



The following settings can be set for when a system is in show or road mode:

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

Allowing Adding Unknown Product: I f this is enabled, the end 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 master product file.

Allow Selling out of Stock Items: If this is enabled, the end user can sell items even if they are out of stock. This is only used if the vendor sends stock information in their product files.

Allow Price Change On Sales Order: If this is enabled the end user will have access change prices of products on the sales order.

Lock Terms on Sales Order: If this is enabled, the end user will not be allowed to override the terms assigned to the customer for the vendor on the sales order or the default term for a vendor on a sales order.

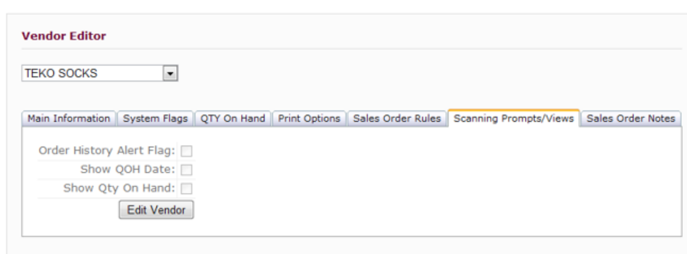
Lock Shipping Method on Sales Order: If this is enabled, the end user will not be allowed to override the shipping methods assigned to the customer for the vendor on the sales order.

Allow retailer to confirm HFC Order: If this is enabled and the sales rep sends an HFC order to the retailer to review on the Reach site the retailer will have the ability to confirm the order.

Scanning Prompts/Views:
The scanning prompts/views are settings for the PocketElite scanning application.

To edit Scanning prompts/views:

1. Click on "Edit Vendor"
2. Set Flags
3. Click "Update"



VENDOR

Order History Alert: If this is enabled the system can 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.

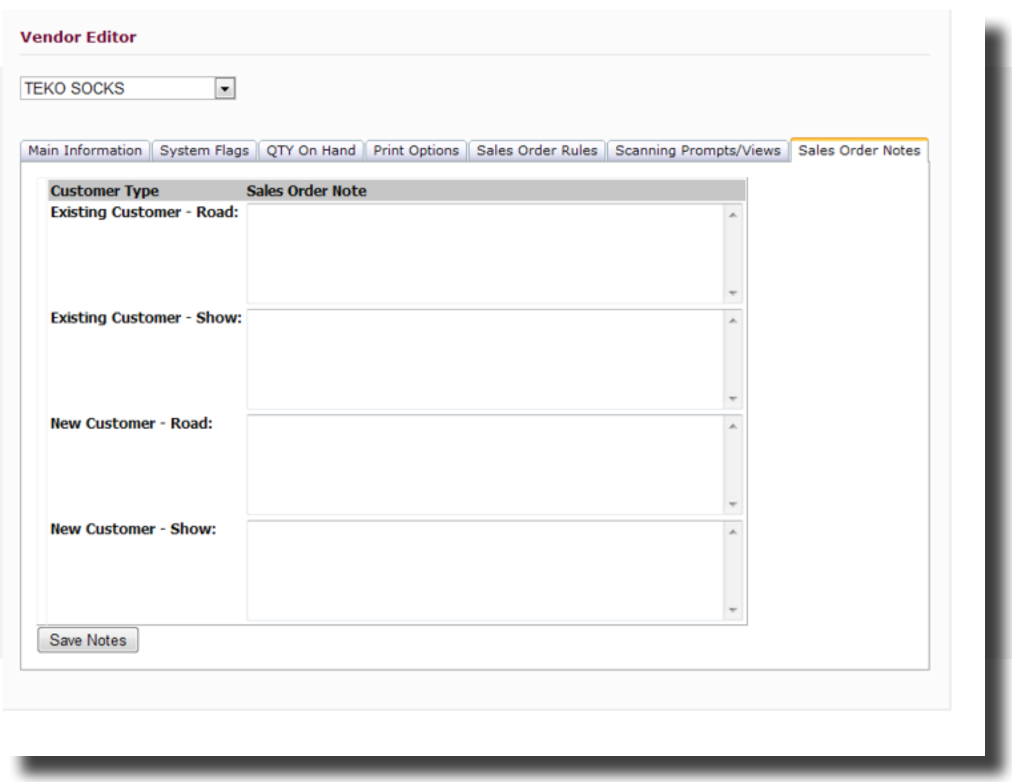
Show QOH Date: If this is enabled the quantity on hand availability dates will display in PocketElite.

Show QtyOnhand: If this is enabled the qty. on hand information will display when an item is added to the order.

Sales Order Notes: The Sales Order Notes section allows default notes to be set on sales orders for the vendor. These notes can be inserted based on Road/Show order types and by Exiting and New customers. These notes are added as Order Notes and will print on the order and these notes will also be sent to the vendor.

To setup a sales order note:

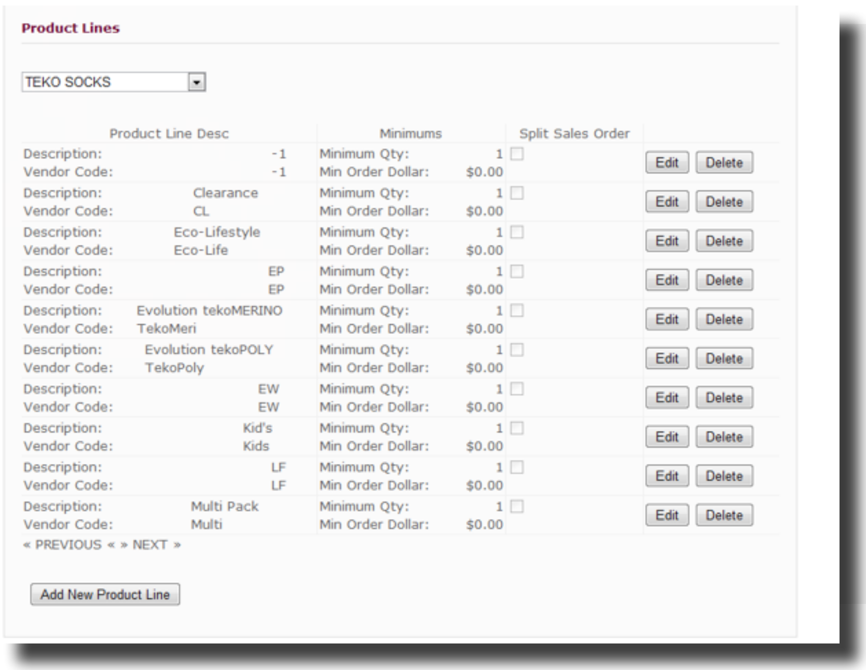
1. Type the note text in the Sales Order Note field.
2. Click "Save Notes"



PRODUCT LINE

The Product Line section allows users to set the option to break up vendor products by product line. The system can then be set to split orders by product line, subtotal orders by product line and setup minimum order and reorder amounts.

