



Contents

1.	Setup.....	9
1.1.	Assisted Setup.....	9
1.2.	Item Matrix dimension setup.....	13
1.3.	Company Logo and Footer.....	14
1.3.1.	Navigate to Company information.....	14
1.3.2.	Adding picture.....	14
1.3.3.	Remove picture.....	15
1.3.4.	Logo Position.....	16
1.4.	Sales & Receivables Setup.....	16
1.5.	Purchase & Payables Setup.....	18
1.6.	Customer price group Setup.....	20
1.6.1.	Navigate to Customer price group Setup.....	20
1.7.	Customer discount group Setup.....	20
1.7.1.	Navigate to Customer discount group Setup.....	20
1.8.	Order type Setup.....	21
1.9.	Inventory setup.....	25
1.10.	Delivery priorities.....	26
1.11.	Receipt worksheet setup.....	27
1.11.1.	Navigate to receipt worksheet setup.....	27
1.12.	Delivery worksheet Setup.....	27
1.13.	Retail location.....	28
1.13.1.	Navigate to Retail location.....	28
1.13.2.	Create a new Retail Location.....	28
1.14.	Barcode Ranges.....	29
1.14.1.	Navigate to Barcode Ranges.....	29
1.14.2.	Create a new Barcode Range.....	29
1.15.	Buying group.....	31
1.15.1.	Navigate to Buying Group Setup.....	31
1.15.2.	Navigate to Buying Group List.....	31
1.15.3.	Navigate to Buying Group members.....	33
1.15.4.	Navigate to Buying Group Brands.....	34
1.15.5.	Navigate to Buying Group Journal.....	34
2.	Item Management.....	40
2.1.	Pebblestone fields.....	40
2.1.1.	Item Phases.....	40
2.1.1.1.	Navigate to Item Phases.....	40
2.1.1.2.	Item phases.....	40
2.1.2.	Seasons.....	40
2.1.2.1.	Navigate to Seasons.....	40
2.1.2.2.	Create a new season.....	41
2.1.2.3.	Delivery drops.....	41
2.1.2.3.1.	Create delivery drops for the season.....	41
2.1.3.	Carry over.....	42
2.1.4.	Item categories.....	43
2.1.4.1.	Navigate to Item category.....	43
2.1.4.2.	Create an Item category.....	43
2.1.5.	Collections.....	44

2.1.5.1.	Navigate to collections	44
2.1.5.2.	Create a collection	44
2.1.6.	Brands.....	44
2.1.6.1.	Navigate to Brand	44
2.1.6.2.	Create a new Brand	45
2.1.7.	Genders	45
2.1.7.1.	Navigate to Gender	45
2.1.7.2.	Create a gender	45
2.1.8.	Themes	45
2.1.8.1.	Navigate to themes	45
2.1.8.2.	Create a new theme.....	46
2.1.9.	Fits	46
2.1.9.1.	Navigate to Fits	46
2.1.9.2.	Create a new Fit.....	46
2.1.10.	Sizes	46
2.1.10.1.	Navigate to Sizes	46
2.1.10.2.	Create a size range.....	46
2.1.10.3.	Create sizes within a size range	47
2.1.10.4.	Size range region mapping	47
2.1.11.	Color Groups.....	48
2.1.11.1.	Navigate to Color Groups.....	48
2.1.11.2.	Create a new Color group.....	48
2.1.11.2.1.	Create colors for the color group	49
2.1.12.	Colors.....	52
2.1.12.1.	Navigate to colors	52
2.1.12.2.	Create a new color.....	52
2.1.13.	Compositions	53
2.1.13.1.	Navigate to Compositions	53
2.1.13.2.	Compositions overview	53
2.1.13.3.	Create a new composition.....	53
2.1.13.4.	Composition code and Tariff number on item colors.....	54
2.1.14.	Styles	54
2.1.14.1.	Navigate to styles.....	54
2.1.14.2.	Create a new style	54
2.1.15.	Wash and Care	55
2.1.15.1.	Navigate to Wash and Care value	55
2.1.15.2.	Add wash and care value on item.....	56
2.1.15.3.	Add wash and care on item color level	58
2.2.	Prices & Discounts.....	58
2.2.1.	Special Purchase Prices and Discounts	58
2.2.1.1.	Navigate to Special Purchase Prices & discounts	58
2.2.1.2.	Create Special Purchase price	58
2.2.1.3.	Add a Special purchase price	59
2.2.1.4.	Different purchase prices on variant level.....	59
2.2.1.5.	Create Special discount price	60
2.2.1.6.	Add a Special discount price.....	61
2.2.2.	Special sales prices & discount prices	61
2.2.2.1.	Navigate to Special sales & discount prices	61
2.2.2.2.	Create Special sales prices.....	61
2.2.2.3.	Add a Special sales price.....	62
2.2.2.4.	Different sales prices on variant level.....	62
2.2.2.5.	Create Special discount prices	63
2.2.2.6.	Add a Special discount price.....	64
2.2.2.7.	Different discounts on variant level	64
2.2.3.	Recommended Retail Prices	65

K3 Pebblestone

2.2.3.1.	Navigate to Special Recommended Retail Prices	65
2.2.3.2.	Create recommended retail prices	65
2.2.3.3.	Add recommended retail price	66
2.2.3.4.	Different recommended retail prices on variant level	66
2.2.4.	Pricing in different currencies	67
2.2.4.1.	Navigate to Currencies	67
2.2.4.1.1.	Choose the sales price currency	67
2.2.4.1.2.	View the sales price currency on the item	68
2.3.	Reports	69
2.3.1.	Barcode Labels	69
2.3.1.1.	Navigate to Barcode labels on Item	69
2.3.1.2.	Print barcode label from Sales order	70
2.3.1.3.	Print barcode label from Purchase order	71
2.4.	Material creation	73
2.4.1.	Create a new material	73
2.4.2.	General	73
2.4.3.	Inventory	74
2.4.4.	Costs & Purchasing	74
2.4.5.	Prices & Sales	75
2.5.	Item creation	75
2.5.1.	Tooltip	75
2.5.2.	Create a new Item	75
2.5.3.	General	76
2.5.4.	Inventory	77
2.5.5.	Cost & Purchasing	77
2.5.5.1.	Cost Details	77
2.5.5.2.	Foreign Trade	77
2.5.6.	Price & Sales	78
2.5.7.	Replenishment	78
2.5.7.1.	Purchase	78
2.5.8.	Warehouse	79
2.5.9.	Picture	79
2.6.	One sample size for all genders	80
2.6.1.	Navigate to Sizes	80
2.6.2.	Sample size for all genders	80
2.6.3.	Sample size on the item card	81
2.7.	One sample size per gender	82
2.7.1.	Navigate to sizes	82
2.7.2.	Samples sizes per gender	82
2.7.3.	Samples size on item card	83
2.8.	Create a prepack	84
2.8.1.	Prepack creation	84
2.9.	Prepack content	88
2.9.1.	Navigate to prepack content	88
2.10.	Information on item colors	88
2.10.1.	Navigate to item colors	88
2.11.	Information on item sizes	89
2.11.1.	Navigate to item sizes	89

2.12.	Ratio Curves	90
2.12.1.	Navigate to Ratio Curves	90
2.12.2.	Create a new Ratio Curve.....	90
2.12.3.	Fill quantities for the ratio curve	90
2.13.	Size Range Region	91
2.13.1.	Navigate to size range region	91
2.13.2.	Create a size range region.....	91
2.13.3.	Create a size range region mapping	92
2.13.3.1.	Size range region mapping	92
2.14.	Create Barcodes	92
2.14.1.	Navigate to Create Barcodes	92
2.14.2.	Create Barcodes on an item	93
2.14.3.	Navigate to Cross Reference	94
2.15.	Document node.....	94
2.15.1.	Navigate to Document node	94
2.16.	Filter by variants.....	95
2.16.1.	Navigate to filter by variants.....	95
3.	Sales	96
3.1.	Sales Quote	96
3.1.1.	Create a Sales Quote	96
3.1.2.	General	96
3.1.3.	Sales quote lines.....	98
3.1.4.	Make order from quote.....	99
3.2.	Sales order creation.....	100
3.2.1.	Tooltips	100
3.2.2.	Order Types	100
3.2.3.	Create a new Sales Order	100
3.2.4.	General	100
3.2.5.	Sales lines.....	102
3.2.6.	Invoice details	108
3.2.7.	Shipping and Billing	108
3.2.7.1.	Shipping	108
3.2.7.2.	Shipment method.....	109
3.2.7.3.	Billing.....	109
3.3.	Use Prepack in Sales Order	109
3.3.1.	Use Prepack in Sales Order	109
3.4.	Use Ratio Curves in Sales Order.....	110
3.4.1.	Ratio Curves in Sales order	110
3.5.	Sales return order creation	111
3.5.1.	Navigate to sales return order.....	111
3.5.2.	Create a sales return order	111
3.5.3.	General	112
3.5.4.	Sales lines.....	112
3.5.4.1.	Copy document.....	113
3.5.5.	Return reason code	115
3.5.6.	Invoicing details	115
3.5.7.	Shipping and billing.....	116

K3 Pebblestone

3.5.7.1.	Ship-to	116
3.5.7.2.	Bill-to	116
3.6.	Consignment order	116
3.6.1.	Consignment order	116
3.6.1.1.	Manually quantity for Transfer order	118
3.6.1.2.	Create consignment transfer order	118
3.6.2.	Transfer order	120
3.6.3.	Transfer order in the Delivery worksheet	121
3.6.3.1.	Create Inventory pick for Transfer order in Delivery worksheet	121
3.7.	Create transfer order for consignment	122
3.8.	Customer creation	124
3.8.1.	Create a new customer	124
3.8.2.	General	124
3.8.3.	Address & Contact	126
3.8.4.	Invoicing	126
3.8.5.	Payments	127
3.8.6.	Shipping	128
3.9.	Customer Price Groups	129
3.9.1.	Navigate to Customer Price Groups	129
3.9.2.	Create a new Customer Price Group	129
3.10.	Customer Discount Groups	131
3.10.1.	Navigate to Customer Discount Groups	131
3.10.2.	Create a new Customer Discount Group	131
3.10.3.	Create a new Sales Line Discount	132
3.10.3.1.	General	132
3.10.3.2.	Sales Line Discount	133
3.11.	Order Type pricing	136
3.11.1.	Navigate to Order Type pricing	136
3.11.2.	Set-up a different price group per Order Type	137
3.12.	Inventory and price list	138
3.12.1.	Navigate to Inventory and Price list	138
3.13.	Comment lines	140
3.13.1.	Attach comment line	140
3.13.2.	Comment line on orderconfirmation	141
3.13.3.	Comment line from special order to purchase order	141
3.14.	Initial quantity sales order	143
3.14.1.	Activate initial quantity	143
3.14.2.	Registered differences	144
3.14.3.	Reset Initial order quantity	144
3.15.	Batch open en release Sales Orders	145
3.15.1.	Navigate to all orders	145
3.15.1.1.	Open and release orders	145
3.16.	Salesperson Determination	146
3.16.1.	Navigate to Salesperson Determination	146
3.16.2.	Create a new Salesperson Determination	146
4.	Purchase	149
4.1.	Vendor creation	149
4.1.1.	Tooltips	149
4.1.2.	Create a new Vendor	149

K3 Pebblestone

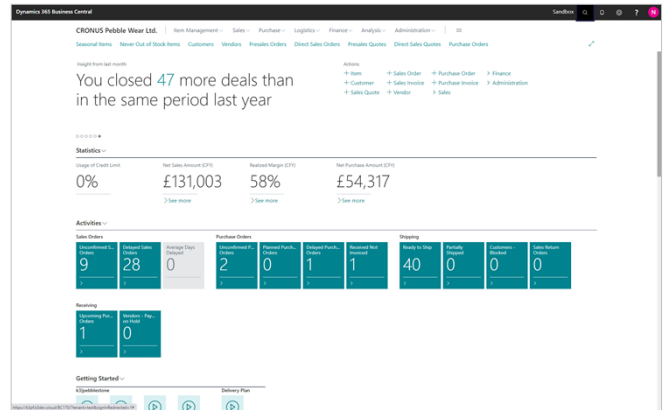
4.1.3.	General	149
4.1.4.	Address & Contacts	150
4.1.4.1.	Address	150
4.1.4.2.	Contacts	150
4.1.5.	Invoicing	150
4.1.6.	Payments	150
4.1.7.	Receiving	151
4.1.8.	Picture	151
4.2.	Purchase order creation	152
4.2.1.	Tooltips	152
4.2.2.	Create a new Purchase Order	152
4.2.3.	General	152
4.2.4.	Purchase Lines	153
4.2.5.	Invoice details	159
4.2.6.	Shipping & Payment	160
4.3.	Use Ratio Curves in Purchase Order	161
4.3.1.	Ratio Curves in Purchase Order	161
4.4.	Item Supply Planning	162
4.4.1.	Navigate to Item supply planning	162
4.4.2.	Item supply planning	162
4.4.3.	Item supply planning details	163
4.5.	Requisition Worksheet	164
4.5.1.	Navigate to Requisition Worksheet	164
4.5.2.	Calculate plan	164
4.5.3.	Creating PO from requisition Worksheet	167
4.5.4.	Special order	167
4.5.5.	Drop Shipment	169
4.6.	Presales Plan	171
4.6.1.	Presales Plan	171
4.7.	Change item phases on presales plan	173
4.7.1.	Change item phases on the presales plan	173
4.8.	Create PO via Presale plan	174
4.8.1.	Navigate to the Presales Plan	174
4.8.2.	Create Purchase orders	175
4.9.	Replacement and cancellation by wholesaler	176
4.9.1.	Replacement proposal	176
4.9.2.	Replacement	176
4.9.3.	Replacement worksheet	177
4.9.4.	Calculate Worksheet	178
4.9.5.	Worksheet	179
5.	Logistics	184
5.1.	Delivery plan	184
5.1.1.	Navigate to Delivery worksheet	184
5.1.2.	Calculate Plan	184
5.1.3.	Delivery worksheet lines	186
5.1.4.	Reallocate Inventories	187

5.1.5.	Summary.....	188
5.2.	Receipt worksheet	189
5.2.1.	Navigate to receipt worksheet.....	189
5.3.	Create Warehouse receipt.....	191
5.3.1.	Create warehouse receipt.....	191
6.	Presales Plan.....	192
6.1.	Presales Plan.....	192
6.1.1.	Presales Plan.....	192
6.2.	Create PO via Presale plan	195
6.2.1.	Navigate to the Presales Plan.....	195
6.2.2.	Create Purchase orders.....	195
7.	Item worksheet.....	197
7.1.	Item Worksheet Templates setup	197
7.2.	Field Setup Item worksheet	198

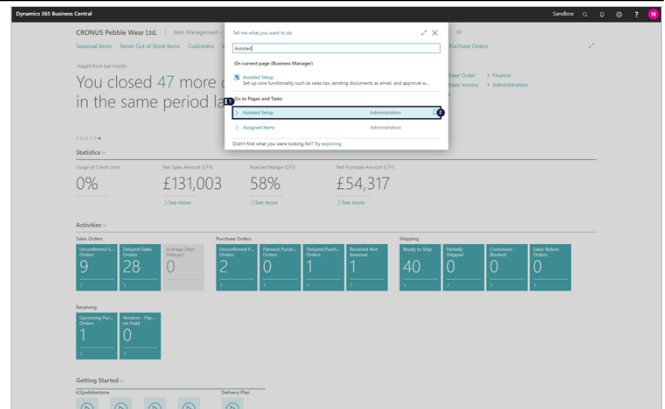
1. Setup

1.1. Assisted Setup

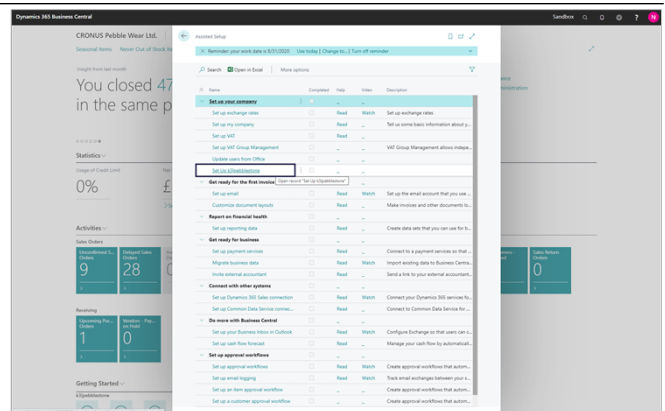
1. Click on the link **Tell me what you want to do. Quickly access actions, pages, reports, documentation, and apps and consulting services..**



