



RESOLV STYLE

**USER MANUAL
Version 10.0**

**PRESENTED BY
VISTAVU SOLUTIONS**



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SAP Business One Integration

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**RESOLV STYLE
USER GUIDE**

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Introduction

Do you buy and sell products that come in a variety of sizes and colors? Do your Customer Service Reps need to enter orders quickly, while on the phone? **Resolv Style** provides a quicker, easier way to enter items on sales and purchasing documents by means of a style grid. Each part number and color can be entered on a single line, with all of the required sizes. Operators can quickly quote prices, recap the order, verify quantities, and check to see if all items are available for shipment – all from a single screen! The order is then transferred into a standard SAP Business One Sales Order or Purchase Order document with the click of a button.

Resolv Style is also used in Inventory Transfers, Inventory Transfer Requests, Goods Issue and Goods Receipts.

Note: Although this manual uses references and terminology relating to the clothing industry, **Resolv Style** is suitable for companies selling many types of products. The program is adaptable to any items that are available in a range of attributes. For example:

Fastener products that are sold in a range of sizes, finishes, thread types, etc.
(screws, washers, etc.)

Plant nursery products that are sold by species, variety, and color (trees, flowers, etc.)

Building materials that are sold by material type and color (roofing tiles, siding, etc.)

Summary of Features

Style Entry

From the Sales Quotations, Sales Order, Purchase Order Screen, Inventory Transfers, Inventory Transfer Requests, Goods Issue and Goods Receipt, tab into the Style Entry Matrix
Enter each style/color on a single line, then enter quantities for all desired sizes
Total quantity and value for each line is shown
Total quantity for each size is shown

Pricing (Sales Only)

See prices for all valid sizes of each style/color
Instant quote to customer on phone
Seasonal "Early Buy" pricing options

Availability (Sales Only)

See available quantity of all valid sizes of each style/color
Instant verification for customer on phone

Detail

Breakout list of all ordered styles by color and size
Recap for customer on phone

Order History (Sales Only)

Lists all items previously purchased by customer
Drill-down to prior orders

Item Check (Sales Only)

Before exiting screen, verify that items are available for expected ship date
Change delivery date if necessary – system shows when item is due into stock

Transfer to Sales/Purchase Order

Items are transferred to the Business One Sales Order or Purchase Order document
Each style/color/size is on a separate line

Setups

There are a few setup screens that are necessary in order to use the features of *Resolv Style*.

Preparation

Before making any entries in the system, you should give careful thought to the structure of your products. Determine what attributes will be used to describe different variations of each product.

Note: *Not all items will have the same attributes.* Here are some examples:

Shirts: style, color, size

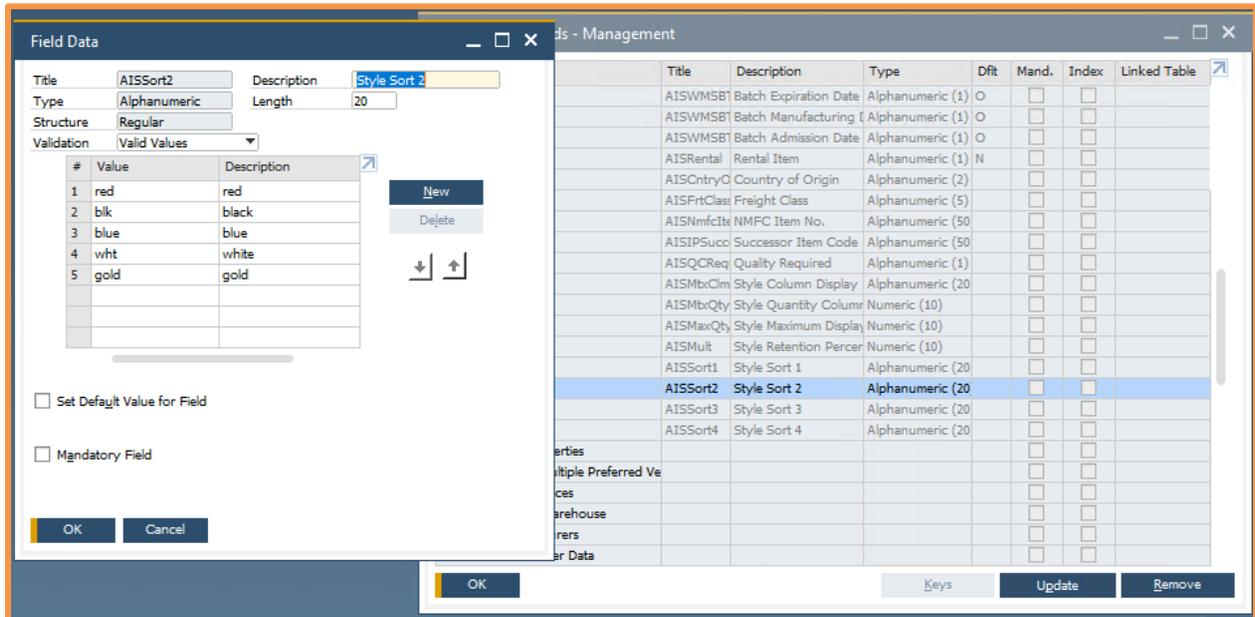
Pants: style, color, length, size

Caps: style, color

Second, determine which attribute will be used for entering quantities. Most often this will be the size. For example, you will enter the quantity of each size of style 1234 red shirts. In the case of caps, as shown above, all caps would have a single size.

Next, assign User-Defined Fields (UDF's) on the Item Master table for each attribute. The system will include pre-defined fields designated: AISSort1, AISSort2, AISSort3, and AISSort4. These may be used for the style attributes, or you may create your own UDF's for this purpose. Be sure that the display name of the attribute is easily understood by the users. You may enter valid values to ensure that correct information is entered consistently in the fields. For example, to avoid multiple spellings and abbreviations of the word "black", enter "BLK" as a valid value.

The user-defined fields are defined in *Tools > Customization Tools > User-Defined Fields – Management*. An example is shown below:



Your support consultant will be able to assist you in defining and entering the UDF's.

Note: *It is not necessary to assign a UDF for the size or other quantity attribute.*

Finally, it is necessary to ensure that your Item Master contains a separate item code for each combination of attributes. Thus, item 1234redXL would be style 1234 shirt, red, extra-large, and item 1234red2X would be style 1234 shirt, red, size 2X. The actual format of the item code may be whatever you wish; it is simply necessary to have a different item code for each combination of style, color, and size that is included in your inventory.

Style Defaults Entry

Administration > Resolv Setup > Resolv Style > Style Defaults

The Style Defaults Entry screen is used to set the formats and other preferences for the Style Matrix. It consists of three tabs.

Form Layout Tab

This section determines which viewing panes will be visible in the Style Matrix, and what they will be called. Note that you may set any of the panes to “Not Used”, and it will not be visible or available to users. The Pane Level would be changed to ‘0’ (not used).

Use Matrix in Sales Quotations

Check this box if you wish to use the Style Matrix when entering Sales Quotations.

Automatically Start Style

Check this box if you want Style to automatically open when you press tab on the Item field on the Sales Quotation instead of prompting the user to select Item or Style.

<i>Use Matrix in Sales Orders</i>	Check this box if you wish to use the Style Matrix when entering Sales Orders.
<i>Automatically Start Style</i>	Check this box if you want Style to automatically open when you press tab on the Item field on the Sales Order instead of prompting the user to select Item or Style.
<i>Use Matrix in Purchase Orders</i>	Check this box if you wish to use the Style Matrix when entering Purchase Orders.
<i>Automatically Start Style</i>	Check this box if you want Style to automatically open when you press tab on the Item field on the Purchase Order instead of prompting the user to select Item or Style.
<i>Use Matrix in Inventory Transfer</i>	Check this box if you wish to use the Style Matrix when entering Inventory Transfers.
<i>Automatically Start Style</i>	Check this box if you want Style to automatically open when you press tab on the Item field on the Inventory Transfers instead of prompting the user to select Item or Style.
<i>Use Matrix in Inventory Transfer Requests</i>	Check this box if you wish to use the Style Matrix when entering Inventory Transfer Requests.
<i>Automatically Start Style</i>	Check this box if you want Style to automatically open when you press tab on the Item field on the Inventory Transfer Requests instead of prompting the user to select Item or Style.
<i>Use Matrix in Goods Issues</i>	Check this box if you wish to use the Style Matrix when entering Goods Issues.
<i>Automatically Start Style</i>	Check this box if you want Style to automatically open when you press tab on the Item field on the Goods Issues instead of prompting the user to select Item or Style.
<i>Use Matrix in Goods Receipt</i>	Check this box if you wish to use the Style Matrix when entering Goods Receipt.

