



## Setup Required

Define valid Groups for specific products and industry.

Groups are dynamically displayed in subsequent maintenance forms.

Group Name	Description	Group Code	Dimension	Active	Dependency
Clad	Clad Material	CL	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Color	Window Color	CO	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Door Size	Door Size	DRSI	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Door Style	Door Style	DRST	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Door Swing	Door Swing	DRSW	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Door Type	Door Type	DRTY	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
ExtJmb	Extension Jamb	EJ	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
ExtJmbSz	Extension Jamb Size	EJS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ExtJmb
Gas	Argon or Other	GS	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Glass	Glass	GL	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Gorell Case	Gorell Casement	GCW	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Gorell DH	Gorell DH	GDH	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Grid Configuration	Grid Configuration	GC	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Grid Options
Grid Options	Grid Options	GO	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Grid Configuration
Hardware	Hardware	HW	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Hinge	Hinge Location	DRHI	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

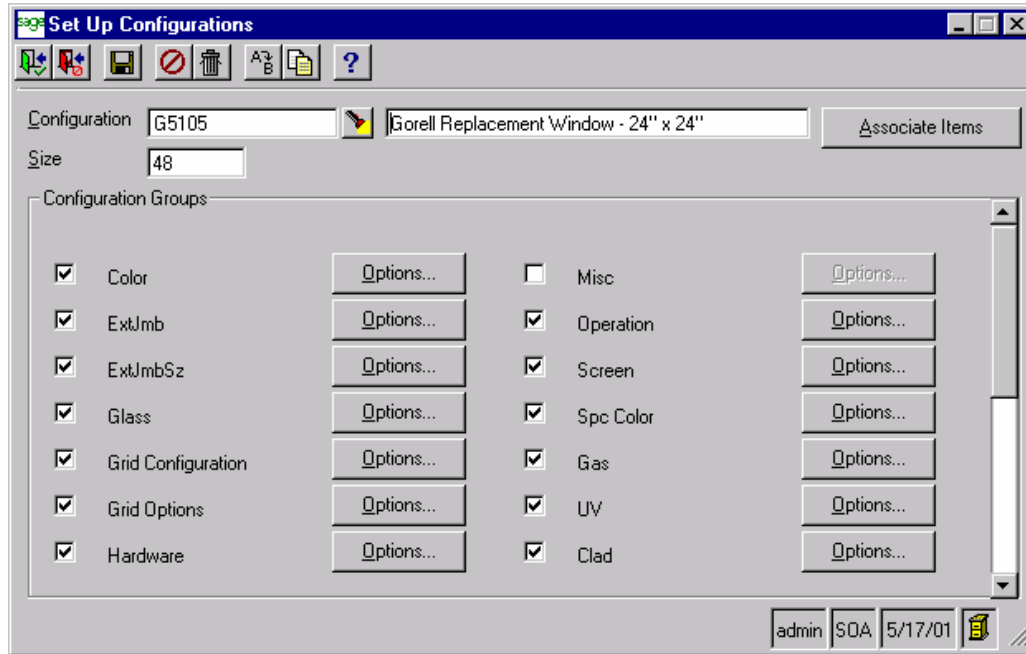
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Define Valid Options within each Group

