

RESOLV STYLE

USER MANUAL Version 10.0

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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:

Field Data	_ □ >	🕻 ds - Manageme	nt						_ [1 × 1
Title AISSort?	Description Style Sort 2		Title	Description	Туре	Dflt	Mand.	Index	Linked Table	7
Type Alphanumeric	Length 20		AISWMSB	Batch Expiration Date	Alphanumeric (1)	0				
Structure Regular	<u>congo:</u>		AISWMSB	Batch Manufacturing I	Alphanumeric (1)	0				
Validation Valid Values	*		AISWMSB	Batch Admission Date	Alphanumeric (1)	0				
# Value	Description 7		AISRental	Rental Item	Alphanumeric (1)	N				
* value	beschpton v		AISCntryO	Country of Origin	Alphanumeric (2)					
1 red	red <u>N</u> ew		AISFrtClass	Freight Class	Alphanumeric (5)					
	Diack Dejete		AISNmfcIte	NMFC Item No.	Alphanumeric (50					
3 blue	Diue		AISIPSuco	Successor Item Code	Alphanumeric (50					
4 wht	white + +		AISQCReq	Quality Required	Alphanumeric (1)					
5 gold			AISMtxClm	Style Column Display	Alphanumeric (20					
			AISMbxQty	Style Quantity Colum	Numeric (10)					
			AISMaxQty	Style Maximum Display	Numeric (10)					
			AISMult	Style Retention Percer	Numeric (10)					
			AISSort1	Style Sort 1	Alphanumeric (20					
			AISSort2	Style Sort 2	Alphanumeric (20					.
Set Default Value for Field			AISSort3	Style Sort 3	Alphanumeric (20					
			AISSort4	Style Sort 4	Alphanumeric (20					
Mandatory Field		erties								
		Itiple Preferred Ve								
		ces								
		arehouse								
OK Cancel		rers								
		er Data								
	ок				<u>K</u> eys		Ugd	late	<u>R</u> emove	

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).

Style Configuration		_ ×
Form Layout	Entry Layout	Pricing Options
Use Matrix in Sales Quotations Automatically Start Style Use Matrix in Sales Orders Automatically Start Style Use Matrix in Purchase Orders Automatically Start Style Use Item Availability Check Require Availability Check	 Use Matrix in Inventory Tran Automatically Start Style Use Matrix in Inventory Tran Automatically Start Style Use Matrix in Goods Issue Automatically Start Style Use Matrix in Goods Receipt Automatically Start Style 	nsfer
Item Entry Pane Level Item Entry Pane Title Price Display Pane Level Price Display Pane Title Availability Display Pane Level Availability Display Pane Title Detail Display Pane Level Detail Display Pane Title History Display Pane Level History Display Pane Title	1 Matrix Entry 2 SKU Pricing 3 Availability 4 Matrix Detail 5 Order History	
Transfer Order	Item Order	T
Style Entry Report Style Entry Report Button Name	WIP	
OK Cancel Excel	I	

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.



Use Matrix in Sales Orders	Check this box if you wish to use the Style Matrix when entering Sales Orders.
Automatically Start Style	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.
Use Matrix in Purchase Orders	Check this box if you wish to use the Style Matrix when entering Purchase Orders.
Automatically Start Style	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.
Use Matrix in Inventory Transfer	Check this box if you wish to use the Style Matrix hen entering Inventory Transfers.
Automatically Start Style	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.
Use Matrix in Inventory Transfer Requests	Check this box if you wish to use the Style Matrix when entering Inventory Transfer Requests.
Automatically Start Style	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.
Use Matrix in Goods Issues	Check this box if you wish to use the Style Matrix when entering Goods Issues.
Automatically Start Style	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.
Use Matrix in Goods Receipt	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.



Detail Display Pane Title	Enter the title to display on the detail pane.
History Display Pane Level	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.
History Display Pane Title Transfer Order	 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: Item Order Description Order Shipment Date Order Entered Order Matrix Style Order
Style Entry Report	Use this field to browse to the location of a Crystal Report to be made available on the Style Matrix window.
Style Entry Report Button Name	Use this field to provide the name of the button that will appear to launch the Sales Entry Report.



Entry Layout Tab

Form Layout	E	Entry Layout	Pricing Options
llow for Searching in Entry Columns	U AISMtxClr	nDis	
umber of Quantity Columns	<u>µ</u> 0		
# Field Name		Display Name	
U_AISSort1		SKU	
U AISSort2		Color	
U_AISSort3	•	Size	
U_AISSort4	•	Option	

This tab allows you to define the attributes that will be shown in the Sales Order Style Matrix.

