



## **ACHIEVE STYLE**

**USER MANUAL**  
**Version 6.5**

**PRESENTED BY**  
**ACHIEVE IT SOLUTIONS**



**SAP**<sup>®</sup> Certified  
SAP Business One Integration

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SAP Business One Integration

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# ACHIEVE STYLE USER MANUAL

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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? **Achieve 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.

**Note:** Although this manual uses references and terminology relating to the clothing industry, *Achieve 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 Order or Purchase Order Screen, 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

## Version 6.5

This manual is specific to Version 6.5 of **Achieve Style**, which is distributed in conjunction with SAP Business One version 9.1 and above. In addition to various minor enhancements and changes to screen formats, it includes the following new elements:

- Change logs for the Style Defaults screen
- Blanket Orders take precedence over Seasonal Pricing when both exist for the same order
- Order-To-Cash (OTC) inquiry screens for Customers, Vendors, and Items show documents of all types related to the specified Business Partner or Item. See the Achieve One Special Features manual for details of this feature.

## Setups

There are a number of setups that are necessary in order to use the features of *Achieve 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

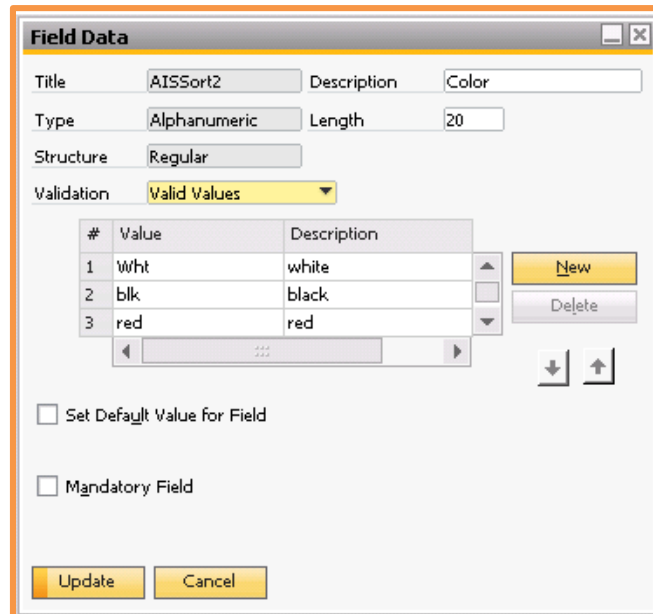
Caps: style, color

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**

Title: AISSort2    Description: Color

Type: Alphanumeric    Length: 20

Structure: Regular

Validation: Valid Values

#	Value	Description
1	Wht	white
2	blk	black
3	red	red

Set Default Value for Field

Mandatory Field

Buttons: New, Delete, Update, Cancel

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.

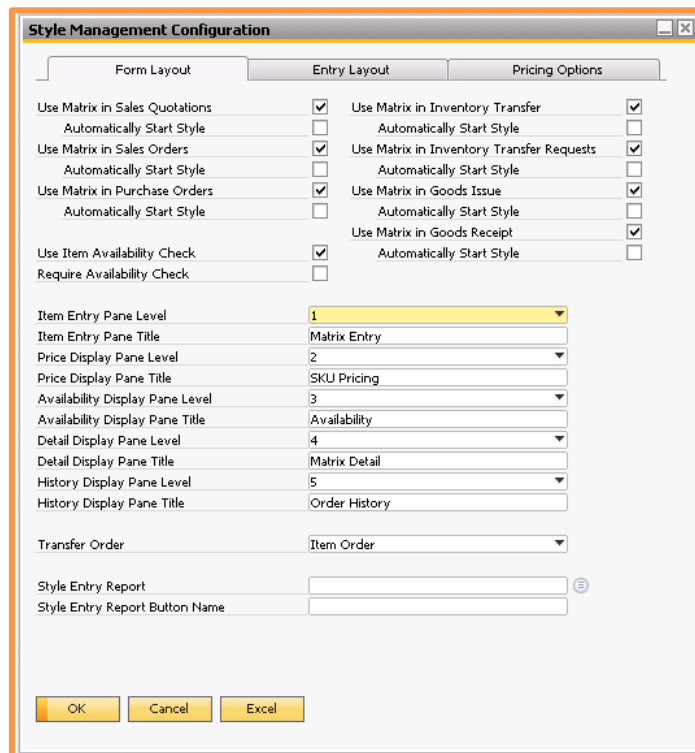
## Style Defaults Entry

*Administration > Achieve One > Achieve 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 screenshot shows the 'Style Management Configuration' dialog box with the 'Form Layout' tab selected. The dialog has three tabs: 'Form Layout', 'Entry Layout', and 'Pricing Options'. The 'Form Layout' tab contains the following settings:

Setting	Value
Use Matrix in Sales Quotations	<input checked="" type="checkbox"/>
Automatically Start Style	<input type="checkbox"/>
Use Matrix in Sales Orders	<input checked="" type="checkbox"/>
Automatically Start Style	<input type="checkbox"/>
Use Matrix in Purchase Orders	<input checked="" type="checkbox"/>
Automatically Start Style	<input type="checkbox"/>
Use Item Availability Check	<input checked="" type="checkbox"/>
Require Availability Check	<input type="checkbox"/>
Item Entry Pane Level	1
Item Entry Pane Title	Matrix Entry
Price Display Pane Level	2
Price Display Pane Title	SKU Pricing
Availability Display Pane Level	3
Availability Display Pane Title	Availability
Detail Display Pane Level	4
Detail Display Pane Title	Matrix Detail
History Display Pane Level	5
History Display Pane Title	Order History
Transfer Order	Item Order
Style Entry Report	
Style Entry Report Button Name	

At the bottom of the dialog are three buttons: 'OK', 'Cancel', and 'Excel'.

*Use Matrix in Sales Quotations*  
*Automatically Start Style*

Check this box if you wish to use the Style Matrix when entering Sales Quotations.  
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.
<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 Receipts instead of prompting the user to select Item or Style.
<i>Use Item Availability Check</i>	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* Enter the title to display on the history pane.

*Transfer Order* 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

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

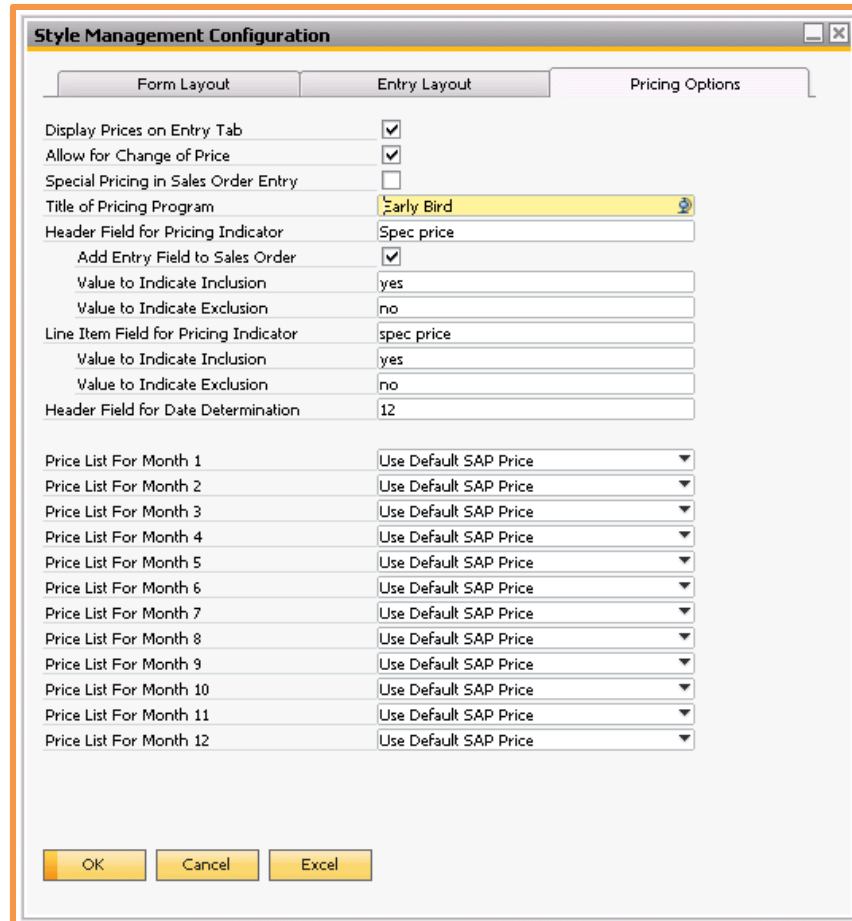
The screenshot shows the 'Style Management Configuration' dialog box with the 'Entry Layout' tab selected. It includes a table with the following data:

#	Field Name	Display Name
1	U_AISSort1	SKU
2	U_AISSort2	Color
3	U_AISSort3	Pattern
4	U_AISSort4	Size

<i>Allow for Searching in Entry Columns</i>	Check this box if you wish users to be able to search for valid values in the Matrix entry columns.
<i>Number of Quantity Columns</i>	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.
<i>Field Names</i>	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.  <b>Note:</b> All possible attributes should be included here, even those which will not be used for all items.
<i>Display Names</i>	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.



*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”.

*Header Field for Pricing Indicator*

Enter the name of the UDF in the Marketing Document Header which defines the seasonal pricing indicator.