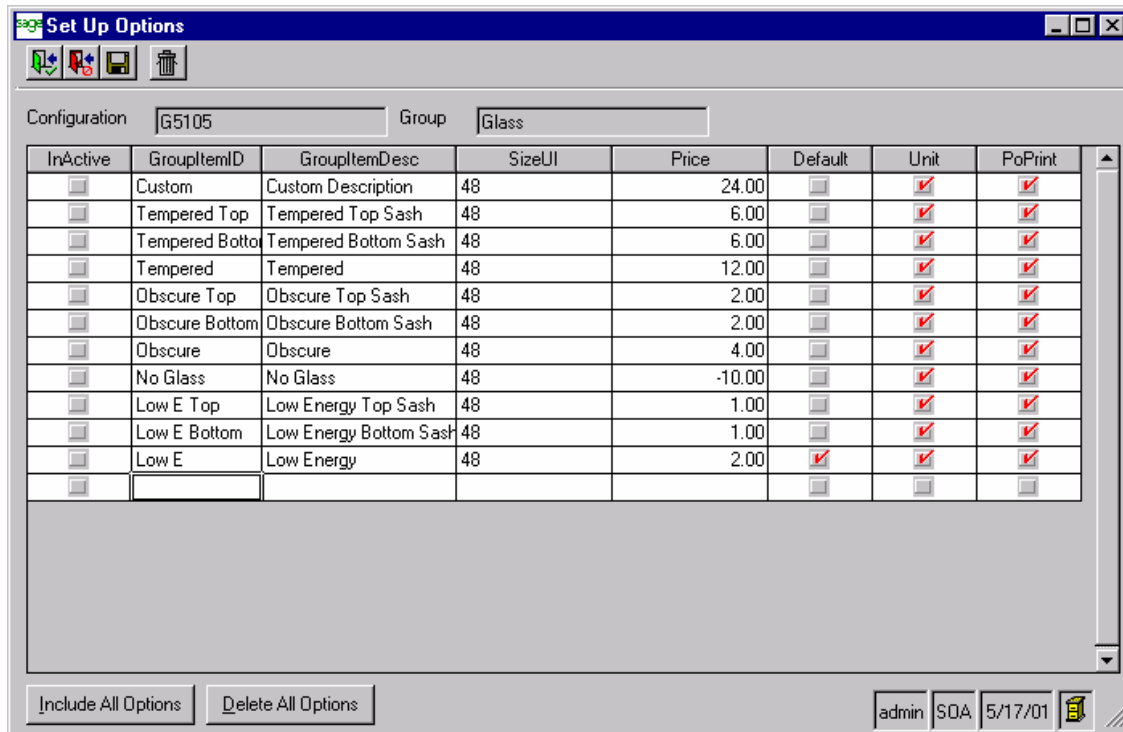
Group Item ID	Group Item	Group Item Description	Active
Custom	CUSGL	Custom Description	<input checked="" type="checkbox"/>
Low E	LE	Low Energy	<input checked="" type="checkbox"/>
Low E Bottom	LEB	Low Energy Bottom Sash	<input checked="" type="checkbox"/>
Low E Top	LET	Low Energy Top Sash	<input checked="" type="checkbox"/>
No Glass	NG	No Glass	<input checked="" type="checkbox"/>
Obscure	OB	Obscure	<input checked="" type="checkbox"/>
Obscure Bottom	OBB	Obscure Bottom Sash	<input checked="" type="checkbox"/>
Obscure Top	OBT	Obscure Top Sash	<input checked="" type="checkbox"/>
Tempered	TMP	Tempered	<input checked="" type="checkbox"/>
Tempered Bottom	TMPB	Tempered Bottom Sash	<input checked="" type="checkbox"/>

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Specify Configurations that define the valid Groups of Options that will apply to specific Items



For each Group in a Configuration, define the Options and Option Prices that will be valid for specific items.



During Quote or Sales Order Entry, invoke the Line Item Configurator to select options for an item from the list of valid Groups and Options defined above.

**Enter Sales Orders**

SO: 0000000870    Change Order: 0    Status: Unacknowledged

Customer: Dunbar    Dave Dunbar Construction Inc.    Confirm No:    Order Type: Standard

W/hse: Jay    Jay St. Warehouse    Status: Open

Item: LD2-2424R    Lincoln Double Hung Replacement Wind    Unit Price: 509.20    Sales Amount: 509.20

Qty Ord: 1.00    Qty Open: 1.00    UOM: Each

Vendor: Lincoln    Address: Lincoln    Promised Date: / /

Shipping: Purchase Order    Comm    Account    Dates    Sales Tax    Discount    Misc    Other

