

## Tag-n-Trak Showroom Display Control

### Overview

This document explains the procedure for tracking display items using the showroom "Open Order" method.

### 1. Create "Customer" Master for Showroom Display Control

- a) Cust ID: **DISPLAY**.
  - b) Name: **ON DISPLAY IN SHOWROOM**.
  - c) Ship Address: <<Enter MFG Name>>
  - d) Credit Limit: **0**
  - e) Price Level: **A (Retail)** or specify desired price level for the Display order.
  - f) Tax Flag: **E for Exempt**
  - g) Optional: Set up a Ship Instruction code on the 7<sup>th</sup> screen of Main Options for "DISPLAY." In the sample below, ship instruction code Q is used for display.
  - h) Dflt PO: **DISPLAY**
  - i) Customer Notes: Optional. Possible use for operator instructions, showroom policy/procedures, etc.
- See sample customer master screen below.

MM/DD/YYYY	ACCOUNTS RECEIVABLE CUSTOMER	CUST ID
ID:DISPLAY	Name:ON DISPLAY IN SHOWROOM	Bill Address:
	Address:<<Enter MFG Name>>	
	City/State:	City/State:
City/State:		Zip Code:
Zipcode:		Contact:
Phone:( )		Date Opened: 03/13/2009
Credit Limit: 0	Avail Credit: 0	Current POS: 0
Price Level: A -Retail-	Adjust: 0.000%	Last Sales: 0.00
Tax -- Flag: E Code: FL	Percent: 7.500%	Last Pymt: 0.00
	Special Price: B	Credit Hold: N
Print Group:	Statement Group: A	Free: High Balance: 0.00
Terms: D	Prompt:	Previous Balance: 0.00
Salesman:	PO#: N Dflt PO: DISPLAY	Service Charges : 0.00
Ship Inst: Q	DISPLAY Archive: N	OVER 90 BALANCE : 0.00
	Sales Profit GP%	61-90 BALANCE : 0.00
Period: 0.00	0.00 0.00	31-60 BALANCE : 0.00
This Year: 0.00	0.00 0.00	CURRENT BALANCE : 0.00
Last Year: 0.00	0.00 0.00	=====
		Account Balance: 0.00
F2=CHANGE ID	F3=LOOKUP	F7=CHG NEXT ITEM
		TAB=BALANCE LOAD

## Tag-n-Trak Showroom Display Control

### 2. Open Orders for Manufacturer's with Items on Display in Showroom

- a) Enter **DISPLAY** as the Customer ID for a Showroom Display Order.
- b) Enter the **Vendor Code or Name in Ship Address Line 1**. The Mfg Rep's name and/or phone number can be entered in address line 2.
- c) Deliver Date: **12312030**

Using a deliver date of 12/31/2030 makes it appear first on the Qty Reserve Search screen. Note: If you create purchase orders based on Deliver Date, consider leaving the deliver date blank.

- d) Stage location: For "**Stage**" enter the word "**SHOWRM**"

The first 4 characters of the Stage location must be **SHOW**. Optional: You can designate an area in the showroom using the last two characters. For example, SHOWMZ (Mezzanine), SHOWNW (North Wall), SHOWUP (Upstairs), etc.

- e) **Line Items:**

- Room Locations can be used to denote the DATE the item was put on Display. The room location field contains 24 characters. In addition to the DATE the item was put on display, some lighting showrooms optionally specify a display area or specify a Showroom Display Group (e.g. CRYSTAL, LANDSCAPE, etc.).

**IMPORTANT NOTE:** The Tag-n-Trak Inventory Stocking Report prints the ROOM LOCATIONS for items on DISPLAY ORDERS. ***When deciding what to enter in the room location field for DISPLAY orders, consideration should be given as to what information would be pertinent or helpful to those who will be reviewing the Inventory Stocking Report (typically, personnel doing the purchasing).***

- Showroom Location: (This is optional.) Override the **Loc:** field with the actual Showroom Location (6 character maximum) such as the grid, quadrant, cloud#, wall ID, etc. Entering a location allows you to later search for empty showroom locations using query. Also, some customers have used query reports to print items on display orders to facilitate physically counting display items in the showroom.
- [F10] sell key just like normal Sales Order.

- f) **Inventory Status**

The quantity is reserved in the item master:

QOH = Unchanged

QRV = 1 (Reserved for Showroom Open Order)

QAV = Qty Available is reduced by quantity on display

- g) **Manufacturer Search**

The same search by Name/Address feature that is used to find orders can be used to find an order for a specific manufacturer.

On a blank Order Heading screen, arrow to Name field and enter Mfg Name and press [F7]. After order displays, press [F10] to move cursor to type L. Press Enter key to edit line items on display for that vendor.