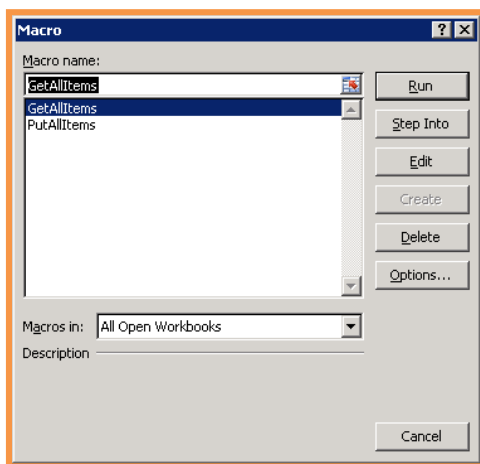
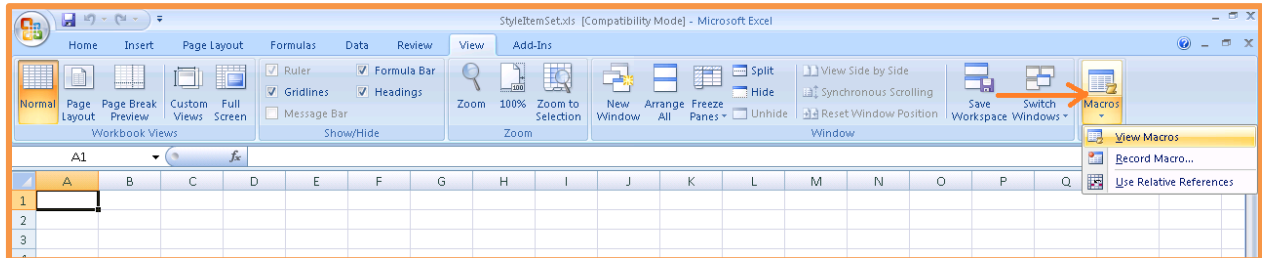
<i>Add Entry Field to Sales Order</i>	Check this box to add an entry field on the sales order header to indicate whether the order will be eligible for seasonal pricing.
<i>Value to Indicate Inclusion</i>	Enter the value to display in the header UDF to indicate that the order will use seasonal pricing (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.
<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 &gt; System Information</i> . Note that the Delivery date is field 12.
<i>Price List for Months</i>	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

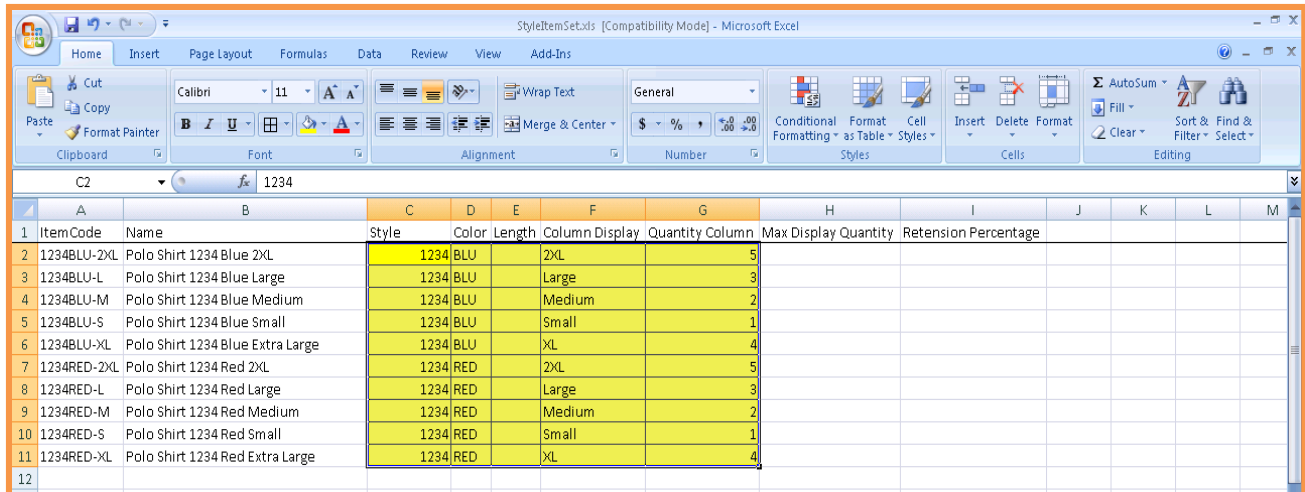
The “Excel” button at the bottom of the Style Defaults Entry screen will allow you to configure existing items with the required information for **Achieve Style**. Note that it is required that you configure Excel to “Enable all macros” in order to use this feature.



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 **Achieve Style** information about each item (see the section on configuring the Item Master later in this manual).



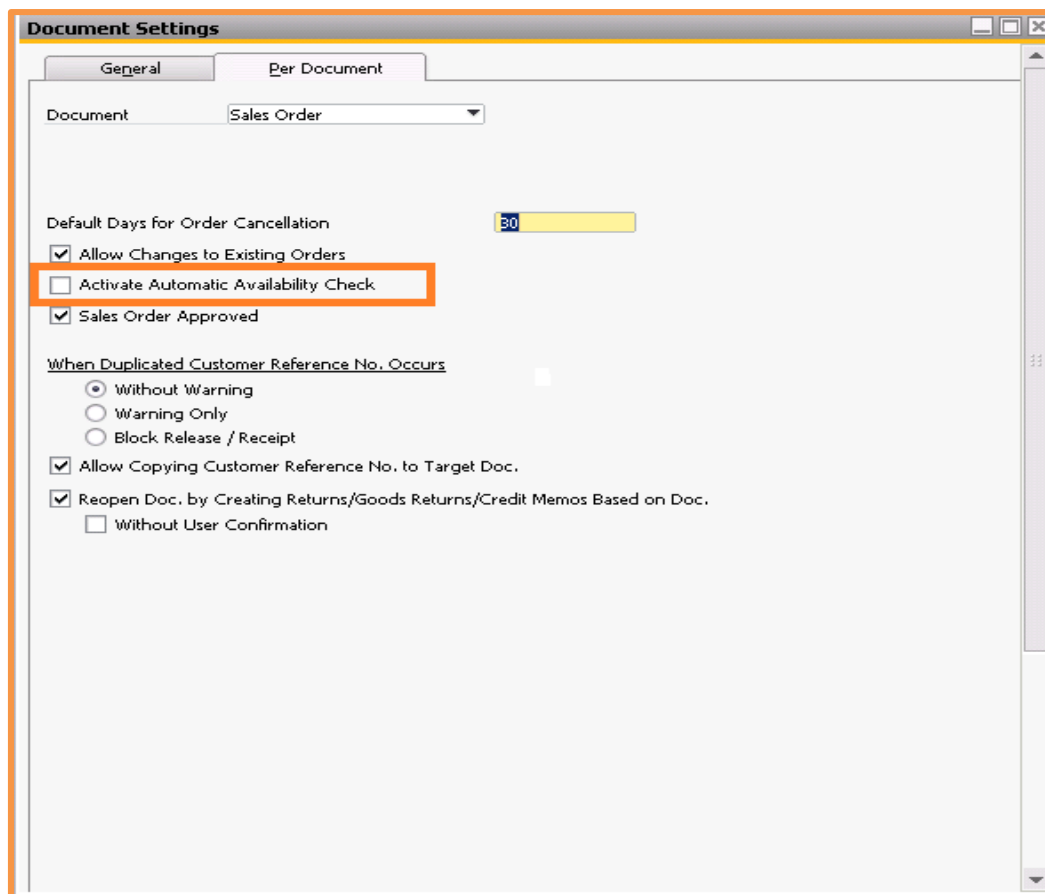
1	ItemCode	Name	Style	Color	Length	Column Display	Quantity	Column	Max Display	Quantity	Retention Percentage
2	1234BLU-2XL	Polo Shirt 1234 Blue 2XL	1234	BLU		2XL	5				
3	1234BLU-L	Polo Shirt 1234 Blue Large	1234	BLU		Large	3				
4	1234BLU-M	Polo Shirt 1234 Blue Medium	1234	BLU		Medium	2				
5	1234BLU-S	Polo Shirt 1234 Blue Small	1234	BLU		Small	1				
6	1234BLU-XL	Polo Shirt 1234 Blue Extra Large	1234	BLU		XL	4				
7	1234RED-2XL	Polo Shirt 1234 Red 2XL	1234	RED		2XL	5				
8	1234RED-L	Polo Shirt 1234 Red Large	1234	RED		Large	3				
9	1234RED-M	Polo Shirt 1234 Red Medium	1234	RED		Medium	2				
10	1234RED-S	Polo Shirt 1234 Red Small	1234	RED		Small	1				
11	1234RED-XL	Polo Shirt 1234 Red Extra Large	1234	RED		XL	4				
12											