Allow for Searching in Entry Columns	Check this box if you wish users to be able to search for valid values in the Matrix entry columns.
Number of Quantity Columns	Enter the number of columns to display for quantities on the Style Matrix. This would be the maximum number of sizes that could be valid for item styles.
Field Names	In each row, select a field name representing one of the style attributes. You will be selecting from the list



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 Display Prices on Entry Tab Allow for Change of Price Special Pricing in Sales Order Entry Title of Pricing Program			Pricing Options	
Display Prices on Entry Tab	S			
Allow for Change of Price	v			
Special Pricing in Sales Order Entry				
Title of Pricing Program				
the of the dig the grant	Early Bird			
Header Field for Pricing Indicator	Special Price			
Add Entry Field to Sales Order	~			
Value to Indicate Inclusion	/es			
Value to Indicate Exclusion	10			
Line Item Field for Pricing Indicator	Special Price			
Value to Indicate Inclusion	/es			
Value to Indicate Exclusion	10			
Header Field for Date Determination 1	2			
Price List For Month 1	Jse Default SAP Price	*		
Price List For Month 2	Jse Default SAP Price	*		
Price List For Month 3	Jse Default SAP Price	*		
Price List For Month 4	Jse Default SAP Price	Ŧ		
Price List For Month 5	Jse Default SAP Price	*		
Price List For Month 6	Jse Default SAP Price	*		
Price List For Month 7	Jse Default SAP Price	Ŧ		
Price List For Month 8	Jse Default SAP Price	*		
Price List For Month 9	Jse Default SAP Price	*		
Price List For Month 10	Jse Default SAP Price	*		
Price List For Month 11	Jse Default SAP Price	*		
Price List For Month 12	Jse Default SAP Price	Ψ.		

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.



Special Pricing in Sales Order Entry	Check this box to enable Early Buy functionality.
Title of Pricing Program	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.
Header Field for Pricing Indicator	Enter the name of the UDF in the Marketing Document Header which defines the seasonal pricing indicator (example AISMtxSeason).
Add Entry Field to Sales Order	Check this box to add an entry field on the sales order header to indicate whether the order will be eligible for seasonal pricing.
Value to Indicate Inclusion	Enter the value to display in the header UDF to indicate that the order will use seasonal pricing (for example, "Yes" or "Y").
Value to Indicate Exclusion	Enter the value to display in the header UDF to indicate that the order will not use seasonal pricing (for example, "No" or "N").
Line Item Field for Pricing Indicator	Enter the name of the UDF in the Marketing Document Rows which defines the seasonal pricing indicator (example AISMtxSeason).
Value to Indicate Inclusion	Enter the value to display in the row UDF to indicate that the item will use seasonal pricing (for example, "Yes" or "Y").
Value to Indicate Exclusion	Enter the value to display in the row UDF to indicate that the order will not use seasonal pricing (for example, "No" or "N").
Header Field for Date Determination	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</i> > <i>System Information</i> . Note that the Delivery date is field 12.



Price List for MonthsFor 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".

	<u>∎</u> 5-	⊘∓									StyleItemS	et [Compati	bility Mode]	- Excel						
FIL	HON	AE INSE	RT	PAGE LAYOU	F FORM	IULAS	DATA	REVIEW	VIEW	ADD	-INS									
Norm	al Page Bre Preview Workbo	ak Page C Layout V	ustom Views	✓ Ruler✓ Gridlines	✓ Formul ✓ Headin Show	la Bar 🕻 Igs Zo	oom 100	Zoom to Selection	New Window	Arrar v Al	nge Freeze I Panes	Split	ED View ED Sync B Rese Window	r Side by Side hronous Scr t Window Pe	e olling osition W	Switch indows	Macros	v Macros		
				£													Rec	ord Macro		
AI		·	~	Jx														Relative Refer	ences	
	Α	В	С	D	E	F	G	н	1		J	к	L	М	N	o	<u>Use</u>		in in	S
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Normal Page Break Page Custom Preview Layout Views	r Q I I I I I I I I I I I I I I I I I I	Split D View Side by Side Hide D Synchronous Scrolling Olnhide D Reset Window Position	Macros
Workbook Views Show	Zoom	Window	Macros
A1 • : × ✓ fx			
A B C D E	F G H Macro	? × 0	P Q R S
1	Macro name:		
2	GetAllItems	📧 <u>R</u> un	
3	GetAllItems		
4	PutAllitems	<u>≥</u> tep Into	
5		Edit	
6		Card a	
7		Create	
8		Delete	
9		Ontion	
10			
11	Marros in: All Open	Narkhookr	
12	Description		
13	Description		
14			
15			
10		Cancel	
1/			
18			

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).