Automatically Start Style Check this box if you want Style to automatically open when you press tab on the Item field on the Goods Receipts instead of prompting the user to select Item or Style.

Use Item Availability Check Check this box if you wish to utilize the Item Availability Check feature during the Matrix entry procedure. This feature allows you to verify that items are not duplicated on the order, and that all items will be available by the specified delivery date. This feature is only available in Sales Orders.

Require Availability Check Check this box if the Item Availability Check will be required for each order, before exiting from the Matrix.

The following options relate to the five possible tabs, or panes, in the Matrix screen. You may determine which ones will be visible to the users, and in what sequence.

Item Entry Pane Level Select the sequence number (from 1 to 5) for the pane on which the user enters the items for the sales order. You may also select 0 – Not Used.

Entry Pane Title Enter the title to display on the item entry pane.

Price Display Pane Level Select the sequence number (from 1 to 5) for the pane on which the user may view prices of the items on the sales order. You may also select 0 – Not Used.

Price Display Pane Title Enter the title to display on the item price pane.

Availability Display Pane Level Select the sequence number (from 1 to 5) for the pane on which the user may view the current availability of the items on the sales order. You may also select 0 – Not Used.

Availability Display Pane Title Enter the title to display on the availability pane.

Detail Display Pane Level Select the sequence number (from 1 to 5) for the pane on which the user may view detail of the prices, quantities, and delivery dates of the items on the sales order. You may also select 0 – Not Used.

<i>Detail Display Pane Title</i>	Enter the title to display on the detail pane.
<i>History Display Pane Level</i>	Select the sequence number (from 1 to 5) for the pane on which the user may view the list of items previously purchased by the customer from the sales order. You may also select 0 – Not Used.
<i>History Display Pane Title</i> <i>Transfer Order</i>	Enter the title to display on the history pane. Select the sequence in which items will be transferred from the Matrix to the sales order. You may select: <ul style="list-style-type: none">• Item Order• Description Order• Shipment Date Order• Entered Order• Matrix Style Order
<i>Style Entry Report</i>	Use this field to browse to the location of a Crystal Report to be made available on the Style Matrix window.
<i>Style Entry Report Button Name</i>	Use this field to provide the name of the button that will appear to launch the Sales Entry Report.

of user-defined fields from the Item Master. The attributes should be entered in the order in which they are to appear on the Style Matrix screen.

Note: *All possible attributes should be included here, even those which will not be used for all items.*

Display Names

In each row, enter the name for the field as you wish it to appear on the Style Matrix screen. The field name that was entered when the UDF was created will appear on the Item Master; it is necessary to enter the same or a similar name here to have it appear correctly during order entry.

Pricing Options Tab

This tab allows you to set options for the seasonal pricing feature. If you do not wish to use this feature, leave all fields blank.

Form Layout	Entry Layout	Pricing Options
Display Prices on Entry Tab	<input checked="" type="checkbox"/>	
Allow for Change of Price	<input checked="" type="checkbox"/>	
Special Pricing in Sales Order Entry	<input type="checkbox"/>	
Title of Pricing Program	Early Bird	
Header Field for Pricing Indicator	Special Price	
Add Entry Field to Sales Order	<input checked="" type="checkbox"/>	
Value to Indicate Inclusion	yes	
Value to Indicate Exclusion	no	
Line Item Field for Pricing Indicator	Special Price	
Value to Indicate Inclusion	yes	
Value to Indicate Exclusion	no	
Header Field for Date Determination	12	
Price List For Month 1	Use Default SAP Price	
Price List For Month 2	Use Default SAP Price	
Price List For Month 3	Use Default SAP Price	
Price List For Month 4	Use Default SAP Price	
Price List For Month 5	Use Default SAP Price	
Price List For Month 6	Use Default SAP Price	
Price List For Month 7	Use Default SAP Price	
Price List For Month 8	Use Default SAP Price	
Price List For Month 9	Use Default SAP Price	
Price List For Month 10	Use Default SAP Price	
Price List For Month 11	Use Default SAP Price	
Price List For Month 12	Use Default SAP Price	

Display Prices on Entry Tab

Check this box if you wish to display the item prices at the bottom of each column on the Matrix entry tab. Note that doing so may result in slower performance of the system; prices will be visible in the Pricing and Detail panes regardless.

Allow for Change of Price

Check this box if users may change the item prices during Matrix entry.

<i>Special Pricing in Sales Order Entry</i>	Check this box to enable Early Buy functionality.
<i>Title of Pricing Program</i>	Enter the title you wish to use for the seasonal pricing program; for example “Early Buy”. This is the field name that will be displayed in the Sales Order header screen.
<i>Header Field for Pricing Indicator</i>	Enter the name of the UDF in the Marketing Document Header which defines the seasonal pricing indicator (example AISMTxSeason).
<i>Add Entry Field to Sales Order</i>	Check this box to add an entry field on the sales order header to indicate whether the order will be eligible for seasonal pricing.
<i>Value to Indicate Inclusion</i>	Enter the value to display in the header UDF to indicate that the order will use seasonal pricing (for example, “Yes” or “Y”).
<i>Value to Indicate Exclusion</i>	Enter the value to display in the header UDF to indicate that the order will not use seasonal pricing (for example, “No” or “N”).
<i>Line Item Field for Pricing Indicator</i>	Enter the name of the UDF in the Marketing Document Rows which defines the seasonal pricing indicator (example AISMTxSeason).
<i>Value to Indicate Inclusion</i>	Enter the value to display in the row UDF to indicate that the item will use seasonal pricing (for example, “Yes” or “Y”).
<i>Value to Indicate Exclusion</i>	Enter the value to display in the row UDF to indicate that the order will not use seasonal pricing (for example, “No” or “N”).
<i>Header Field for Date Determination</i>	Enter the field ID for the field containing the date to be used for determining the pricing month for the order. You may view the field ID by turning on <i>View > System Information</i> . Note that the Delivery date is field 12.