Line	Item	Item Desc	LIC Options Desc	Qty Ordered	UOM	Unit Price
1	6	LD2-2424R	Lincoln Double Hung Replacement W [USING GLASS SIZE ], Height: 24 UI: 48, Clad: Vinal C	1.00	Each	509.20
2	1	LD2-2424	Lincoln Double Hung: 24"x24" [USING OPENING SIZE ], .Width: 28-5/8 Height: 29-1/2 UI: 58-1	1.00	Inch	235.00
3	4	G5105	Gorell Replacement Window, 2' by 2' [USING OPENING SIZE ], Height: 26-1/8 Width: 31-7/16 UI: 57-4	4.00	Each	605.00

**Line Item Configurator**

SD Line No: 4    Item: G5105    Unit Price: 0.000    Configuration: GORELL    70    Configured Price: 670.00

Attribute Key: GR&LE&GC55&GDH55&LT&WD&HSC&NOSCRN&

Using: Opening Size    Height: 26-1/8    Width: 31-7/16    UI: 57-9/16    Units: 2

Option	Code	Description	Price
<input type="checkbox"/> 4 Light Grid	4LT	4 Light Grid	4.00
<input checked="" type="checkbox"/> 6 Light Grid	6LT	6 Light Grid	6.00
<input type="checkbox"/> Custom	CUSGC	Custom Description	0.00
Grid Options [Dependency: Grid Configuration]			
<input type="checkbox"/> Custom	CUSGO	Custom Description	0.00
<input type="checkbox"/> Internal	INT	Internal between Panes	20.00
<input type="checkbox"/> Vinal	VN	Vinal Grids (Common)	10.00
<input type="checkbox"/> Vinal Custom	VNC	Vinal Grids (Custom)	30.00
<input checked="" type="checkbox"/> Wood	WD	Wood Grids	40.00
Hardware			
<input type="checkbox"/> Custom	CUSHW	Custom Description	0.00
<input checked="" type="checkbox"/> High Security Clip	HSC	High Sec. Clip Locks	5.00
<input type="checkbox"/> High Security Electr	HSE	High Sec Electronic Locks	5.00
<input type="checkbox"/> High Security Slide	HSS	High Security Slide Locks	5.00
<input type="checkbox"/> Low Security Clip	LSC	Low Sec Clip Locks	3.00
<input type="checkbox"/> Low Security Electro	LSE	Low Sec. Electronic Locks	3.00
<input type="checkbox"/> Low Security Slide	LSS	Low Security Slide Locks	3.00
Screen			
<input type="checkbox"/> Aluminum Double View	ADV	Aluminum Double View	10.00
<input type="checkbox"/> Aluminum Single View	ASV	Aluminum Single View	5.00
<input type="checkbox"/> Custom	CUSSCR	Custom Description	0.00
<input checked="" type="checkbox"/> No Screen	NOSCRN	No Screen	-10.00
<input type="checkbox"/> Vinal Double View	VDV	Vinal Double View	20.00
<input type="checkbox"/> Vinal Single View	VSV	Vinal Single View	10.00

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Switch between a Tree View (above) showing all options and Drop Down List Box View (below)

The screenshot shows the 'Line Item Configurator' window. At the top, there are fields for 'SO Line No' (4), 'Item' (G5105), 'Unit Price' (0.000), 'Configuration' (GORELL), '70', and 'Configured Price' (670.00). Below these are 'Attribute Key' and 'Using' (Glass Size). A table of configuration groups is shown below, with a dropdown menu open for the 'Screen' category.

Configuration Group	Option	Description	Price
Color	Green	Green	70.00
Glass	Low E	Low Energy	20.00
Gorell Case	Gorell Case 0-55	Gorell Casement 0-55	125.00
Gorell DH	Gorell 0-55	Gorell DH UI 0-55	125.00
Grid Configuration	6 Light Grid	6 Light Grid	6.00
Grid Options	Wood	Wood Grids	40.00
Hardware	High Security Clip	High Sec. Clip Locks	5.00
Screen	No Screen	No Screen	-10.00

Additional options for the Screen category are listed in a dropdown menu: <None>, Aluminum Double View, Aluminum Single View, Custom, No Screen (highlighted), Vinal Double View, and Vinal Single View.


Pricing and the Description will be returned to the line item screen.