🚺 🔒 🐬 👌 ÷	Style	ltemSet [Co	mpatibility	/ Mode] - Excel					
FILE HOME INSERT PAGE LAYOUT FORM	IULAS DATA REVIEW VIEW ADD-INS								
Ruler V Formu	la Bar 🔍 📑 🔄		plit 🛙	Ciew Side by Side by Side	lling		<u>_</u>		
Preview Layout Views	gs Zoom 100% Zoom to New Arrange Selection Window All	Panes 👻 🗔 l	Jnhide 🗄	🕮 Reset Window Pos	sition Wi	ndows •	*		
Workbook Views Show	Zoom		Wind	iow		Ma	icros		
$G10$ \checkmark \vdots \times \checkmark f_x									
						_			
A	В		С	D E	F	G	Н	1	J K
1 ItemCode	Name	Styl	e Co	olor Size	Option	Column D	Quantity (Max Displ	Retension Percenta
2 DMTest3	DM Test3		5000 red	d small		2	0	0	0
3 TestNI	Test No Inventory Item		5000 red	d medium		3	0	0	0
4 QC002	QC002-Serial Managed Item		5000 red	d large		4	0	0	0
5 JJ10200	Tr415 Snap-In Valve Schrader		5020 blk	k small		2	0	0	0
6 ChkNeg2	Check Negative		5020 red	d small		2	0	0	0
7 JJ10201	Tr418 Snap-In Valve Schrader		5010 blk	k small		2	0	0	0
8 JJ10202	Tr423 Snap-In Valve Schrader		5010 blk	k medium		3	0	0	0
9 ReallyReallySuperLongItemNumber	Really Really Super Long Item Number Descri	otion	5010 blk	k large		4	0	0	0
10 0-01899_Flexible	0-01899 Flexible						0	0	0
11 JJ10300	Tr425 Snap-In Valve Schrader						0	0	0
12 JJ10301	Universal Cement Quart Can						0	0	0
13 RD224	120PAR38/220-240V-AAMSCO						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
✓ Allow Changes to Existing Orders
Activate Automatic Availability Check
Ivert 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
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.

ltem Groups - Setup		_ 🗆 ×
Item Group Name	Apparel	
Ge <u>n</u> eral	Accounting	
Default UoM Group	Manual	
Planning Method	MRP	*
Procurement Method	Buy	*
Order Interval		_
Order Multiple	0.000	
Minimum Order Qty	0.000	Inventory UoM
Lead Time	10	Dave
Tolerance Days	10	Days
Default Valuation Method	Moving Average	•
Use Forecast Demand Formula	Use Actual Inventory Demand	v
Procurement Method	Buy	*
Default Bin Locations		
# Whse Code Whse Name	Default Bin Location Enfo	rce Default Bin Loc. 🛛 🔼
1 ➡ 02 West Cost Wa	ri	
2 🔿 05 In-Transit		



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.

✓ Purchase Item	Require Internal Serial Scan	Optional 👻
Is Quality Check Required ?	Require Manu Serial Scan	Optional 🔻
	Require Lot Number Scan	Optional 👻
	Require Details Scan	Optional 🔻
	WMS Batch 1 Label	
	WMS Batch 2 Label	
Properties Remarks Attachments	WMS Detail Label	
- Contraction of the second seco	Batch Attribute #1	Optional 🔻
	Batch Attribute #2	Optional 🔻
	Require Details Scan	Optional 🔻
	Batch Expiration Date	Optional 🔻
	Batch Manufacturing Date	Optional 💌
	Batch Admission Date	Optional 💌
	Rental Item	No 🔻
	Country of Origin	
	Freight Class	
	NMFC Item No.	
	Successor Item Code	
	Quality Required	
	Style Column Display	34
	Style Quantity Column	4
	Style Maximum Display Quantity	
	Style Retention Percentage	
	Style Sort 1	PO
	Style Sort 2	black 🔻
	Style Sort 3	34
	Style Sort 4	TS

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. <u>If you have changed the display names</u> 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

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.

Sales Order								_ 🗆 ×
Customer 🛋	C40000				No.	Primary	258	
Name	Earthshaker Cor	poration			Status		Unapproved	
Contact Person	Bob McKensly	•			Posting) Date	04/07/2020	
Customer Ref. No.	2000-919293949-	1			Deliver	y Date	04/18/2020	
Local Currency					Docum	ent Date	04/07/2020	
					Early E	Sird	yes	*
Contents Logis	tics Accountir	ng Rental Elec	tronic Documents	Attachments Document I	Delivery I	Packing		
Item/Service Type	Item	-				Summary T	ype No S	ummary 🔻
# Item No.	Quantity	Unit Price	Disc Tax C	Total (LC)	Whse	Del. Date	UoM Code	c 7
1 🔿 A00001	1	500.00 \$	0.000 📫 LG	500.00 \$	➡ 01	04/18/2020	Manual	
2 📫 100007	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 Owner	Sophie Klogg	E			Total B Discou	efore Discount		597.50 \$
					Freight	<u>t</u>		
					L Roj	unding		ED 70 ¢
					Total			53./8 \$
Remarks					Total			651.28 ş
ОК Са	ancel Recal	lc Prices Reserva	ations			Copy Fro	om Co	ру То

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:



#	Item No.	Quantity	Unit Price	Disc	Tax C	Total (LC)	Whee	Del. Date	UoM Code	C 7
		Quantity		Discin	have only	10121 (20)			00000	
1	A00001	1	500.00 \$	0.000	📫 LG	500.00 ş	➡ 01	04/18/2020	Manual	
2	100007	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	(9		0.000				04/18/2020		
			System Message					×		
			Choose By Style or	Item Ent	rγ?			?		
les I	Employee	Sophie Klogg	Style	Item						597.5
vne	r	L					Discour	nt %		

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

<u>Item Entry Tab</u>

The following screen appears.