To add a new Product Line click on "Add New Product Line"



Product Line Desc		Minimums		Split Sales Order	
Description:	-1	Minimum Qty:	1	☐	Edit Delete
Vendor Code:	-1	Min Order Dollar:	$0.00		
Description:	Clearance	Minimum Qty:	1	☐	Edit Delete
Vendor Code:	CL	Min Order Dollar:	$0.00		
Description:	Eco-Lifestyle	Minimum Qty:	1	☐	Edit Delete
Vendor Code:	Eco-Life	Min Order Dollar:	$0.00		
Description:	EP	Minimum Qty:	1	☐	Edit Delete
Vendor Code:	EP	Min Order Dollar:	$0.00		
Description:	Evolution tekoMERINO	Minimum Qty:	1	☐	Edit Delete
Vendor Code:	TekoMeri	Min Order Dollar:	$0.00		
Description:	Evolution tekoPOLY	Minimum Qty:	1	☐	Edit Delete
Vendor Code:	TekoPoly	Min Order Dollar:	$0.00		
Description:	EW	Minimum Qty:	1	☐	Edit Delete
Vendor Code:	EW	Min Order Dollar:	$0.00		
Description:	Kid's	Minimum Qty:	1	☐	Edit Delete
Vendor Code:	Kids	Min Order Dollar:	$0.00		
Description:	LF	Minimum Qty:	1	☐	Edit Delete
Vendor Code:	LF	Min Order Dollar:	$0.00		
Description:	Multi Pack	Minimum Qty:	1	☐	Edit Delete
Vendor Code:	Multi	Min Order Dollar:	$0.00		

INSERT A PRODUCT LINE DESCRIPTION

Insert Product Line Code: (if vendor requires a Product Line code to be on the sales order)

Insert Min Quantity: If there is a min qty for each product line. This is for information that can only be displayed when completing an order.

Insert Minimum Order Dollar: If there is a min order dollar for the product line. This is for information only that can be displayed when completing an order.

Split Sales Order: Check if the vendor requires the orders to be split into separate orders by product line.

PAYMENT TERMS & SHIPPING METHODS

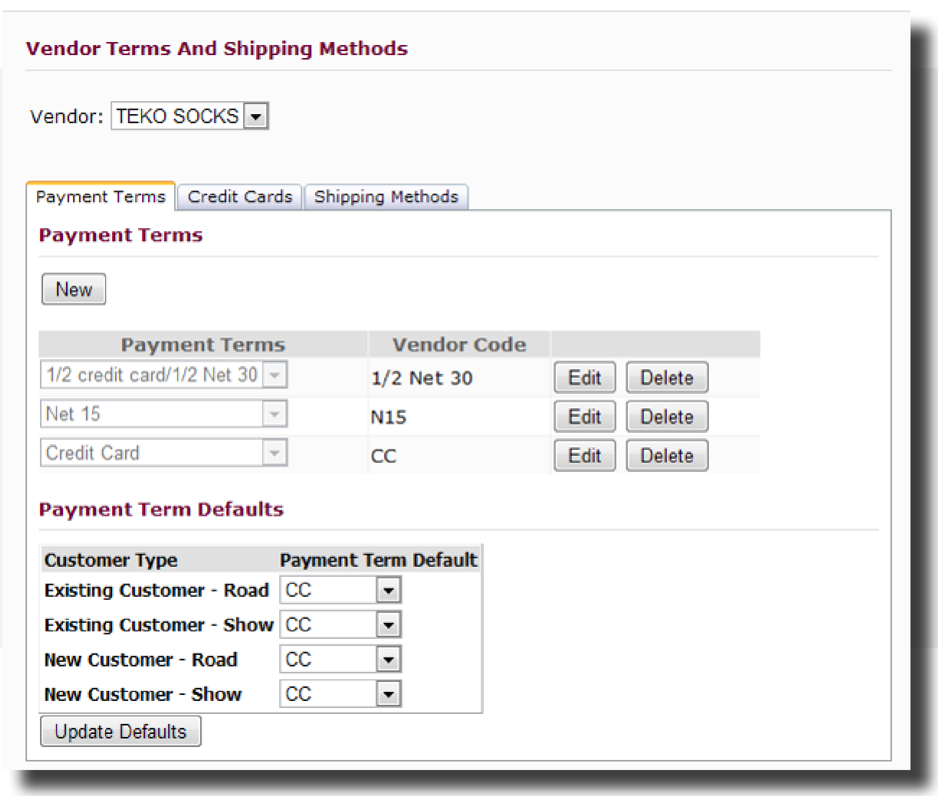
The payment terms & shipping method section allows the assignment of system payment terms & shipping methods to be assigned to each vendor. This section also allows a default payment term & shipping method to be defined.

PAYMENT TERMS

The payment terms tab allows the assignment of the system payment terms the vendor accepts. These payment terms will be available to the end user to apply to the vendor sales orders.

To assign a payment term to a vendor:
1. Click on "New"
2. Select the Payment Term from the drop down list
3. Enter Vendor Code if available
4. Click "Insert New Payment Term"

To set Payment Term Defaults for sales orders:
1. Select the appropriate default payment term from the drop down of each selection
2. Click "Update Defaults"



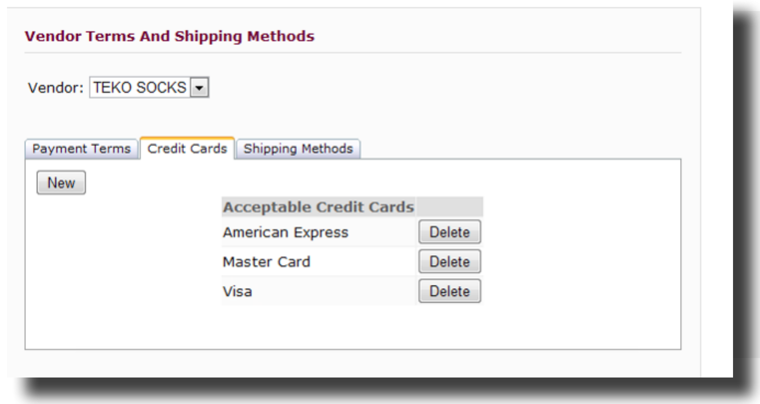
VENDOR

CREDIT CARDS

The credit card section allows the assignment of credit card types accepted by the vendor to be defined.

To setup credit card accepted by a vendor:

1. Click "Add Credit Card"
2. Select Credit Card type from drop down list
3. Click "Add Credit Card"
4. Repeat until all credit cards accepted by the vendor are setup.



SHIPPING METHODS

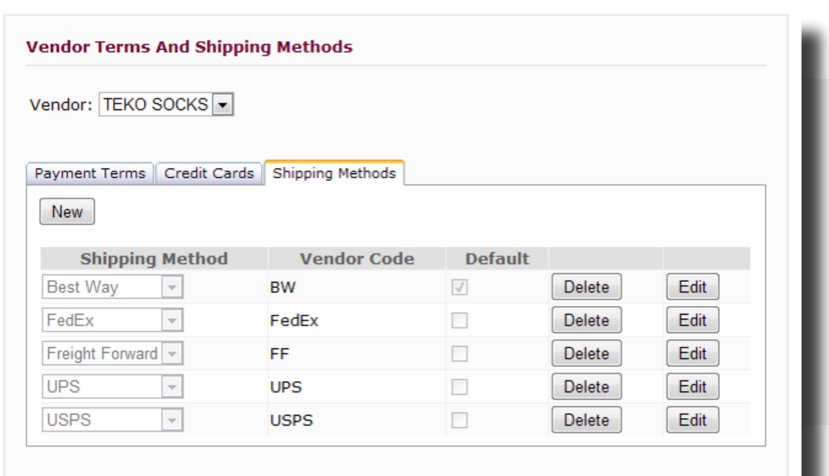
The shipping method tab allows the assignment of the system ship via's the vendor accepts. These ship via's will be available at the end user to apply to the vendor sales orders.