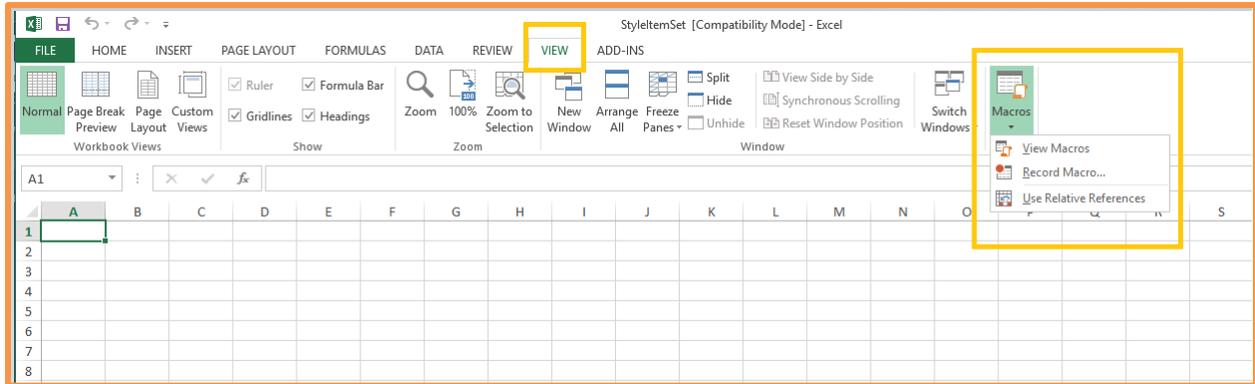
Price List for Months

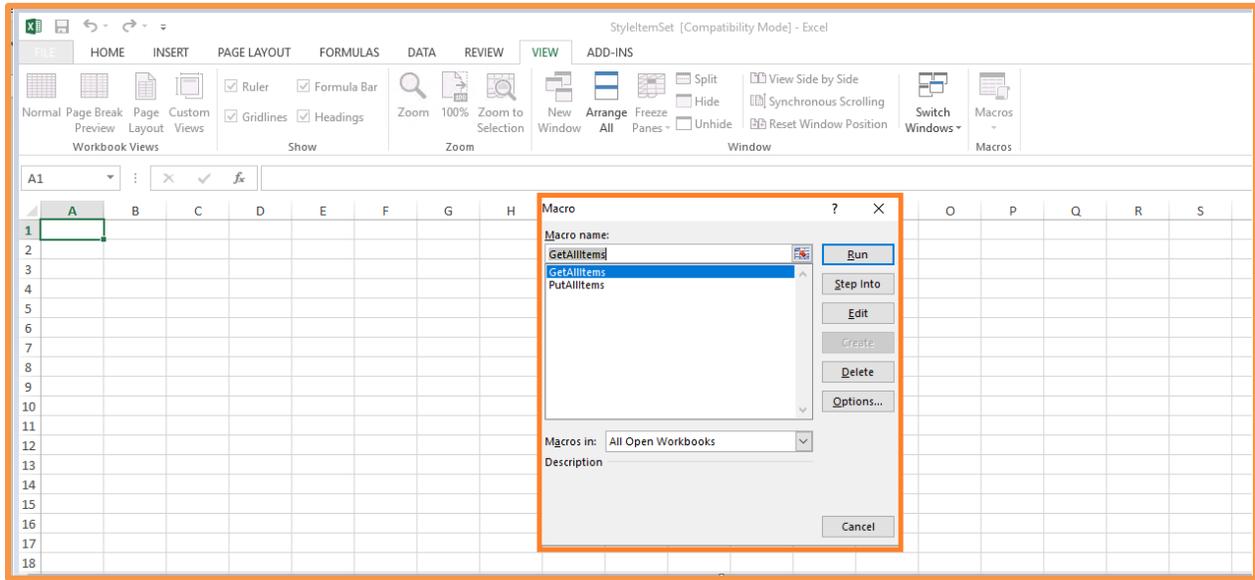
For each of the 12 months, select the price list to be used for seasonal pricing for that month. You may also select “Use Default SAP Price”. If seasonal pricing is used, and a specific price list is selected for the month, then the prices from this list will override the price list attached to the customer, or any special pricing that has been defined for the customer, item, or quantity. Note that months 1-12 represent the periods of the company’s fiscal year.

Excel Button – Populate Item Master

The “Excel” button at the bottom of the Style Defaults Entry screen will allow you to configure existing items with the required information for **Resolv Style**. Note that it is required that you configure Excel to “Enable all macros” in order to use this feature.

When you click on the “Excel” button, an Excel spreadsheet will open. It will appear to be blank. Go to View > Macros > View Macros. Two macros will be shown: “Get All Items” and “Put All Items”.





Click on “Get All Items”. The screen will display a list of all items in the Business One Item Master along with several blank columns. You may use these columns to enter **Resolv Style** information about each item (see the section on configuring the Item Master later in this manual).

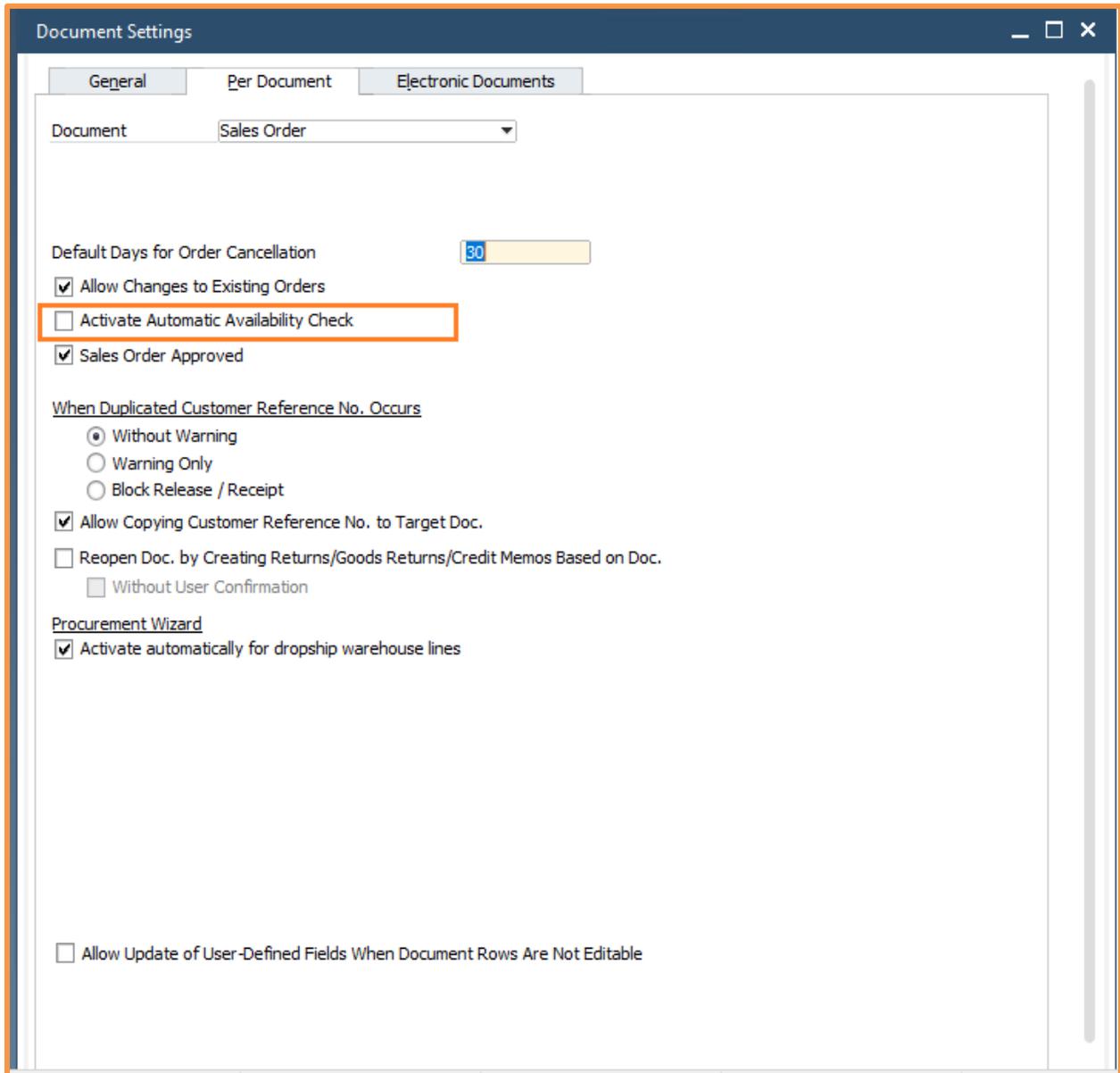
ItemCode	Name	Style	Color	Size	Option	Column D	Quantity	Max Displ	Retention	Percenta
DMTest3	DM Test3	5000	red	small	Option	2	0	0	0	0
TestNI	Test No Inventory Item	5000	red	medium		3	0	0	0	0
QC002	QC002-Serial Managed Item	5000	red	large		4	0	0	0	0
JJ10200	Tr415 Snap-In Valve Schrader	5020	blk	small		2	0	0	0	0
ChkNeg2	Check Negative	5020	red	small		2	0	0	0	0
JJ10201	Tr418 Snap-In Valve Schrader	5010	blk	small		2	0	0	0	0
JJ10202	Tr423 Snap-In Valve Schrader	5010	blk	medium		3	0	0	0	0
ReallyReallySuperLongItemNumber	Really Really Super Long Item Number Description	5010	blk	large		4	0	0	0	0
0-01899_Flexible	0-01899 Flexible						0	0	0	0
JJ10300	Tr425 Snap-In Valve Schrader						0	0	0	0
JJ10301	Universal Cement Quart Can						0	0	0	0
RD224	120PAR38/220-240V-AAMSCO						0	0	0	0

When the entries are complete, display the macros again, and select “Put All Items”. The Item Master will be updated with the information you have entered in the spreadsheet. Note that all entries must conform to the valid values for each field.