1. Enter the text **Assisted Setup.**
2. Click on **Assisted Setup Administration** .

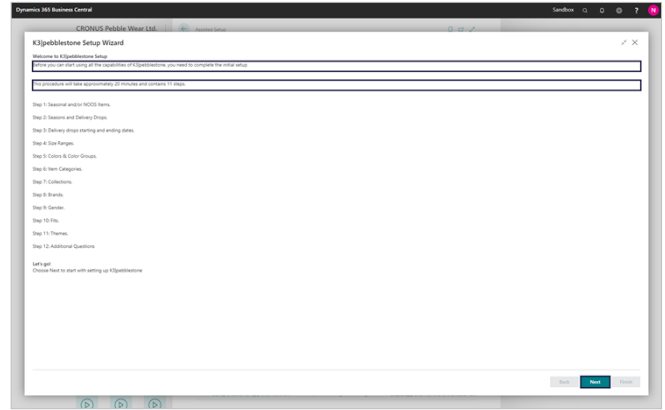


1. Click on the link in cell **Name** with the value **Set Up k3|pebblestone.**

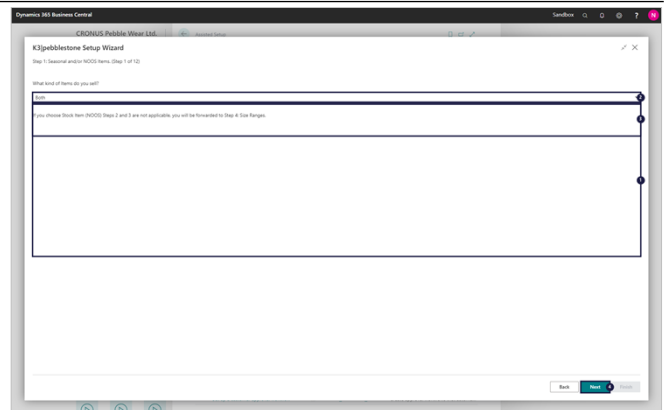


K3 Pebblestone

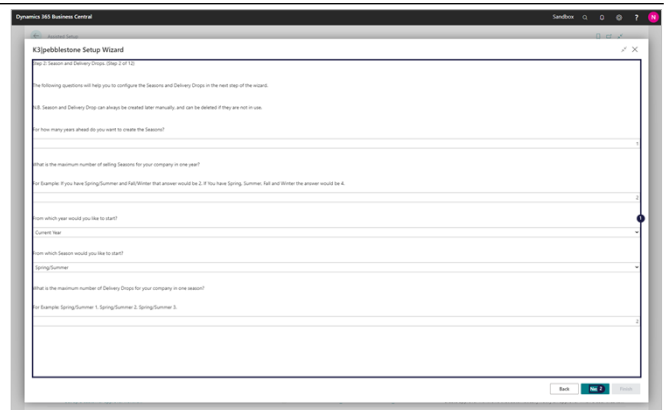
- Before you can start using all the capabilities of K3|pebblestone, you need to complete the initial setup.
- This procedure will take approximately 20 minutes and contains 11 steps.
- Click on the button **Next**.



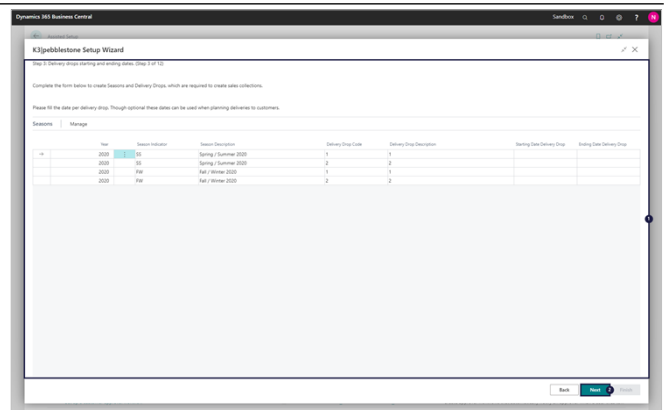
1. **Step 1: Seasonal and/or NOOS Items..**
2. Click on the field **What kind of Items do you sell?**
3. Click on the item **Both** in the list.
4. Click on the button **Next**.



1. **Step 2: Season and Delivery Drops.** The following questions will help you to configure the Seasons and Delivery Drops in the next step of the wizard. .
2. Click on **Next**.

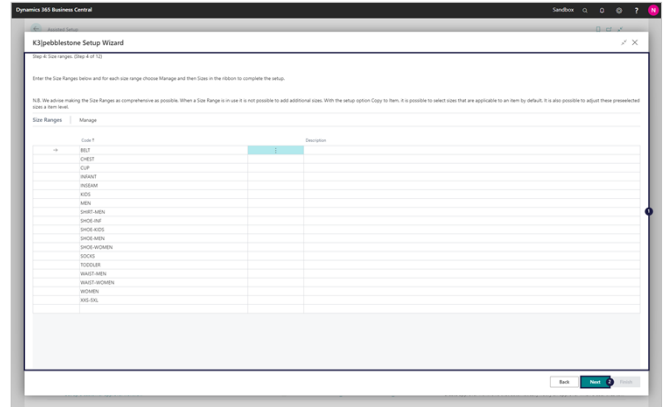


1. **Step 3: Delivery drops starting and ending dates.**
2. Click on the button **Next**.

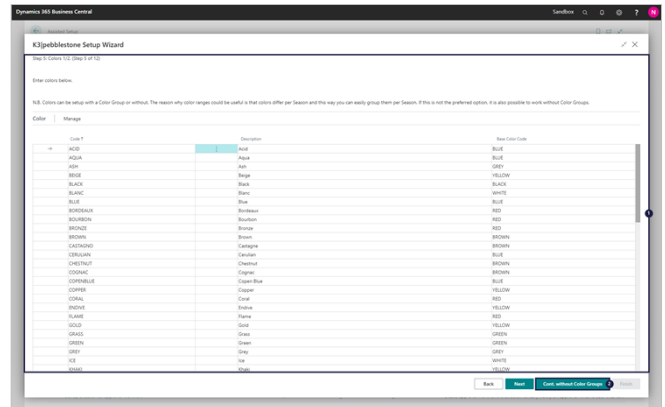


K3 Pebblestone

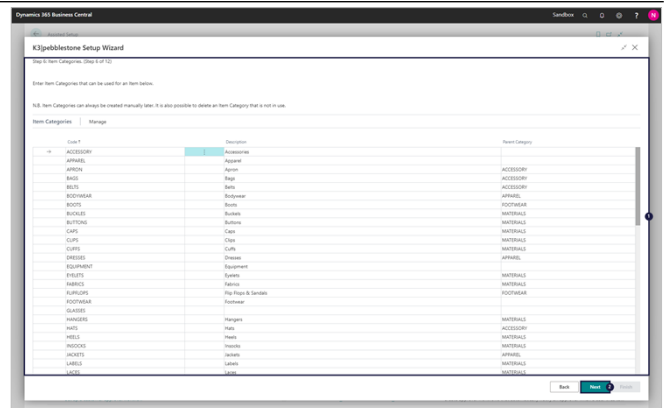
1. **Step 4: Size ranges.**
2. Click on the button **Next.**



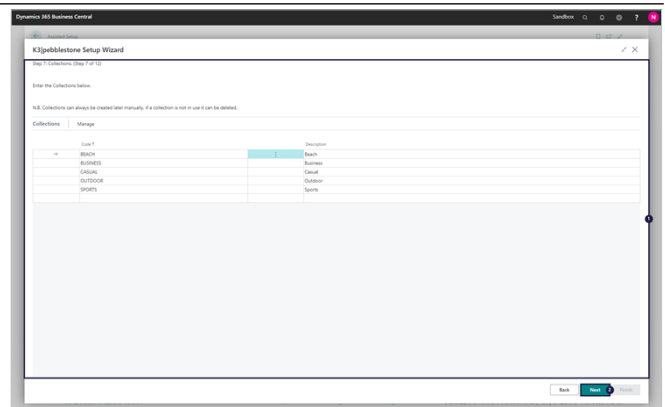
1. **Step 5: Colors.**
2. Click on the button **Cont. without Color Groups.**



1. **Step 6: Item Categories.**
2. Click on the button **Next.**

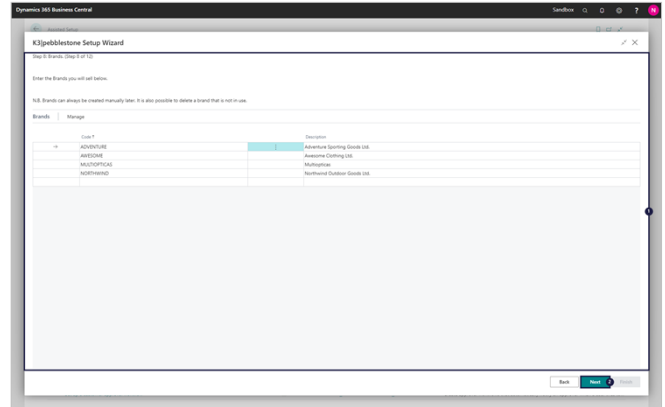


1. **Step 7: Collections.**
2. Click on the button **Next.**

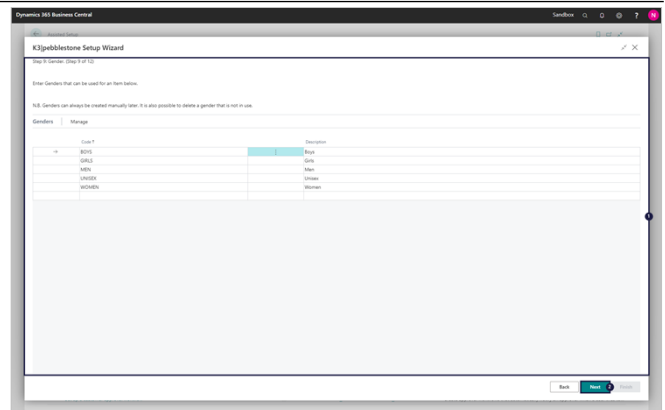


K3 Pebblestone

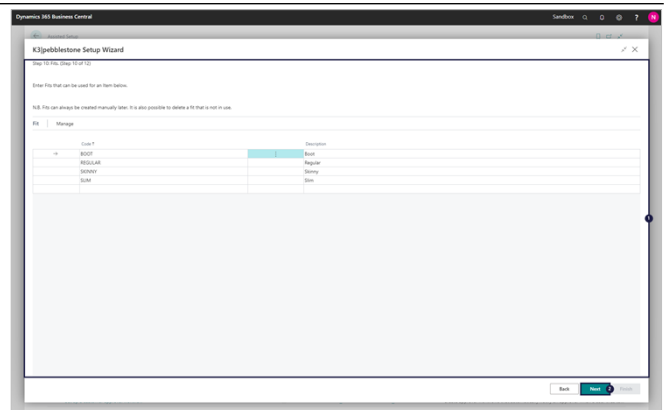
1. **Step 8: Brands..**
2. Click on the button **Next.**



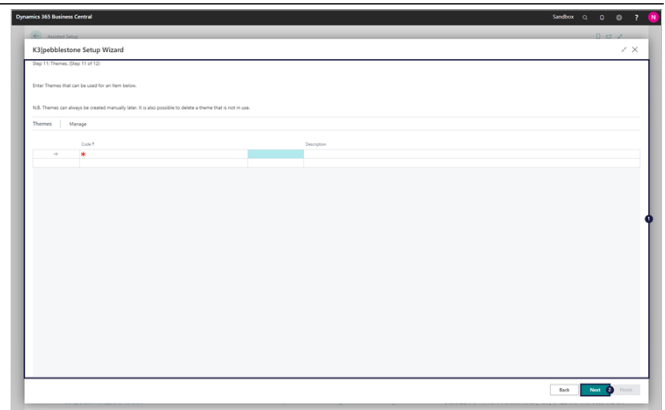
1. **Step 9: Gender.**
2. Click on the button **Next.**



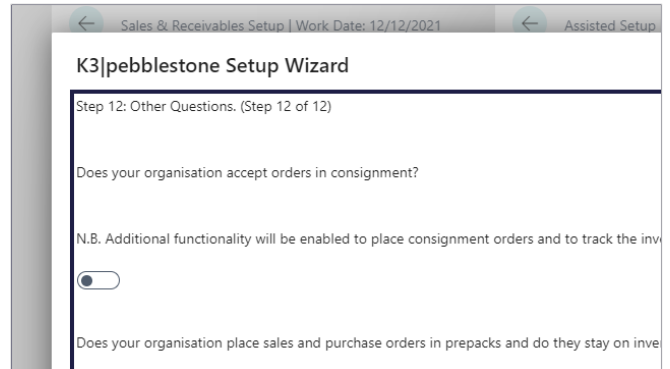
1. **Step 10: Fits..**
2. Click on the button **Next.**



1. **Step 11: Themes..**
2. Click on the button **Next.**



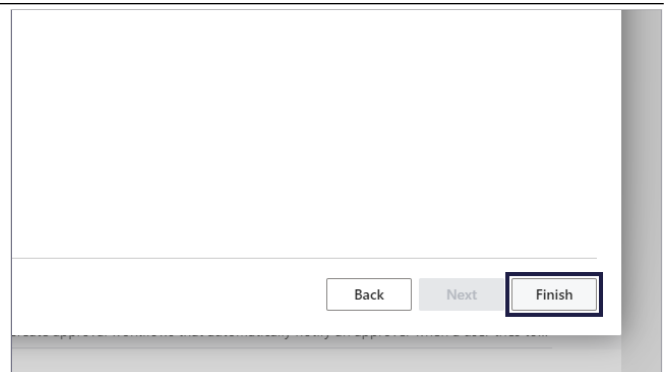
Step 12: Other Questions.



1. **Does your organisation accept orders in consignment.**
2. **N.B. Additional functionality will be enabled to place consignment orders and to track the inventory levels on the consignment orders..**
3. Enable if you want to use consignment.
4. **Does your organisation place sales and purchase orders in prepacks and do they stay on inventory as prepacks?.**
5. **N.B. Additional functionality will be enabled to place prepack items on orders and to track the inventory levels on prepack level..**
6. Enable if you want to use Prepacks.
7. **N.B. Additional functionality will be enabled to use commission..**
8. Enable if you want to use commission.



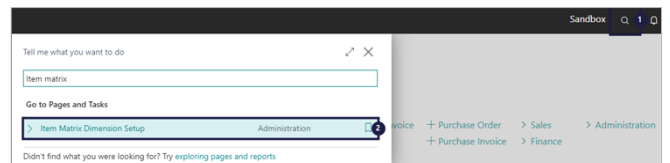
Click on the button **Finish**



1.2. Item Matrix dimension setup

Navigate to Item matrix dimension setup

1. Click on the link **Search** - Enter the text **Item matrix**.
2. Click on **Item Matrix Dimension Setup Administration**.



1. **Create Configurable Variant Codes .**
Indicates that the system should create configurable and meaningful variant codes for the item color - size combinations. It can not be longer then 10 positions in total.
2. **Positions for Color .**

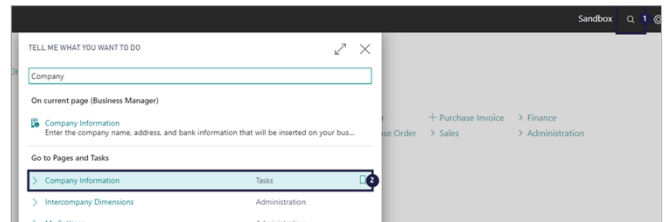


- Positions to assign Color value on Variant Code.
- 3. **Separator** .
The character that is used as a separator in the variant code between the color part and the size part.
- 4. **Positions for 1st Size** .
Positions to assign 1st Size value on Variant Code.
- 5. **Positions for 2nd Size** .
Positions to assign 2nd Size value on Variant Code, if there is no 2nd Size code these positions are assigned to the 1st Size Code value.

1.3. Company Logo and Footer

1.3.1. Navigate to Company information

- 1. Click on the link **Tell me what you want to do. Quickly access actions, pages, reports, documentation, and apps and consulting services.** - Enter the text **Company**.
- 2. Click on **Company Information Tasks** .

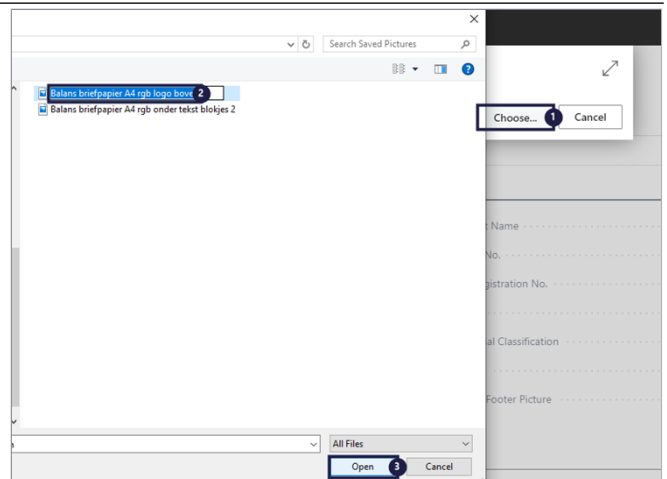


1.3.2. Adding picture

- 1. **Picture.**
Specifies the picture that has been set up for the company, such as a company logo.
- 2. **Select Picture..**

The screenshot shows a form for company information. The fields are: 'Contact Name' (Adam Matteson), 'Phone No.' (0666-666-6666), 'VAT Registration No.' (77777777), 'GLN', 'Industrial Classification', 'Picture', and 'Report Footer Picture'. The 'Picture' field is highlighted with a blue box and has a small icon next to it. Below the 'Picture' field, there is a '+ Select Picture.' button.