To assign a Shipping Method to a vendor:

1. Click on "New"
2. Select the Shipping Method from the drop down list
3. Insert the Vendor Code if available from the vendor
4. Click on "Add Shipping Method"

To set a default shipping method:

1. Click "edit" next to the default Shipping Method
2. Insert a "Check" under the default column click "Update"

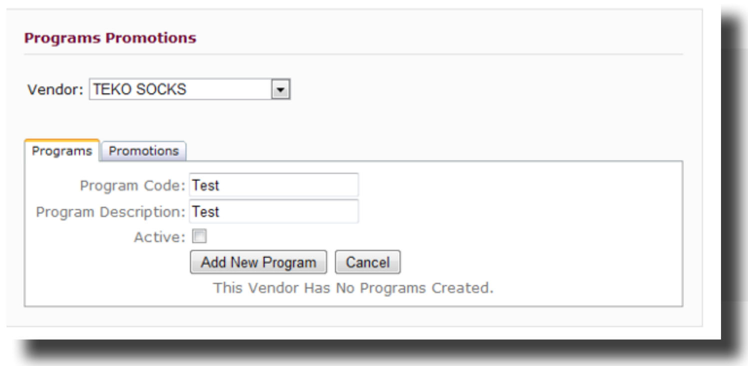


PROGRAMS AND PROMOTIONS

The Programs & Promotion section allows the setup of vendor programs and promotions to be available for selection on the vendor sales orders.

PROGRAMS

The Programs tab allows the setup of vendor programs. Vendor programs are available to select at the end of the order. Programs do not apply a discount or term to a sales order.



To add a Program:

1. Click on “Add New Program”
2. Complete the following information:

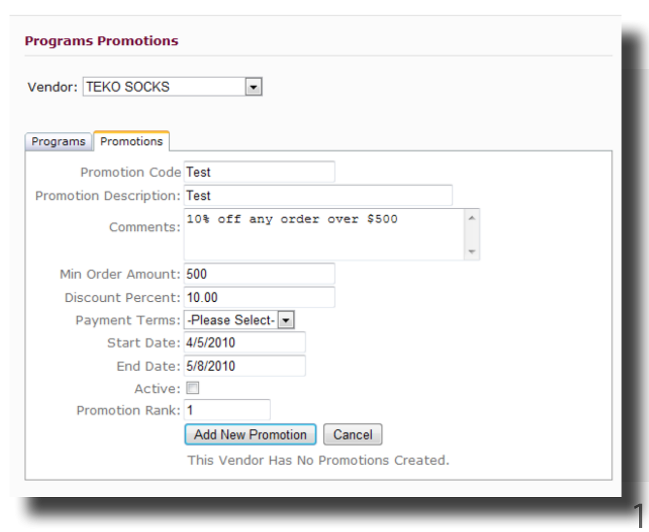
Program Code: The program code is used if the vendor requires the code on the sales order.

Program Description: Insert a Program Description, the description will print on the sales order if it is selected on the order.
Active: Check the active flag. Only active programs will be available to be selected on sales orders.

PROMOTIONS

The promotions tab allows the setup of vendor promotions. Vendor promotions can be setup to apply order discounts and/or order terms if an order meets a minimum requirement.

Promotion Code: This is the vendor to add a promotion:



1. Click on “Add New Promotion”.
2. Complete the information in the example on the right.

Promotion Code: code for the promotion.

Promotion Description: The promotion Description will display in the drop down available for the end user to select the promotion on the sales order.

Comments: The comments will display on the sales order in the sales order notes box.

VENDOR

Min Order Amount: Enter the min order amount if applicable. The promotion will not be applicable to the order unless it meets the amount entered. If there isn't a min amount then leave the field blank.

Discount Percent: The discount for the promotion. If a discount is entered then when the promotion is applied to the order the discount percent will be applied to the order total and display on the order printout.

Payment Terms: The payment term of the promotion if applicable. The payment term will then be applied to the order when selected on the sales order.

Start Date: Start date of the promotion.

End Date: End date of the promotion

Active: check if the promotion is available.

NOTE: Promotions will only display to select on the sales order if they are active and meet the start & end date criteria.

Promotion 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.
Click "Add New Promotion"

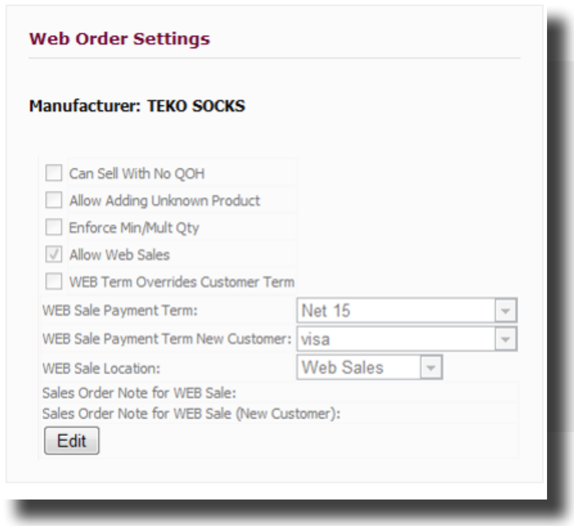
VENDOR

WEB

The web section allows setting of order rules for Reach orders.

To set Web Order Settings:

1. Click "Edit".
2. Apply the appropriate flags:



Can sell with no QOH: Allows the ability to sell products that have a quantity on hand of less than 1.

Allow Adding Unknown Product: Allows the end user to add a product not in the system.

Enforce Min/MultQty: Does not allow the end user to break the min/mult product quantities

Allow Web Sales: Allows your products to be available on the system Reach site.

Web Term Overrides Customer Term: If there are customer terms setup the Web term will override the term assigned to the customer.

Web Sale Payment Term: Default term for Reach orders.

Web Sale Payment Term New Customer: Default term for Reach orders for a new customer.

Web Sales Location: Default sales location for all Reach orders.

Sales Order Note for Web Sale: Note added to the sales order, when the order is written on Reach.

Sales Order Note for Web Sales (New Customer): Note added to the sales order, when the order is written on Reach for new customers.