Item Check

Administration > System Initialization > Document Settings > Per Document Tab, Sales Order

Be sure that the Automatic Item Availability Check is turned off in the system. This feature of standard Business One is redundant when **Resolv Style** is used, and if it is turned on, it may cause errors when items are transferred from the Style matrix to the Sales Order.



Document Settings

General Per Document Electronic Documents

Document Sales Order

Default Days for Order Cancellation 30

Allow Changes to Existing Orders

Activate Automatic Availability Check

Sales Order Approved

When Duplicated Customer Reference No. Occurs

Without Warning

Warning Only

Block Release / Receipt

Allow Copying Customer Reference No. to Target Doc.

Reopen Doc. by Creating Returns/Goods Returns/Credit Memos Based on Doc.

Without User Confirmation

Procurement Wizard

Activate automatically for dropship warehouse lines

Allow Update of User-Defined Fields When Document Rows Are Not Editable

Item Groups

Administration > Setup > Inventory > Item Groups

For each item group relating to items that will be used in the Style matrix, enter the expected lead time, in days. This represents the number of days that are expected to elapse from the time an item is ordered from a supplier until it is received in the warehouse. **Resolv Style** will use this figure when calculating the expected shipment date for backordered items.

Item Groups - Setup
— □ ×

Item Group Name

General

Accounting

Default UoM Group

Planning Method

Procurement Method

Order Interval

Order Multiple

Minimum Order Qty Inventory UoM

Checking Rule

Lead Time Days

Tolerance Days Days

Default Valuation Method

Use Forecast Demand Formula

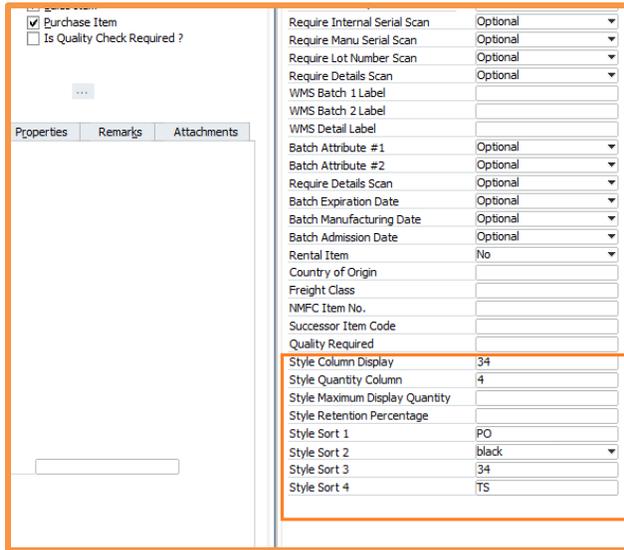
Procurement Method

Default Bin Locations

#	Whse Code	Whse Name	Default Bin Location	Enforce Default Bin Loc.
1	➔ 02	West Cost War		<input type="checkbox"/>
2	➔ 05	In-Transit		<input type="checkbox"/>

Item Master

Several fields have been added to the Item Master. They are shown in the User-Defined Fields panel. It is necessary to enter data in these fields for the item to be used correctly in the order entry Style Matrix.



Style Column Display

Enter the heading that will appear above the column for this size on the Style Matrix.

Style Quantity Column

Enter the column number for this size. In general, the smallest size for a style should be in column 1, and each succeeding size should be in the next succeeding column. Note that the maximum number of columns is set in the Style Defaults.

Style Maximum Display Quantity

Enter the maximum quantity of the item to display, if desired. If a quantity is entered here, users will not see any quantity greater than this number as the quantity on hand, even if there is a greater quantity in the warehouse.

Style Retention Percentage

If desired, enter a percentage of the quantity of this item to be subtracted from the total available quantity displayed in the Style Matrix. If entered, users will see a reduced quantity on hand in order to avoid the possibility of running out of stock.

Style Sort fields

Four or more user-define fields for style attributes will be shown. *If you have changed the display names for these fields, the changed names will be shown.* Others will appear as Style Sort 1, 2, 3, and 4.

Enter the attributes for this item in the appropriate fields. If valid values have been defined for the field, a drop-down list will provide the selection.

Seasonal Pricing

It is common in the apparel industry, and in others where products are seasonal, for suppliers to offer special discounts in return for placing orders well in advance of the date needed. For example, winter clothing would generally be received in the fall, but if the order is placed in the spring, then the supplier has advance notice of what he will need and in what quantity. In return, he may offer discounts based on how far ahead the order is received.

If you wish to offer this kind of discount pricing to your customers, you can utilize the seasonal pricing feature of **Resolv Style**. Standard Business One pricing is based on price lists; each customer is assigned to a price list and sales order prices are set accordingly. Alternatively, you can create special pricing, generally based on an existing price list, for the customer. While it is possible to use various combinations of date ranges to vary the price of an item, the system only looks at the date on which the order is entered, not the date when it is due. **Resolv Style** uses a different approach.

You can set up price lists that are specific to various months of the year, relative to the delivery date of the items. For example, create the following prices for item ABC:

Price List Name	Base Price List	Factor	Price
Standard Price List			\$100.00
3-month Price List	Standard Price List	10%	\$ 90.00
6-month Price List	Standard Price List	20%	\$ 80.00

In the Style Defaults, make the following settings (assuming that you begin in January and your fiscal year begins in January).

Month	Price List
Month 1 (January)	Standard Price List
Month 2 (February)	Standard Price List
Month 3 (March)	Standard Price List
Month 4 (April)	3-month Price List
Month 5 (May)	3-month Price List
Month 6 (June)	3month Price List
Month 7 (July)	6-month Price List
Month 8 (August)	6-month Price List
Month 9 (September)	6-month Price List
Month 10 (October)	Use Default SAP Price
Month 11 (November)	Use Default SAP Price

Month 12 (December)	Use Default SAP Price
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The result of this procedure is that if a customer places an order in January for delivery in January, February, or March, he will pay the standard price. If he places an order in January for delivery in April, May, or June, he will pay the 3-month price. If he places an order in January for delivery in July, August, or September, he will pay the 6-month price. If the delivery date is in any other month, he will pay the price on his assigned price list, or his designated special pricing.

Periodically, you can change the settings in the Style Defaults so that the pricing is appropriate for the month in which the orders are received. For example, in March you can move the 3-month pricing to June, July, and August, and so on.

Points to remember:

- The months in the Style Defaults are always based on your company’s fiscal year, not necessarily the calendar year.
- In order to use Seasonal Pricing, you must check “Special Pricing in Sales Order Entry” box in the Pricing Options tab of the Style Defaults and fill in the other fields appropriately.
- You must specify Seasonal Pricing in the Sales Order header for it to be applied to that order. All rows will initially be set the same as the header.
- You may activate or de-activate Seasonal Pricing on any row of a Sales Order once the items are entered.
- Seasonal Pricing is only available on Sales Orders, not on Purchase Orders.
- Blanket Sales Orders are legal contracts and will take precedence over standard SAP pricing and seasonal pricing.

Procedures

Resolv Style is utilized during the Sales Order and Purchase Order entry process. No other documents or screens in the system are affected.

The prime objective of **Resolv Style** is to provide a quick, efficient, and accurate way for operators to enter Sales or Purchase Orders, when those orders are likely to consist of multiple sizes of the same item code. Rather than entering the item code for each size on a separate line, it is possible to enter the attributes of each item type (style, color, etc.), and then enter the quantity for each size along a single row of a matrix.

Additional functionality is provided which allows the operator to see the cumulative quantities of each size and style, pricing, availability, and the customer's order history, all from the same set of screens. This allows the operator to provide all information quickly to the customer, who may be on the phone while the order is being entered.

Note that the appearance of the style Matrix is dependent upon the settings in the Style Configuration screen. Which tabs are visible, their sequence, and the label of each tab are all subject to the settings in this screen. The following sections illustrate the standard settings.

Sales Order Procedures

Entering the Sales Order

Begin by entering the Sales Order in the usual manner. Enter the customer code or name, customer's PO number, and requested delivery date in the header. Verify or change the ship-to address and shipping method on the Logistics tab.

If you use the seasonal pricing feature, be sure to set the header field to indicate whether this order qualifies for the seasonal prices.