- 1. Click on the button **Choose file.**
- 2. Click on the input field **Name.**
- 3. Click on the button **Open.** You may also press **Alt+O.**

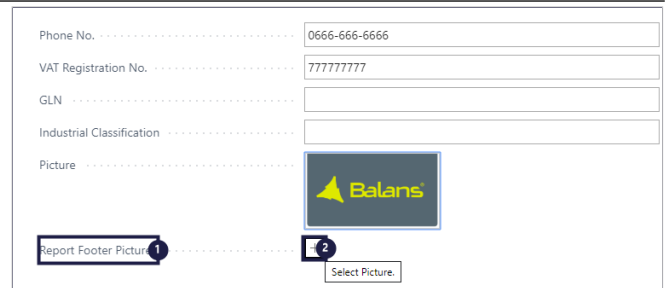



The picture is added.



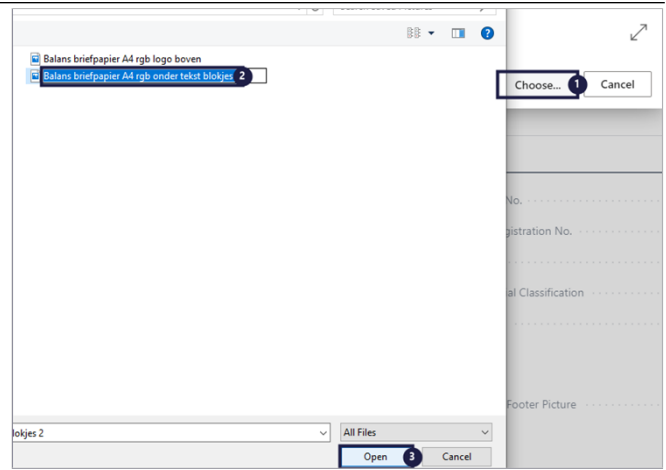
Phone No. 0666-666-6666
 VAT Registration No. 77777777
 GLN
 Industrial Classification
 Picture 
 Report Footer Picture +

- Report Footer Picture.**
Specifies an additional picture that has been set up for the company, such as a company logo. This picture is shown in the footer on some sales reports. The recommended file type is .jpg with the following size: a width of 700 Pixels (= 18.520833333 CM), and a height of 37 Pixels (= 0.978958333 CM).
- Select Picture..**



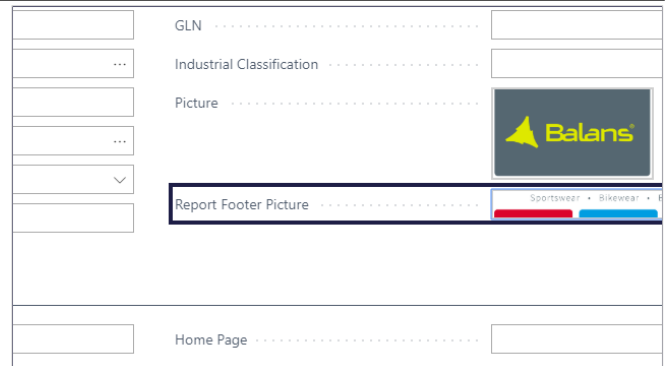
Phone No. 0666-666-6666
 VAT Registration No. 77777777
 GLN
 Industrial Classification
 Picture 
 Report Footer Picture **1** **2** Select Picture.



- Click on the field **null**.
- Click on the input field **Name**.
- Click on the button **Open**. You may also press **Alt+O**.



Balans briefpapier A4 rgb logo boven
 Balans briefpapier A4 rgb onder tekst blokjet **2**
 Choose... **1** Cancel
 lokjes 2 All Files
 Open **3** Cancel

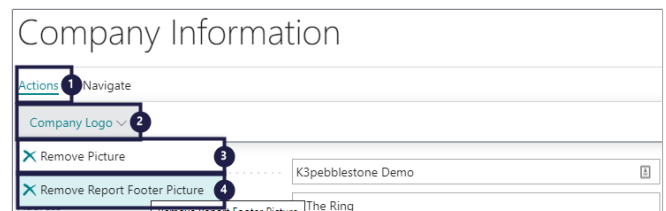
The footer picture is added.



GLN
 Industrial Classification
 Picture 
 Report Footer Picture 
 Home Page

1.3.3. Remove picture

- Click on the navigation menu item popup **Actions**.
- Click on the navigation menu item popup **Company Logo**.
- Move the mouse to the link **Remove Picture**.
- Move the mouse to the navigation menu item **Remove Report Footer Picture**.

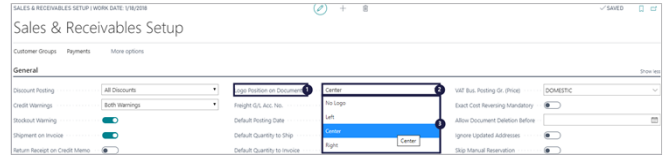


Company Information
 Actions **1** Navigate
 Company Logo **2**
 X Remove Picture **3** K3pebblestone Demo
 X Remove Report Footer Picture **4** The Ring

Remove Report Footer Picture.

1.3.4. Logo Position

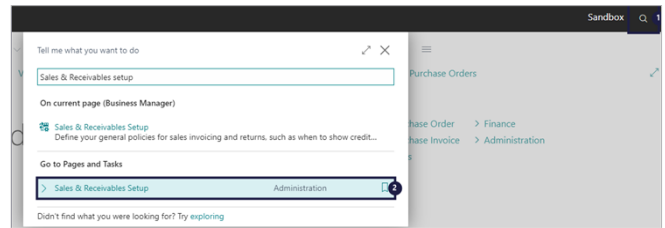
1. **Logo Position on Documents.**
Specifies the position of your company logo on business letters and documents.
2. Click on the field **Logo Position on Documents.**
3. Click on an option from the list.



1.4. Sales & Receivables Setup

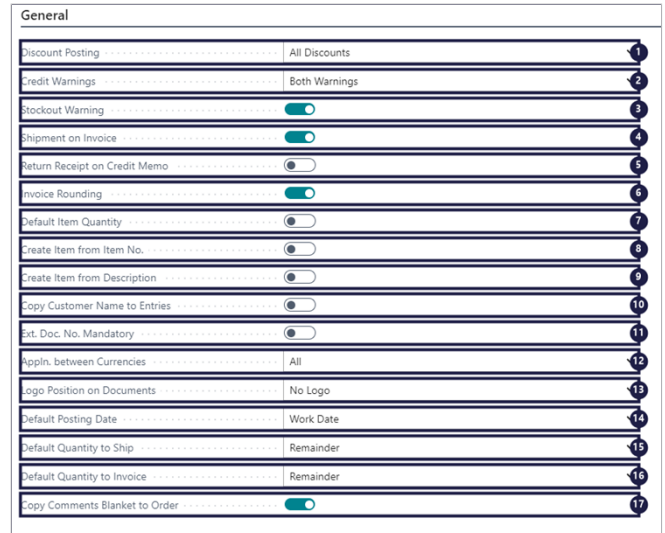
Navigate to Sales & Receivables setup

1. Click on the link **Search**
- Enter the text **Sales & Receivables setup.**
2. Click on **Sales & Receivables Setup Administration** .



General

1. **Discount Posting.**
2. **Credit Warnings.**
3. **Stockout Warning.**
4. **Shipment on Invoice.**
5. **Return Receipt on Credit Memo.**
6. **Invoice Rounding.**
7. **Default Item Quantity.**
8. **Create Item from Item No..**
9. **Create Item from Description.**
10. **Copy Customer Name to Entries.**
11. **Ext. Doc. No. Mandatory.**
12. **Appln. between Currencies.**
13. **Logo Position on Documents.**
14. **Default Posting Date.**
15. **Default Quantity to Ship.**
16. **Default Quantity to Invoice.**
Specifies the default value that is inserted in the Qty. to Invoice field on sales order lines and in the Return Qty. to Receive field on sales return order lines.
17. **Copy Comments Blanket to Order.**



K3 Pebblestone

1. **Copy Comments Order to Invoice.**
2. **Copy Comments Order to Shpt..**
3. **Copy Cmts Ret.Ord. to Cr. Memo.**
4. **Copy Cmts Ret.Ord. to Ret.Rcpt.**
5. **Allow VAT Difference.**
6. **Calc. Inv. Discount.**
7. **VAT Bus. Posting Gr. (Price).**
8. **Exact Cost Reversing Mandatory.**
9. **Allow Document Deletion Before.**
10. **Ignore Updated Addresses.**
11. **Skip Manual Reservation.**
12. **Quote Validity Calculation.**
13. **Allow Overshipping.**
14. **Post only lines with quantities.**
Specifies that only sales lines with a value in the Qty. to Ship, Qty. to Invoice, or Return Qty. to Receive fields will be posted.
15. **Disallow Manual Price Change.**
Indicates whether it is allowed to manually change sales prices.
16. **Copy Line Descr. to G/L Entry.**

Copy Comments Order to Invoice	<input checked="" type="checkbox"/>	1
Copy Comments Order to Shpt.	<input checked="" type="checkbox"/>	2
Copy Cmts Ret.Ord. to Cr. Memo	<input checked="" type="checkbox"/>	3
Copy Cmts Ret.Ord. to Ret.Rcpt	<input checked="" type="checkbox"/>	4
Allow VAT Difference	<input type="checkbox"/>	5
Calc. Inv. Discount	<input type="checkbox"/>	6
VAT Bus. Posting Gr. (Price)	DOMESTIC	7
Exact Cost Reversing Mandatory	<input type="checkbox"/>	8
Allow Document Deletion Before		9
Ignore Updated Addresses	<input type="checkbox"/>	10
Skip Manual Reservation	<input type="checkbox"/>	11
Quote Validity Calculation		12
Allow Overshipping	Yes	13
Post only lines with quantities	<input checked="" type="checkbox"/>	14
Disallow Manual Price Change	<input checked="" type="checkbox"/>	15
Copy Line Descr. to G/L Entry	<input type="checkbox"/>	16

Dimensions

1. **Customer Group Dimension Code.**
2. **Salesperson Dimension Code.**

Dimensions	
Customer Group Dimension Code	SALESGRP
Salesperson Dimension Code	

Number Series

1. **Customer Nos..**
 2. **Quote Nos..**
 3. **Blanket Order Nos..**
 4. **Order Nos..**
 5. **Return Order Nos..**
 6. **Invoice Nos..**
 7. **Posted Invoice Nos..**
 8. **Credit Memo Nos..**
 9. **Posted Credit Memo Nos..**
 10. **Posted Shipment Nos..**
-
1. **Posted Return Receipt Nos..**
 2. **Reminder Nos..**
 3. **Issued Reminder Nos..**
 4. **Canceled Issued Reminder Nos..**
 5. **Fin. Chrg. Memo Nos..**
 6. **Issued Fin. Chrg. M. Nos..**
 7. **Canceled Issued Fin. Charge Memo Nos..**
 8. **Direct Debit Mandate Nos..**
 9. **Replacement Nos..**
Specifies the No. Series to be used for replacement worksheets.

Number Series	
Customer Nos.	CUST
Quote Nos.	S-QUO
Blanket Order Nos.	S-BLK
Order Nos.	S-ORD
Return Order Nos.	S-RETORD
Invoice Nos.	S-INV
Posted Invoice Nos.	S-INV+
Credit Memo Nos.	S-CR
Posted Credit Memo Nos.	S-CR+
Posted Shipment Nos.	S-SHPT

Posted Return Receipt Nos.	S-RCPT
Reminder Nos.	S-REM
Issued Reminder Nos.	S-REM+
Canceled Issued Reminder Nos.	
Fin. Chrg. Memo Nos.	S-FIN
Issued Fin. Chrg. M. Nos.	S-FIN+
Canceled Issued Fin. Charge Memo Nos.	
Direct Debit Mandate Nos.	
Replacement Nos.	REPLACEMENT

Background Posting

1. **Post with Job Queue.**
2. **Post & Print with Job Queue.**
3. **Job Queue Category Code.**
4. **Notify On Success.**
5. **Report Output Type.**

Background Posting	
Post with Job Queue	<input checked="" type="checkbox"/>
Post & Print with Job Queue	<input checked="" type="checkbox"/>
Job Queue Category Code	TABLEPOST
Notify On Success	<input checked="" type="checkbox"/>
Report Output Type	PDF

K3 Pebblestone

Archiving

1. **Archive Quotes.**
2. **Batch Archiving Quotes.**
3. **Archive Blanket Orders.**
4. **Archive Orders.**
5. **Archive Return Orders.**



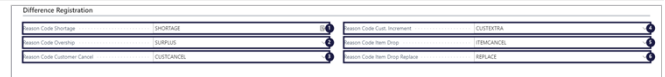
Dynamics 365 Sales

1. **Write-in Product Type.**
2. **Write-in Product No..**
3. **Freight G/L Account No..**



Difference Registration

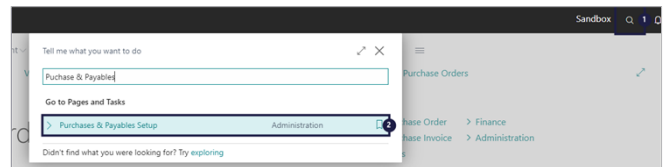
1. **Reason Code Shortage.**
Specifies the reason code that will be used as default to register cancellations due to shortages.
2. **Reason Code Overship.**
Specifies the reason code that will be used as default to register the change when you ship more then ordered.
3. **Reason Code Customer Cancel.**
Specifies the reason code that will be used as default to register a cancelation by the customer.
4. **Reason Code Cust. Increment.**
Specifies the reason code that will be used as default to register an increment by the customer.
5. **Reason Code Item Drop.**
Specifies the Reason Code to be used for Item Drop.
6. **Reason Code Item Drop Replace.**
Specifies the Reason Code to be used for Item Drop Replace.



1.5. Purchase & Payables Setup

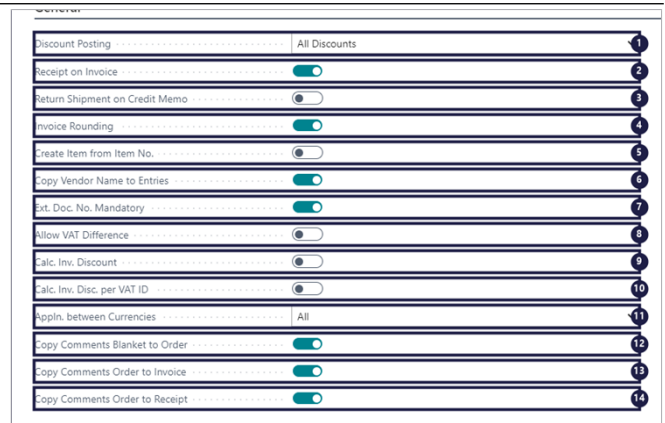
Purchase & Payables Setup

1. Click on the link **Search** - Enter the text **Purchase & Payables**.
2. Click on **Purchases & Payables Setup Administration** □.



General

1. **Discount Posting.**
2. **Receipt on Invoice.**
3. **Return Shipment on Credit Memo.**
4. **Invoice Rounding.**
5. **Create Item from Item No..**
6. **Copy Vendor Name to Entries.**
7. **Ext. Doc. No. Mandatory.**
8. **Allow VAT Difference.**
9. **Calc. Inv. Discount.**
10. **Calc. Inv. Disc. per VAT ID.**
11. **Appln. between Currencies.**
12. **Copy Comments Blanket to Order.**



- 13. **Copy Comments Order to Invoice.**
- 14. **Copy Comments Order to Receipt.**

- 1. **Copy Cmts Ret.Ord. to Cr. Memo.**
- 2. **Copy Cmts Ret.Ord. to Ret.Shpt.**
- 3. **Exact Cost Reversing Mandatory.**
- 4. **Default Posting Date.**
- 5. **Default Qty. to Invoice.**
Specifies the default value that is inserted in the Qty. to Invoice field in purchase order lines.
- 6. **Allow Document Deletion Before.**
- 7. **Ignore Updated Addresses.**
- 8. **Post only lines with quantities..**
Specifies that only purchase lines with a value in the Qty. to Receive, Qty. to Invoice, or Return Qty. to Ship fields will be posted.
- 9. **Disallow Manual Price Change.**
Indicates whether it is allowed to manually change purchase prices.
- 10. **Copy Line Descr. to G/L Entry.**
- 11. **Copy Invoice No. To Payment Reference.**
- 12. **Use Presales Plan.**
Indicates whether or not presales orders are fulfilled by the presales plan. If you do not use presales plan the presales orders are included in the replenishment via the Requisition Worksheet. If you use presales plan the presales orders are fulfilled by the presales plan and they are excluded in the replenishment via the Requisition Worksheet. It will also be required to convert presales stock into direct stock to be able to resell remaining presales stock levels as never out of stock or direct orders.