SFA ADMIN GUIDE

PERMISSION SETUP

SFA

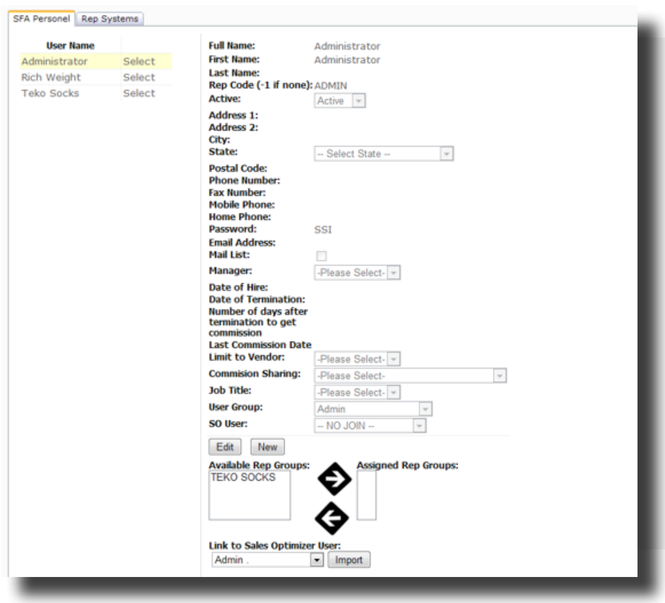
The permission setup section allows the setup and maintenance of all users and user permissions for the ShowroomElite/Play systems.

USER ADMIN

The user admin section is designed to setup the personnel of the system, and assign which license is associated with that personnel record.

SFA PERSONNEL

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.



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

Password: The password set on the personnel record is the password used to log into ShowroomElite.

Email Address: Email address is a required field.

Manager: A manager can be assigned to a user which will allow all the personnel sales data to be shared with the assigned manager.

Job Title: The job title describes how the user will use the system and if the user is entitled to commissions. Most users will be assigned the "sales rep" user role, as this is the role that can receive commissions.

NOTE: Different system access levels can be assigned based on the user group assignment and are not assigned based on the job title.

Administration: An administrator is user which will be the administrator of data or is a data entry person. User's setup as administration will not be paid commissions.

Manager: Manager is use only if a user needs ShowroomElite for reporting purposes only. If a sales manager also has assigned customers or a territory then their job title should be sales rep. See "Manager" assignment for assigning reps to a manager.

Personnel can be assigned a manager. The manager is then able to view and edit all of the personnel assigned to him/her.

SFA ADMIN GUIDE

PERMISSION SETUP

SFA

Order Taker: An order take is a user which is not assigned a territory of customers and only writes orders. The order taker can receive commissions based on the commission rules setup for the sharing rep. An order take 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 (see commission rule section for more details)

User Group: The user group assigned to the personnel record determines the access permissions of the user. See "Group Definitions" and "User Setup" for more on user permissions.

SO User: If Vision is being used, the SFA Personnel record must be matched up with the Vision User record. The SO User field will consist of all the Vision user records that are setup so that they can be mapped to the SFA User.

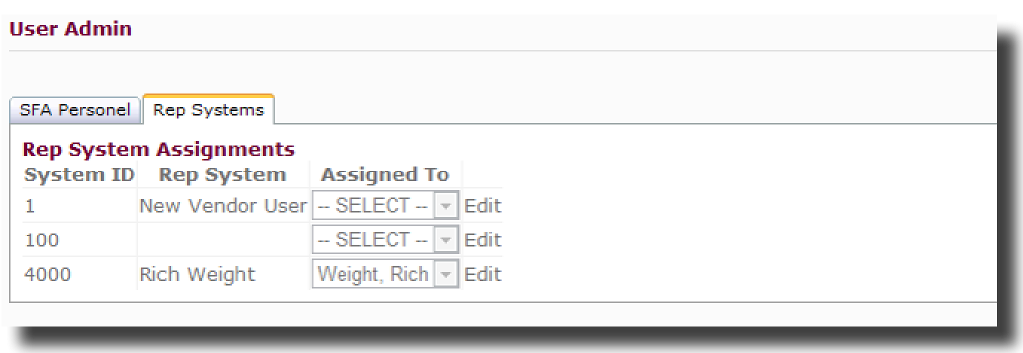
Rep Group: All personnel records need to be assigned to a rep group, even if there is only one rep group. Then a user can also be assigned a rep type per group for reporting purposes.

REP SYSTEMS

Once your personnel/reps are setup in the system, assign them to the appropriate system they will be using on the road.

To assign reps to their system:

1. Select the Rep Systems Tab
2. Click Edit next to the system to assign
3. Select a Rep Name from the dropdown for each system
4. Click Save Rep System Changes



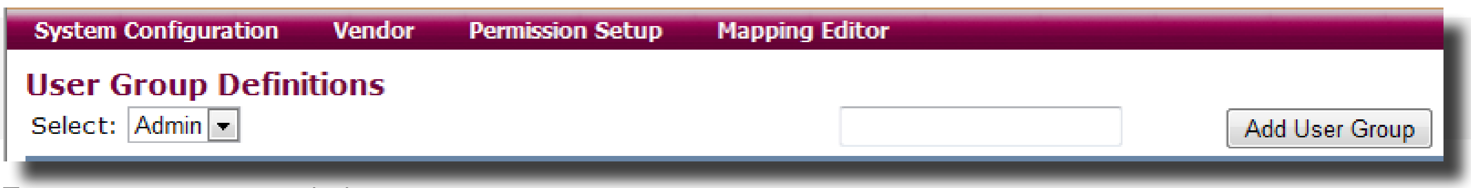
PERMISSION SETUP

GROUP DEFINITIONS

Personnel user permissions are all managed under the group definition part of the software. User permissions determine what the user has access to see in their local system and also what the user has ability to do in the system.

To add a new user group:

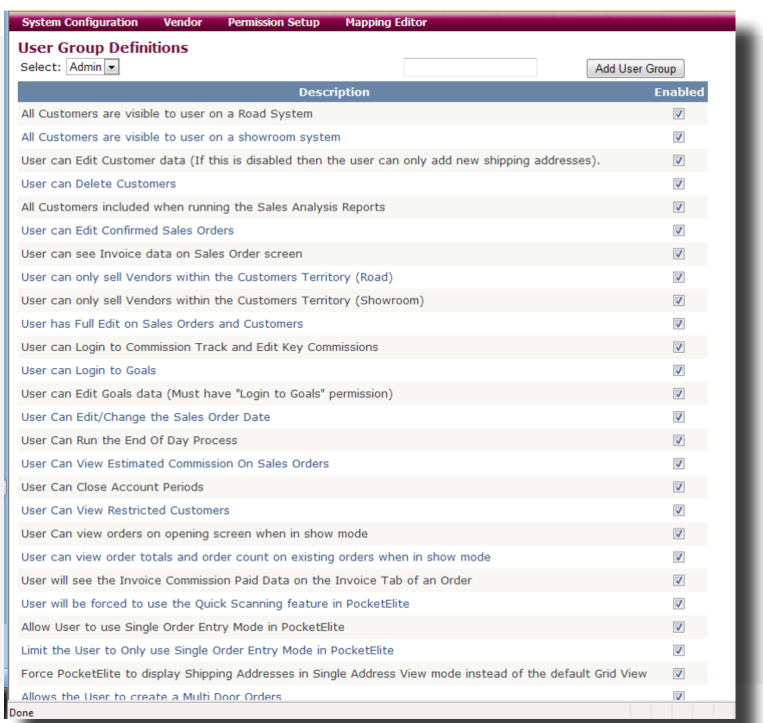
1. Type user group name in box
2. Click the "Add User Group"