The screenshot shows the 'Sales Order' window with the following details:

- Customer:** C40000 (Earthshaker Corporation)
- Contact Person:** Bob McKensly
- Customer Ref. No.:** 2000-919293949-1
- No.:** Primary 258
- Status:** Unapproved
- Posting Date:** 04/07/2020
- Delivery Date:** 04/18/2020
- Document Date:** 04/07/2020
- Early Bird:** yes (highlighted)

#	Item No.	Quantity	Unit Price	Disc...	Tax C...	Total (LC)	Whse	Del. Date	UoM Code	C...
1	A00001	1	500.00 \$	0.000	LG	500.00 \$	01	04/18/2020	Manual	
2	I00007	1	35.00 \$	0.000	LG	35.00 \$	01	04/18/2020	Manual	
3	LM4029MC	1	62.50 \$	0.000	LG	62.50 \$	01	04/18/2020	Manual	
4				0.000				04/18/2020		

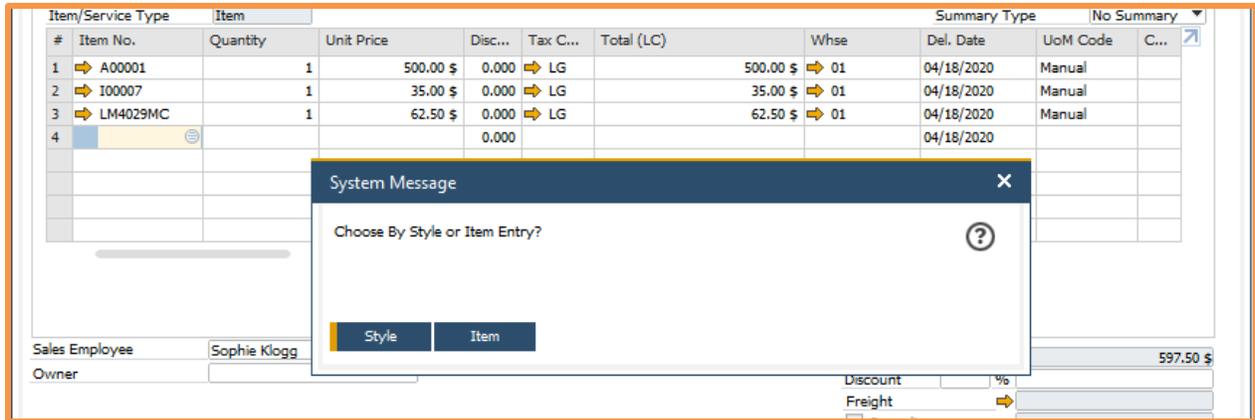
Sales Employee: Sophie Klogg

Summary:

- Total Before Discount: 597.50 \$
- Discount: %
- Freight: →
- Rounding
- Tax: 53.78 \$
- Total: 651.28 \$

Buttons: OK, Cancel, Recalc Prices, Reservations, Copy From, Copy To

On the Contents tab, you may enter a single item at a time in the normal way, without entering the Style Matrix. However, if you press TAB in the Item Number column and the check box "Use Matrix in Sales Orders" is turned on and "Automatically Start Style" check box is turned off in the Style Configuration, the screen will display the following message:



If you choose “Item”, you will see the usual list of items to choose from, and you may proceed to select one or more of them and enter one item code per row of the sales order.

If you choose “Style”, the Style Matrix will open.

On the Contents tab if you press TAB in the Item Number column and the check boxes “Use Matrix in Sales Orders” and “Automatically Start Style” are turned on in the Style Configuration, the screen will automatically open the Style Matrix.

On the Contents tab if you press TAB in the Item Number column and the check boxes “Use Matrix in Sales Orders” and “Automatically Start Style” are turned off in the Style Configuration, the screen will **NOT** open the Style Matrix.

Style Matrix

Item Entry Tab

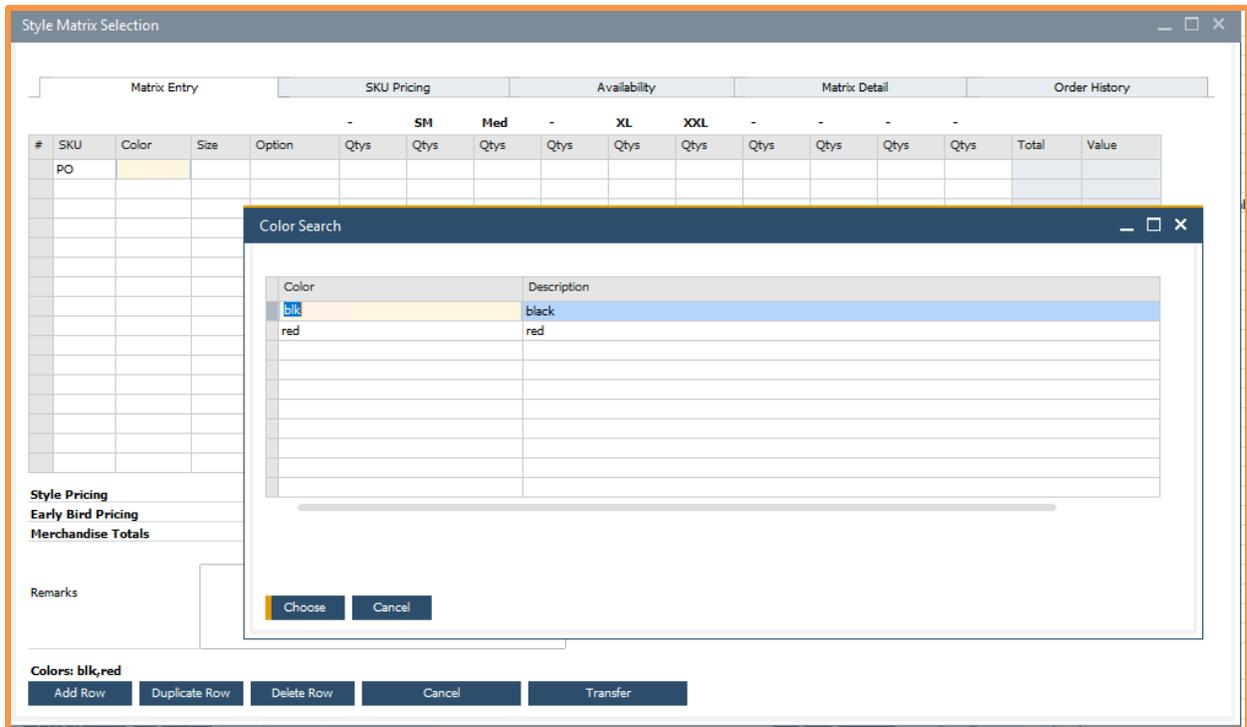
The following screen appears.

Note: The columns on the left side of the grid display the attributes that have been defined in the system followed by the columns displaying the maximum number of quantity columns established in the Style Configuration. Initially there are no headings above the quantity columns.

At the bottom of the grid, “Style Pricing” will appear if seasonal pricing is used. The item’s price will be displayed if “Display Prices on Entry Tab” was selected. The field is editable if “Allow for Change of Price” was selected in the Style Configuration screen, Pricing Options. A check will be displayed beneath the price when items are entered if seasonal pricing is applied to that item.

Begin by entering a code in the first column, then tab to enter the remaining attributes for the item being ordered. Once the style is entered, only valid entries will be permitted for the remaining fields; i.e., only colors and sizes that are available for that style are permitted. Also, once the style code is entered, the appropriate labels will appear above the quantity columns.

Continue to tab across the row, entering the quantity of each size that the customer is ordering.



Note: If you press TAB in a field, or make a partial entry, the search window will appear which will show valid values for the field (provided that “Allow for Searching in Entry Columns” was selected from the Style Configuration screen, Entry Layout tab).

To enter additional rows, click on “Add Row”. You may also highlight a row and duplicate it or delete it by clicking on the appropriate buttons.

Item Check

At any point while you are in the matrix, you may click on “Item Check”. The system will verify that all items have enough available quantity to ship on the requested date of the order. If this is not the case, you will be able to see the next date when the item will be available, and you will be able to change the delivery date for that item. The Item Check also locates any instances of duplicate items on the order.