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*

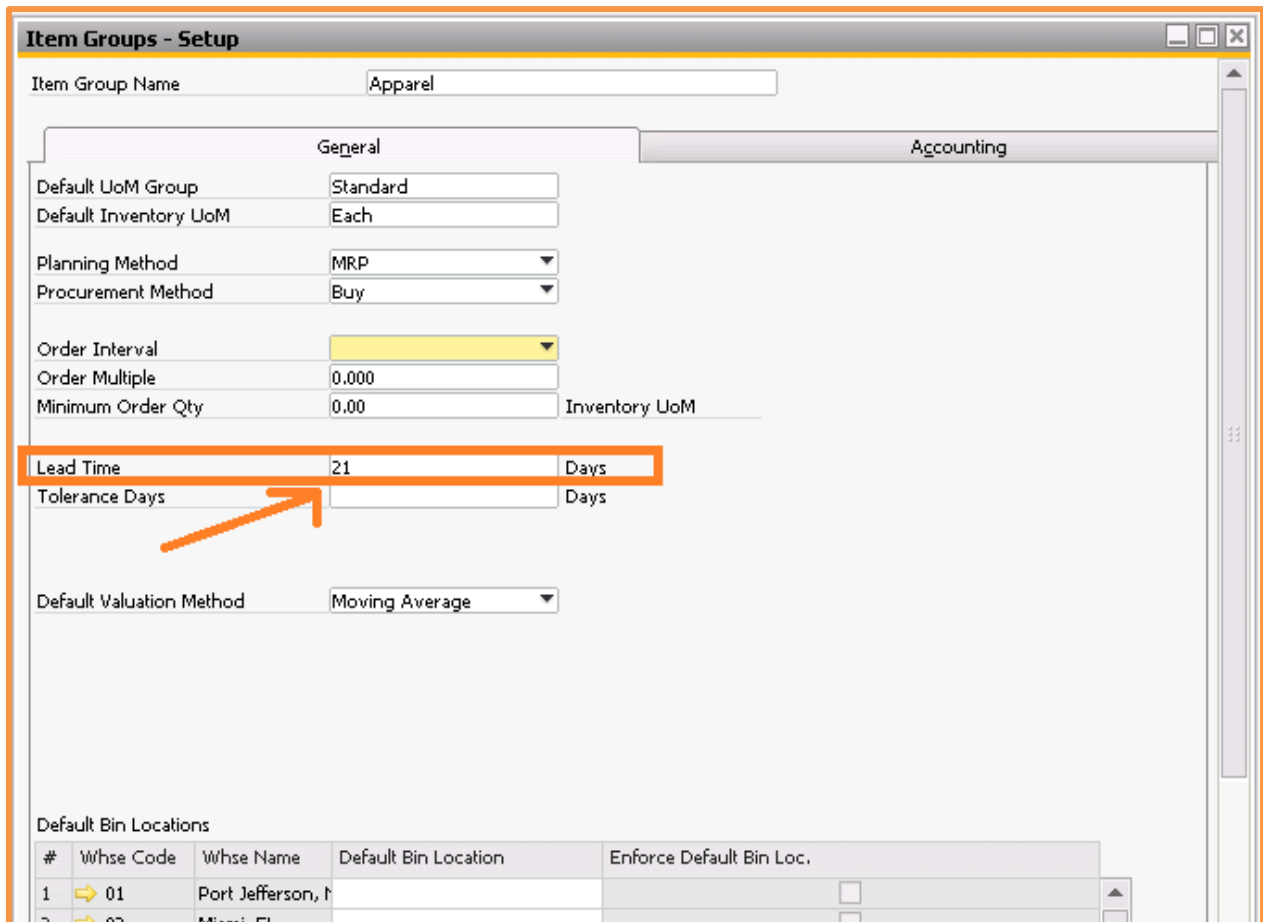
Be sure that the Automatic Item Availability Check is turned off in the system. This feature of standard Business One is redundant when **Achieve Style** is used, and if it is turned on, it may cause errors when items are transferred from the Style matrix to the Sales Order.



## 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. **Achieve Style** will use this figure when calculating the expected shipment date for backordered items.



**Item Groups - Setup**

Item Group Name: Apparel

**General** | Accounting

Default UoM Group: Standard

Default Inventory UoM: Each

Planning Method: MRP

Procurement Method: Buy

Order Interval: [Dropdown]

Order Multiple: 0.000

Minimum Order Qty: 0.00 Inventory UoM

**Lead Time: 21 Days**

Tolerance Days: [Field] Days

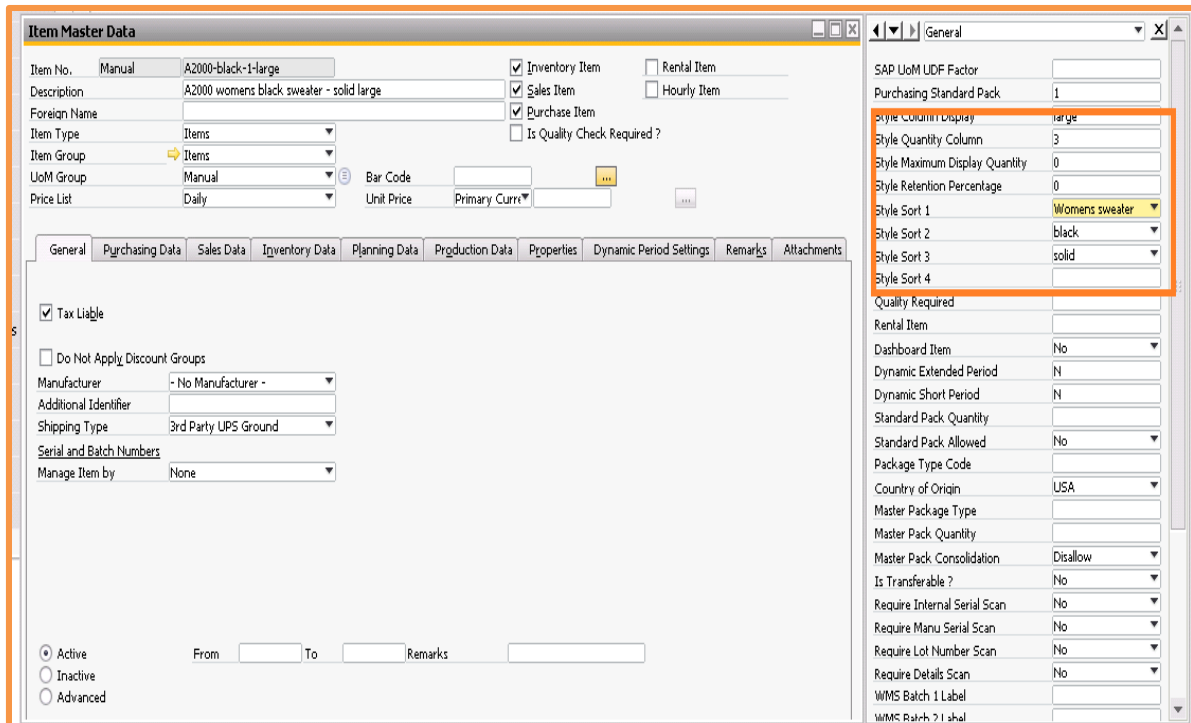
Default Valuation Method: Moving Average

Default Bin Locations

#	Whse Code	Whse Name	Default Bin Location	Enforce Default Bin Loc.
1	01	Port Jefferson, N		<input type="checkbox"/>
2	02	Missi, FL		<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 in order for the item to be used correctly in the order entry Style Matrix.



The screenshot displays the 'Item Master Data' form with the 'General' tab selected. The 'User-Defined Fields' panel is highlighted with an orange border. The form includes the following fields and values:

- Item No.: Manual A2000-black-1-large
- Description: A2000 womens black sweater - solid large
- Foreign Name: (empty)
- Item Type: Items
- Item Group: Items
- UoM Group: Manual
- Price List: Daily
- Inventory Item:
- Rental Item:
- Sales Item:
- Hourly Item:
- Purchase Item:
- Is Quality Check Required?:
- Bar Code: (empty)
- Unit Price: Primary Curr (empty)

The 'User-Defined Fields' panel (highlighted in orange) contains the following fields:

- Style Column Display: large
- Style Quantity Column: 3
- Style Maximum Display Quantity: 0
- Style Retention Percentage: 0
- Style Sort 1: Womens sweater
- Style Sort 2: black
- Style Sort 3: solid
- Style Sort 4: (empty)

Other visible fields in the form include:

- Tax Liab:
- Do Not Apply Discount Groups:
- Manufacturer: - No Manufacturer -
- Additional Identifier: (empty)
- Shipping Type: 3rd Party UPS Ground
- Serial and Batch Numbers: Manage Item by: None
- Active:  Inactive:  Advanced:
- From: (empty) To: (empty) Remarks: (empty)

<i>Style Column Display</i>	Enter the heading that will appear above the column for this size on the Style Matrix.
<i>Style Quantity Column</i>	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.
<i>Style Maximum Display Quantity</i>	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.
<i>Style Retention Percentage</i>	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 an entry is made here, users will see a reduced quantity on hand in order to avoid the possibility of running out of stock.
<i>Style Sort fields</i>	Four or more user-define fields for style attributes will be shown. <u><i>If you have changed the display names for these fields, the changed names will be shown.</i></u> 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 **Achieve 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. **Achieve 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 the box at the top of 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 in order 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

**Achieve 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 **Achieve 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 Defaults. Which tabs are visible, their sequence, and the label of each tab are all subject to changes made in the Defaults. 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:** c200
- Name:** Home Depot Corporate
- Contact Person:** (empty)
- Customer Ref. No.:** (empty)
- BP Currency:** \$
- No.:** Primary 10407
- Status:** Open
- Posting Date:** 12/15/15
- Delivery Date:** 12/15/15
- Document Date:** 12/15/15
- Early Bird:** yes

The 'Contents' tab is active, showing a table with the following columns: #, Item No., Quantity, Unit Price, Discount %, Tax Code, Total (LC), Whse, Procurement Doc., UoM Code, COGS Dimension 1, B..