Number Series

- 1. **Vendor Nos..**
- 2. **Quote Nos..**
- 3. **Blanket Order Nos..**
- 4. **Order Nos..**
- 5. **Invoice Nos..**
- 6. **Posted Invoice Nos..**
- 7. **Credit Memo Nos..**
- 8. **Posted Credit Memo Nos..**
- 9. **Posted Receipt Nos..**

Background Posting

- 1. **Post with Job Queue.**
- 2. **Post & Print with Job Queue.**
- 3. **Job Queue Category Code.**
- 4. **Notify On Success.**
- 5. **Report Output Type.**

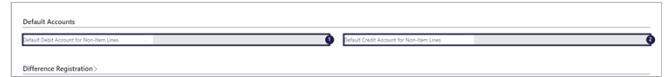
Archiving

- 1. **Archive Quotes.**
- 2. **Archive Orders.**
- 3. **Archive Blanket Orders.**

K3 Pebblestone

Default Accounts

1. **Default Debit Account for Non-Item Lines.**
2. **Default Credit Account for Non-Item Lines.**



Difference Registration

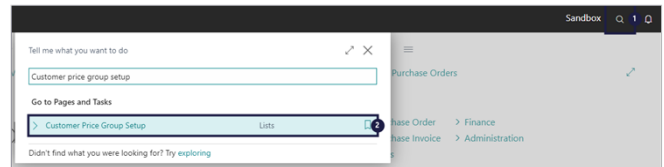
1. **Reason Code Shortage.**
Specifies the reason code that will be used as default to register cancellations due to shortages.
2. **Reason Code Over Receive.**
Specifies the reason code that will be used as default to register the change when you receive more than ordered.
3. **Reason Code Cancel.**
Specifies the reason code that will be used as default to register a cancellation by the vendor.
4. **Reason Code Increment.**
Specifies the reason code that will be used as default to register an increment by the vendor.



1.6. Customer price group Setup

1.6.1. Navigate to Customer price group Setup

1. Click on the link **Tell me what you want to do. Quickly access actions, pages, reports, documentation, and apps and consulting services.** - Enter the text **Customer price group setup.**
2. Click on **Customer Price Group Setup Lists**.



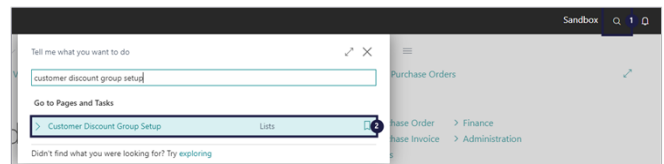
1. **Customer No..**
Specifies the customer account number for which the price groups are setup per order type.
2. **Order Type Code.**
Specifies the order type for which you want to setup special discounts.
3. **Customer Price Group.**
Specifies the customer price group code for this order type, which you can use as a criterion to set up special prices in the Sales Prices window.

Customer No. ↑	Order Type Code ↑	Customer Price Group
1000	PRESALES	NATPRESALE
1001	PRESALES	NATPRESALE
1002	PRESALES	NATPRESALE
1003	PRESALES	NATPRESALE

1.7. Customer discount group Setup

1.7.1. Navigate to Customer discount group Setup

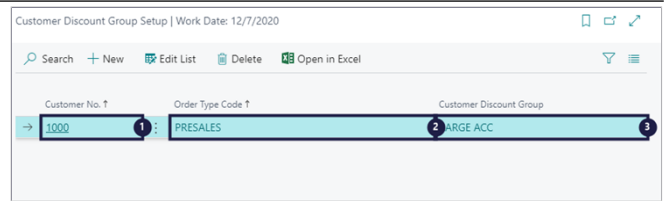
1. Click on the link **Tell me what you want to do. Quickly access actions, pages, reports, documentation, and apps and consulting services.** - Enter the text **customer discount group setup.**
2. Click on **Customer Discount Group Setup**



K3 Pebblestone

Lists ☐.

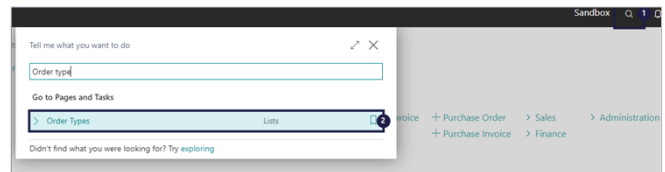
1. **Customer No..**
Specifies the customer account number for which the price groups are setup per order type.
2. **Order Type Code.**
Specifies the order type for which you want to setup special discounts.
3. **Customer Discount Group.**
Specifies the customer discount group code for this order type, which you can use as a criterion to set up special discounts in the Sales Line Discounts window.



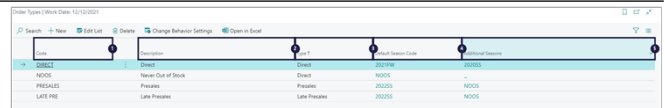
1.8. Order type Setup

Navigate to Order type

1. Click on the link **Search** - Enter the text **Order type**.
2. Click on **Order Types Lists** ☐.

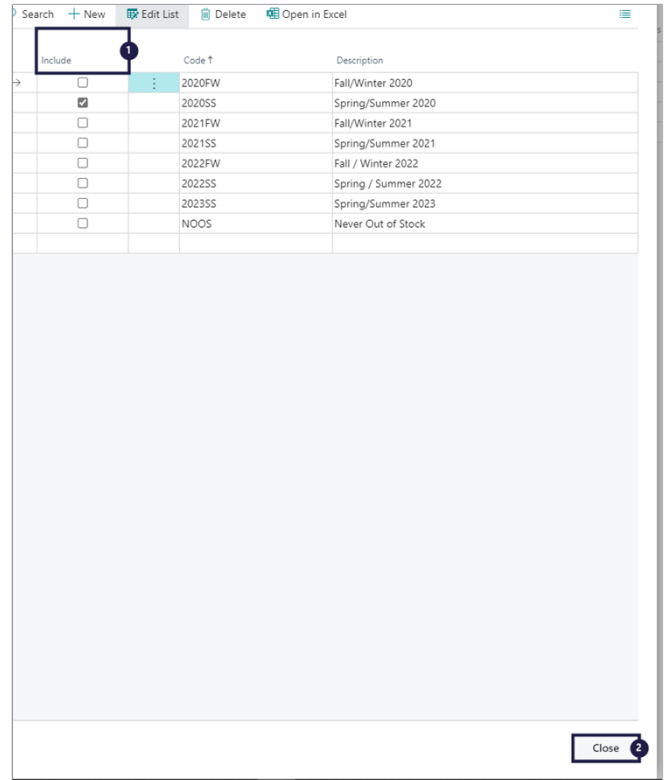


1. **Code.**
Specifies a code for the order type.
2. **Description.**
Specifies a description for the order type.
3. **Type.**
Specifies the type that the Order Type applies to. The available options are, Direct, Presales, and Late Presales. The type controls the default behavior settings and is used on documents to separate presales and late presales orders from direct orders.
4. **Default Season Code.**
Specifies the default season code that is used for this order type.
5. **Additional Seasons.**
Setup a filter for extra seasons to enable the selection of items which belong to these seasons on documents.

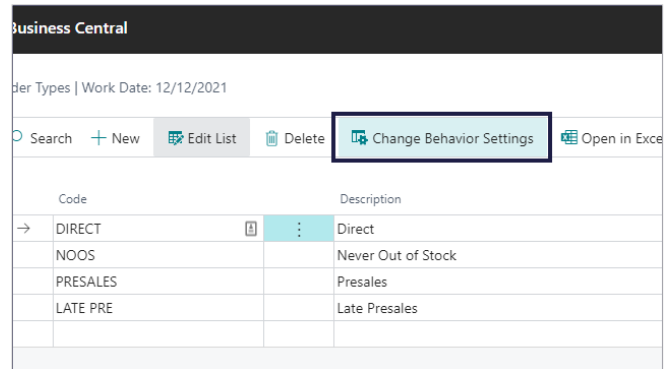


K3 Pebblestone

1. **Include.**
To add multiple seasons include the seasons.
2. **Close.**

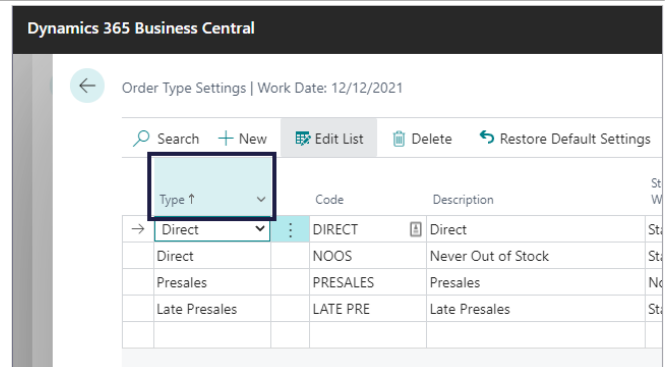


Change Behavior Settings
Change how, in particular, order entry behaves for sales documents with this order type assigned.



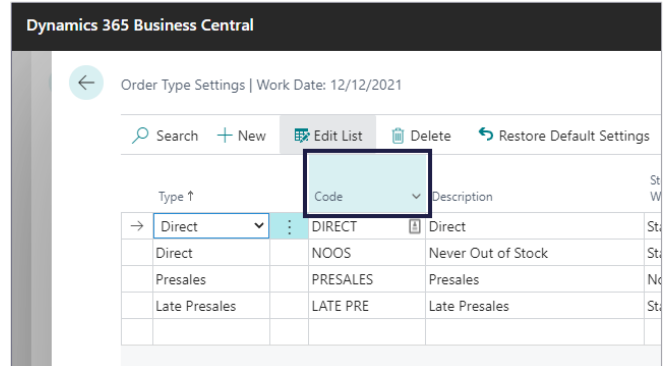
Type

Specifies the type that the Order Type applies to. The available options are, Direct, Presales, and Late Presales.



Code

Specifies a code for the order type.



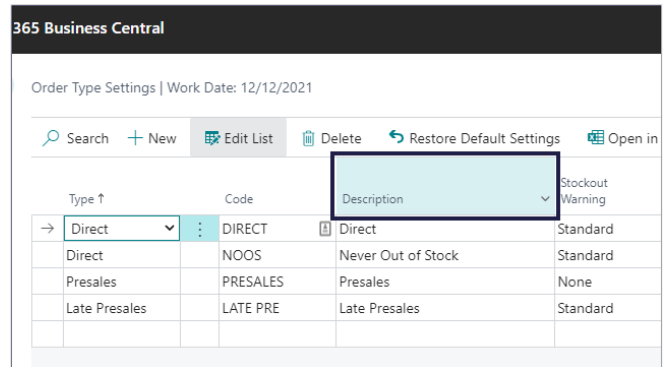
Dynamics 365 Business Central

Order Type Settings | Work Date: 12/12/2021

Type ↑	Code	Description	St	W
→ Direct	DIRECT	Direct	St	W
Direct	NOOS	Never Out of Stock	St	W
Presales	PRESALES	Presales	N	W
Late Presales	LATE PRE	Late Presales	St	W

Description

Specifies a description for the order type.



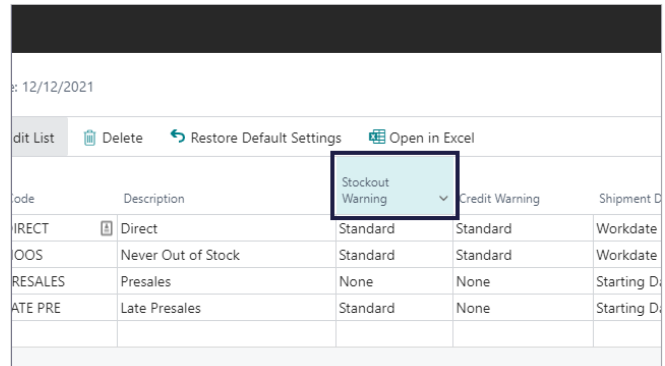
365 Business Central

Order Type Settings | Work Date: 12/12/2021

Type ↑	Code	Description	Stockout Warning
→ Direct	DIRECT	Direct	Standard
Direct	NOOS	Never Out of Stock	Standard
Presales	PRESALES	Presales	None
Late Presales	LATE PRE	Late Presales	Standard

Stockout Warning

Specifies if a warning is displayed when you enter a quantity on a sales document that brings the item's inventory level below zero. Stockout warning typically will be 'No' for presales.

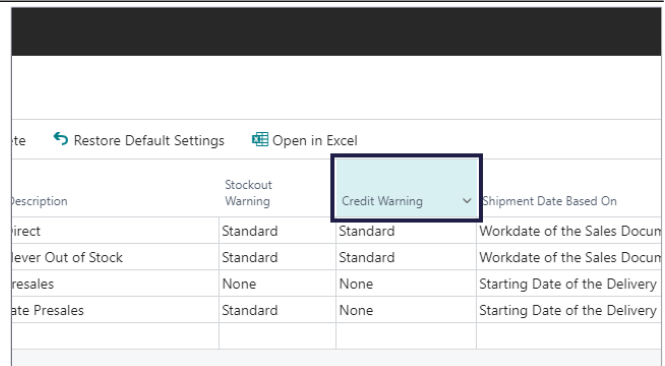


12/12/2021

Code	Description	Stockout Warning	Credit Warning	Shipment D
DIRECT	Direct	Standard	Standard	Workdate
NOOS	Never Out of Stock	Standard	Standard	Workdate
PRESALES	Presales	None	None	Starting D
LATE PRE	Late Presales	Standard	None	Starting D

Credit Warning

Specifies whether to warn about the customer's status when you create a sales order or invoice.



Description	Stockout Warning	Credit Warning	Shipment Date Based On
Direct	Standard	Standard	Workdate of the Sales Docun
Never Out of Stock	Standard	Standard	Workdate of the Sales Docun
Presales	None	None	Starting Date of the Delivery
Late Presales	Standard	None	Starting Date of the Delivery

Shipment Date Based On

Specifies the date that will determine the shipment date.

Stockout Warning	Credit Warning	Shipment Date Based On	Auto C
Standard	Standard	Workdate of the Sales Document	
Standard	Standard	Workdate of the Sales Document	
None	None	Starting Date of the Delivery Drop	
Standard	None	Starting Date of the Delivery Drop	

Auto Cancel Remnants

Specifies if the remaining quantity will automatically be canceled when shipping less then the ordered quantity.

Shipment Date Based On	Auto Cancel Remnants	Reason Code for canceled remnants
Workdate of the Sales Document	<input checked="" type="checkbox"/>	SHORTAGE
Workdate of the Sales Document	<input checked="" type="checkbox"/>	SHORTAGE
Starting Date of the Delivery Drop	<input type="checkbox"/>	
Starting Date of the Delivery Drop	<input type="checkbox"/>	

Reason Code for canceled remnants

Specifies the reason code that will be used to register an automatic cancellation of remaining quantities.

Auto Cancel Remnants	Reason Code for canceled remnants	Default Quantity to Ship	Default Quantity to Invoice
<input checked="" type="checkbox"/>	SHORTAGE	Blank	Remainder
<input checked="" type="checkbox"/>	SHORTAGE	Blank	Remainder
<input type="checkbox"/>		Blank	Remainder
<input type="checkbox"/>		Blank	Remainder

Default Quantity to Ship

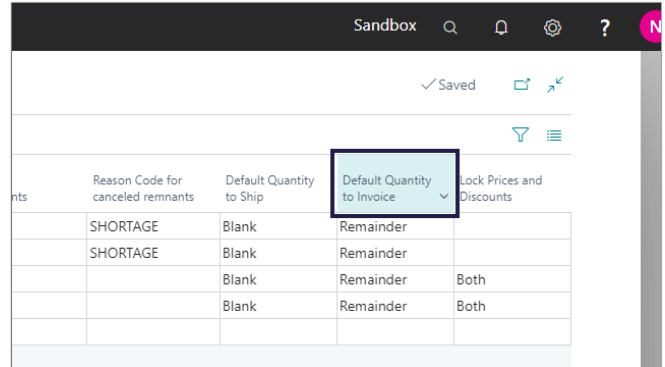
Specifies the default value that is inserted in the Qty. to Ship field on sales order lines.