If all items are available and none are duplicated, you will see a message letting you know that all the items are available on the delivery date and are not duplicated.

However, if there are backorders or duplicates, the Item Check screen will be displayed.

Style Matrix Selection

#	SKU	Color	Size	Option	Qtys	SM	Med	XL	XXL	Qtys	Qtys	Qtys	Qtys	Total	Value
PO	blk				2		4		5	2				13	243.75
PO	blk				1		2	1	1					5	93.75

Style Matrix Item Check

Duplicate Rows

Select	Row	ItemCode	Description	Order Qty	Delivery Date	Qty to Update	Price
<input type="checkbox"/>	1	PO-TS-SM-BLK	Polo Tee shirt black small	2	2020/04/29		18.75
<input type="checkbox"/>	1	PO-TS-Med-BLK	Polo Tee shirt Black Medium	4	2020/04/29		18.75
<input type="checkbox"/>	1	PO-TS-XL-BLK	Polo Tee shirt Black XL	5	2020/04/29		18.75
<input type="checkbox"/>	1	PO-TS-XXL-BLK	Polo Tee shirt Black XXL	2	2020/04/29		18.75
<input type="checkbox"/>	2	PO-TS-SM-BLK	Polo Tee shirt black small	1	2020/04/29		18.75
<input type="checkbox"/>	2	PO-TS-Med-BLK	Polo Tee shirt Black Medium	2	2020/04/29		18.75
<input type="checkbox"/>	2	PO-TS-XXL-BLK	Polo Tee shirt Black XXL	1	2020/04/29		18.75
<input type="checkbox"/>	2	PO-TS-XL-BLK	Polo Tee shirt Black XL	1	2020/04/29		18.75

Merge Lines Delete Line(s) Update Quantity

Item Availability

Item	Description	Row Delivery Dt	Order Qty	Available on Delivery Date	BackOrder Complete Dt
1	PO-TS-Med-BLK	Polo Tee shirt Black Medium	4	04/29/2020	3 05/10/2020
2	PO-TS-XL-BLK	Polo Tee shirt Black XL	5	04/29/2020	-1 05/10/2020
3	PO-TS-XL-BLK	Polo Tee shirt Black XL	1	04/29/2020	-1 05/10/2020
4	PO-TS-XXL-BLK	Polo Tee shirt Black XXL	2	04/29/2020	0 05/10/2020
5	PO-TS-XXL-BLK	Polo Tee shirt Black XXL	1	04/29/2020	0 05/10/2020

Change to Available Qty Back Order Rem. Qty Back Order Complete SKU Complete Ship Complete Order Complete Date: 05/10/2020

Cancel

The Item Check screen contains two grids. The upper grid displays items that have been entered more than once on the order. You may select one or more lines by using the checkboxes at the left, and then use the buttons under the grid to merge the lines, delete lines, or change the quantity on the lines.

The lower grid displays items that are not available to ship on the delivery date entered on the sales order. Each line indicates the earliest date on which the items may be expected to be available for shipment.

If there are open Purchase Orders that will fulfill the order, after first filling any other committed quantities of the item, then the expected delivery date of the Purchase Order will be displayed.

If there are no open Purchase Orders, or if they will not be adequate to fill the order, the system will check the Lead Time for the Item Group of the item. It will add one day to the lead time days, and then add that number to the current date. The resulting date is displayed as the Backorder Complete date.

If there are no open Purchase Orders, or if they will not be adequate to fill the order, and there is no Lead Time on the Item Group of the item, the system will enter the date "12/31/2049" as the Backorder Complete date.

Highlight each line in turn and use the buttons below the grid to indicate the disposition of the backordered items.

Change to Available Qty	If a partial quantity is available to ship on the sales order delivery date, you may use this button to change the quantity of the item to the maximum available quantity. The remaining quantity will be omitted from the order.
Backorder Remaining Qty	If a partial quantity is available to ship on the sales order delivery date, you may use this button to ship the available quantity on the original delivery date and backorder the remainder until the next available date.
Backorder Complete	Use this button to backorder the entire quantity of the item until the next available date. Items that have adequate stock will ship on the original delivery date of the order.
Ship Complete	Use this button to indicate that the order must be shipped complete, when all items are available. The latest available date will then become the delivery date for all items on the order.

Order History Tab

Style Matrix Selection
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Matrix Entry		SKU Pricing		Availability		Matrix Detail		Order History
Cust Code	Customer Name	DocDate	Order #	Cust PO #	ShipToCode	Item Code	Quantity	Price
1	C40000	Earthshaker Corporation	04/07/2020	⇒ 258	2000-919293949-1	Ship To	A00001	1.000 500.00
2	C40000	Earthshaker Corporation	04/07/2020	⇒ 258	2000-919293949-1	Ship To	I00007	1.000 35.00
3	C40000	Earthshaker Corporation	04/07/2020	⇒ 258	2000-919293949-1	Ship To	LM4029MC	1.000 62.50
4	C40000	Earthshaker Corporation	04/07/2020	⇒ 256	x-sell	Ship To	A00001	1.000 500.00
5	C40000	Earthshaker Corporation	04/07/2020	⇒ 255	0101	Ship To	A00001	1.000 500.00
6	C40000	Earthshaker Corporation	04/07/2020	⇒ 255	0101	Ship To	I00007	2.000 35.00
7	C40000	Earthshaker Corporation	04/07/2020	⇒ 255	0101	Ship To	LM4029MC	3.000 62.50
8	C40000	Earthshaker Corporation	04/07/2020	⇒ 254	2:40 x-sell	Ship To	A00001	1.000 500.00
9	C40000	Earthshaker Corporation	04/07/2020	⇒ 254	2:40 x-sell	Ship To	I00007	1.000 35.00
10	C40000	Earthshaker Corporation	04/07/2020	⇒ 254	2:40 x-sell	Ship To	LM4029MC	1.000 62.50
11	C40000	Earthshaker Corporation	12/13/2009	⇒ 244		Ship To	I00004	20.000 37.50
12	C40000	Earthshaker Corporation	12/13/2009	⇒ 244		Ship To	I00005	10.000 112.50
13	C40000	Earthshaker Corporation	12/13/2009	⇒ 244		Ship To	I00006	5.000 100.00
14	C40000	Earthshaker Corporation	11/17/2009	⇒ 238		Ship To	A00002	5.000 250.00
15	C40000	Earthshaker Corporation	11/17/2009	⇒ 238		Ship To	A00003	10.000 375.00
16	C40000	Earthshaker Corporation	11/17/2009	⇒ 238		Ship To	A00004	10.000 625.00

Remarks

Shipping Type	Motor Express ▾
Freight Amount	.00
Document Amount	109.41

WIP
Cancel
Transfer

This tab provides the operator with a detailed list of the customer’s previous purchases. The list can be re-sorted by clicking at the top of any column. You may use the drill-down arrows to see the actual documents on each row.

Completing the Sales Order

Once items are entered in the Style Matrix, click on the “Transfer” button to transfer the entries to the actual Sales Order document. The system creates one line per item code in the Contents tab of the Sales Order.

The screenshot shows the 'Sales Order' window with the following details:

- Customer:** C40000 (Earthshaker Corporation)
- Contact Person:** Bob McKensly
- Customer Ref. No.:** 876111
- BP Currency:** \$
- No.:** Primary 261
- Status:** Open
- Posting Date:** 04/15/2020
- Delivery Date:** 04/15/2020
- Document Date:** 04/15/2020
- Early Bird:** yes

#	Item No.	Quantity	Unit Price	Disc...	Tax C...	Total (LC)	Whse	Del. Date	UoM Code	COGS Distr. Rule
1	PO-TS-Med-Blk	7	15.63 \$	0.000	LG	109.41 \$	01	04/15/2020	Manual	
2	PO-TS-SM-Blk	5	15.63 \$	0.000	LG	78.15 \$	01	04/15/2020	Manual	
3	PO-TS-SM-RED	3	15.63 \$	0.000	LG	46.89 \$	01	04/15/2020	Manual	
4	PO-TS-XL-Blk	3	15.63 \$	0.000	LG	46.89 \$	01	04/15/2020	Manual	
5	PO-TS-XXL-Blk	2	15.63 \$	0.000	LG	31.26 \$	01	04/15/2020	Manual	
6				0.000				04/15/2020		

Sales Employee: Sophie Klogg

Owner:

Summary Totals:

- Total Before Discount: 312.60 \$
- Discount: %
- Freight: →
- Rounding: 0.00 \$
- Tax: 28.14 \$
- Total: 340.74 \$

Buttons at the bottom: Add & View, Cancel, Recalc Prices, Reservations, Copy From, Copy To.