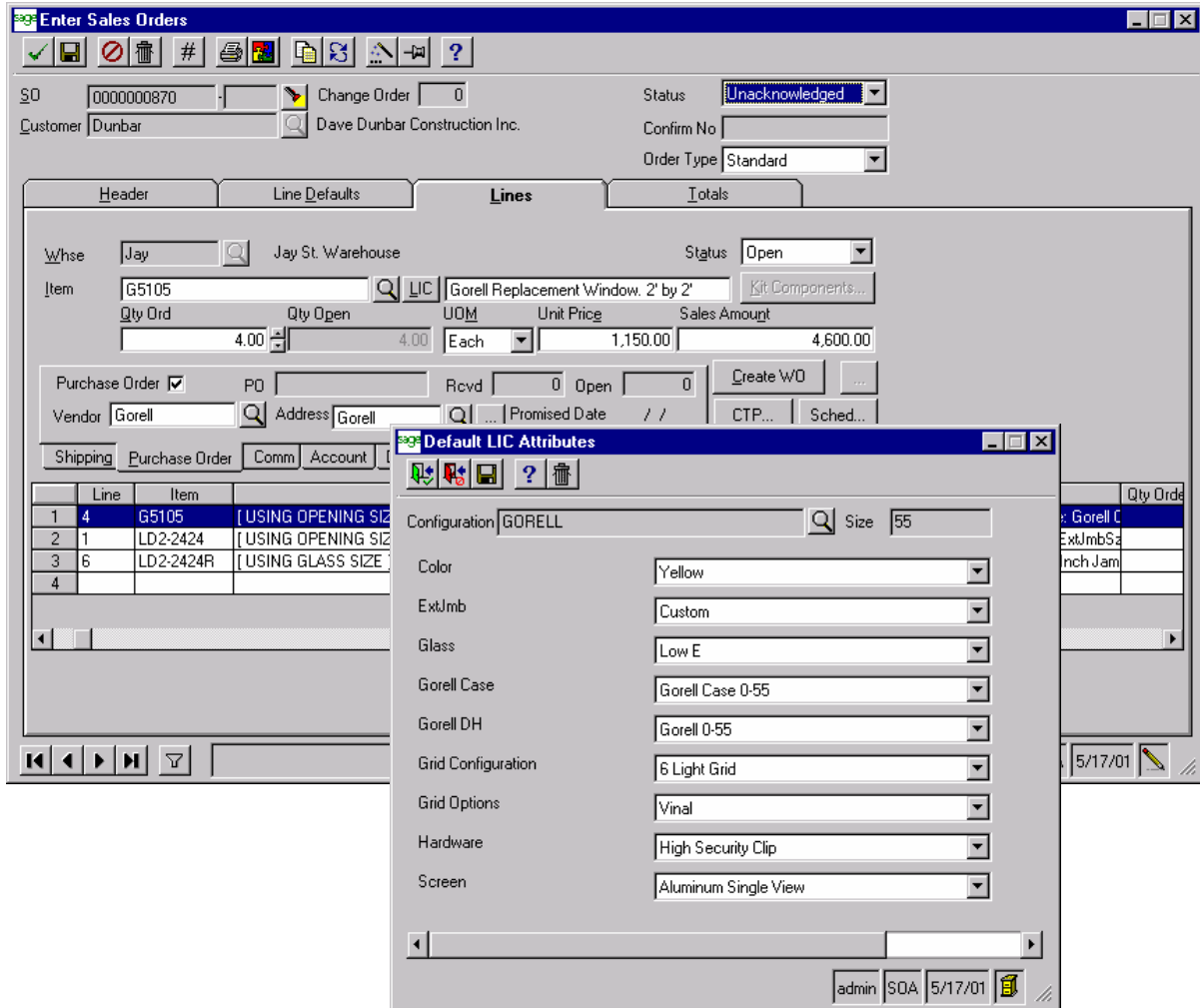
Multiple user-definable units of measurement and formulas can be established for an item and used for auto-calculation. Both Decimal and Fractional display is supported. Default characteristics and rules are established for an item such as minimum and maximum, including formula's and designating the Option pricing unit of measure.