To set user group permissions:

1. Select the user group from the drop-down list
2. Set each permission

User Group Definitions: The following are the user group permissions that can be set for each group:



Description	Enabled
All Customers are visible to user on a Road System	☑
All Customers are visible to user on a showroom system	☑
User can Edit Customer data (If this is disabled then the user can only add new shipping addresses).	☑
User can Delete Customers	☑
All Customers included when running the Sales Analysis Reports	☑
User can Edit Confirmed Sales Orders	☑
User can see Invoice data on Sales Order screen	☑
User can only sell Vendors within the Customers Territory (Road)	☑
User can only sell Vendors within the Customers Territory (Showroom)	☑
User has Full Edit on Sales Orders and Customers	☑
User can Login to Commission Track and Edit Key Commissions	☑
User can Login to Goals	☑
User can Edit Goals data (Must have "Login to Goals" permission)	☑
User Can Edit/Change the Sales Order Date	☑
User Can Run the End Of Day Process	☑
User Can View Estimated Commission On Sales Orders	☑
User Can Close Account Periods	☑
User Can View Restricted Customers	☑
User Can view orders on opening screen when in show mode	☑
User can view order totals and order count on existing orders when in show mode	☑
User will see the Invoice Commission Paid Data on the Invoice Tab of an Order	☑
User will be forced to use the Quick Scanning feature in PocketElite	☑
Allow User to use Single Order Entry Mode in PocketElite	☑
Limit the User to Only use Single Order Entry Mode in PocketElite	☑
Force PocketElite to display Shipping Addresses in Single Address View mode instead of the default Grid View	☑
Allows the User to create a Multi Door Orders	☑

PERMISSION SETUP

All customers are visible to user on a road system: When users login 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 users 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: billing & shipping addresses, phone, fax, email, contract, 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 a 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 the 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 orders after they have been confirmed

User can invoice data on sales order screens: This allows invoice data to be transferred to the user's system and they can see invoice data against an order using their local system on the road.

User can only sell vendors within the customer territory (road): This limits the vendors a user can see based on the territory setting 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 into the shows the are allowed to see all vendor info 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 application.

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: The is 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.

PERMISSION SETUP

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: The is 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 end of day process: This is a back office function and should not be turned on for reps.

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

Allow user to use Single Order Entry Mode in Pocket Elite: If this is enabled the user will have the option to write orders that will not split.

Limit the user to only use single order entry mode in Pocket Elite: If this is enabled the user will not have the ability to add any info to the order that will split it.

PocketEliteshows Shipping Addresses one at a time instead of the default Grid View: If this is enabled, there will only be one customer search screen in PocketElite instead of both a billing and shipping address search screen.

Allows user to create a Multi-Door Order: If this is enabled, the user will be allowed to create multi-door orders.

Allow the user to make any click list viewable by all reps also allows user to sell all private lists: If this is enabled, the user will have the ability to setup shared click list and view all user's click lists.

NOTE: Each user group must be setup before you can assign personnel to the group. Most user groups are created during the install process and don't have to be altered. However, all new users, once created in personnel, need to be assigned to a user group.

SFA ADMIN GUIDE

PERMISSION SETUP

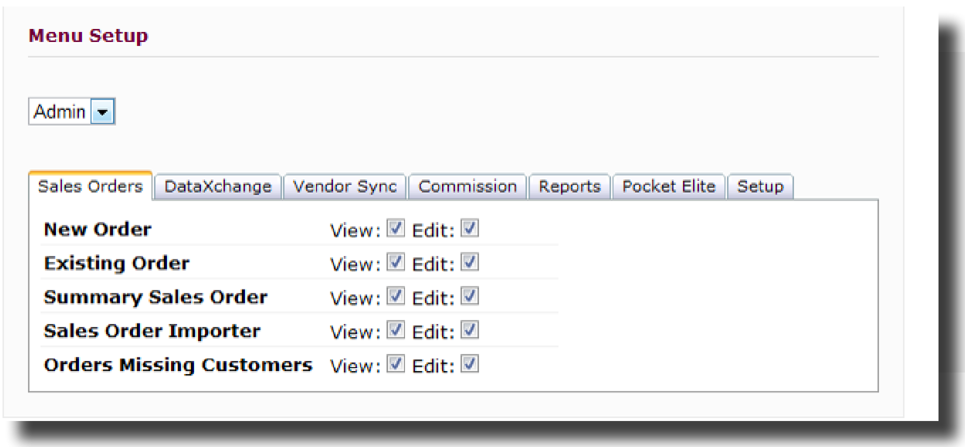
SFA

MENU SETUP

The menu setup will allow the setup of which menu items are available to the user group. Several of the menu items can be set to Edit or View only permissions.

The Menus setup consists of several tabs, which are the different menu items within ShowroomElite. If no permissions are turned on for a menu item then the menu will not display for the user group and users assigned to the user group will not be able to access the screens.

SALES ORDER



New Order: View and Edit should be checked if users in this group will be writing orders.

Existing Order: View and Edit should be checked if users in this group will be writing and\or editing orders.

Summary Sales Order: View writes will enable users to see summary orders in their territory, edit writes will allow users to create summary sales orders. View and Edit are both turned on for key account reps, typically.

Sales Order Importer: View and Edit writes should be turned on for Admin users only, and only when the Sales Order Importer functionality has been setup by Brandwise.

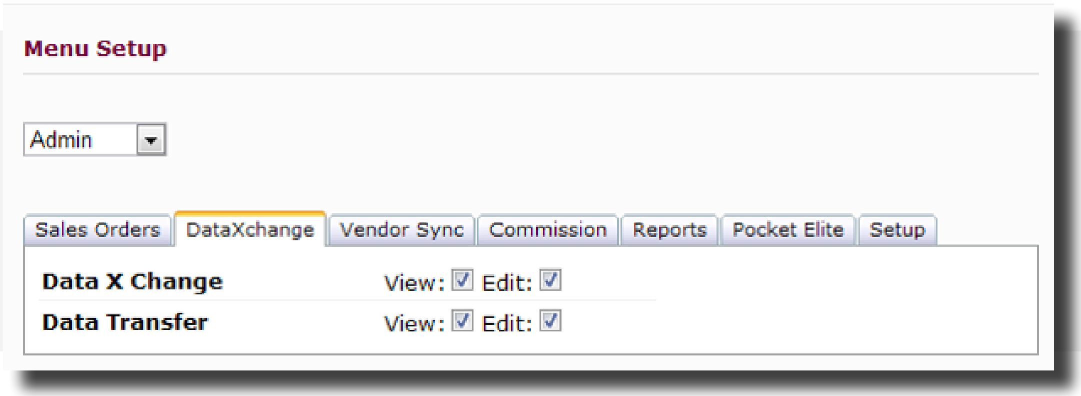
Orders Missing Customers: View and Edit writes should be granted to administration only and can be used to find orders that do not have a customer assigned. When a customer is not assigned on a sales order, the sales order can be difficult to locate in the system.