If the seasonal pricing feature is used, you may change the indicator either at the header level, for the entire document, or individually by line. Prices will change accordingly when you do so.

At this point, all normal Sales Order entry procedures may be used. You may make any changes desired in the rows that have been entered, or in the header or other tabs of the document. You may also return to the Sales Order to make changes at any time, as long as it remains open.

Note: You may add more lines to the sales order by typing or searching for a new item code. You may open the Style Matrix again by using the TAB key in the item number column, as before. However, the matrix will open in a blank state, for new items to be entered. It is not possible to re-open the matrix with the existing items to make any changes there.

When all additions and changes are complete, click on “Add” to enter the Sales Order.

Purchase Order Procedures

Entering the Purchase Order

Begin by entering the Purchase Order in the usual manner. Enter the vendor code or name, and the requested delivery date in the header. Verify or change the ship-to address and shipping method on the Logistics tab.

Note: Seasonal pricing does not apply to Purchase Orders.

#	Item No.	Quantity	Unit Price	Disco...	Tax Code	Total (LC)	UoM Code
1				0.000			

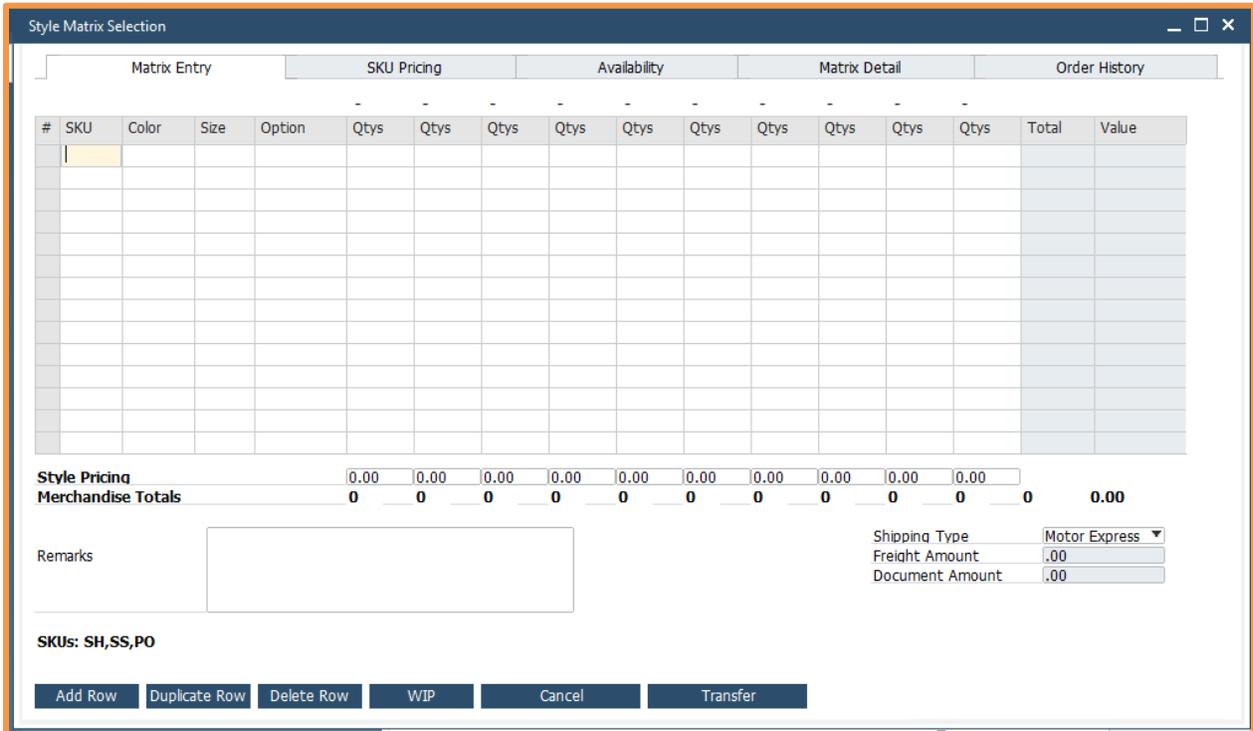
On the Contents tab, you may enter a single item at a time in the normal way, without entering the Style Matrix. However, if you press TAB in the Item Number column, the screen will display the following message:

If you choose “Item”, you will see the usual list of items to choose from, and you may proceed to select one or more of them and enter one item code per row of the sales order.

If you choose “Style”, the Style Matrix will open.

Style Matrix

Item Entry Tab



The screenshot shows the 'Style Matrix Selection' window with the following components:

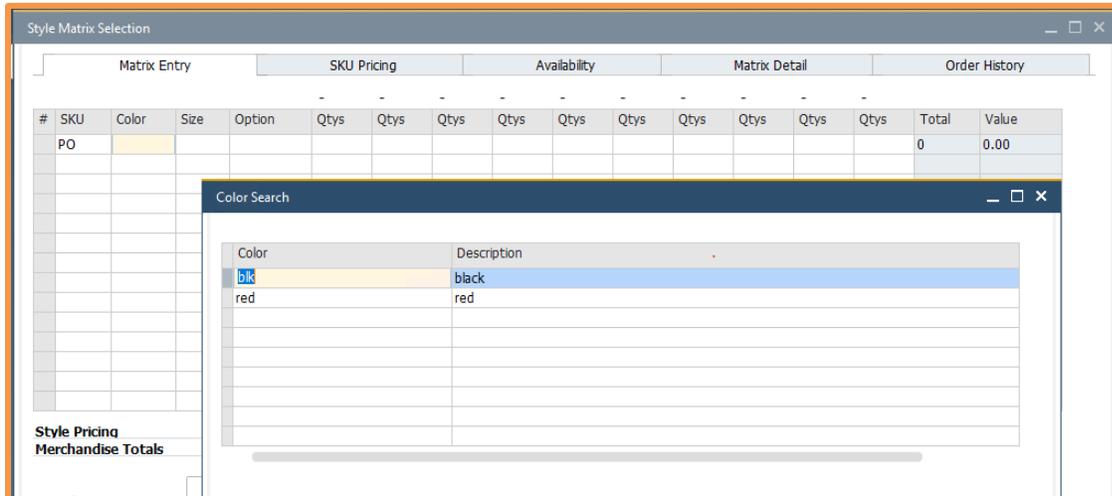
- Grid Headers:** #, SKU, Color, Size, Option, and 10 Qty columns (labeled 'Qtys').
- Summary Section:**
 - Style Pricing: 0.00
 - Merchandise Totals: 0
 - Shipping Type: Motor Express
 - Freight Amount: .00
 - Document Amount: .00
- SKUs:** SH,SS,PO
- Buttons:** Add Row, Duplicate Row, Delete Row, WIP, Cancel, Transfer

Note: The columns on the left side of the grid display the attributes that have been defined in the system. The following columns display the maximum number of quantity columns established in the Style Defaults. Initially there are no headings above the quantity columns.

At the bottom of the grid, the item's price will be displayed if "Display Prices on Entry Tab" was selected. The field is editable if "Allow for Change of Price" was selected in the Style Configuration screen, Pricing Options.