The screenshot shows the 'Maintain Items Data' window. It includes fields for 'Item' (G5105), 'Item Category' (Replacement), 'Default Vendor' (Gorell), 'Using' (Opening Size), 'Configuration' (GORELL), and 'Default Size' (55). Below these is a table with columns: Usage, Title, UOM, Default Size, Minimum, Maximum, Override, Price, and Formula.

	Usage	Title	UOM	Default Size	Minimum	Maximum	Override	Price	Formula
1	Required	Height	Inch		24-5/8	80-13/16	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
2	Required	Width	Inch		21-7/16	70-1/2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
3	Computed	UI	Inch	55	54-1/2	120-7/8	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Formula In
4	Required	Units	inch	1	1	5	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
5							<input type="checkbox"/>	<input type="checkbox"/>	
6							<input type="checkbox"/>	<input type="checkbox"/>	
7							<input type="checkbox"/>	<input type="checkbox"/>	
8							<input type="checkbox"/>	<input type="checkbox"/>	

In the above example, the UI (United Inches) is calculated as the Height + Width and will be used to determine pricing. Multiple price break levels can be defined and the level that is used will be determined upon the entry of Height and Width. The user may change these values which in turn may result in a higher or lower price break level to be applied automatically.

During Order Entry, a Default Configuration may be selected by clicking the 'pin cushion'  on the toolbar. Selecting a default provides for efficient data entry when all or a majority of line items will be configured with similar options, i.e., all will be Color White, Material Aluminum, etc.




The screenshot shows the 'Enter Sales Orders' window with a 'Default LIC Attributes' dialog box open. The dialog box is titled 'Default LIC Attributes' and contains the following fields and options:

- Configuration: GORELL
- Size: 55
- Color: Yellow
- ExtJmb: Custom
- Glass: Low E
- Gorell Case: Gorell Case 0-55
- Gorell DH: Gorell 0-55
- Grid Configuration: 6 Light Grid
- Grid Options: Vinal
- Hardware: High Security Clip
- Screen: Aluminum Single View

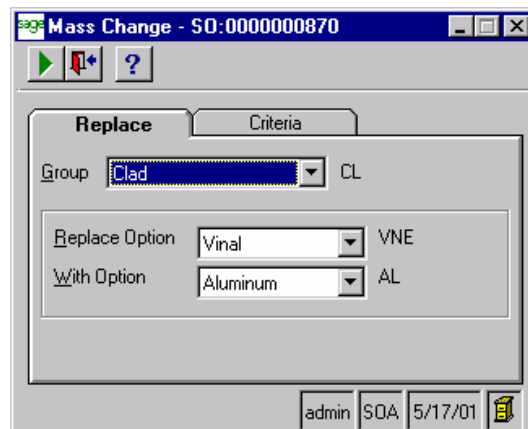
The background window shows the 'Enter Sales Orders' interface with the following details:

- SO: 0000000870
- Customer: Dunbar
- Status: Unacknowledged
- Order Type: Standard
- Whse: Jay
- Item: G5105
- Qty Ord: 4.00
- Unit Price: 1,150.00
- Sales Amount: 4,600.00

If it is necessary to change an option across the entire order, or only certain lines of an order, a Mass Line Item Change option can be invoked

by clicking the 'magic wand'  icon on the toolbar.

This process will update the option for all line items matching the criteria. Prices and descriptions will be updated accordingly. This is handy, for example, when a customer wants to know what the price difference will be for choosing one style over another.



The screenshot shows the 'Mass Change - SO:0000000870' window with the 'Replace' tab selected. The 'Replace' tab contains the following fields and options:

- Group: Clad
- Replace Option: Vinal (VNE)
- With Option: Aluminum (AL)

The background window shows the 'Mass Change' interface with the following details:

- SO: 0000000870
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Drop Ship Line Items for delivery to either the end customer or the warehouse – when sales orders are generated for non-stocked vendor catalogue items and the items are shipped to the company, generating PO's to be received at the warehouse is key. When PO's are generated, the Configured Options from the SO are copied to the PO, and the PO Vendor Cost can be calculated using the Configured SO price as the base from which to Discount.