		Matrix E	ntry		SKU	Pricing			Availability			Matrix	Detail		Or	der History
					-	-	-	-	-	-	-	-	-	-		
	SKU	Color	Size	Option	Qtys	Qtys	Qtys	Qtys	Qtys	Qtys	Qtys	Qtys	Qtys	Qtys	Total	Value
μ																
											_					
						_			_		_					
						_										
2	Pricing				0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		
,	Bird Pri	cing														
c	handise	Totals			0	0	0	0	0	0	0	0	0	0	0	0.00
													Shipping T	vpe	Motor	Express 🔻
а	rks												Freight Am	ount	.00	
													Document.	Amount	651.28	3

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.



Style	e Matrix Se	election															_ D >
		Matrix Er	itry		SKU	Pricing			Availability			Matrix	Detail		0	rder History	
_					-	SM	Med	-	XL	XXL	-	-	-	-			
#	SKU	Color	Size	Option	Qtys	Qtys	Qtys	Qtys	Qtys	Qtys	Qtys	Qtys	Qtys	Qtys	Total	Value	
	PO													_			_
	_		_	Color Sea	ırch											_	□ ×
	_																
				Color				Description									
				blk				black									
				red				red									_
	_																
																	_
				_													
																	_
Sty	le Pricing																
Ear	rly Bird Pr	icing Totals															
me	ruialiuise	TOLAIS															
Ren	narks																
				Choos	e Ca	ncel											
Co	lors: blk,re	ed								_							
	Add Row	Dupli	icate Row	Delete R	ow	Cance		Т	ransfer								

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.



		Matrix E	ntry		SKL	Pricing			Availability			Matrix	Detail		c	Order History
					-	SM	Med	-	XL	XXL	-	-	-	-		
	SKU	Color	Size	Option	Qtys	Qtys	Qtys	Qtys	Qtys	Qtys	Qtys	Qtys	Qtys	Qtys	Total	Value
ļ	PO	blk				2	7		3	2					14	0.00
									_		_					
	Duisian					0.00	0.00		0.00	0.00	_	_	_	1		
	Bird Pr	icina				0.00	0.00		0.00							
, c	handise	Totals			0	2	7	0	3	2	0	0	0	0	14	0.00
	-l												Shipping Ty	/pe	Moto	or Express 🔻
3	rks												Document A	Amount	.00	
													bocament		100	

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.



<u>Item Check</u>

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.

	N	latrix Er	try		SKU	Pricing			Availability			Matrix	Detail		c	Order History	
					-	SM	Med	-	XL	XXL	-	-	-	-			
I.	Co	or	Size	Option	Qtys	Qtys	Qtys	Qtys	Qtys	Qtys	Qtys	Qtys	Qtys	Qtys	Total	Value	
	Ыk					2	4		5	2					13	243.75	
	blk					1	2		1	1		_			5	93.75	
	Style	Matrix	ltem Ch	leck													
	Dup	licate Ro	ws														
11		Select	Row	ItemCode		Des	cription				Order Qty	Del	ivery Date		Qty to Updat	te	Price
	1		1	PO-TS-SM-E	Blk	Polo	Tee shirt bla	ck small			2	2020	0/04/29				18.75
	2		1	PO-TS-Med-	-BLK	Polo	Tee shirt Bla	ck Medium			4	2020	0/04/29				18.75
	3		1	PO-TS-XL-B	SLK	Polo	Tee shirt Bla	ck XL			5	2020	0/04/29				18.75
41	4	⊢⊢	1	PO-TS-XXL-	BLK	Polo	Tee shirt Bla	ck XXL			2	2020	0/04/29				18.75
-11-	5	⊢⊢	2	PO-TS-SM-E	- PI V	Polo	Tee shirt bla	ck small			1	2020	0/04/29				18.75
11	7	H	2	PO-TS-XXI-	BLK	Polo	Tee shirt Bla	ck XXI			1	2020	0/04/29				18.75
	8		2	PO-TS-XL-B	SLK	Polo	Tee shirt Bla	ck XL			1	2020	0/04/29				18.75
ic																	
y																	
1		Mer	ae Lines		Delete Line(s		Update	Ouantity									
			2														
	Item	Availat	oility														
		Item			Description			Row I	Delivery Dt		Order Qty	Availa	ble on Deliv	ery Date	Ba	ackOrder Cor	mplete Dt
	1	📫 PO	-TS-Med-I	BLK	Polo Tee shirt	Black Med	ium	04/29/	2020			4			3 05/	/10/2020	
	2	🕈 PO	-TS-XL-BL	.K	Polo Tee shirt	Black XL		04/29/	2020			5			-1 05/	/10/2020	
84	3	PO	-TS-XL-BL	.K	Polo Tee shirt	Black XL		04/29/	2020			1			-1 05/	/10/2020	
	4		-15-XXL-E	SLK	Polo Tee shirt	Black XXL Black XXL		04/29/	2020			2			0 05/	/10/2020	
ē.,	-		13-776-6	our.	POID Tee shirt	DIGCK AAL		04/25/	2020			1			0 05	10/2020	
	-1											1.1	Order	Convolutor		2020	
	Cha	nge to	Available (Qty Back Or	rder Rem. Qty	Back	Order Comp	olete	SKU Comp	lete	Ship Con	nplete	Order	Complete I	Date 05/10/	2020	

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

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.