Set the value to Blank if you use the Delivery plan otherwise you will not see the Sales orders.

Auto Cancel Remnants	Reason Code for canceled remnants	Default Quantity to Ship	Default Quantity to Invoice	Lock Prices and Discounts
<input checked="" type="checkbox"/>	SHORTAGE	Blank	Remainder	
<input checked="" type="checkbox"/>	SHORTAGE	Blank	Remainder	
<input type="checkbox"/>		Blank	Remainder	Both
<input type="checkbox"/>		Blank	Remainder	Both

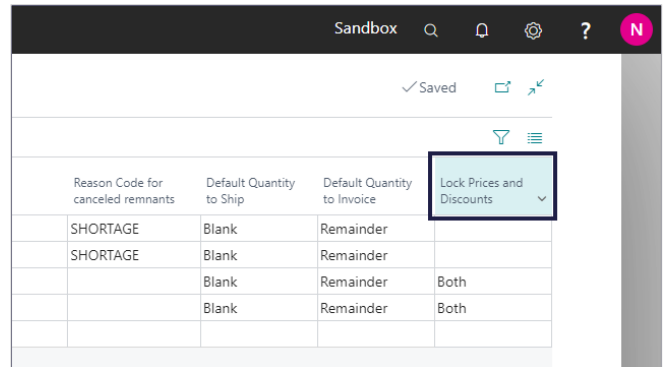
Default Quantity to Invoice

Specifies the default value that is inserted in the Qty. to Invoice field on sales order lines.



Lock Prices and Discounts

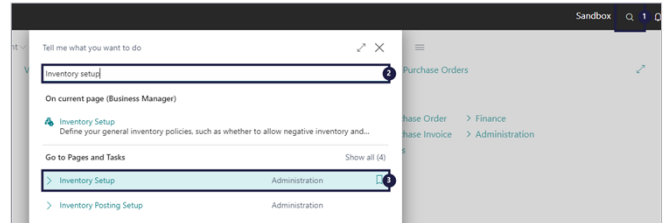
Specifies if the Unit Price or Line Discount % will be locked on releasing the sales order.



1.9. Inventory setup

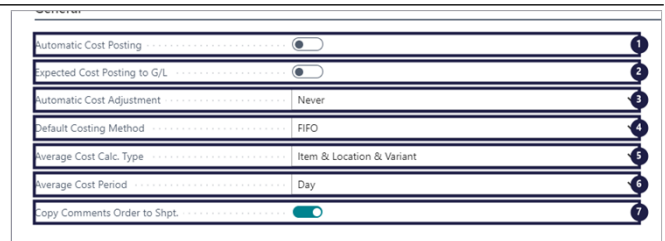
Inventory setup

1. Click on the link **Search**.
2. Click on the field **Tell me what you want to do** - Enter the text **Inventory setup**.
3. Click on **Inventory Setup Administration**.

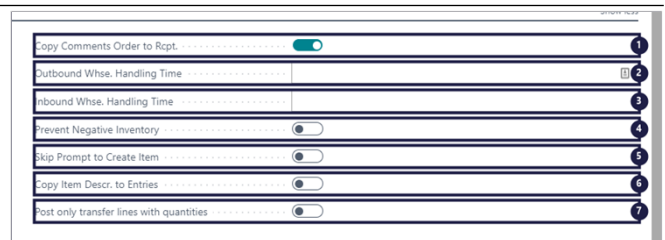


General

1. **Automatic Cost Posting.**
2. **Expected Cost Posting to G/L.**
3. **Automatic Cost Adjustment Never Day Week Month Quarter Year Always.**
4. **Default Costing Method.**
5. **Average Cost Calc. Type.**
6. **Average Cost Period.**
7. **Copy Comments Order to Shpt..**



1. **Copy Comments Order to Rcpt..**
2. **Outbound Whse. Handling Time.**
3. **Inbound Whse. Handling Time.**
4. **Prevent Negative Inventory.**
5. **Skip Prompt to Create Item.**
6. **Copy Item Descr. to Entries.**
7. **Post only transfer lines with quantities.**
Specifies that only transfer lines with a value in the Qty. to Ship, Qty. to Receive fields will be posted.



Location

1. **Location Mandatory.**



K3 Pebblestone

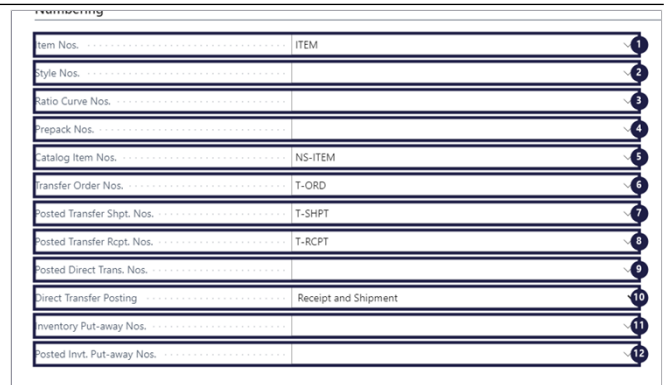
Dimensions

1. **Item Group Dimension Code.**

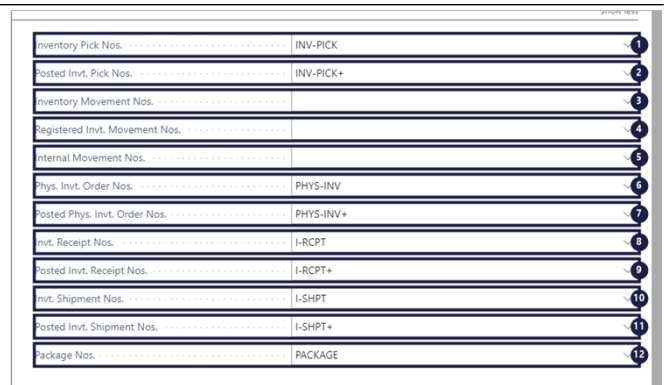


Numbering

1. **Item Nos..**
2. **Style Nos..**
Specifies the number series code that will be used to assign numbers to styles.
3. **Ratio Curve Nos..**
Specifies the number series code that will be used to assign numbers to ratio curves.
4. **Prepack Nos..**
Specifies the number series code that will be used to assigned numbers to Prepacks.
5. **Catalog Item Nos..**
6. **Transfer Order Nos..**
7. **Posted Transfer Shpt. Nos..**
8. **Posted Transfer Rcpt. Nos..**
9. **Posted Direct Trans. Nos..**
10. **Direct Transfer Posting.**
11. **Inventory Put-away Nos..**
12. **Posted Invt. Put-away Nos..**



1. **Inventory Pick Nos..**
2. **Posted Invt. Pick Nos..**
3. **Inventory Movement Nos..**
4. **Registered Invt. Movement Nos..**
5. **Internal Movement Nos..**
6. **Phys. Invt. Order Nos..**
7. **Posted Phys. Invt. Order Nos..**
8. **Invt. Receipt Nos..**
9. **Posted Invt. Receipt Nos..**
10. **Invt. Shipment Nos..**
11. **Posted Invt. Shipment Nos..**
12. **Package Nos..**
Specifies the number series that will be used to assign numbers to packages.

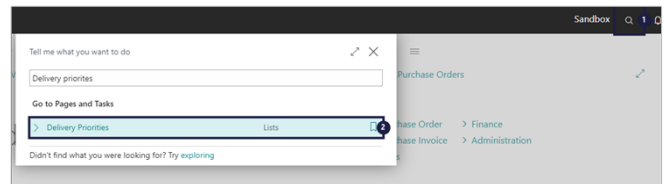


1.10. Delivery priorities

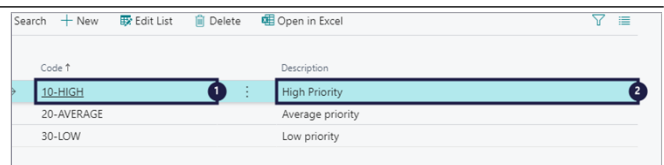
The delivery priority is used as a sorting sequence when allocating available stock to sales orders.

Delivery priorities

1. Click on the link **Search** - Enter the text **Delivery priorities.**
2. Click on **Delivery Priorities Lists.**



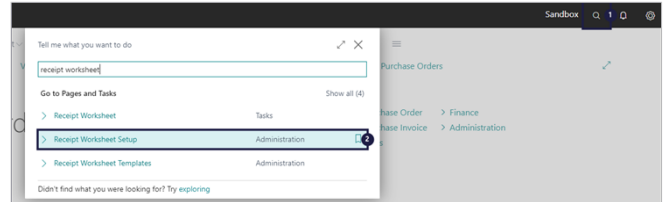
1. **Code**
Specifies the code that identifies the delivery priority.
2. **Description**
Specifies the description of the delivery priority.



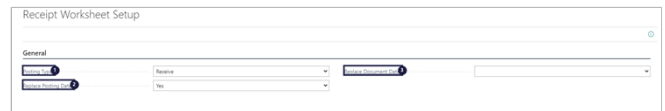
1.11. Receipt worksheet setup

1.11.1. Navigate to receipt worksheet setup

1. Click on the link **Tell me what you want to do. Quickly access actions, pages, reports, documentation, and apps and consulting services.** - Enter the text **receipt worksheet.**
2. Click on **Receipt Worksheet Setup Administration** .

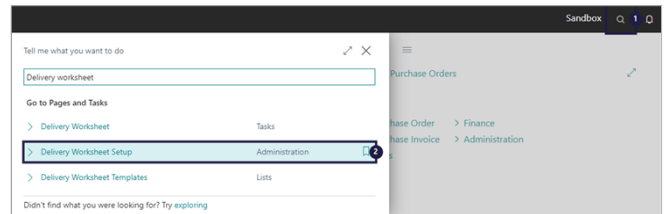


1. **Posting Type.**
Specifies how the source document lines will be processed when you post the receipt worksheet. Available options are: Update, Receive, or Receive & Invoice.
2. **Replace Posting Date.**
Indicates whether you want to replace the posting date of the source document upon posting the receipt worksheet. Available options are: No, Yes.
3. **Replace Document Date.**
Indicates whether you want to replace the document date of the source document upon posting the receipt worksheet. Available options are: No, Yes.

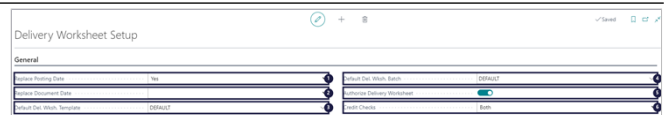


1.12. Delivery worksheet Setup

1. Click on the link **Tell me what you want to do. Quickly access actions, pages, reports, documentation, and apps and consulting services.** - Enter the text **Delivery worksheet.**
2. Click on **Delivery Worksheet Setup Administration** .



1. **Replace Posting Date No Yes.**
Indicates whether you want to replace the posting date of the source document upon posting the delivery worksheet.
2. **Replace Document Date No Yes.**
Indicates whether you want to replace the document date of the source document upon posting the delivery worksheet.
3. **Default Del. Wksh. Template.**
Specifies the delivery worksheet template in which the delivery line will be created when created from the source document.
4. **Default Del. Wksh. Batch.**
Specifies the delivery worksheet batch in which the delivery line will be created when created from the source document.
5. **Authorize Delivery Worksheet.**
Indicates whether a credit check is performed when posting the delivery worksheet. If this



K3 Pebblestone

field is not marked, the field Credit Checks = No Check.

6. **Credit Checks No Check Credit Limit Overdue Balance Both.**
Specifies which credit check is performed when posting the delivery worksheet. The options are No Check, Credit Limit, Overdue balance or Both.

1.13.Retail location

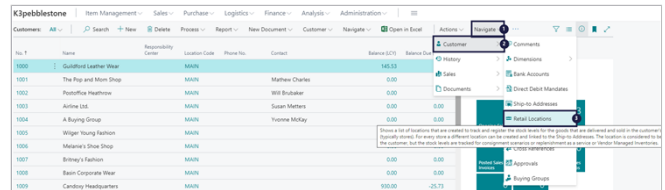
1.13.1. Navigate to Retail location

1. **Sales .**
2. **Customers.**

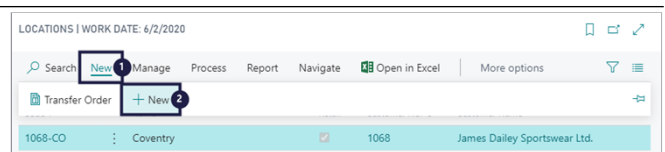


1.13.2. Create a new Retail Location

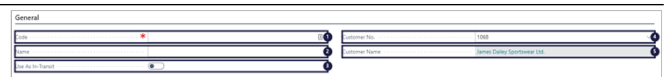
1. Click on the navigation menu item popup **Navigate**.
2. Move the mouse to the navigation menu item popup **Customer**.
3. Click on **Retail Locations**, it **Shows a list of locations that are created to track and register the stock levels for the goods that are delivered and sold in the customer's locations (typically stores). For every store a different location can be created and linked to the Ship-to Addresses. The location is considered to be owned by the customer, but the stock levels are tracked for consignment scenarios or replenishment as a service or Vendor Managed Inventories..**



1. Click on the navigation menu item popup **New**.
2. Click on the navigation menu item **New**.



1. **Code.**
Specifies a location code for the warehouse or distribution center where your items are handled and stored before being sold.
2. **Name.**
Specifies the name or address of the location.
3. **Use As In-Transit.**
Specifies that this location is an in-transit location.
4. **Customer No..**
Specifies the number of the customer that owns this location, which is typically a store or distribution center.
5. **Customer Name James Dailey Sportswear Ltd..**
Specifies the customer that owns this location, which is typically a store or



distribution center.

1. **Address.**
Specifies the location address.
2. **Address 2.**
Specifies additional address information.
3. **Post Code.**
Specifies the postal code.
4. **City.**
Specifies the city of the location.
5. **Country/Region Code.**
Specifies the country/region of the address.
6. **Contact.**
Specifies the name of the contact person at the location.
7. **Phone No..**
Specifies the telephone number of the location.
8. **Fax No..**
Specifies the fax number of the location.
9. **Email.**
Specifies the email address of the location.
10. **Home Page.**
Specifies the location's web site.

1. **Main Location Code.**
For a Retail Location a Main Location can be selected as well. This is the nearest Warehouse to the Retail Location and will be used later to transfer goods from the warehouses to the Retail Locations (stores).

1.14.Barcode Ranges

1.14.1. Navigate to Barcode Ranges

- Click on the link **Tell me what you want to do.** Quickly access actions, pages, reports, documentation, and apps and consulting services..
- **Type to start search:**
- Choose **Barcode Ranges Tasks** □.

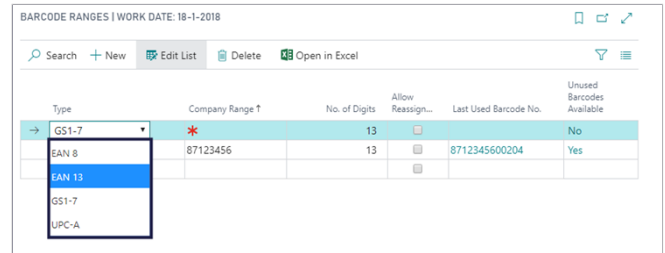
1.14.2. Create a new Barcode Range

Click on the navigation menu item **New**.

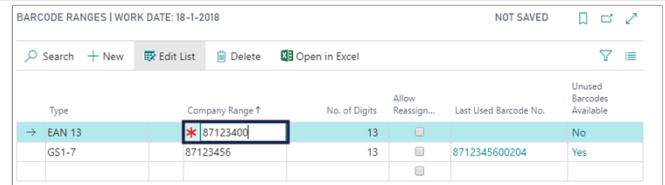
Type	Company Range #	No. of Digits	Allow Reassign...	Last Used Barcode No.	Unused Barcodes Available
GS1-7	87123456	13		8712345600204	Yes

K3 Pebblestone

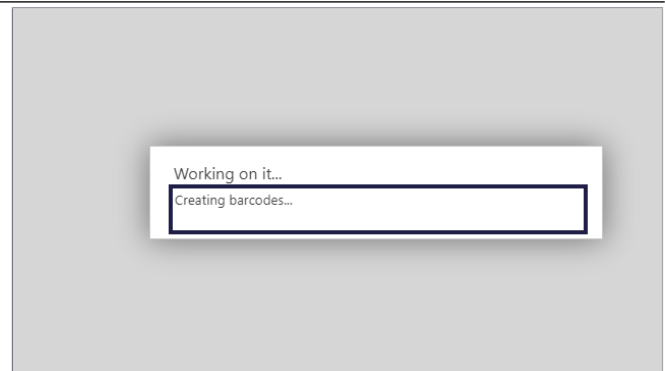
Click on an option from the list.