The screenshot displays the Sage software interface for managing sales and purchase orders. It features several overlapping windows and data entry fields.

**Enter Sales Orders Window:**

- SO: 0000000871, Change Order: 0, Status: Open
- Customer: Dunbar, Dave Dunbar Construction Inc., Confirm No: , Order Type: Standard
- Whse: Jay, Jay St. Warehouse, Status: Open
- Item: LD2-2424, Lincoln Double Hung; 24"x24"
- Qty Ord: 1.00, Qty Open: 1.00, UDM: Inch, Unit Price: 180.80, Sales Amount: 180.80
- Ship Via: UPS, Priority: 3, Freight: 0.00
- F.O.B.: , Ship To: Jay

**Enter Purchase Orders Window:**

- PO: 0000000537, Vendor: Lincoln
- Company: SOA, Whse: Jay, Department: , Status: Open
- Item: LD2-2424, Lincoln Double Hung; 24"x24"
- Qty Ord: 1.00, Qty Open: 1.00, UDM: Inch, Unit Cost: 180.80, Ordered Amount: 180.80
- Drop Ship:
- Customer: , Customer Address:

**Ship-To Address Window (top right):**

- Name: Jay St. Warehouse
- Address: 1123 Jay St.
- City: Rochester, State: NY, Postal Code: 05551, Country: USA

**Address Window (bottom right):**

- Name: Jay St. Warehouse
- Address: 1123 Jay St.
- City: Rochester, State: NY, Postal Code: 05551, Country: USA

**Order Line Tables:**

**Sales Order Lines:**

Line	Item	Item Desc
1	LD2-2424	Lincoln Double Hung
2	G5105	Gorell Replacement
3	LD2-2424R	Lincoln Double Hung
4		

**Purchase Order Lines:**

Line	Item	Item Desc
1	LD2-2424	Lincoln Double Hung; 24"x24" [ USING OPENIN
2	LD2-2424R	Lincoln Double Hung Replaceme [ USING GLASS
3		

**Enter Sales Orders**

SO: 0000000870    Change Order: 0    Customer: Dunbar    Dave Dunbar Construction Inc.

**Header**    **Line Defaults**    **Lines**    **Totals**

Sales Order Total: \$5,290.00

Sales: \$5,290.00

Freight: 0.00

Trade Discount: 0.00

Sales Tax: 0.00

Sales Order Total: \$5,290.00

Contract Amount: \$0.00

Wash-out: \$0.00

Credit Card Information:

Tender Type: [Dropdown]

Card Number: [Text]

Authorization Number: [Text]

ExpDate: [Text]

Down Payment:

Total Deposits: 400.00    Enter Deposit

Create Purchase Orders...    Credit Limit...

**Down Payment**

Payment Reference: 87123

Down Payment Amount: \$400.00

Discount Amount: \$0.00

Deposit Date: 5/17/01

Tender Type: Check

Check Number: 87123

Bank ABA Number: 0

Comment: [Text]

Close    Unapply

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Enter one or more deposits against an order. Deposits are fully integrated to Cash Management. Upon invoicing, the net balance due is posted to Accounts Receivable, the Gross Sale is posted to Revenue and the Customer SO Deposit liability account is debited. The SO Deposits Liability account is defined in SO Setup Options

**Set Up SO Options**

Main    **General Ledger**    Other

Post GL Transactions:

Posting Register Format: Summary

Account Override Segments:

Customer Class: Region

Sales Clearing: 1110-00-00-00    Sales Clr Acct

Restocking Charge: 4670-00-00-00    Restocking Acct

Drop Ship: 4015-00-00-00    Drop Ship

SO Deposits: 4000-00-00-NE    Customer Deposits

Washout: 4315-00-00-00    Project Write Downs

Account List	Post In Detail
Sales Clearing	<input type="checkbox"/>
Drop Ship	<input type="checkbox"/>

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