As each line in the upper and lower grid is rectified, the item disappears from the grid. When the grid is empty, it will close.

Note: The Item Availability Check screen will only be visible if "Use Item Availability Check" was selected.

If "Require Availability Check" was selected, then if there are any backordered items on the order, you will not be allowed to exit from the matrix until an acceptable ship date has been entered for all items.

	Matrix E	Entry			SKU Pricing		Availabilit	/		Matrix Detail			Order History
5KU	Color	Size	Option	-	SM	Med	-	XL	XXL	-	-	-	-
Ó	blk				15.63	15.63							
ks		T				^				Ship Freig	ping Type ht Amount		Motor Express V
										Docu	iment Amount		93.78

Pricing Tab

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 customer's price list or special pricing, regardless of whether seasonal pricing is used or not. It is not possible to edit the prices on this screen.

This screen allows the operator to quickly quote prices of each item/size to the customer while taking the order on the phone.

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



<u>Availability Tab</u>

	Matrix Er	ntry		SKU	Pricing		Avail	ability		Matrix D	etail		Order History	
5KU	Color	Size	Option	-	SM	Med	-	XL	XXL	-	-	-	-	
o	blk			0	7	5	0	0	0	0	0	0	0	
ks										<u>s</u> 1	5hipping Type Freight Amount		Motor Express]
										1	Document Amoun	t	109.41	1

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

This screen allows the operator to quickly confirm quantities for the customer while taking the order on the phone.

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



<u>Detail Tab</u>

Style	Matrix Selection								_ 🗆 ×
	Matrix Entry		SKU Pricing		Availability	м	atrix Detail	Order History	
	• • • • • • • • • • • • • • • • • • •	0	D. Sa	7.1.1	Set offer pate	Back Ordered	71		
		Quantity	Price	1014	est. Ship Date	Back Ordered	Dele Tee shirt P	lash M	
2	PO-TS-SM-Blk	1	15.63	15.63	04/15/2020	Yes	Polo Tee shirt b	ack small	
3	PO-TS-Med-BLK	2	15.63	31.26	04/15/2020	Yes	Polo Tee shirt B	lack Medium	
									_
							Chine Trans	Males France	-
Ren	narks						Ereight Amount	.00	
							Document Amour	109.41	
			WIP		Cancel	Transfer			

This screen allows you to see the order in detail as it will appear on the completed Sales Order. Each item code is shown on a separate row, along with its quantity, price, and expected ship date. Operators can use this screen to check that each item is entered correctly and priced correctly. Prices may be changed, if "Allow for Change in Prices" was selected.

Note: If the Item Check has been performed, this screen will indicate which items have been backordered, and what their current expected delivery date will be.