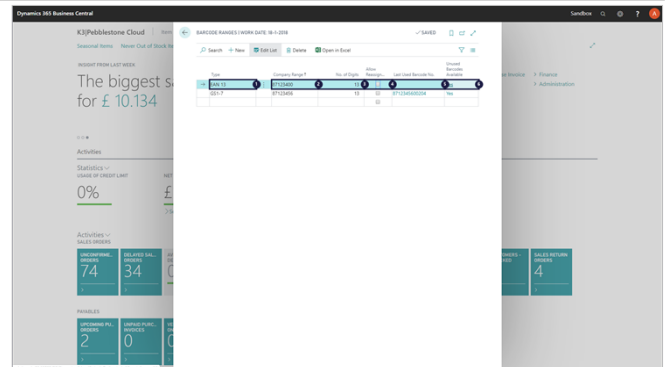
Fill in the **Company Range**.



The **Creating barcodes...** is running



- Type.**
Specifies the barcode format for which the range is setup.
- Company Range.**
Specifies the portion of the barcode that corresponds with the range that has been purchased by the company. All barcodes that will be created from the range will be a sequencing number commencing with the range number and most likely a checkdigit. The Range No. should only hold the recurring part of the barcode's that are created from the range.
- No. of Digits.**
Specifies the total number of digits a created barcode has, including the checkdigit. The length of the barcode is dependend of the barcode type.
- Allow Reassignment.**
Indicates that it's allowed to reuse gaps in the existing range for barcode assignment. Gaps can be created when items are removed from the collection or when items with barcodes are manually removed. Usually reassignments are allowed to save some costs, but only after a couple of years to avoid that one barcode can exist for several items.
- Last Used Barcode No..**
Specifies which barcode numbers is last assigned from the barcode range.
- Unused Barcodes Available.**
Specifies if the barcode range has any

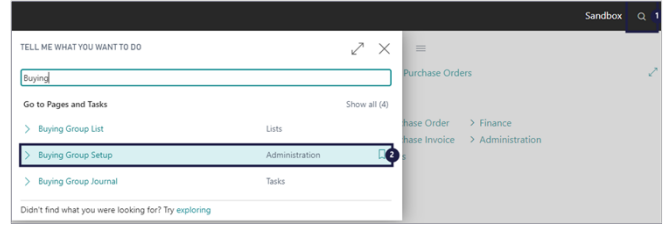


barcodes available.

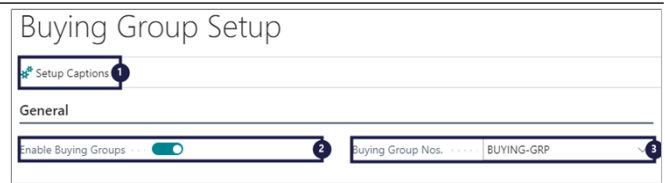
1.15. Buying group

1.15.1. Navigate to Buying Group Setup

1. Click on the link **Tell me what you want to do. Quickly access actions, pages, reports, documentation, and apps and consulting services.** - Enter the text **Buying.**
2. Click on **Buying Group Setup Administration** .

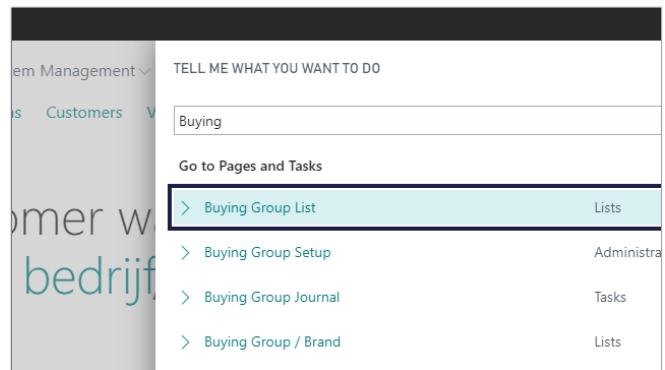


1. **Setup the Caption Expressions for the Buying Group.**
2. **Enable Buying Groups.**
Indicates that your company wants to use the Buying Groups functionality. By setting this checkmark the Buying Groups becomes available in the solution.
3. **Buying Group Nos..**
Specifies the code for the number series that will be used to assign numbers to Buying. To see the number series that have been set up in the No. Series table, click the field.

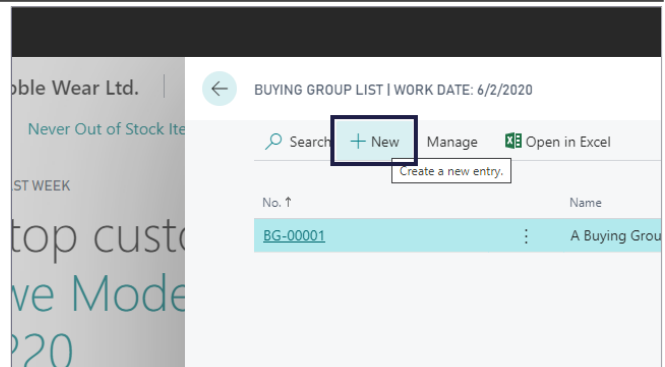


1.15.2. Navigate to Buying Group List

Click on **Buying Group List Lists**



Create a new entry.



K3 Pebblestone

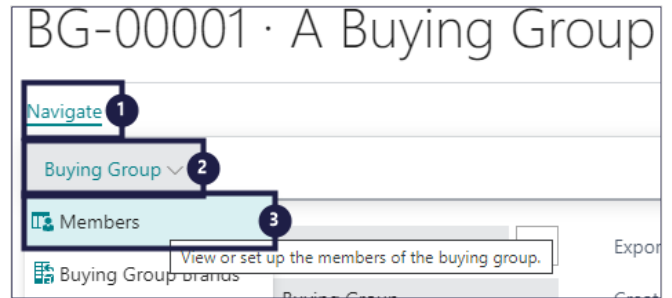
1. **No..**
Specifies the number of the buying group. The field is either filled automatically from a defined number series, or you enter the number manually because you have enabled manual number entry in the number-series setup.
2. **Name.**
Specifies the name of the buying group. This name will appear on all documents for the buying group. You can enter a maximum of 50 characters, both numbers and letters.
3. **Customer No..**
Specifies the name of the buying group. This name will appear on all documents for the buying group. You can enter a maximum of 50 characters, both numbers and letters.
4. **Customer Name A Buying Group.**
Specifies the name of the customer that is created in the system for the buying group.
5. **Vendor No..**
Specifies the number of the vendor that is created in the system for the buying group. This vendor number will be used to pay the buying group.
6. **Vendor Name.**
Specifies the name of the vendor that is created in the system for the buying group.
7. **Report ID.**
Specifies the report that is used to print invoices for the buying group.
8. **Report Name K3PF Buying Grp. P/D Euretco.**
Specifies the name of the report that is used to print invoices and create files for the buying group.
9. **Exportfile.**
Specifies the directory and file name of the files that are created.
10. **Create Extra Invoice.**
Indicates whether or not an additional invoice is required for the buying group.
11. **Create Report.**
Indicates whether or not an report is required for the buying group.
12. **Create File.**
Indicates whether or not an file have to be created for file exchange with the buying group.
13. **Control Number.**
Specifies the buying group control number, which is used in the communication with the buying group.
14. **Company Number.**
Specifies the company number of the buying group.
15. **Our Member No..**
Specifies the member number of your company with the buying group.



General			
No.	BG-0001	Exportfile	C:\temp\intres\intres.txt
Name	A Buying Group	Create Extra Invoice	<input checked="" type="checkbox"/>
Customer No.	1004	Create Report	<input checked="" type="checkbox"/>
Customer Name	A Buying Group	Create File	<input checked="" type="checkbox"/>
Vendor No.		Control Number	4321
Vendor Name		Company Number	12
Report ID	11179205	Our Member No.	4321
Report Name	K3PF Buying Grp. P/D Euretco		

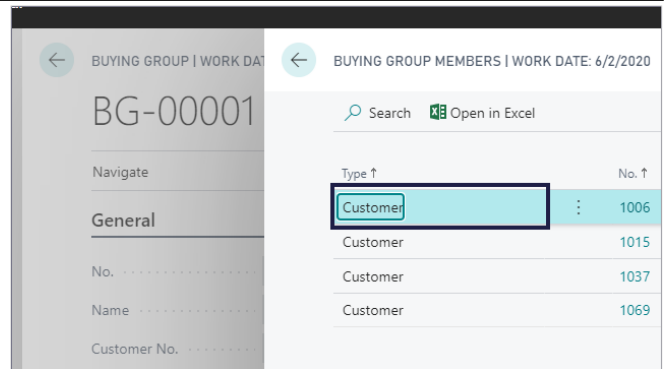
1.15.3. Navigate to Buying Group members

1. Click on the navigation menu item popup **Navigate**.
2. Click on the navigation menu item popup **Buying Group**.
3. **View or set up the members of the buying group..**



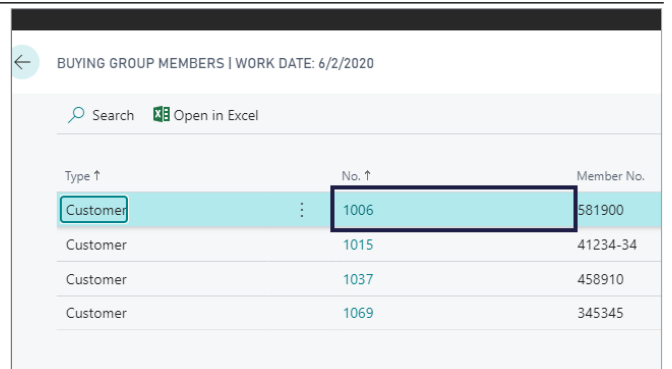
Type

Indicates if the member is a vendor or a customer.



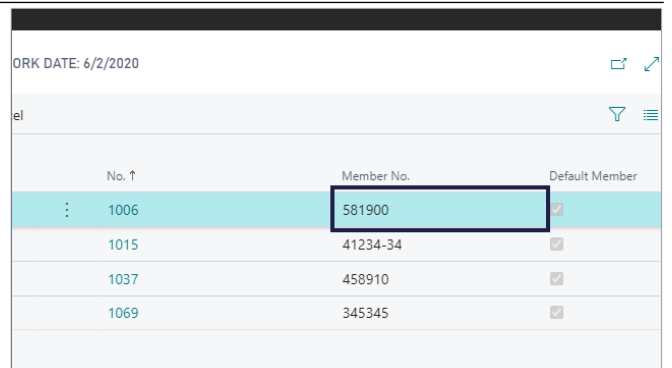
No.

Specifies the number of the customer or vendor that has a membership with a buying group.



Member No.

Specifies the buying group's member number of the customer or vendor.



Default Member

Indicates that this is the preferred buying group to use for the customer or vendor. There can only be one default buying group per customer or vendor.

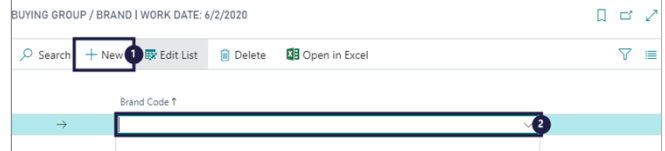
Member No.	Default Member
581900	<input checked="" type="checkbox"/>
41234-34	<input type="checkbox"/>
458910	<input type="checkbox"/>
345345	<input type="checkbox"/>

1.15.4. Navigate to Buying Group Brands

1. Move the mouse to the navigation menu item popup **Buying Group**.
2. Click on the navigation menu item **Buying Group Brands**.

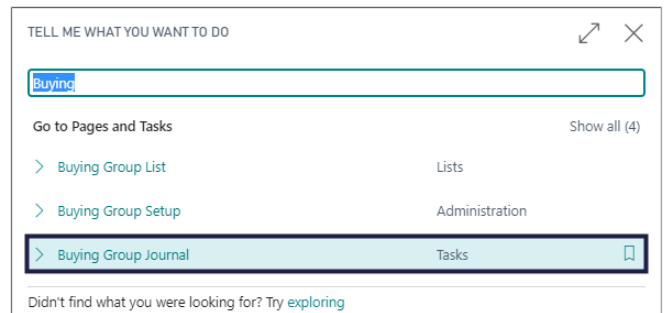


1. Click on the navigation menu item **New**.
2. **Brand Code**.
Select a brand to associate with the buying group.



1.15.5. Navigate to Buying Group Journal

1. Click on **Buying Group Journal Tasks**.



Posting Date

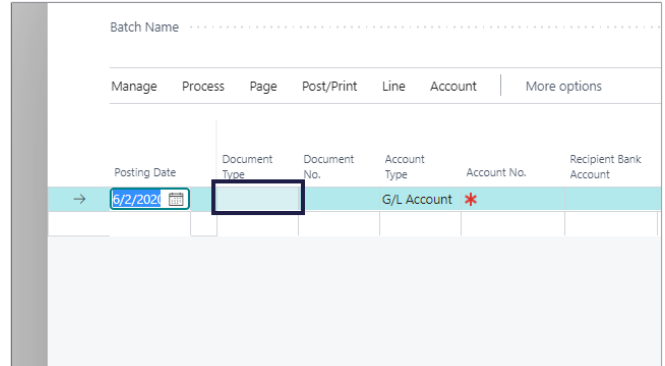
Specifies the posting date for the entry.

Posting Date	Document Type	Document No.	Account Type	Account No.	Recipient Bank Account
6/2/2023			G/L Account	*	

K3 Pebblestone

Document Type

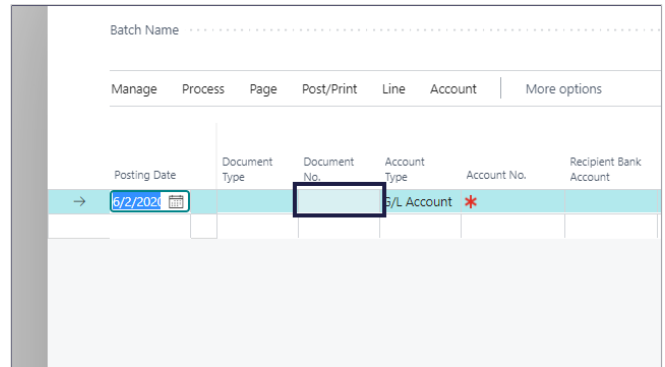
Specifies the type of document that the entry on the journal line is.



A screenshot of a journal entry form. The 'Document Type' field is highlighted with a blue box. The form includes a 'Batch Name' field at the top, followed by a menu bar with 'Manage', 'Process', 'Page', 'Post/Print', 'Line', 'Account', and 'More options'. Below this is a table with columns: 'Posting Date', 'Document Type', 'Document No.', 'Account Type', 'Account No.', and 'Recipient Bank Account'. The first row shows a date of 6/2/2023, a highlighted 'Document Type' field, and 'G/L Account' with a red asterisk.

Document No.

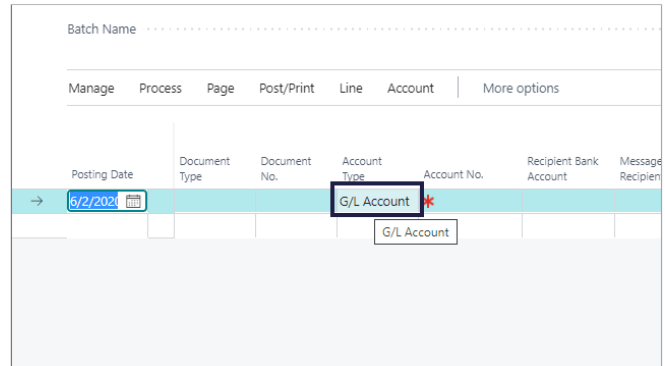
Specifies a document number for the journal line.



A screenshot of a journal entry form, similar to the previous one. The 'Document No.' field is highlighted with a blue box. The table row shows '6/2/2023', the highlighted 'Document No.' field, and 'G/L Account' with a red asterisk.

Account Type

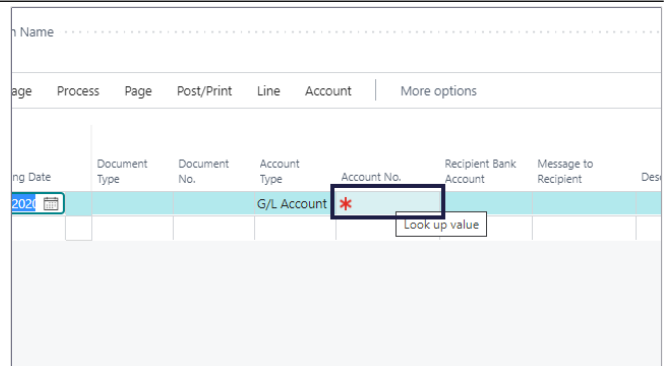
Specifies the type of account that the entry on the journal line will be posted to.



A screenshot of a journal entry form. The 'Account Type' field is highlighted with a blue box. The table row shows '6/2/2023', 'G/L Account', and 'G/L Account' with a red asterisk. A dropdown menu is open below the 'Account Type' field, showing 'G/L Account'.