SFA ADMIN GUIDE

PERMISSION SETUP

SFA

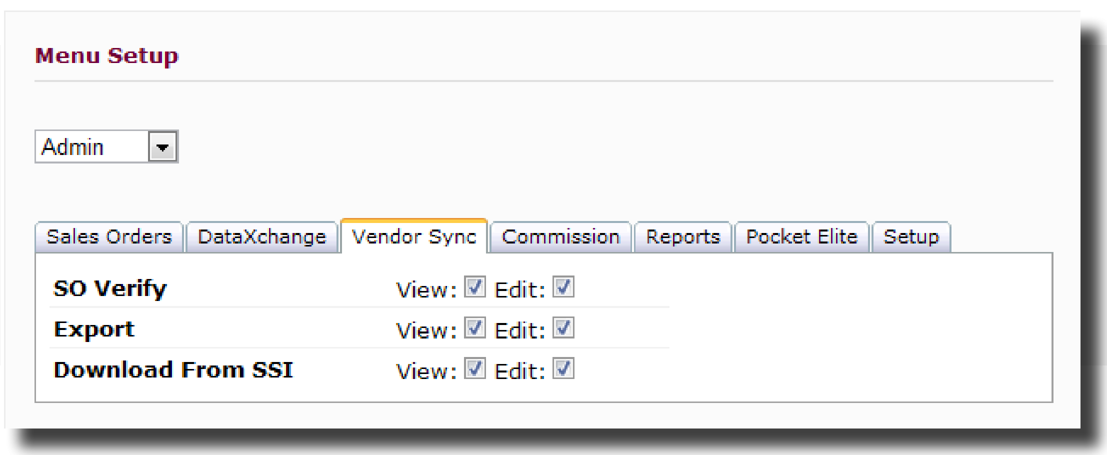
DATAXCHANGE



Data X Change: View and Edit writes should be granted to any user that will send orders to the vendor and/or the customer via fax or email.

Data Transfer: Any user that has a system installed should be assigned to a group that has the ability to View and Edit the Data Transfer screen.

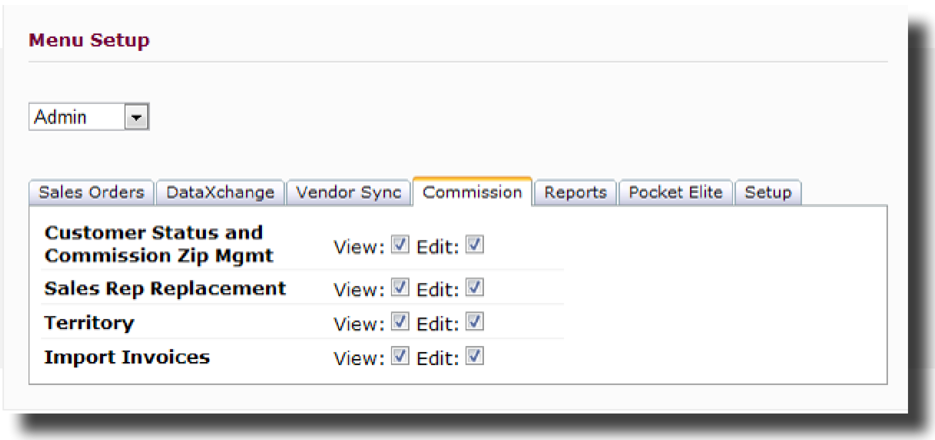
VENDOR SYNC



NOTE: It is not necessary to set any of these permissions as they do not pertain to this system.

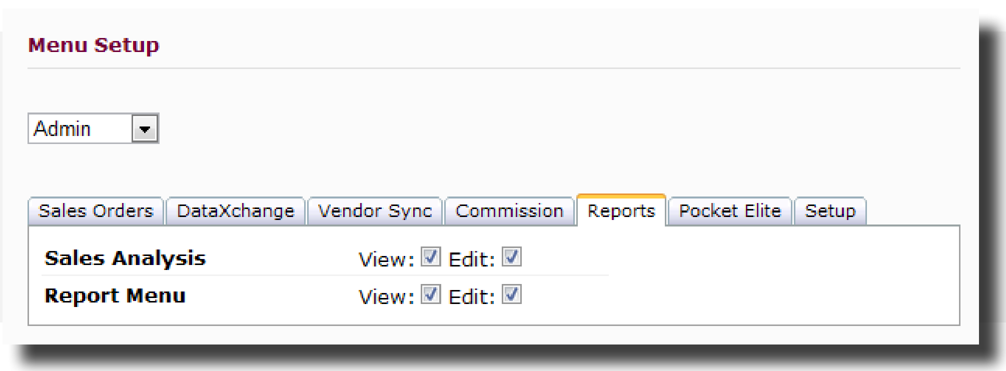
PERMISSION SETUP

COMMISSION



NOTE: It is not necessary to set any of these permissions as they do not pertain to this system.

REPORTS

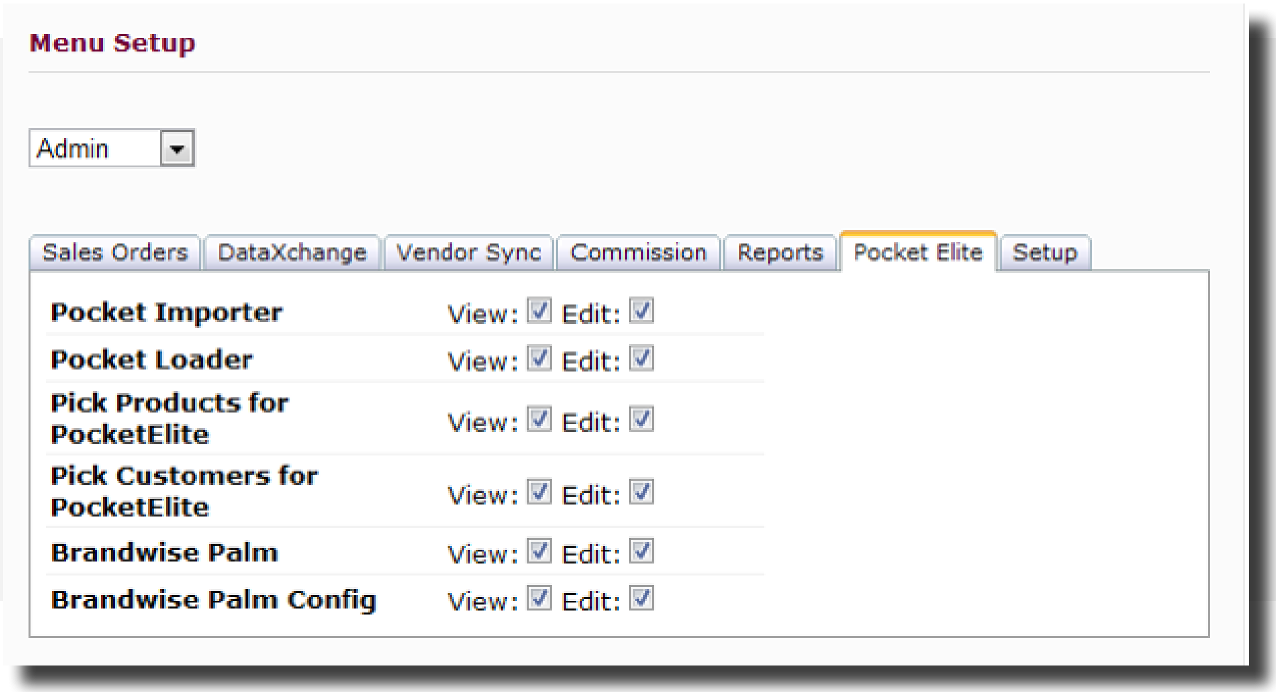


Sales Analysis: View and Edit writes should be granted to any user that will run reports. Reps are limited to reporting within their own territory, unless otherwise specified in the permissions.