#	Item No.	Quantity	Unit Price	Discount %	Tax Code	Total (LC)	Whse	Procurement Doc.	UoM Code	COGS Dimension 1	B..
1				0.000							

Summary fields at the bottom right:

- Total Before Discount
- Discount %
- Freight
- Rounding \$ 0.00
- Tax
- Total \$ 0.00

Buttons at the bottom: Add, Cancel, Reservations, Ship, Rate Shop, 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, the screen will display the following message:

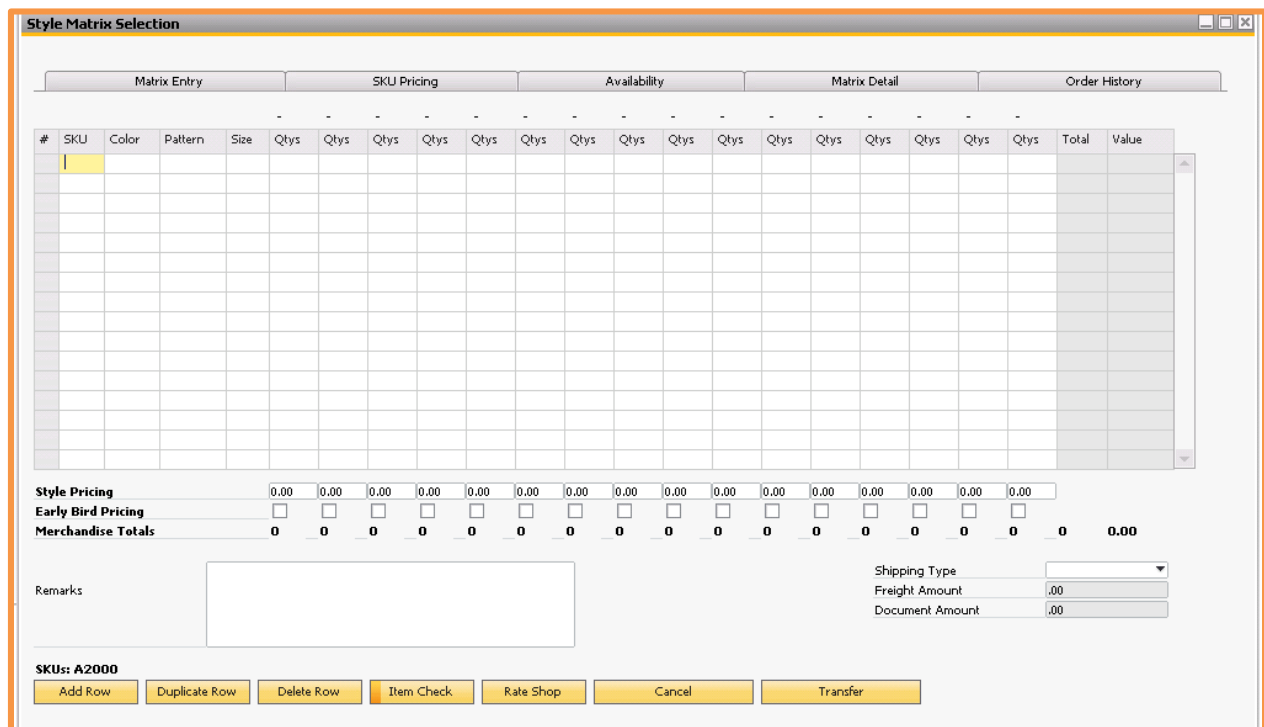


If you choose “Item”, you will see the usual list of items to choose from, and you may proceed to select one or more of them and enter one item code per row of the sales order.

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

### Style Matrix: Item Entry Tab

The following screen appears.

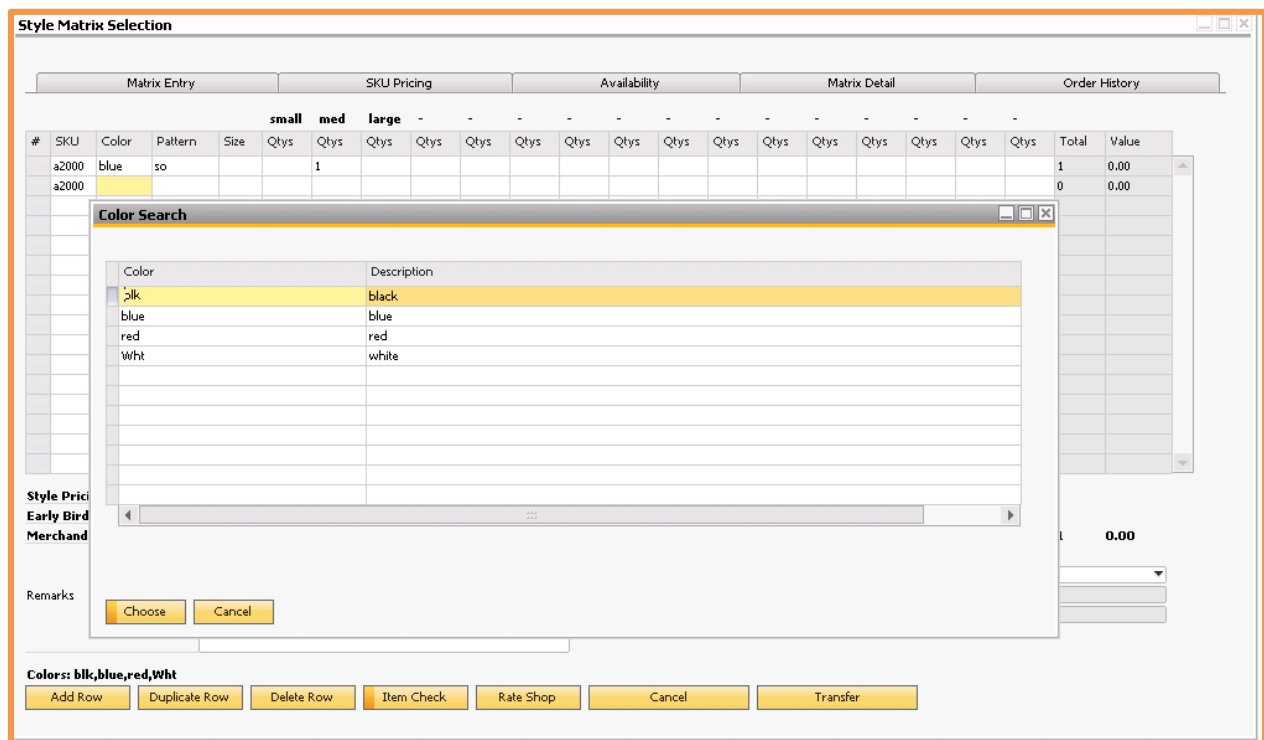


**Note:** The columns on the left side of the grid display the attributes that have been defined in the system. The following columns display the maximum number of quantity columns established in the Style Defaults. Initially there are no headings above the quantity columns.

At the bottom of the grid, “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. 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 Search in Entry Columns” was selected).

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.

**Style Matrix Selection**

Matrix Entry    SKU Pricing    Availability    Matrix Detail    Order History

#	SKU	Color	Pattern	Size	small	med	large	-	-	-	-	-	-	-	-	-	-	-	-	Total	Value	
					Qtys	Qtys	Qtys	Qtys	Qtys	Qtys	Qtys	Qtys	Qtys	Qtys	Qtys	Qtys	Qtys	Qtys	Qtys			Qtys
a2000	blue	so			1	1														1	0.00	
a2000	red	so			1		2													3	0.00	
					1	1	2	0	0	0	0	0	0	0	0	0	0	0	0	0	4	

**Style Pricing**    0.00    0.00    0.00                                                                       

**Early Bird Pricing**       

**Merchandise Totals**    1    1    2    0    0    0    0    0    0    0    0    0    0    0    0    0    0    0    0    0    4

Remarks:

Shipping Type:

Freight Amount:

Document Amount:

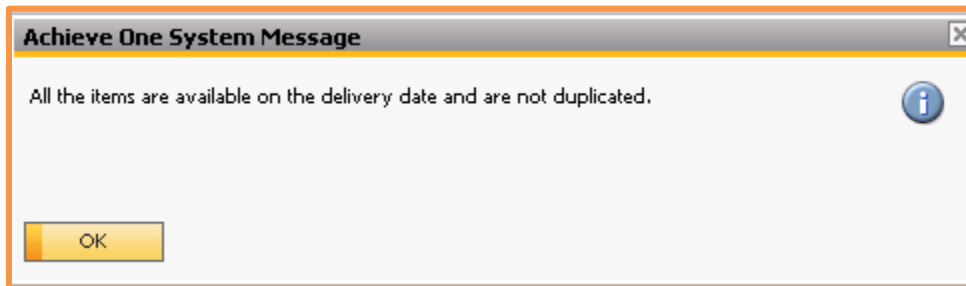
                      

The columns on the right of the matrix show the total quantity and total price for the items on that row. The bottom of each quantity column shows the total quantity for each size, including all item codes.