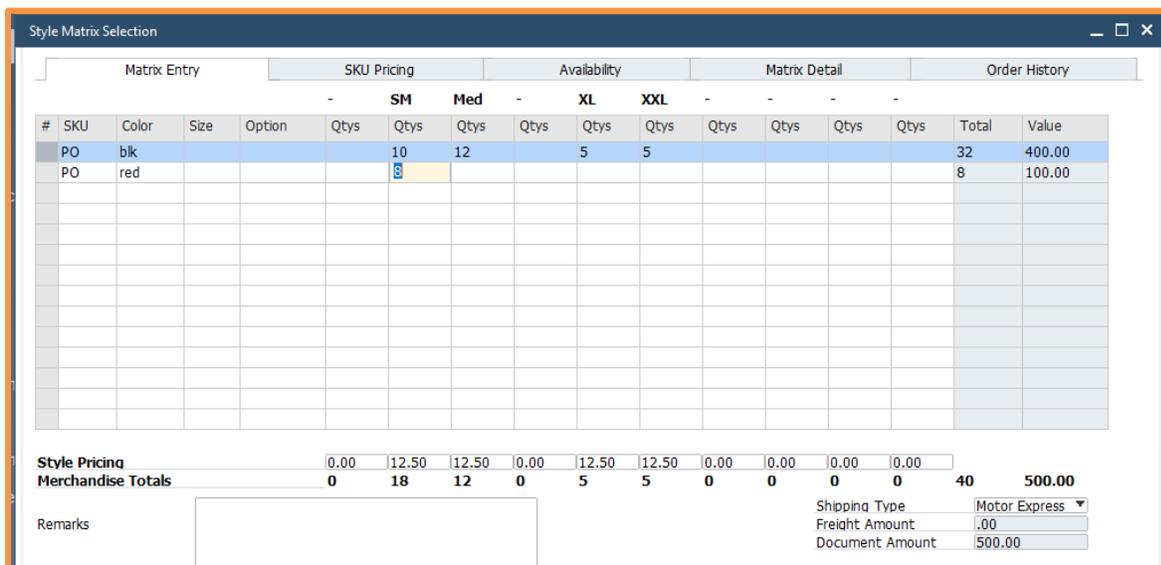
Begin by entering a code in the first column, then tab to enter the remaining attributes for the item being ordered. Once the style is entered, only valid entries will be permitted for the remaining fields; i.e., only colors and sizes that are available for that style are permitted. Also, once the style code is entered, the appropriate labels will appear above the quantity columns.

Continue to tab across the row, entering the quantity of each size that the customer is ordering.



Note: If you press TAB in a field, or make a partial entry, the search window will appear which will show valid values for the field (provided that “Allow for Searching in Entry Columns” was selected from the Style Configuration screen, Entry Layout tab).

To enter additional rows, click on “Add Row”. You may also highlight a row and duplicate it or delete it by clicking on the appropriate buttons.



The columns on the right of the matrix show the total quantity and total price for the items on that row. The bottom of each quantity column shows the total quantity for each size, including all item codes.

Note: The Item Check feature is not available for Purchase orders.

Pricing Tab

Matrix Entry					SKU Pricing		Availability			Matrix Detail		Order History	
SKU	Color	Size	Option	-	SM	Med	-	XL	XXL	-	-	-	-
1	PO	blk			12.50	12.50		12.50	12.50				
2	PO	red			12.50	12.50		12.50	12.50				

Remarks:

Shipping Type: Motor Express
 Freight Amount: .00
 Document Amount: 200.00

WIP Cancel Transfer

The Pricing tab displays the unit price of every size for the items that have been entered. These prices are derived through standard Business One procedures, using the vendor’s price list or special pricing. It is not possible to edit the prices on this screen.

Note: You must highlight a line to see the column headings for the sizes.

Availability Tab

SKU	Color	Size	Option	-	SM	Med	-	XL	XXL	-	-	-	-
PO	blk			0	2	-2	0	-3	-2	0	0	0	0
PO	red			0	-3	0	0	0	0	0	0	0	0

Shipping Type: Motor Express
 Freight Amount: .00
 Document Amount: 200.00

Buttons: WIP, Cancel, Transfer

The Availability tab shows the current available quantity of every size for the items entered.

This screen allows the operator to quickly verify the quantities that are needed for each size.

Note: You must highlight a line to see the column headings for the sizes.

Order History Tab

Style Matrix Selection
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	Matrix Entry	SKU Pricing	Availability	Matrix Detail	Order History				
	Vendor Code	Vendor Name	DocDate	Order #	Vendor PO #	ShipToCode	Item Code	Quantity	Price
1	V23000	Anthony Smith	11/20/2009	⇒ 262			C00007	30.000	500.00
2	V23000	Anthony Smith	11/20/2009	⇒ 262			C00008	30.000	200.00
3	V23000	Anthony Smith	11/20/2009	⇒ 262			C00009	30.000	20.00
4	V23000	Anthony Smith	11/20/2009	⇒ 262			C00010	30.000	20.00
5	V23000	Anthony Smith	11/20/2009	⇒ 262			C00011	30.000	40.00
6	V23000	Anthony Smith	10/08/2009	⇒ 254			C00001	40.000	400.00
7	V23000	Anthony Smith	10/08/2009	⇒ 254			C00002	40.000	300.00
8	V23000	Anthony Smith	10/08/2009	⇒ 254			C00003	40.000	130.00
9	V23000	Anthony Smith	10/08/2009	⇒ 254			C00004	40.000	35.00
10	V23000	Anthony Smith	10/08/2009	⇒ 254			C00005	40.000	60.00
11	V23000	Anthony Smith	08/26/2009	⇒ 246			LM4029APCD	40.000	5.00
12	V23000	Anthony Smith	08/26/2009	⇒ 246			A00001	50.000	400.00
13	V23000	Anthony Smith	08/26/2009	⇒ 246			A00002	50.000	200.00
14	V23000	Anthony Smith	08/26/2009	⇒ 246			A00003	50.000	300.00
15	V23000	Anthony Smith	08/26/2009	⇒ 246			A00004	50.000	500.00
16	V23000	Anthony Smith	07/16/2009	⇒ 238			I00012	30.000	45.00

Remarks

Shipping Type Motor Express ▾

Freight Amount .00

Document Amount 200.00

WIP
Cancel
Transfer

This tab provides the operator with a detailed list of the company’s previous purchases from this vendor. The list can be re-sorted by clicking at the top of any column. You may use the drill-down arrows to see the actual documents on each row.

Completing the Purchase Order

Once items are entered in the Style Matrix, click on the “Transfer” button to transfer the entries to the actual Purchase Order document. The system creates one line per item code in the Contents tab of the Purchase Order.

The screenshot shows the 'Purchase Order' window with the following details:

- Vendor:** V23000 (Anthony Smith), Contact Person: Matt Spanos, Vendor Ref. No.: ab-1000, BP Currency: \$.
- Header Info:** No. Primary 271 - 0, Status: Open, Posting Date: 04/16/2020, Delivery Date: 04/16/2020, Document Date: 04/16/2020.
- Contents Tab:** A table with columns: #, Item No., Quantity, Unit Price, Disc..., Tax C..., Total (LC), UoM Code, Blan..., Standard Pric..., Aggregate Pri..., Best Price, Tot... The table contains 6 rows of items.
- Summary:** Total Before Discount: 200.00 \$, Discount: %, Freight: \$, Rounding: 0.00 \$, Tax: 16.50 \$, Total Payment Due: 216.50 \$.
- Buyer/Owner:** Buyer: James Chan, Owner: blumkin, dennis.
- Buttons:** Add & New, Cancel, Reservations, Copy From, Copy To.

#	Item No.	Quantity	Unit Price	Disc...	Tax C...	Total (LC)	UoM Code	Blan...	Standard Pric...	Aggregate Pri...	Best Price	Tot...
1	PO-TS-Med-BLK	5	12.50 \$	0.000	NY	62.50 \$	Manual				No	No
2	PO-TS-SM-BLK	2	12.50 \$	0.000	NY	25.00 \$	Manual				No	No
3	PO-TS-SM-RED	5	12.50 \$	0.000	NY	62.50 \$	Manual				No	No
4	PO-TS-XL-BLK	2	12.50 \$	0.000	NY	25.00 \$	Manual				No	No
5	PO-TS-XXL-BLK	2	12.50 \$	0.000	NY	25.00 \$	Manual				No	No
6				0.000							No	No

At this point, all normal Purchase Order entry procedures may be used. You may make any changes desired in the rows that have been entered, header section or other tabs of the document. You may also return to the Purchase Order to make changes as long as it remains open.

Note: You may add more lines to the Purchase Order by typing or searching for a new item code. You may open the Style Matrix again by using the TAB key in the item number column, as before. However, the matrix will open in a blank state, for new items to be entered. It is not possible to re-open the matrix with the existing items to make any changes there.

When all additions and changes are complete, click on “Add” to enter the Purchase Order.