Report Menu: View and Edit writes should be granted to any user that will run reports. Reps are limited to reporting within their own territory, unless otherwise specified in the permissions.

PERMISSION SETUP

POCKETELITE



NOTE: It is not necessary to set any of these permissions as they do not pertain to this system.

Pocket Importer: This screen is used to pull orders off of a Palm device with either PocketElite or BWPalm.

Pocket Loader: This screen is used to load data such as products and customers to a Palm device for PocketElite.

Pick Products for PocketElite: This screen is used to specify the products that will get loaded to a Palm device via the Pocket Loader.

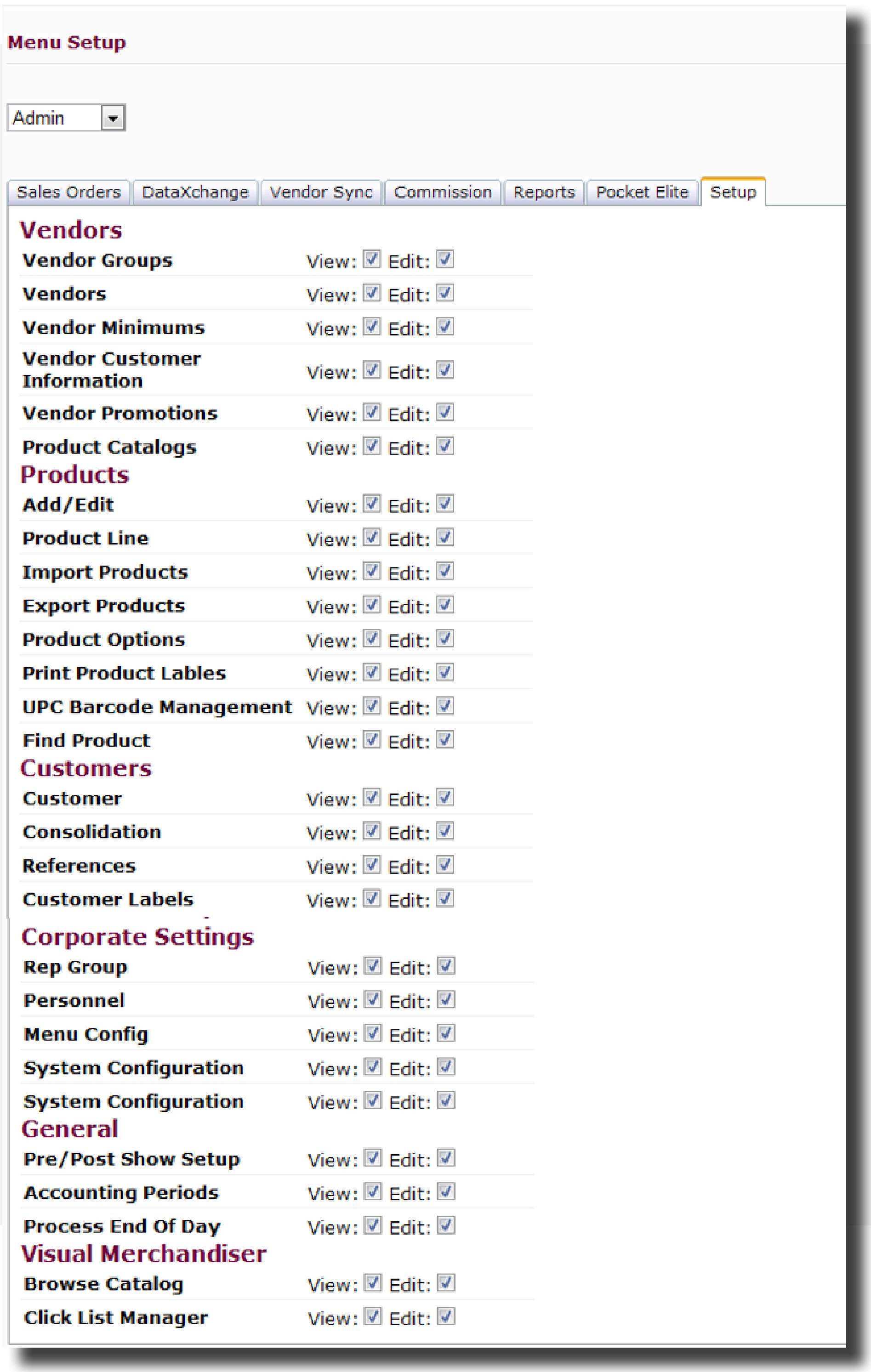
Pick Customer for PocketElite: This screen is used to specify the customers that will get loaded to a Palm device via the Pocket Loader.

BrandwisePalm: This permission is used to specify that users will be using BWPalms opposed to PocketElite on a Palm Device.

BrandwisePalm Config: This permission enables the use of BWPalm Config and is necessary to sync orders from a Palm device if a user is scanning with BWPalm.

PERMISSION SETUP

SETUP



Menu Setup

Admin

Sales Orders | DataXchange | Vendor Sync | Commission | Reports | Pocket Elite | Setup

Vendors		
Vendor Groups	View: ☑	Edit: ☑
Vendors	View: ☑	Edit: ☑
Vendor Minimums	View: ☑	Edit: ☑
Vendor Customer Information	View: ☑	Edit: ☑
Vendor Promotions	View: ☑	Edit: ☑
Product Catalogs	View: ☑	Edit: ☑
Products		
Add/Edit	View: ☑	Edit: ☑
Product Line	View: ☑	Edit: ☑
Import Products	View: ☑	Edit: ☑
Export Products	View: ☑	Edit: ☑
Product Options	View: ☑	Edit: ☑
Print Product Lables	View: ☑	Edit: ☑
UPC Barcode Management	View: ☑	Edit: ☑
Find Product	View: ☑	Edit: ☑
Customers		
Customer	View: ☑	Edit: ☑
Consolidation	View: ☑	Edit: ☑
References	View: ☑	Edit: ☑
Customer Labels	View: ☑	Edit: ☑
Corporate Settings		
Rep Group	View: ☑	Edit: ☑
Personnel	View: ☑	Edit: ☑
Menu Config	View: ☑	Edit: ☑
System Configuration	View: ☑	Edit: ☑
System Configuration	View: ☑	Edit: ☑
General		
Pre/Post Show Setup	View: ☑	Edit: ☑
Accounting Periods	View: ☑	Edit: ☑
Process End Of Day	View: ☑	Edit: ☑
Visual Merchandiser		
Browse Catalog	View: ☑	Edit: ☑
Click List Manager	View: ☑	Edit: ☑

PERMISSION SETUP

VENDORS

Vendor Groups: Reps typically do not receive view or edit writes for this permission. Select view or edit to give users the ability to see or edit vendor groups.