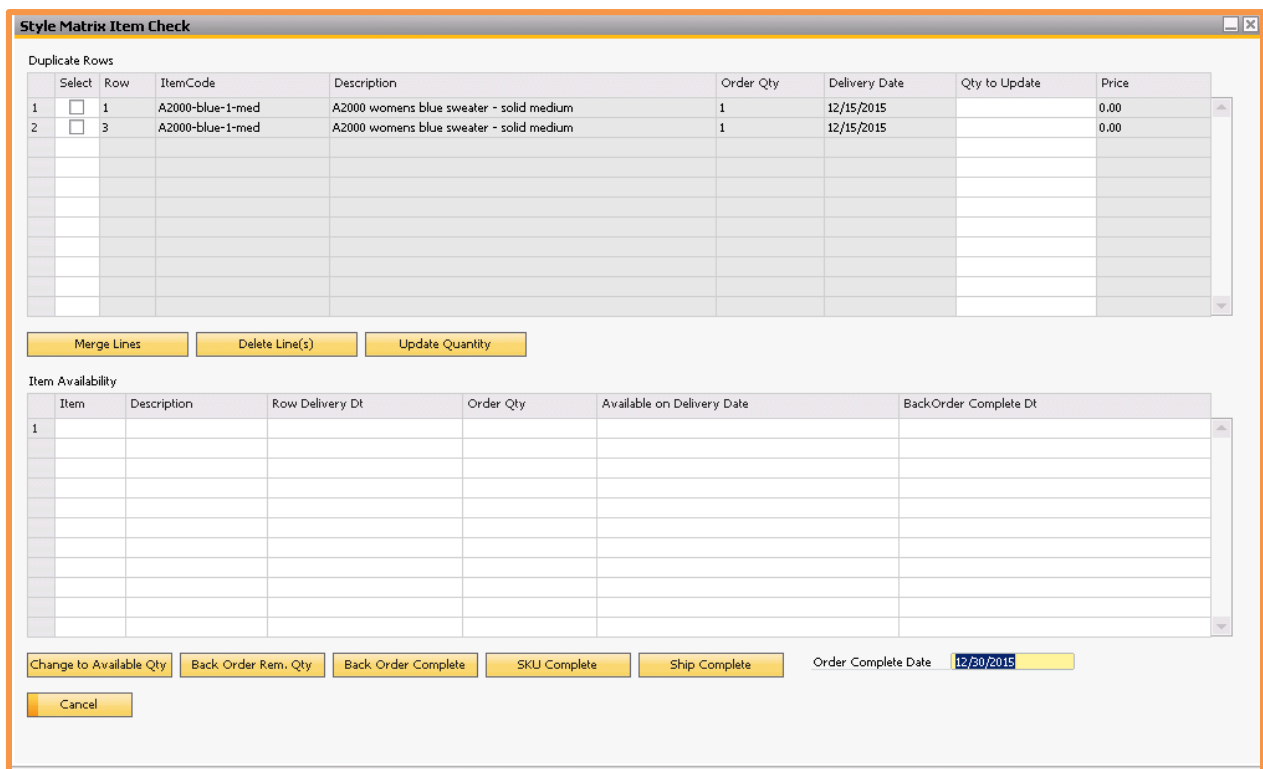
## Style Matrix: Item Check

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 this message:



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 of the items on the order.

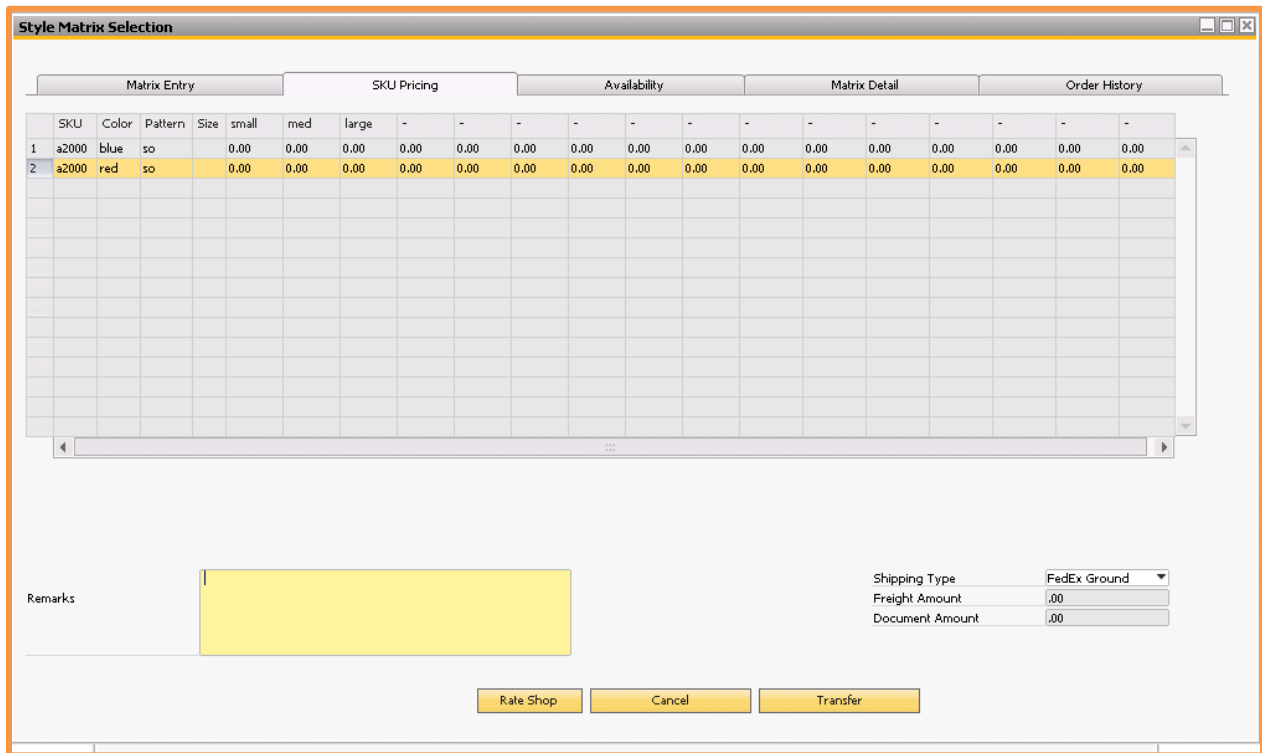
As each line in the upper and lower grid is rectified, the item disappears from the grid. When the grid is empty, it will close.

***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.***



## Style Matrix: Pricing Tab



Matrix Entry				SKU Pricing				Availability				Matrix Detail				Order History			
SKU	Color	Pattern	Size	small	med	large	-	-	-	-	-	-	-	-	-	-	-	-	
1	a2000	blue	so	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
2	a2000	red	so	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	

Remarks:

Shipping Type:

Freight Amount:

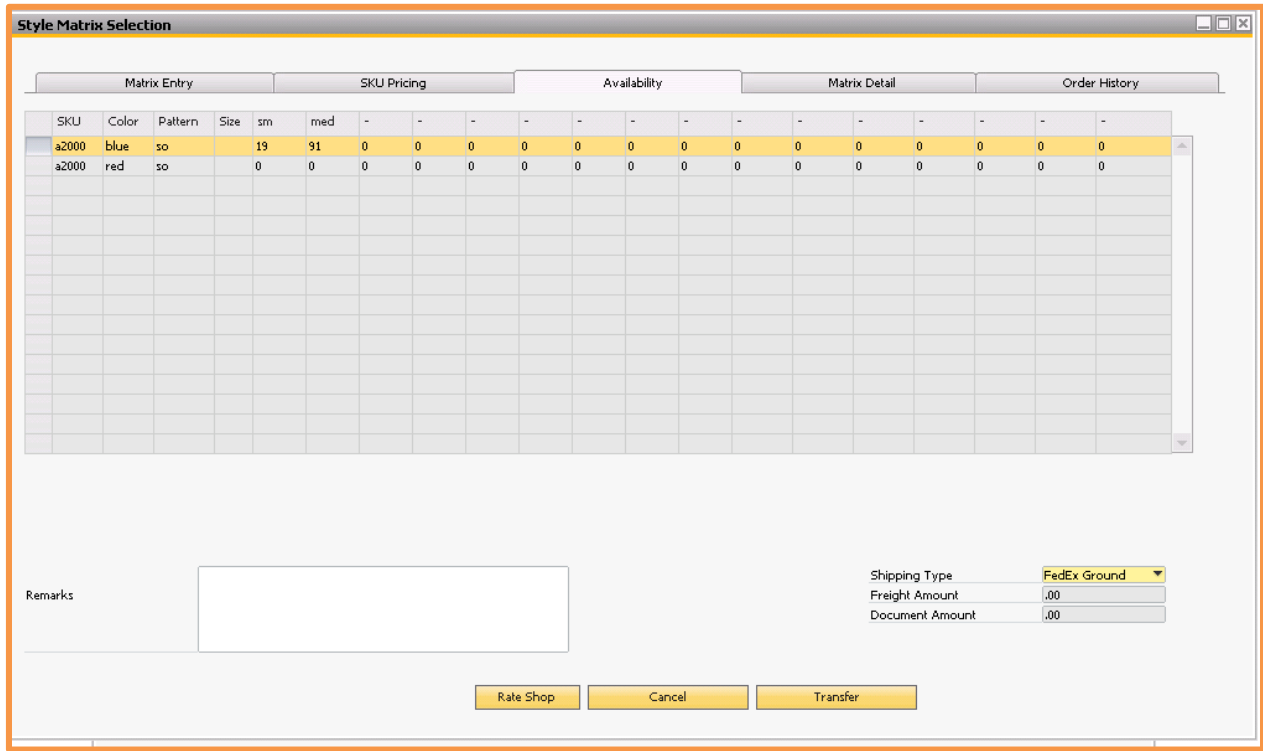
Document Amount:

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.

## Style Matrix: Availability Tab



Matrix Entry				SKU Pricing				Availability								Matrix Detail				Order History									
SKU	Color	Pattern	Size	sm	med	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
a2000	blue	so		19	91	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
a2000	red	so		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

Remarks:

Shipping Type:

Freight Amount:

Document Amount:

Buttons: Rate Shop, Cancel, Transfer

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.

## Style Matrix: Detail Tab

Item	Quantity	Price	Early Bird	Total	Est. Ship Date	Back Ordered	Item Name
1 → A2000-blue-1-med	1	0.00	N	0.00	12/15/2015		A2000 womens blue sweater - solid medium
2 → A2000-red-1-small	1	0.00	N	0.00	12/15/2015		A2000 womens red sweater - solid small
3 → A2000-red-1-large	2	0.00	N	0.00	12/15/2015		A2000 womens red sweater - solid large

Remarks:

Shipping Type:

Freight Amount:

Document Amount:

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.