Order History Tab

ust Code 0000 0000 0000	Customer Name Earthshaker Corporation Earthshaker Corporation	DocDate 04/07/2020	Order #					order history
0000	Earthshaker Corporation Earthshaker Corporation	04/07/2020	Order #	Cust PO #	ShipToCode	Item Code	Quantity	Price
0000	Earthshaker Corporation		- 258	2000-919293949-1	Ship To	A00001	1.000	500.00
0000		04/07/2020	258	2000-919293949-1	Ship To	100007	1.000	35.00
0000	Earthshaker Corporation	04/07/2020	📫 258	2000-919293949-1	Ship To	LM4029MC	1.000	62.50
0000	Earthshaker Corporation	04/07/2020	📫 256	x-sell	Ship To	A00001	1.000	500.00
0000	Earthshaker Corporation	04/07/2020	📫 255	0101	Ship To	A00001	1.000	500.00
0000	Earthshaker Corporation	04/07/2020	📫 255	0101	Ship To	100007	2.000	35.00
0000	Earthshaker Corporation	04/07/2020	📫 255	0101	Ship To	LM4029MC	3.000	62.50
0000	Earthshaker Corporation	04/07/2020	📫 254	2:40 x-sell	Ship To	A00001	1.000	500.00
0000	Earthshaker Corporation	04/07/2020	📫 254	2:40 x-sell	Ship To	100007	1.000	35.00
0000	Earthshaker Corporation	04/07/2020	📫 254	2:40 x-sell	Ship To	LM4029MC	1.000	62.50
0000	Earthshaker Corporation	12/13/2009	📫 244		Ship To	100004	20.000	37.50
0000	Earthshaker Corporation	12/13/2009	📫 244		Ship To	100005	10.000	112.50
0000	Earthshaker Corporation	12/13/2009	📫 244		Ship To	100006	5.000	100.00
0000	Earthshaker Corporation	11/17/2009	📫 238		Ship To	A00002	5.000	250.00
0000	Earthshaker Corporation	11/17/2009	📫 238		Ship To	A00003	10.000	375.00
0000	Earthshaker Corporation	11/17/2009	📫 238		Ship To	A00004	10.000	625.00
	000 000 000 000 000 000 000 000 000 00	000 Earthshaker Corporation 000 Earthshaker Corporation	000 Earthshaker Corporation 04/07/2020 000 Earthshaker Corporation 12/13/2009 000 Earthshaker Corporation 12/13/2009 000 Earthshaker Corporation 11/17/2009 000 Earthshaker Corporation 11/17/2009	000 Earthshaker Corporation 04/07/2020 ➡ 255 000 Earthshaker Corporation 04/07/2020 ➡ 255 000 Earthshaker Corporation 04/07/2020 ➡ 254 000 Earthshaker Corporation 12/13/2009 ➡ 244 000 Earthshaker Corporation 12/13/2009 ➡ 244 000 Earthshaker Corporation 12/13/2009 ➡ 244 000 Earthshaker Corporation 11/17/2009 ➡ 238 000 Earthshaker Corporation 11/17/2009 ➡ 238	000 Earthshaker Corporation 04/07/2020 255 0101 000 Earthshaker Corporation 04/07/2020 255 0101 000 Earthshaker Corporation 04/07/2020 254 2:40 x-sell 000 Earthshaker Corporation 12/13/2009 244 000 Earthshaker Corporation 12/13/2009 244 000 Earthshaker Corporation 12/13/2009 244 000 Earthshaker Corporation 11/17/2009 238 000 Earthshaker Corporation 11/17/2009 238 000 Earthshaker Corporation 11/17/2009 238	D000 Earthshaker Corporation 04/07/2020 ➡ 255 0101 Ship To 0000 Earthshaker Corporation 04/07/2020 ➡ 255 0101 Ship To 0000 Earthshaker Corporation 04/07/2020 ➡ 255 0101 Ship To 0000 Earthshaker Corporation 04/07/2020 ➡ 254 2:40 x-sell Ship To 0000 Earthshaker Corporation 04/07/2020 ➡ 254 2:40 x-sell Ship To 0000 Earthshaker Corporation 04/07/2020 ➡ 254 2:40 x-sell Ship To 0000 Earthshaker Corporation 12/13/2009 ➡ 244 Ship To 0000 Earthshaker Corporation 11/17/2009 ➡ 238 Ship To 0000 Earthshaker Corporation 11/17/2009 ➡ 238 Ship To	D000 Earthshaker Corporation 04/07/2020 ➡ 255 0101 Ship To 100007 000 Earthshaker Corporation 04/07/2020 ➡ 255 0101 Ship To LM4029MC 000 Earthshaker Corporation 04/07/2020 ➡ 255 0101 Ship To LM4029MC 0000 Earthshaker Corporation 04/07/2020 ➡ 254 2:40 x-sell Ship To A00001 0000 Earthshaker Corporation 04/07/2020 ➡ 254 2:40 x-sell Ship To IM4029MC 0000 Earthshaker Corporation 04/07/2020 ➡ 254 2:40 x-sell Ship To IM4029MC 0000 Earthshaker Corporation 12/13/2009 ➡ 244 Ship To I00004 0000 Earthshaker Corporation 12/13/2009 ➡ 244 Ship To I00005 0000 Earthshaker Corporation 12/13/2009 ➡ 244 Ship To I00006 0000 Earthshaker Corporation 11/17/2009 ➡ 238 Ship To A00002 0000 Earthshaker Corporati	D000 Earthshaker Corporation 04/07/2020 ➡ 255 0101 Ship To 100007 2.000 0000 Earthshaker Corporation 04/07/2020 ➡ 255 0101 Ship To LM4029MC 3.000 0000 Earthshaker Corporation 04/07/2020 ➡ 255 0101 Ship To LM4029MC 3.000 0000 Earthshaker Corporation 04/07/2020 ➡ 254 2:40 x-sell Ship To 100007 1.000 0000 Earthshaker Corporation 04/07/2020 ➡ 254 2:40 x-sell Ship To 100007 1.000 0000 Earthshaker Corporation 04/07/2020 ➡ 254 2:40 x-sell Ship To 100007 1.000 0000 Earthshaker Corporation 12/13/2009 ➡ 244 Ship To 100004 20.000 0000 Earthshaker Corporation 12/13/2009 ➡ 244 Ship To 100005 10.000 0000 Earthshaker Corporation 12/13/2009 ➡ 244 Ship To 100005 5.000 0000

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.