Account No.

Specifies the account number that the entry on the journal line will be posted to.



A screenshot of a journal entry form. The 'Account No.' field is highlighted with a blue box. The table row shows '6/2/2023', 'G/L Account', and 'G/L Account' with a red asterisk. A dropdown menu is open below the 'Account No.' field, showing 'Look up value'.

K3 Pebblestone

Recipient Bank Account

Specifies the bank account that the amount will be transferred to after it has been exported from the buying group journal.

.....								DEFAULT
Page	Post/Print	Line	Account	More options				
Document No.	Document No.	Account Type	Account No.	Recipient Bank Account	Message to Recipient	Description	Credito	
		G/L Account *		<input type="text"/>				

Message to Recipient

Specifies the message exported to the payment file when you use the Export Payments to File function in the Buying Group Journal window.

.....								DEFAULT
Print	Line	Account	More options					
Document	Account Type	Account No.	Recipient Bank Account	Message to Recipient	Description	Creditor No.	Doc A	
		G/L Account *		<input type="text"/>				

Description

Specifies a description of the entry.

.....							DEFAULT
Account	More options						
Account No.	Recipient Bank Account	Message to Recipient	Description	Creditor No.	Document	Amount	
int *			<input type="text"/>			0.00	

Creditor No.

Specifies the vendor who sent the purchase invoice.

.....							DEFAULT
More options							
Recipient Bank Account	Message to Recipient	Description	Creditor No.	Document Amount	Amount	Am	
			<input type="text"/>	0.00	0.00		

K3 Pebblestone

Document Amount

Specifies the total amount (including VAT) that the journal line consists of.

..... DEFAULT						
rt Bank t	Message to Recipient	Description	Creditor No.	Document Amount	Amount	Amount (LCY)
				0.00	0.00	0.00

Amount

Specifies the total amount (including VAT) that the journal line consists of.

..... DEFAULT						
to	Description	Creditor No.	Document Amount	Amount	Amount (LCY)	Total Exported Amount
			0.00	0.00	0.00	0.00

Amount (LCY)

Specifies the total amount in local currency (including VAT) that the journal line consists of.

..... DEFAULT						
n	Creditor No.	Document Amount	Amount	Amount (LCY)	Total Exported Amount	Bal. Account Type
		0.00	0.00	0.00	0.00	G/L Account

Total Exported Amount

Specifies the amount for the payment journal line that has been exported to payment files that are not canceled.

Document Amount	Amount	Amount (LCY)	Total Exported Amount	Bal. Account Type	Bal. Account No.	Applies Doc. Ty
0.00	0.00	0.00	0.00	G/L Account		
Open record "0.00"						

K3 Pebblestone

Bal. Account Type

Specifies the type of account that a balancing entry is posted to, such as BANK for a cash account.

Amount	Amount (LCY)	Total Exported Amount	Bal. Account Type	Bal. Account No.	Applies-to Doc. Type	Applies-to Doc. No.	Applies-to Doc. Due Date	Exported to Payment File
0.00	0.00	0.00	G/L Account					

Bal. Account No.

Specifies the number of the general ledger, customer, vendor, or bank account that the balancing entry is posted to, such as a cash account for cash purchases.

Amount	Amount (LCY)	Total Exported Amount	Bal. Account Type	Bal. Account No.	Applies-to Doc. Type	Applies-to Doc. No.	Applies-to Doc. Due Date	Exported to Payment File
0.00	0.00	0.00	G/L Account					

Applies-to Doc. Type

Specifies the type of the posted document that this document or journal line will be applied to when you post, for example to register payment.

(LCY)	Total Exported Amount	Bal. Account Type	Bal. Account No.	Applies-to Doc. Type	Applies-to Doc. No.	Applies-to Doc. Due Date	Cor...	Exported to Payment File
0.00	0.00	G/L Account					<input type="checkbox"/>	<input type="checkbox"/>

Applies-to Doc. No.

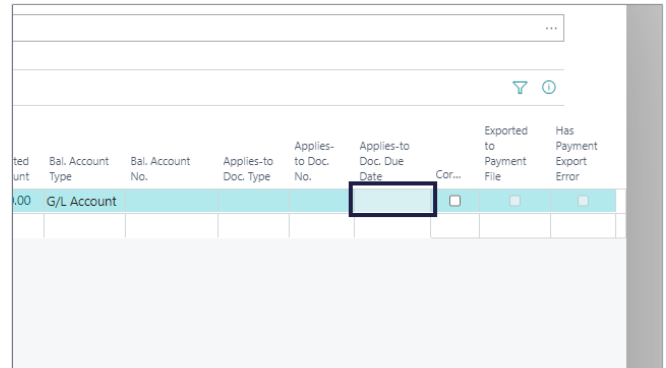
Specifies the number of the posted document that this document or journal line will be applied to when you post, for example to register payment.

Total Exported Amount	Bal. Account Type	Bal. Account No.	Applies-to Doc. Type	Applies-to Doc. No.	Applies-to Doc. Due Date	Cor...	Exported to Payment File	Has Payment Export Error
0.00	G/L Account					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

K3 Pebblestone

Applies-to Doc. Due Date

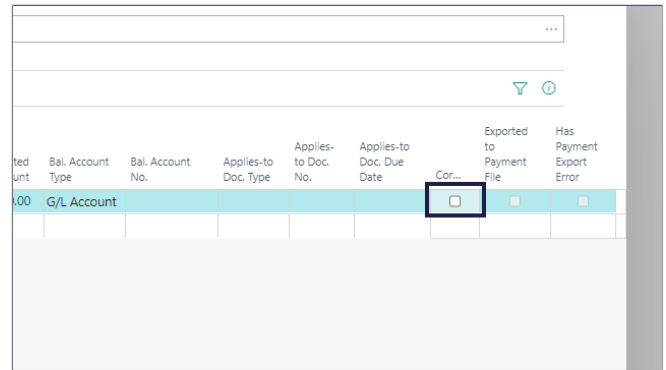
Specifies the due date from the Applies-to Doc. on the journal line.



ted unt	Bal. Account Type	Bal. Account No.	Applies-to Doc. Type	Applies- to Doc. No.	Applies-to Doc. Due Date	Cor...	Exported to Payment File	Has Payment Export Error
.00	G/L Account					<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Correction

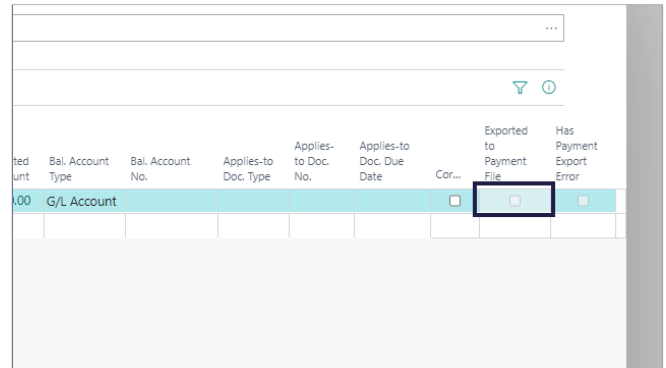
Specifies the entry as a corrective entry. You can use the field if you need to post a corrective entry to an account.



ted unt	Bal. Account Type	Bal. Account No.	Applies-to Doc. Type	Applies- to Doc. No.	Applies-to Doc. Due Date	Cor...	Exported to Payment File	Has Payment Export Error
.00	G/L Account					<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Exported to Payment File

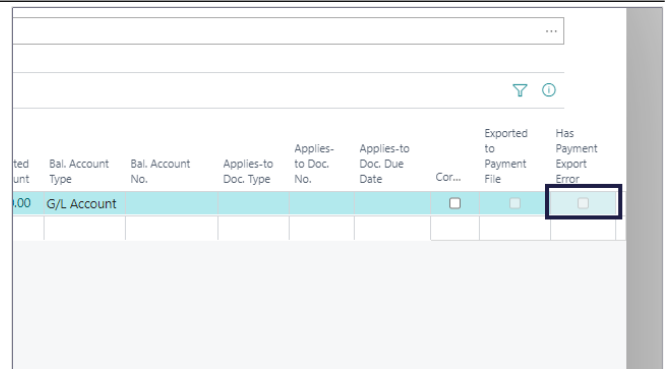
Specifies that the buying group journal line was exported to a buying group file.



ted unt	Bal. Account Type	Bal. Account No.	Applies-to Doc. Type	Applies- to Doc. No.	Applies-to Doc. Due Date	Cor...	Exported to Payment File	Has Payment Export Error
.00	G/L Account					<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Has Payment Export Error

Specifies that an error occurred when you used the Export Payments to File function in the Payment Journal window.



ted unt	Bal. Account Type	Bal. Account No.	Applies-to Doc. Type	Applies- to Doc. No.	Applies-to Doc. Due Date	Cor...	Exported to Payment File	Has Payment Export Error
.00	G/L Account					<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

2. Item Management

2.1. Pebblestone fields

2.1.1. Item Phases

2.1.1.1. Navigate to Item Phases

1. Click on the navigation menu item popup **Item Management**.
2. Click on the navigation menu item **Item Phases**.



2.1.1.2. Item phases

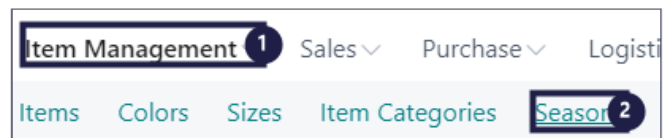
1. **Code.**
Specifies a code to identify the item phase.
2. **Description.**
Specifies the description of the item phase.
3. **Sorting.**
Specifies the order in which the items would iterate from one phase to the next phase.
4. **Samples Open.**
Indicates whether or not the items are allowed on sample orders.
5. **Sales Open.**
Indicates whether or not the items are allowed on sales orders.
6. **Purchase Open.**
Indicates whether or not the items are allowed on purchase orders.
7. **Receiving Open.**
Indicates whether or not the items may be received.
8. **Delivery Open.**
Indicates whether or not the items may be shipped.
9. **Returns Open.**
Indicates whether or not the items may be returned.
10. **No. of Items.**
Specifies the number of items which are assigned to this Item Phase.

CODE	DESCRIPTION	SORTING	SAMPLES OPEN	SALES OPEN	PURCHASE OPEN	RECEIVING OPEN	DELIVERY OPEN	RETURNS OPEN	NO. OF ITEMS
10	Design	10	Y	N	N	N	N	N	10
20	Product Development	20	Y	N	N	N	N	N	1
30	Pre-sales	30	Y	Y	N	N	N	N	37
40	Buying	40	Y	Y	Y	N	N	N	5
50	Delivery	50	Y	Y	Y	Y	Y	Y	27
60	Direct Sales	60	Y	Y	Y	Y	Y	Y	0
70	Closing Sales	70	Y	Y	Y	Y	Y	Y	16
80	Blocked / Discontinued	80	N	N	N	N	N	N	0

2.1.2. Seasons

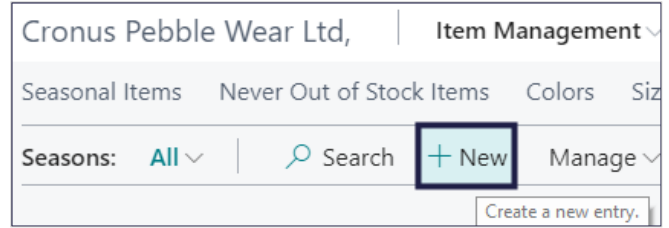
2.1.2.1. Navigate to Seasons

1. Click on the navigation menu item popup **Item Management**.
2. Click on the navigation menu item **Seasons**.



2.1.2.2. Create a new season

1. Click on the navigation menu item **New**.



1. **Code.**
Add a code to identify the season.
2. **Description.**
Change the description for the season.
3. **Sorting.**
Specifies the order in which the seasons are shown in the matrixes.
4. **Never Out of Stock.**
Indicates whether or not the season is for never out of stock items.

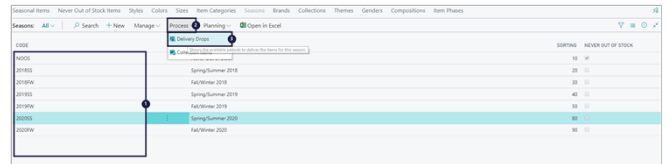
CODE	DESCRIPTION	SORTING	NEVER OUT OF STOCK
NOOS	Never Out of Stock	10	<input checked="" type="checkbox"/>
2016SS	Spring/Summer 2016	20	<input type="checkbox"/>
2016FW	Fall/Winter 2016	30	<input type="checkbox"/>
2017SS	Spring/Summer 2017	40	<input type="checkbox"/>
2017FW	Fall/Winter 2017	50	<input type="checkbox"/>
2018SS	Spring/Summer 2018	60	<input type="checkbox"/>
2018FW	Fall/Winter 2018	90	<input type="checkbox"/>
2019SS	Spring / Summer 2019	100	<input type="checkbox"/>
2019FW	Fall / Winter 2019	110	<input type="checkbox"/>

2.1.2.3. Delivery drops

Delivery Drops shows the available periods to deliver the items for a season.

2.1.2.3.1. Create delivery drops for the season

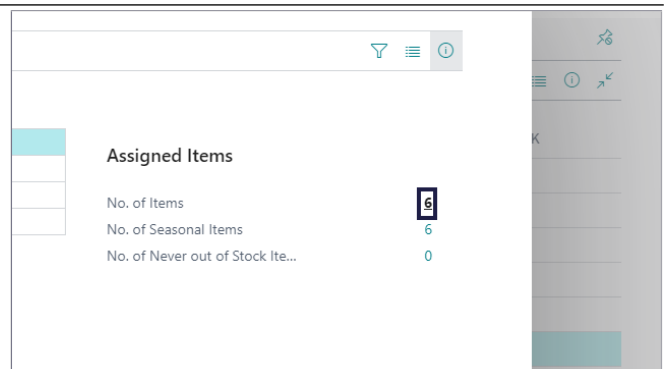
1. Move the mouse to the cell **Code** on any row.
2. Click on the link **Process**.
3. Click on the navigation menu item **Delivery Drops**.



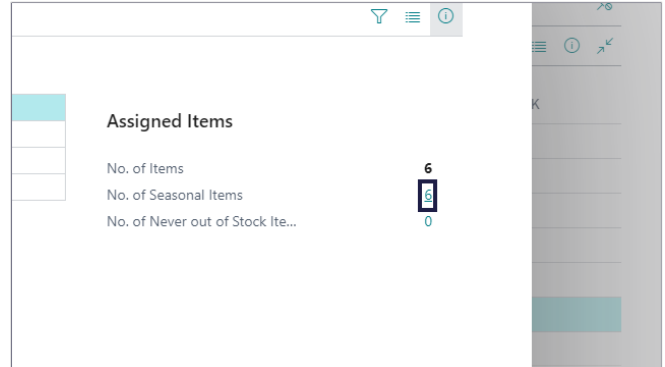
1. **Season Code.**
Specifies the code of the season for the delivery drop.
2. **Code.**
Add the code that identifies the delivery drop.
3. **Description.**
Add the description of the delivery drop.
4. **Starting Date.**
Add the starting date of the delivery drop.
5. **Ending Date.**
Add the ending date of the delivery drop.

SEASON CODE	CODE	DESCRIPTION	STARTING DATE	ENDING DATE	Assigned Items
2020SS	1	2020SS drop 1	11-2019	3-2020	
2020SS	2	2020SS drop 2	15-1-2020	30-4-2020	No. of Items: 6
2020SS	3	2020SS drop 3	15-2-2020	20-4-2020	No. of Seasonal Items: 6 No. of Never out of Stock It...: 0

Open details for "No. of Items" "6"



Open details for "No. of Seasonal Items" "6"



Overview of all the items / seasonal items which are in this season.

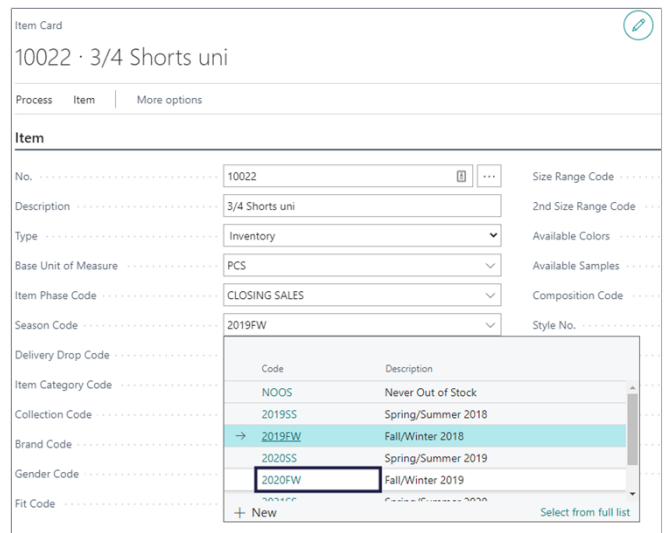
NO.	STYLE NO.	DESCRIPTION	INVENTORY	SUB... EXIST	B O M
10026		Skirt uni	0	No	P
10059		Dress polo uni	0	No	P
10093		Running shoes uni	0	No	P
10216		Dress uni	0	No	P
10223		Jeans	0	No	P
10251		Dress k3|pebblestone	0	No	P

2.1.3. Carry over

- When an item is successful it could become a Carry-over item, this means that the item is part of more than one season. You can attach different seasons on item and colour level and K3 pebblestone supports this and makes sure that the different seasons are linked to the item and colour.