## Tag-n-Trak Showroom Display Control

### 3. Normal Sales Order (or House Order) Processing

- a) **Qty Search:** When a Qty Reserve Search is done for an item on a display order, it will appear at the top of the list of open orders (because the deliver date is 12/31/2030). The Order# displays as "SHOWRM" instead of the order number assigned to the display ticket. See the top line in the example below:

RESERVED QTY SEARCH KIC 10016ESWH							
CEILING							
CUST ID	NAME	ORDER #	T	QTY	DELIVER	OPENED	LOC
DISPLAY	ON DISPLAY IN SHOWRM	SHOWRM	L	1	12/31/30	03/13/09	N.WALL
AMERIN	AMERICAN INTERIORS	12782	L	1	11/30/10	03/30/10	
CASH	ANDERSON, MICHELLE	12783	L	1		03/30/10	
_____	_____	_____	-	_____	_____	_____	_____
_____	_____	_____	-	_____	_____	_____	_____
_____	_____	_____	-	_____	_____	_____	_____
_____	_____	_____	-	_____	_____	_____	_____
_____	_____	_____	-	_____	_____	_____	_____
_____	_____	_____	-	_____	_____	_____	_____
_____	_____	_____	-	_____	_____	_____	_____
QTY: _____				BACKORDER: _			

- b) **Rob from Display Order to Sell out of Showroom:** When the quantity available for a display item is insufficient, salespersons can "rob" from the display order if they wish to sell the one on display. (The salesperson record either allows or does not allow the salesperson to rob from another order, including showroom display orders.) After robbing from the display order, a sales note is automatically created to print on the Pick Ticket:

\*\*\*\* TAKE 1 FROM # SHOWRM @ N.WALL

In the above example, "N.WALL" would be replaced with the location specified in the POS line item for the item that was robbed.

The warehouse personnel know to take the one on display to fill the order rather than searching the warehouse stock.

- c) **Option to Backorder the Item on Display when Robbing from Display Order:** When a salesperson "robs" from the display order to fill their order, they have the option to backorder the item on the display ticket. When a purchase order is created, this backorder will be "picked up" and a replacement fixture ordered for the Showroom. The line note is created for the PO Receiving report.

**1 ON DISPLAY IN S 12353 12/31/2030**

After the backorder is received, the Display Order can be called up and the **Loc** field checked to determine where to hang the fixture. If the fixture will be hung in a different showroom location, the Loc field can be changed to reflect the new location.

## Tag-n-Trak Showroom Display Control

### 4. Other Features & Options

- a) **Search for Empty Showroom Locations:** Since the item# and showroom location (if used) remain on the Display Order, it is possible to generate a Query Report listing all empty Showroom Locations. (The Query would search for Order Qty of 0 for all items on DISPLAY orders.)
- b) **Showroom Inventory Counts:** Pick Tickets can be printed or a Query Report designed to print all items on display orders to facilitate counting the Showroom inventory.
- c) **Inventory Value of Showroom:** A Query Report could be designed to print a Value Report of what is on display in the Showroom based on the items on the Display Orders.
- d) **Update the Display Flag in Item Master:** A Query could be designed to update the **Display** flag with “D” in the Item Master if the item is on a Display Order. When salespersons sell an item with “D” in the Display flag field, the Point of Sale program displays “DSP” so that they know the item is “on display in the showroom.”
- e) **Inventory Stocking Report Prints Room Locations for DISPLAY tickets:**

The Inventory Stocking Report (a selection on the Inventory Reports Menu) has as option to print the Order Quantity and the Room Location for items on Showroom Display orders. This feature benefits lighting showrooms that maintain their display items on point of sale orders using the customer ID “DISPLAY.” When the display items are entered on the POS order, the room location can be used to note the date the item was put on display, the display area in the showroom or other pertinent information. Both the order quantity and the room location of the item on the display order optionally print on the Inventory Stocking Report.

As each item is printed on the Inventory Stocking Report, the program will search for that item in the point of sale line item file for L type orders in Open or Hold status for customer ID DISPLAY. Orders with customer ID DISPLAY are considered Display Tickets. If the item is found on a Display Ticket, the display order quantity and room location will print on the report as the third report line for the item. If the item is found on more than one point of sale line, additional report lines will be used to print the display information (e.g. the second occurrence will print as the fourth report print line, the third occurrence will print as the fifth report print line, and so on).

If the item on display has an order quantity of zero (because it has been robbed), the order quantity and room location will not print on the report.

The “PRINT TOTALS ONLY?” prompt on the dialog screen provides the option as follows:

#### **PRINT TOTALS ONLY? D (Yes, No, D=Print Display Room Loc)**

Y - prints “Totals Only” based on the qualifiers

N - prints Item Detail based on the qualifiers

D - prints the same as ‘N’ plus the additional print lines for the Order Quantity and Room Location if the item is on a Display order.

The default for the “PRINT TOTALS ONLY” dialog question is ‘N.’ The user will need to change it to ‘D’ for the Display ticket information to print.

The Print Scan Labels and Print Purchase Order Work Sheet must both be ‘N’ in order to have the option to print display room locations.