Sales	Order										_	□ ×
Custo Name Conta Custo BP Cu	omer act Person omer Ref. No. urrency	C40000 Earthshaker Bob McKens 876111 \$	Corporation)					No. Pr Status Posting Dat Delivery Da Document Early Bird	imary 2 C c c c c c c c c c c c c c c c c c c	61 Open 4/15/2020 4/15/2020 4/15/2020 res	
	Contents Log	jistics Acco	unting Rental	Electroni	ic Documer	ts Attachments	Docum	ent Delivery	Packing			
# 1	Item No. PO-TS-Med-I	Quantity BLF 7	Unit Price 15.63 \$	Disc 0.000	Tax C	Total (LC)	109.41 \$	Whse 01	Del. Date 04/15/2020	UoM Code Manual	COGS Distr. Rule	7
2 3 4	PO-TS-SM-B PO-TS-SM-R PO-TS-XL-BL PO-TS-XL-BL	k 5 ED 3 K 3	15.63 \$ 15.63 \$ 15.63 \$	0.000			78.15 \$ 46.89 \$ 46.89 \$	01 01 01 01 01 01 01	04/15/2020 04/15/2020 04/15/2020	Manual Manual Manual		
6	POTISAL	2	\$ 50,51	0.000			51.20 ş		04/15/2020	Manual		
								1	1			
Sales Owne	Employee	Sophie Klog	<u>ig</u>)					Total Before Discount Freight	e Discount	31	0.00 \$
Remai	rks								Tax Total		2 34	100 \$ 18.14 \$ 10.74 \$
Add	& View 🦼	Cancel F	Recalc Prices Res	ervations	5					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.

endor	➡ V23000		۲		No.	Primary	Ŧ	271	- 0	
ame	Anthony Smith	1			Statu	S		Open		
ontact Person	Matt Spanos		T (1)		Posti	ng Date		04/15/20	020	
endor Ref. No.					Delive	ery Date		04/15/20	020	
P Currency	▼ \$				Docu	ment Date		04/15/20	020	
Contents	Logistic	.s	Acc	ounting		Attachments		Do	ocument Deli	very
Contents Item/Service Type	Logistic	cs	Acc	ounting		Attachments Summa	ary Ty	Do /pe	ocument Delin No Summa	very ry 🔻
Contents Item/Service Type # Item No.	Logistic Item Quantity	cs Unit Pr	Acc	ounting Disco	Tax Code	Attachments Summ Total (LC)	ary Ty	Do /pe	ocument Deli No Summa UoM Code	very ry 🔻
Contents Item/Service Type # Item No. 1	Item Quantity	r Unit Pr	Acc	Disco 0.000	Tax Code	Attachments Summ Total (LC)	ary Ty	Do	No Summa UoM Code	ry Very

Note: Seasonal pricing does not apply to Purchase Orders.

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:

System Message	×
Choose By Style or Item Entry?	?
Style Item	

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

<u>Item Entry Tab</u>

Style	Matrix S	election														-	
		Matrix E	Intry		SKU	Pricing			Availability			Matrix [Detail		Ord	er History	
					-	-	-	-	-	-	-	-	-	-			
#	SKU	Color	Size	Option	Qtys	Qtys	Qtys	Qtys	Qtys	Qtys	Qtys	Qtys	Qtys	Qtys	Total	Value	
	1		_							_							
Sty Me	/le Pricii rchandi	ng ise Totals			0.00 0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0	0.00	
													Shipping .	Type	Moto	r Express 🔻	
ler	marks												Freight Ar	mount	.00		
													Documen	L Amount	.00		
SKI	lle: SH 4	SS PO															
J	03. 011,0	55,10															
1	Add Row	/ Dupl	icate Row	v Delete R	low	WIP		Cancel		Trans	fer						

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.



	Matrix E	Entry		SKU Pricing			Availability			Matrix Detail				Order History		
				-	-	-	-	-	-	-	-	-	-			
* SKU	Color	Size	Option	Qtys	Qtys	Qtys	Qtys	Qtys	Qtys	Qtys	Qtys	Qtys	Qtys	Total	Value	
PO					_									0	0.00	
			Color Search												_ 🗆 ×	
			Color			Des	cription									
			red			black red	¢									
vle Prici	ng															

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.

Styl	e Matrix	Selection														
	_	Matrix E	Intry		SKU	Pricing			Availability			Matrix	Detail		Ord	ler History
					-	SM	Med	-	XL	XXL	-	-	-	-		
#	SKU	Color	Size	Option	Qtys	Qtys	Qtys	Qtys	Qtys	Qtys	Qtys	Qtys	Qtys	Qtys	Total	Value
	PO	blk				10	12		5	5					32	400.00
	PO	red				8									8	100.00
			_					_	_	_						
											_					
									-		_					
								_			_					
	_															
									_							
SI	vle Pric	ina			0.00	12.50	12.50	0.00	12.50	12.50	0.00	0.00	0.00	0.00		
M	erchand	lise Totals			0	18	12	0	5	5	0	0	0	0	40	500.00
													Shipping	Туре	Moto	r Express
Re	marks												Freight A	mount	.00	
													Documen	t Amount	500.	00

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.



<u>Pricing Tab</u>

yle	Matrix	Selection											_ [
		Matrix	Entry			SKU Pricing		Availa	bility	1	Matrix Detail	Order History	
	SKU	Color	Size	Option	-	SM	Med	-	XL	XXL			
L	PO	blk				12.50	12.50		12.50	12.50			
	PO	red				12.50	12.50		12.50	12.50			
			1					~			Shipping Type	Motor Express 💌	
n	arks										Freight Amount	200.00	
								~			Document Amount	200.00	
						WID		ancel	Trans	fer			

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.