Vendors: Reps can typically view but not edit the Vendor Record. This permission will allow users to see\edit information such as Vendor Name, fax number and other vendor contact info.

Vendor Minimums: This permission is used to give users the ability to open a screen that lists all vendors and their order minimums. Order minimums are displayed when finishing an order regardless of how this setting is set.

Vendor Customer Information: This permission allows users to see\edit a list of customers and their related vendor information such as default terms for a vendor or vendor account numbers.

Vendor Promotions: This permission will allow users to see\edit Vendor Promotions. Reps should not have access to this screen. Reps are able to run promotion reports from the Report Menu.

Product Catalogs: This permission will allow users to see\edit vendor catalogs. Catalogs built on Rep Systems are not transferable to other systems. Catalogs can be used to print product labels in the same order as the catalog.

PRODUCTS

Add/Edit: This screen is used to view the current product database. With edit permissions, users can add a product to the product database, but products added will be removed with the next data transfer. It is recommended that only show managers are able to have edit rights on this screen.

Product Line: This screen is used to view current product lines. The only way to edit or assign products to a product line is within the product import file.

Import Products: This screen is used to import products into the Product Database. Only administrators\showroom managers should be able to see or edit this screen. Any products imported will be purged on the next data transfer.

Export Products: This screen is used to create an excel line list. Edit permissions do not pertain to this screen.

Product Options: This screen is used for setting up product options and its permissions are not applicable to this system.

Print Product Labels: This screen is used to print product labels and should be granted visibility to anyone whom will be scanning within the system.

UPC Barcode Management: This screen is used to verify product UPCs. This screen should only be granted visibility to administrative personnel.

PERMISSION SETUP

CUSTOMERS

Customer: View and Edit rights should be granted to all personnel to see and edit the customer record. The level of permissions for editing the customer record can be further delineated via the User Group Definitions.

Consolidation: This screen is used to clean up duplicated customer and\or customer shipping records. View and Edit rights should only be granted to administrative personnel.

References: If this system will process\store credit information for each customer than View and Edit writes should be given to all personnel.

Customer Labels: View and Edit rights should be granted to personnel that need to create customer lists in excel.

COPRPORATE SETTINGS

Rep Group: Only administrators should be able to view and edit the rep group information. This is where company contact info and sales order foot notes are added to the system.

Personnel: Anyone that can view\edit this screen will have access to all personnel system passwords. Only administrators should be able to even see this screen.

Menu Config: Only administrative personnel should have rights to see and edit this screen, it pertains to the user system permissions.

System Configuration: Only administrative personnel need access to this screen.

Local Settings: All users that will have a system assigned to them will need rights to View and Edit this screen.

GENERAL

Pre/Post Show Setup: This permission should be given to showroom mangers and is used to go into or come out of Show Mode.

Accounting Periods: This permission does not pertain to this system.

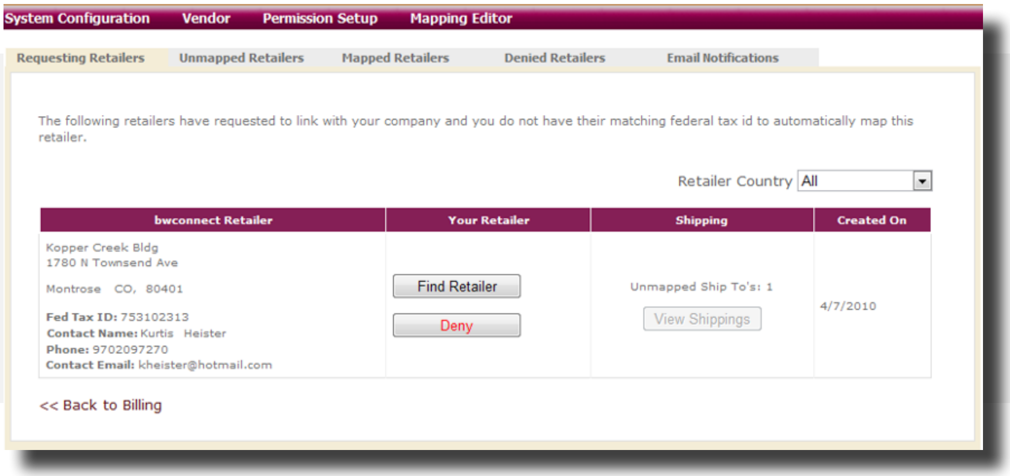
PLAY FOR PC

Browse Catalog: This permission should be granted to users when Play for PC is incorporated into this system and it is desired to allow users to browse the catalog.

Click List Manager: This permission should be granted to users when Play for PC is incorporated into this system and it is desired to allow users to create click lists.

MAPPING EDITOR

The mapping editor is only used for Reach sites. New customer approval is managed under the mapping editor menu.



Requesting Retailers: This is where administrators go to approve a requesting retailer.

To approve a requesting retailer:

1. Click "Find Retailer".
2. Select a matching retailer on the right and click Map Customer.
3. If the retailer is not displayed on the right, it is possible to search for an existing retailer to map to by clicking, Search For Customer.
4. If the retailer is new to the system, click Create New Customer.
5. Once the billing record is mapped, it is necessary to map the shipping record as well.
6. Click View Shippings to map the shipping record.
7. If multiple shipping records are available, click Find Shipping next to the record to be mapped now.
8. Select a matching shipping record on the right and click Map Shipping.
9. If the retailer is new to the system, click Create New Shipping.

Note: When searching customer shipping records, the system limits the shipping records returned to shipping records that are associated with the billing record that has already been mapped.

To Deny a requesting retailer:

1. Click Deny next to the retailer that will be denied access to the Reach site.

Unmapped Retailers: Any retailers that were approved to shop the site and then were later unmapped will display here. Simply remap the customer to grant them access to the Reach site once again.

Mapped Retailers: Any retailers that are approved to shop the Reach site will display here. To remove their ability to shop the Reach site, click Clear Mapping.

Denied Retailers: Any retailers that were denied access to the Reach site will display here. Retailers that have been denied access cannot gain access to the Reach site.

Email Notifications: This screen is used to set the email of the administrator that will receive notifications.

STAY INFORMED!

SFA

EMAIL NEWS

- Presentation & Order Entry: Play
- Online Retailer Ordering: Reach
- Sales & Territory Reporting: Vision
- General Brandwise News

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ADDITIONAL RESOURCES

SFA

Brandwise makes it easy so you can sell more. You'll love our electronic order submission, online and mobile catalogs, and sales reporting tools for managers and sales reps.

All Brandwise solutions work together so everyone in your organization gets the tools and information they need to make selling easier.

CONTACT BRANDWISE

12596 W. Bayaud Ave.
Suite 100
Lakewood, CO 80228

1 877 435 3225

www.brandwise.com

SCHEDULE A DEMO

877-435-3225 x2

sales@brandwise.com

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