## Style Matrix: Order History Tab

**Style Matrix Selection**

Matrix Entry		SKU Pricing		Availability		Matrix Detail		Order History	
Cust Code	Customer Name	DocDate	L. Order #	Cust PO #	ShipToCode	Item Code	Quantity	Price	
1	c200	Home Depot Corporate	08/17/15	→ 20023		main	425-PAF	1.000	3.00
2	c200	Home Depot Corporate	08/17/15	→ 20023		main	425-PAF	10.000	5.00
3	c200	Home Depot Corporate	08/17/15	→ 20023		main	QC003	3.000	2.00
4	c200	Home Depot Corporate	08/17/15	→ 20025		main	Plain	3.000	5.00
5	c200	Home Depot Corporate	03/02/15	→ 10101	TEST-030215-A	main	0066388P	2.000	2.31

Remarks:

Shipping Type:

Freight Amount:

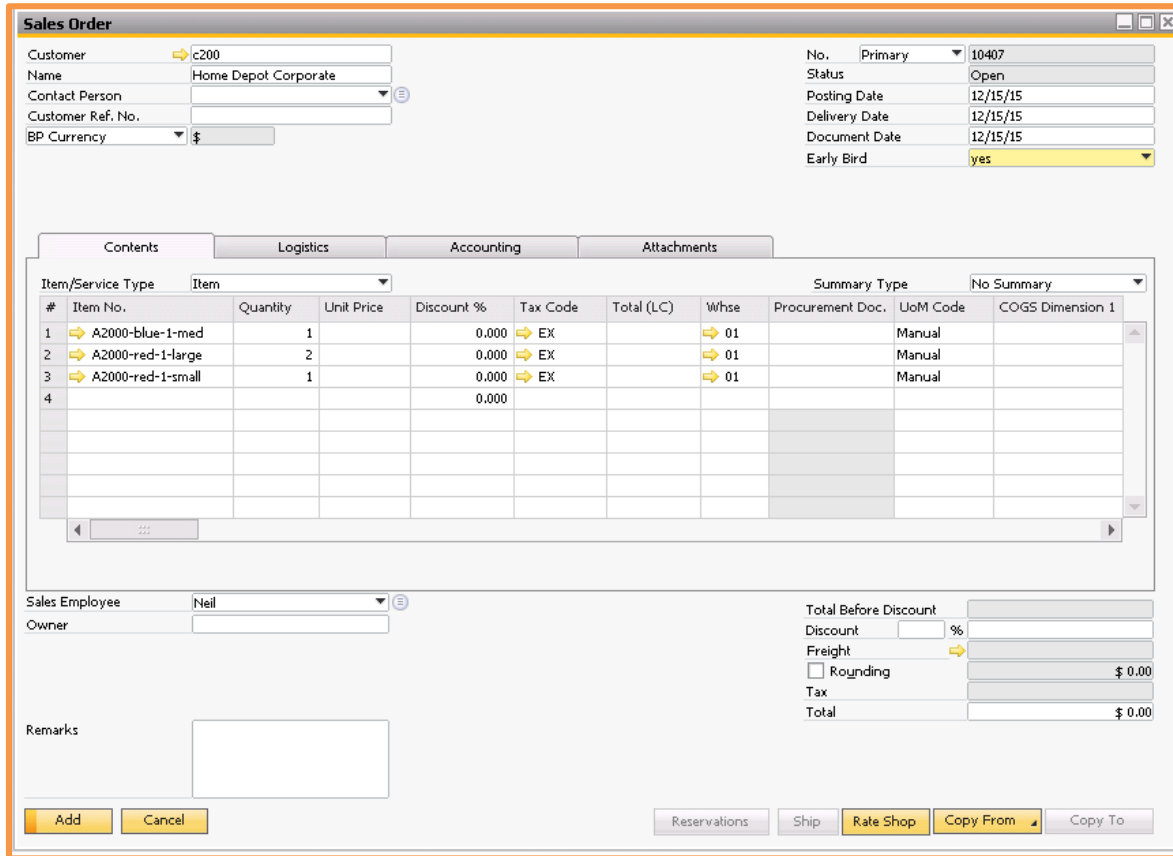
Document Amount:

Buttons:

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:** c200, Name: Home Depot Corporate, Contact Person: [blank], Customer Ref. No.: [blank], BP Currency: \$
- Order Info:** No. Primary 10407, Status Open, Posting Date 12/15/15, Delivery Date 12/15/15, Document Date 12/15/15, Early Bird yes
- Contents Tab:**

#	Item No.	Quantity	Unit Price	Discount %	Tax Code	Total (LC)	Whse	Procurement Doc.	UoM Code	COGS Dimension 1
1	A2000-blue-1-med	1		0.000	EX		01		Manual	
2	A2000-red-1-large	2		0.000	EX		01		Manual	
3	A2000-red-1-small	1		0.000	EX		01		Manual	
4				0.000						
- Summary:** Total Before Discount [blank], Discount [blank] %, Freight [blank], Rounding  \$ 0.00, Tax [blank], Total \$ 0.00
- Buttons:** Add, Cancel, Reservations, Ship, Rate Shop, 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.

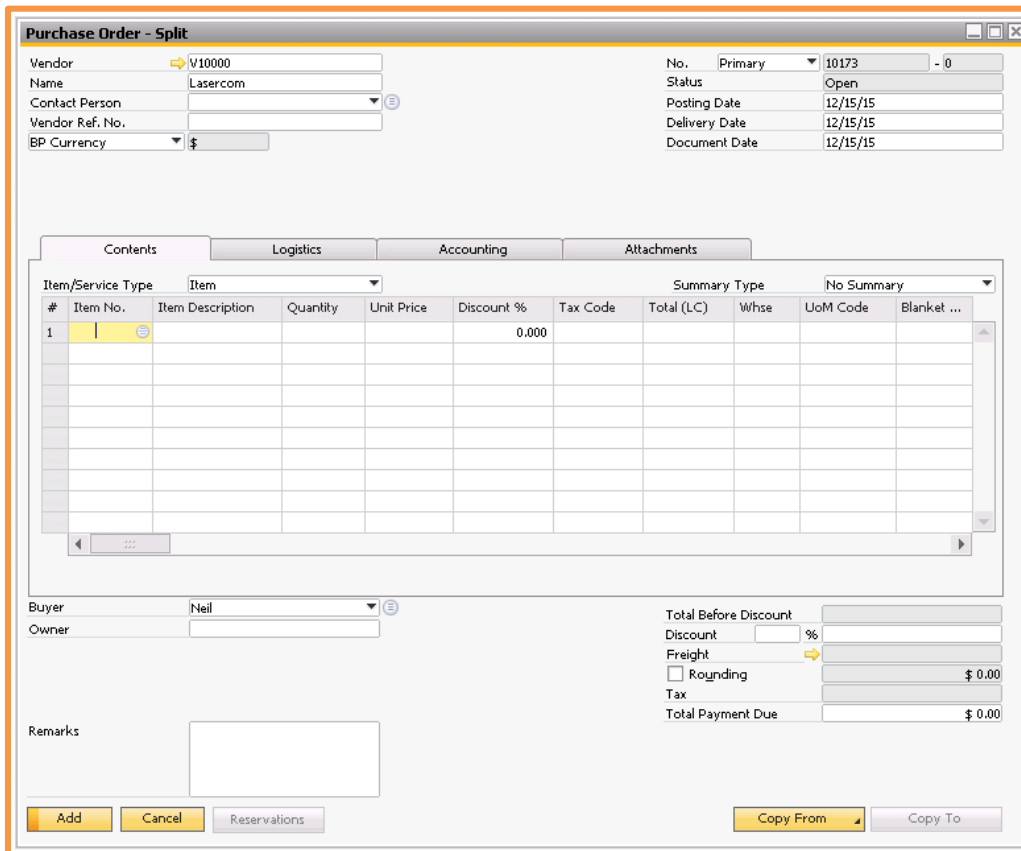
When all additions and changes are complete, click on “Add” to enter the Sales Order.

## 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.



**Purchase Order - Split**

Vendor: V10000  
 Name: Lasercom  
 Contact Person: [dropdown]  
 Vendor Ref. No.: [dropdown]  
 BP Currency: \$

No.: Primary 10173 - 0  
 Status: Open  
 Posting Date: 12/15/15  
 Delivery Date: 12/15/15  
 Document Date: 12/15/15

#	Item No.	Item Description	Quantity	Unit Price	Discount %	Tax Code	Total (LC)	Whse	UoM Code	Blanket ...
1					0.000					

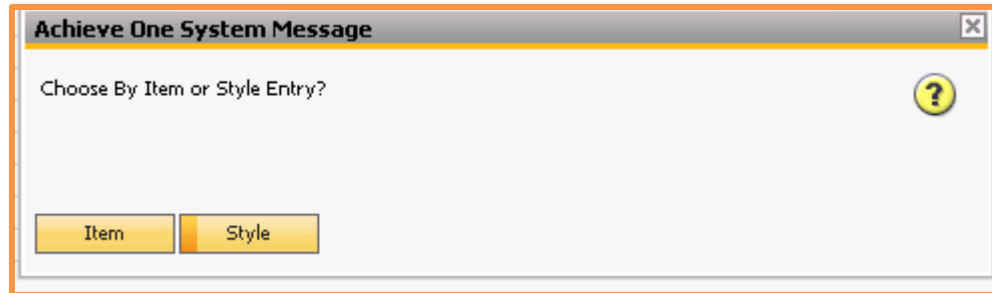
Buyer: Neil  
 Owner: [dropdown]