<u>Availability Tab</u>

	Matrix En	itry		SKU Pricing			Availability			Matrix Detai		Order History		
SKU	Color	Size	Option	-	SM	Med	-	XL	XXL	-	-	-	-	
РО	blk			0	2	-2	0	-3	-2	0	0	0	0	
PO	red			0	-3	0	0	0	0	0	0	0	0	
]			Ship	ping Type	Ma	otor Express 🔻	
rks										Frei	ght Amount	.00)	
										Doc	ument Amount	20	0.00	
							J							

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.



<u>Detail Tab</u>

Style	Matrix Selection							_ 🗆 ×
	Matrix Entry		SKU Pricing		Availability	Ма	trix Detail	Order History
	Item	Quantity	Price	Total	Est. Ship Date	Back Ordered	Item Name	
1	PO-TS-SM-RED	5	12.50	62.50	04/16/2020	Yes	Polo Tee shirt I	RED small
2	PO-TS-XL-BLK	2	12.50	25.00	04/16/2020	Yes	Polo Tee shirt I	Black XL
3	PO-TS-Med-BLK	5	12.50	62.50	04/16/2020	Yes	Polo Tee shirt i	Black Medium
4	PO-TS-XXL-BLK	2	12.50	25.00	04/16/2020	Yes	Polo Tee shirt I	Black XXL
5	PO-TS-SM-Blk	2	12.50	25.00	04/16/2020	Yes	Polo Tee shirt l	black small
Rer	narks						Shipping Type Freight Amount Document Amount	Mator Express .00 200.00
			WIP	c	ancel	Transfer		

This screen allows you to see the order in detail as it will appear on the completed Purchase Order. Each item code is shown on a separate row, along with its quantity, price, and expected ship date. Operators can use this screen to check that each item is entered correctly and priced correctly. Prices may be changed, if "Allow for Change of Price" was selected from the Style Configuration screen, Pricing Options tab.



Order History Tab

Ma	atrix Entry	SKU Pricing		Availability		Matrix Detail		Order History
/endor Code	Vendor Name	DocDate	Order #	Vendor PO #	ShipToCode	Item Code	Quantity	Price
/23000	Anthony Smith	11/20/2009	➡ 262			C00007	30.000	500.00
23000	Anthony Smith	11/20/2009	📫 262			C00008	30.000	200.00
23000	Anthony Smith	11/20/2009	📫 262			C00009	30.000	20.00
23000	Anthony Smith	11/20/2009	📫 262			C00010	30.000	20.00
23000	Anthony Smith	11/20/2009	📫 262			C00011	30.000	40.00
23000	Anthony Smith	10/08/2009	📫 254			C00001	40.000	400.00
23000	Anthony Smith	10/08/2009	📫 254			C00002	40.000	300.00
23000	Anthony Smith	10/08/2009	📫 254			C00003	40.000	130.00
23000	Anthony Smith	10/08/2009	📫 254			C00004	40.000	35.00
23000	Anthony Smith	10/08/2009	📫 254			C00005	40.000	60.00
23000	Anthony Smith	08/26/2009	📫 246			LM4029APCD	40.000	5.00
23000	Anthony Smith	08/26/2009	📫 246			A00001	50.000	400.00
23000	Anthony Smith	08/26/2009	📫 246			A00002	50.000	200.00
23000	Anthony Smith	08/26/2009	📫 246			A00003	50.000	300.00
23000	Anthony Smith	08/26/2009	📫 246			A00004	50.000	500.00
23000	Anthony Smith	07/16/2009	📫 238			100012	30.000	45.00
						Shipping Ty	/pe	Motor Express
ks						Freight Am	ount	.00
						Document /	Amount	200.00

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.

Purch	ase Order													_ 🗆
Vendo Name	or 📫	Anthony Smith	(No. Status	Primary 🔻	271 Open	-	0
Conta	ict Person 🛁	Matt Spanos	▼ (3)							Posting	Date	04/16/2020		
Vendo	or Ref. No.	ab-1000								Deliver	y Date	04/16/2020		
BP CL	irrency 🔻	\$								Docum	ent Date	04/16/2020		
	Contents	Logistics	Accou	nting		Attachments	Do	cument Deliver	у					
Iter	n/Service Type	Item 🔻							-1		Summary T	ype I	No Sumr	ary 🔻
#	Item No.	Quantity	Unit Price	Disc	Tax C	Total (LC)		UoM Code	Blan	Standard Pric	Aggregate Pri	Best Price	Тс	t 🔼
1	PO-TS-Med-BLH	5	12.50 \$	0.000	I NY		62.50 \$	Manual				No	No	
2	PO-TS-SM-Blk	2	12.50 \$	0.000	I 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	I NY		25.00 \$	Manual				No	▼ No	
5	PO-TS-XXL-BLK	2	12.50 \$	0.000	I NY		25.00 \$	Manual				No	▼ No	
6				0.000								No	▼ No	
3uyer Dwne	r 📫	James Chan	▼							Total Be Discour	efore Discount			200.00
lemar	ke									Freight Ro <u>u</u> Tax Total Pa	inding syment Due			0.00 16.50 216.50

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.