Total Before Discount: [field]  
 Discount: [field] %  
 Freight: [field]  
 Rounding: \$ 0.00  
 Tax: [field]  
 Total Payment Due: \$ 0.00

Remarks: [text area]

Buttons: Add, Cancel, Reservations, Copy From, Copy To

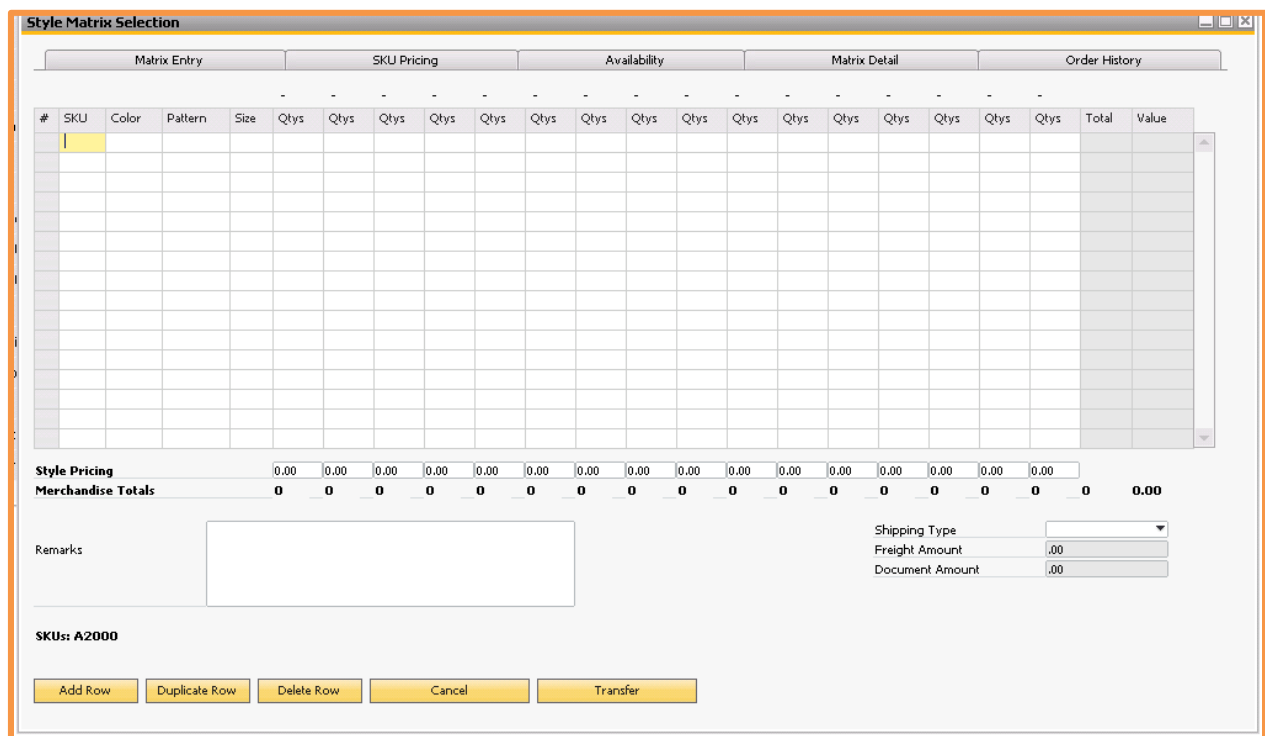
On the Contents tab, you may enter a single item at a time in the normal way, without entering the Style Matrix. However, if you press TAB in the Item Number column, the screen will display the following message:



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

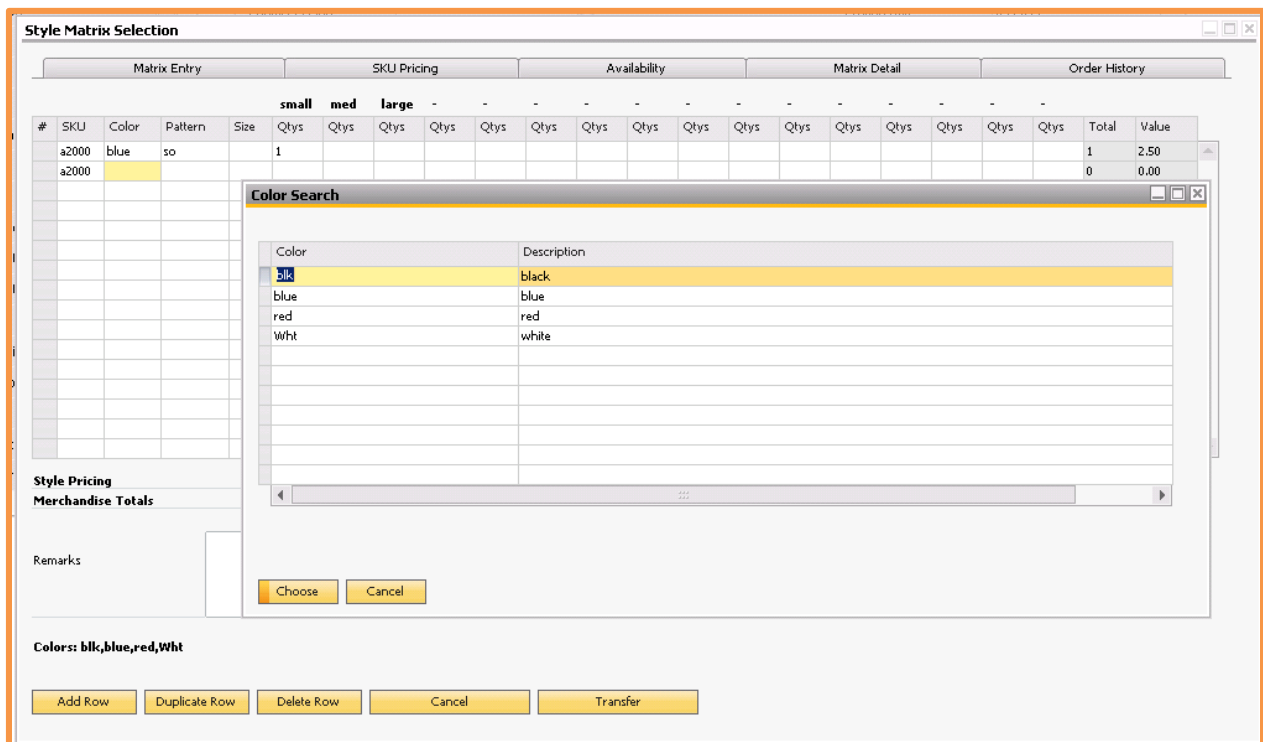


**Note:** The columns on the left side of the grid display the attributes that have been defined in the system. The following columns display the maximum number of quantity columns established in the Style Defaults. Initially there are no headings above the quantity columns.

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.

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 Search in Entry Columns” was selected).

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.



Style Matrix Selection

Matrix Entry | SKU Pricing | Availability | Matrix Detail | Order History

#	SKU	Color	Pattern	Size	small	med	large	-	-	-	-	-	-	-	-	-	-	-	Total	Value	
					Qtys	Qtys	Qtys	Qtys	Qtys	Qtys	Qtys	Qtys	Qtys	Qtys	Qtys	Qtys	Qtys				
a2000	blue	so			1	5													6	4339.15	
a2000	blk	so			12	12													36	0.00	
Style Pricing					0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Merchandise Totals					13	17	12	0	0	0	0	0	0	0	0	0	0	0	0	42	

Remarks:

Shipping Type:

Freight Amount:

Document Amount:

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.

## Style Matrix: Pricing Tab

Matrix Entry	SKU Pricing											Availability	Matrix Detail			Order History			
SKU	Color	Pattern	Size	Ext 1	Ext 2	Ext 3	Ext 4	Ext 5	Ext 6	Ext 7	Ext 8	Ext 9	Ext 10	Ext 11	Ext 12	Ext 13	Ext 14	Ext 15	Ext 16
1	a2000	blk	so	0.00	0.00	0.00													
2	a2000	blue	so	2.50	867.33														

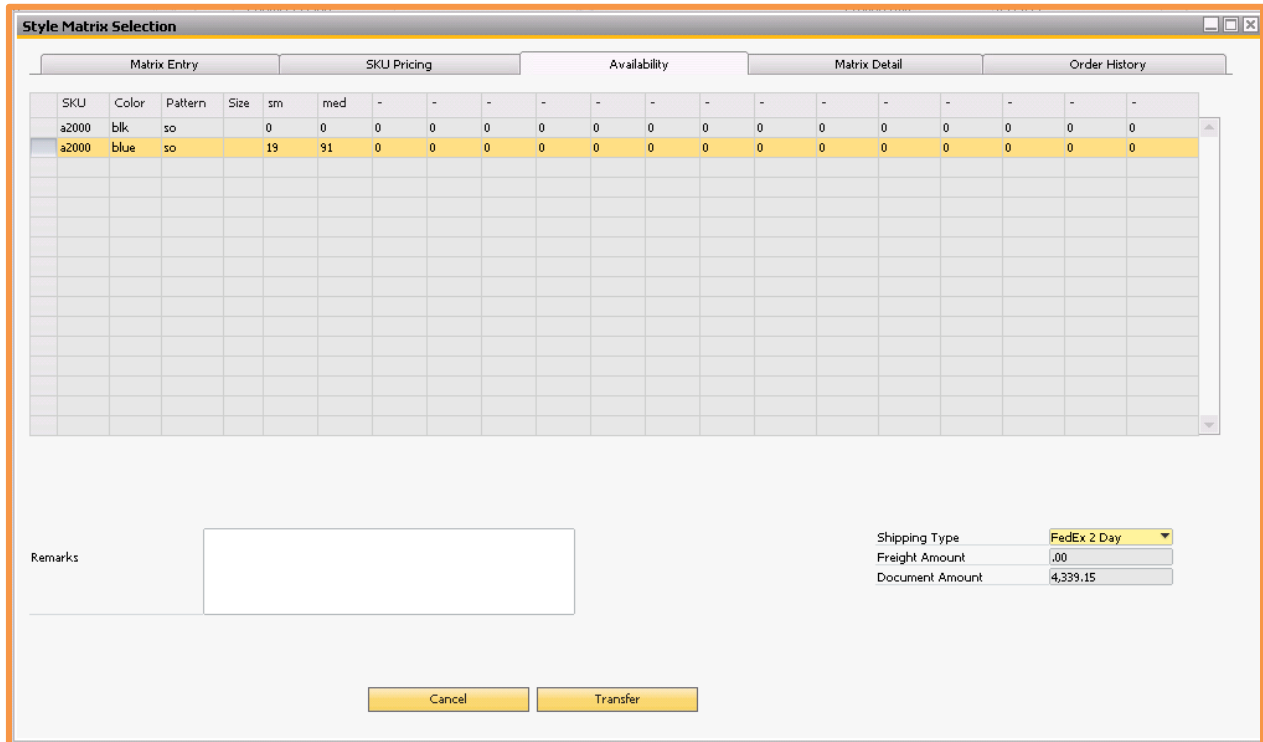
Remarks:

Shipping Type:   
Freight Amount:   
Document Amount:

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.

## Style Matrix: Availability Tab



SKU	Color	Pattern	Size	sm	med	-	-	-	-	-	-	-	-	-	-	-	-	-
a2000	blk	so		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
a2000	blue	so		19	91	0	0	0	0	0	0	0	0	0	0	0	0	0

Remarks:

Shipping Type:

Freight Amount:

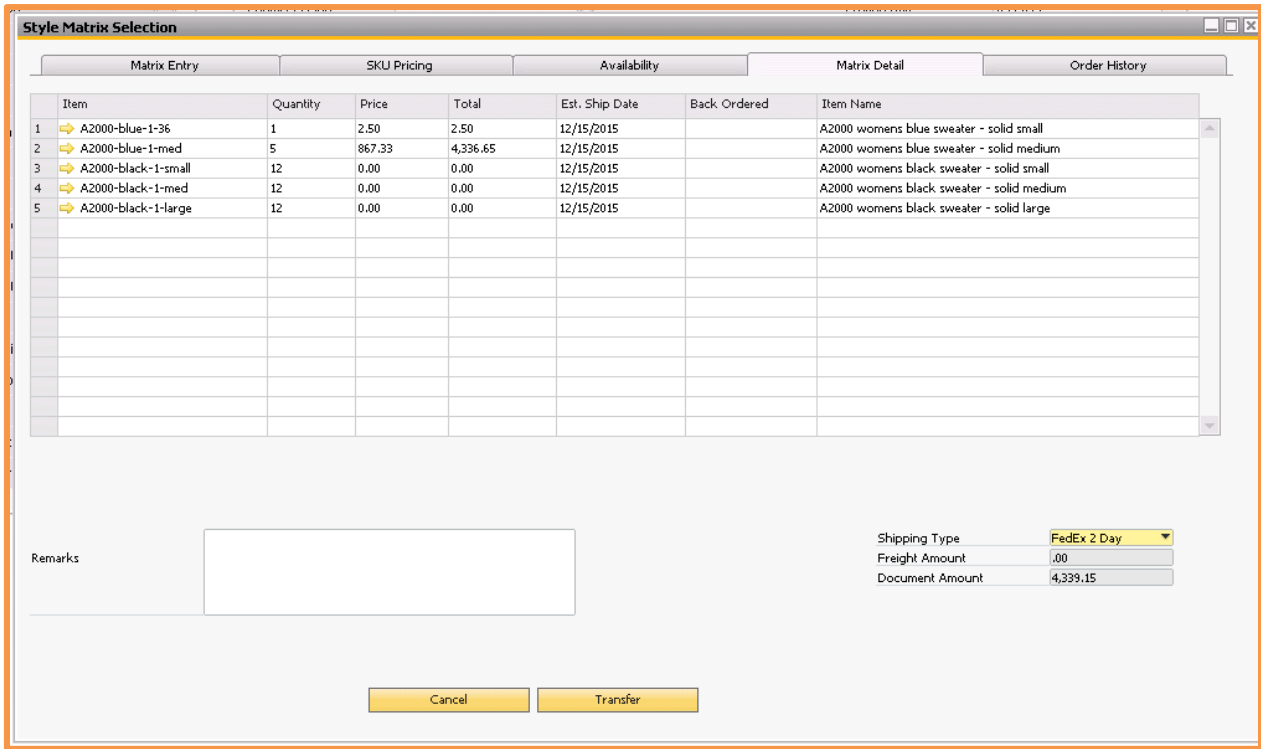
Document Amount:

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.

## Style Matrix: Detail Tab



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

Item	Quantity	Price	Total	Est. Ship Date	Back Ordered	Item Name
1 A2000-blue-1-36	1	2.50	2.50	12/15/2015		A2000 womens blue sweater - solid small
2 A2000-blue-1-med	5	867.33	4,336.65	12/15/2015		A2000 womens blue sweater - solid medium
3 A2000-black-1-small	12	0.00	0.00	12/15/2015		A2000 womens black sweater - solid small
4 A2000-black-1-med	12	0.00	0.00	12/15/2015		A2000 womens black sweater - solid medium
5 A2000-black-1-large	12	0.00	0.00	12/15/2015		A2000 womens black sweater - solid large

Shipping Type: FedEx 2 Day  
 Freight Amount: .00  
 Document Amount: 4,339.15

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 in Prices” was selected.

## Style Matrix: Purchase History Tab

Style Matrix Selection
[Close] [Maximize] [Refresh]

	Matrix Entry	SKU Pricing	Availability	Matrix Detail	Order History				
	Vendor Code	Vendor Name	DocDate	L. Order #	Vendor PO #	ShipToCode	Item Code	Quantity	Price
1	V10000	Lasercom	12/14/15	⇒ 10170			A2000-black-1-large	1.000	10.00
2	V10000	Lasercom	12/14/15	⇒ 10170			A2000-black-1-med	45.000	2.00
3	V10000	Lasercom	12/14/15	⇒ 10170			A2000-black-1-small	6.000	6.00
4	V10000	Lasercom	12/14/15	⇒ 10170			A2000-blue-1-36	569.000	9.00
5	V10000	Lasercom	12/14/15	⇒ 10170			A2000-blue-1-med	35.000	5.00
6	V10000	Lasercom	12/14/15	⇒ 10170			A2000-red-1-large	25.000	4.00
7	V10000	Lasercom	12/14/15	⇒ 10170			A2000-red-1-med	141.000	15.00
8	V10000	Lasercom	12/14/15	⇒ 10170			A2000-red-1-small	458.000	2.00
9	V10000	Lasercom	12/14/15	⇒ 10170			A2000-white-1-large	8.000	45.00
10	V10000	Lasercom	12/14/15	⇒ 10170			A2000-white-1-med	5.000	25.00
11	V10000	Lasercom	12/14/15	⇒ 10170			A2000-white-1-small	6.000	36.00
12	V10000	Lasercom	12/14/15	⇒ 10170			backpack1	2.000	62.00
13	V10000	Lasercom	12/14/15	⇒ 10170			i400	55.000	5.00
14	V10000	Lasercom	12/14/15	⇒ 10170			ITEM0001	25.000	2.00
15	V10000	Lasercom	12/14/15	⇒ 10170			ITEM001	21.000	4.00
16	V10000	Lasercom	12/14/15	⇒ 10170			ITEM002	44.000	9.00

Remarks

Shipping Type: FedEx 2 Day

Freight Amount: .00

Document Amount: 4,339.15

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.

**Purchase Order - Split**

Vendor: 10000  
 Name: Lasercom  
 Contact Person:   
 Vendor Ref. No.:   
 BP Currency: \$

No. Primary: 10173 - 0  
 Status: Open  
 Posting Date: 12/15/15  
 Delivery Date: 12/15/15  
 Document Date: 12/15/15

Contents
Logistics
Accounting
Attachments

Item/Service Type: Item      Summary Type: No Summary

#	Item No.	Item Description	Quantity	Unit Price	Discount %	Tax Code	Total (LC)
1	A2000-black-1-large	A2000 womens black sweater - solid large	12		0.000	EX	
2	A2000-black-1-med	A2000 womens black sweater - solid medium	12		0.000	EX	
3	A2000-black-1-small	A2000 womens black sweater - solid small	12		0.000	EX	
4	A2000-blue-1-36	A2000 womens blue sweater - solid small	1	\$ 2.50	0.000	EX	\$ 2.5
5	A2000-blue-1-med	A2000 womens blue sweater - solid medium	5	\$ 867.33	0.000	EX	\$ 4,336.6
6					0.000		

Buyer: Neil  
 Owner:   
 Remarks:

Total Before Discount: \$ 4,339.15  
 Discount: %  
 Freight:   
 Rounding: \$ 0.00  
 Tax:   
 Total Payment Due: \$ 4,339.15

Add    Cancel    Reservations

Copy From    Copy To

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, or in the header or other tabs of the document. You may also return to the Purchase Order to make changes at any time, 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.