Code.

Choose the new season.



1. **Previous Seasons.**
Specifies the number of previous seasons that this item belongs to.

Item Card
10022 · 3/4 Shorts uni

Process | Item | More options

Item

No. 10022

Description 3/4 Shorts uni

Type Inventory

Base Unit of Measure PCS

Item Phase Code CLOSING SALES

Season Code 2020FW

Previous Seasons **1**

Delivery Drop Code 1

Item Category Code SHORTS

Collection Code SPORTS

Brand Code ADVENTURE

Gender Code MEN

1. **Season Code.**
Specifies a code for the season that this item belongs to.
2. **No. of Colors.**
Specifies the number of colors that are available for this item and season.
3. **Delivery Drop Code.**
Specifies the code that defines the drop in which this item will be delivered in this season.

Season Items

Reminder: your work date is 8/31/2020 Use today | Change to... | Turn off reminder

Search Edit List Delete Open in Excel

Season Code	No. of Colors	Delivery Drop Code
2019FW 1	2 2	3 3

2.1.4. Item categories

2.1.4.1. Navigate to Item category

1. Click on the navigation menu item popup **Item Management.**
2. Click on the navigation menu item **Item Categories.**

Item Management **1** Sales Purchase Logout

Items Styles Colors Sizes **Item Categories** **2** Search

2.1.4.2. Create an Item category

1. Click on the navigation menu item **New.**

Item Categories: All - New Manage Open in Excel

CODE	DESCRIPTION
ACCESSORIE	Accessories
BAGS	Bags
BELTS	Belts
TOWELS	Towels
APPAREL	Apparel
BODYWEAR	Bodywear
DRESSES	Dresses
JACKETS	Jackets
LEGWEAR	Legwear
PANTS	Pants
SHIRTS	Shirts
SHORTS	Shorts

1. **Code.**
Add the item category.
2. **Description.**
Add a description of the item category.
3. **Parent Category.**
Add the item category that this item category belongs to. If the parent item category does not exist create it. Item attributes that are assigned to a parent item category also apply to the child item category.
4. **Default Color Group Code.**
Add the default Color Group Code that will be applied on items that get this Item Category assigned if needed.
5. **Default Size Range Code.**
Add the default Size Range Code that will be applied on items that get this Item Category assigned if needed.
6. **Default 2nd Size Range Code.**
Add the default second Size Range Code that will be applied on items that get this Item Category assigned if needed.

2.1.5. Collections

2.1.5.1. Navigate to collections

1. Click on the navigation menu item popup **Item Management**.
2. Click on the navigation menu item **Collections**.

2.1.5.2. Create a collection

1. Click on the navigation menu item **New**.

1. **Code.**
Add a code to identify the collection.
2. **Description.**
Add the description of the collection.

CODE	DESCRIPTION
BEACH	Beach
BUSINESS	Business
CASUAL	Casual
OUTDOOR	Outdoor
SPORTS	Sports

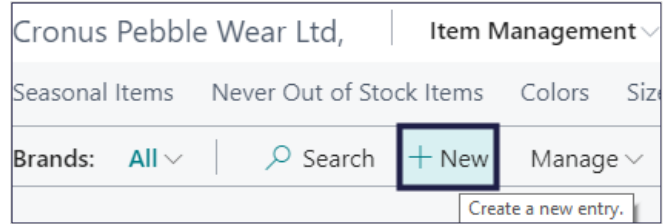
2.1.6. Brands

2.1.6.1. Navigate to Brand

1. Click on the navigation menu item popup **Item Management**.
2. Click on the navigation menu item **Brands**.

2.1.6.2. Create a new Brand

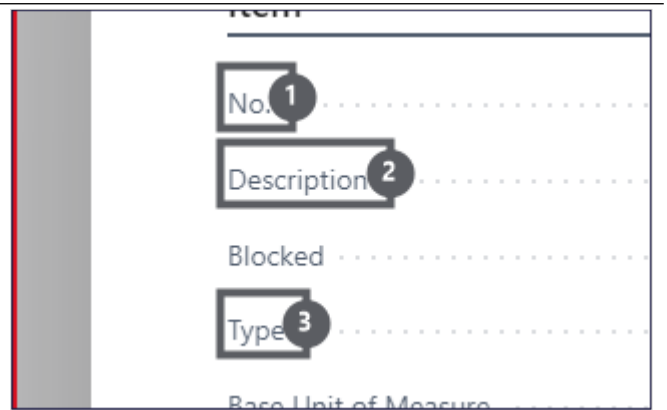
1. Click on the navigation menu item **New**.



1. **Code.**
Add the code that identifies the brand.
2. **Description.**
Add the description of the brand.

CODE	DESCRIPTION
* [1]	
ADVENTURE	Adventure Sporting Goods Ltd.
AWESOME	Awesome Clothing Ltd.
NORTHWIND	Northwind Outdoor Goods Ltd.

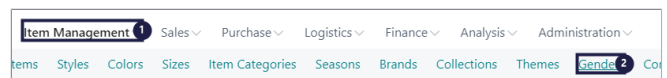
1. **No.:** %3
2. **Description:**
3. **Type:**



2.1.7. Genders

2.1.7.1. Navigate to Gender

1. Click on the navigation menu item popup **Item Management**.
2. Click on the navigation menu item **Genders**.



2.1.7.2. Create a gender

1. Click on the navigation menu item **New**.

CODE	DESCRIPTION
BOYS	
GIRLS	
MEN	
UNISEX	
WOMEN	

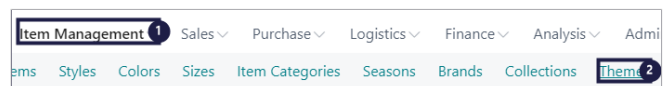
1. **Code.**
Add a code to identify a gender.
2. **Description.**
Add the description of the gender.

CODE	DESCRIPTION
* [1]	
BOYS	
GIRLS	
MEN	
UNISEX	
WOMEN	

2.1.8. Themes

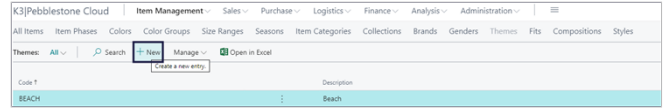
2.1.8.1. Navigate to themes

1. Click on the navigation menu item popup **Item Management**.
2. Click on the navigation menu item **Themes**.

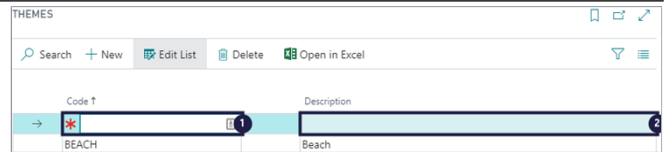


2.1.8.2. Create a new theme

Click on the navigation menu item **New**.



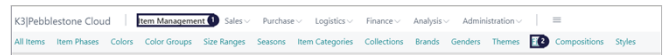
1. **Code.**
Add the code that identifies the theme.
2. **Description.**
Add the description of the theme.



2.1.9. Fits

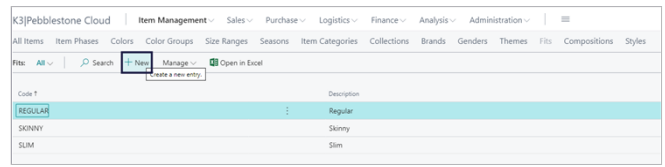
2.1.9.1. Navigate to Fits

1. Click on the navigation menu item popup **Item Management**.
2. Click on the navigation menu item **Fits**.

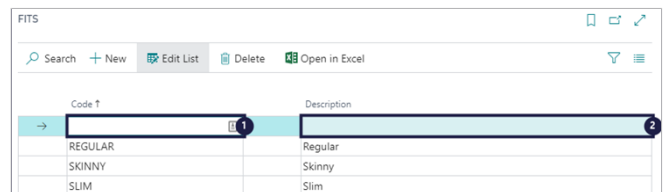


2.1.9.2. Create a new Fit

1. Click on the navigation menu item **New**.



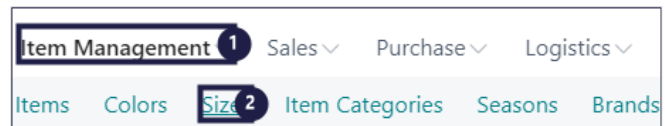
1. **Code.**
Specifies a code for the item fit.
2. **Description.**
Add a description for the item fit.



2.1.10. Sizes

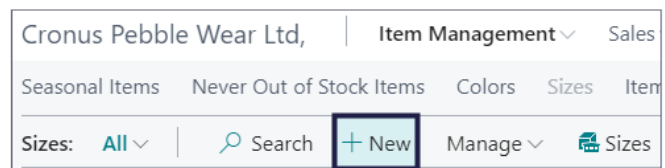
2.1.10.1. Navigate to Sizes

1. Click on the navigation menu item popup **Item Management**.
2. Click on the navigation menu item **Sizes**.

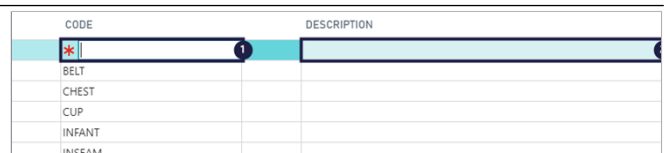


2.1.10.2. Create a size range

1. Click on the navigation menu item **New**.



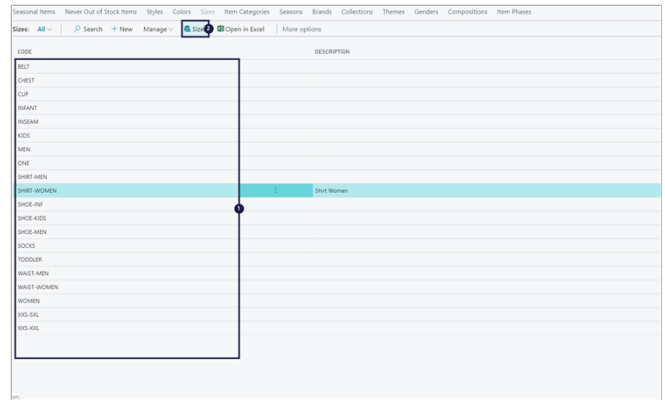
1. **Code.**
Add a code for the size range. A size range determines the default set of sizes in which the items are produced or sold.
2. **Description.**



Change the description for the size range if needed.

2.1.10.3. Create sizes within a size range

1. Select the size range you just created.
2. Click on the link **Shows the sizes which belong to the size range..**

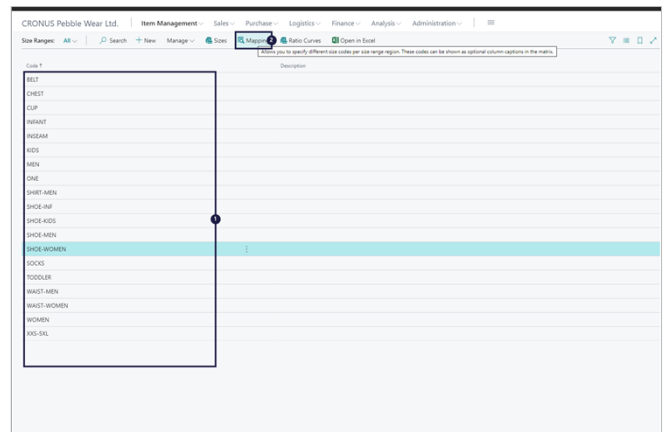


1. **Size Code.**
Add a code to identify the size.
2. **Description.**
Specifies the description for the size.
3. **Sorting.**
Specifies the order in which the sizes are shown in the matrixes.
4. **Sample.**
Select the sample size, if needed. Only one size within a size range can be a sample size.
5. **Copy to Item.**
Indicates if the size will be available on an item automatically, when the Size Range is selected on the item. Sizes that are not copied automatically can be manually added to an item after selecting the Size Range.

SIZE CODE	DESCRIPTION	SORTING	SAMPLE	COPY TO ITEM
36	36	10	0	☑
38	38	10	0	☑
40	40	10	0	☑
42	42	10	0	☑
44	44	10	0	☑

2.1.10.4. Size range region mapping

1. Click on the cell **Code** on any row.
2. Click on the navigation menu item **Mapping**.



K3 Pebblestone

Code

Specifies the code for the Size Range Region.

Code ↑	Description	34	35
→ EU	Size conversions for Europe		
NA	Size conversions for North America		

Description

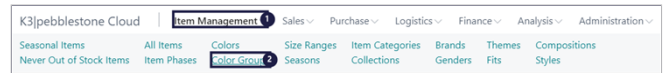
Specifies the description for the Size Range Region.

Code ↑	Description	34	35
→ EU	Size conversions for Europe		
NA	Size conversions for North America		

2.1.11. Color Groups

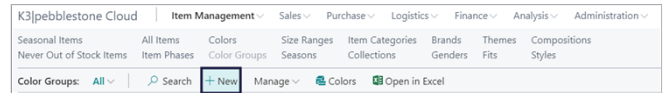
2.1.11.1. Navigate to Color Groups

1. Click on the navigation menu item popup **Item Management**.
2. Click on the navigation menu item **Color Groups**.



2.1.11.2. Create a new Color group

1. Click on the navigation menu item **New**.



Code

Add a color group name or number.

CODE	DESCRIPTION
* [input field]	
2020SS	2018 Spring /
BASE	Base Colors
SHOES	Colors for Sh

K3 Pebblestone

Description

Add a description of the color group.

Screenshot of a data table interface. At the top right, there is a 'SAVE' button with a checkmark. Below it is a toolbar with icons for 'Edit List', 'Delete', 'Colors', and 'Open in Excel'. The table has two columns: 'DESCRIPTION' and 'SEASON CODE'. The first row is highlighted in light blue, and its 'DESCRIPTION' cell is selected with a blue border. Below it, the text '2018 Spring / Summer Colors' is visible in the 'DESCRIPTION' column, and '2020SS' is in the 'SEASON CODE' column. Other rows contain 'Base Colors' and 'Colors for Shoes'.

Season Code

Screenshot of a dropdown menu for the 'SEASON CODE' column. The menu is open, showing a list of options: 'Fall / Winter Colors', 'Spring / Summer Colors', 'Colors', and 'rs for Shoes'. The 'Fall / Winter Colors' option is highlighted in light blue. A blue border is around the dropdown arrow in the 'SEASON CODE' cell of the table above.

Click on the lookup button in the cell **Season Code**

Screenshot of a 'Look up value' dialog box. The dialog is open over the 'SEASON CODE' cell of the table. It shows a search field and a list of values. The value '2020SS' is visible in the list. A blue border is around the 'Look up value' button in the dialog.

Move the mouse to the cell Code and choose the season.

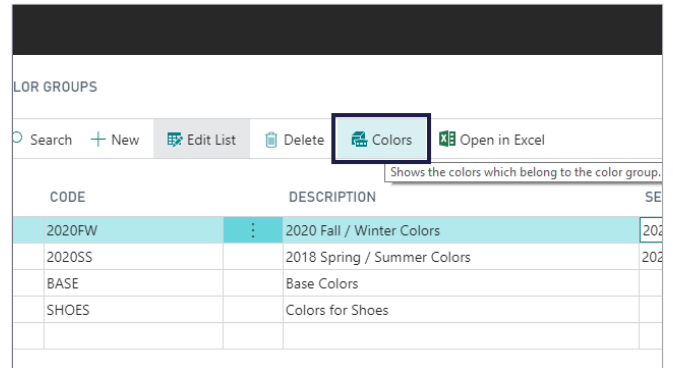
Screenshot of a lookup table. The table has two columns: 'CODE' and 'DESCRIPTION'. The 'CODE' column contains values: '2018FW', '2019SS', '2019FW', '2020SS', and '2020FW'. The 'DESCRIPTION' column contains corresponding season names: 'Fall/Winter 2018', 'Spring/Summer 2019', 'Fall/Winter 2019', 'Spring/Summer 2020', and 'Fall/Winter 2020'. The row with '2020FW' is highlighted in light blue. A blue border is around the '2020FW' cell.

2.1.11.2.1.

Create colors for the color group

K3 Pebblestone

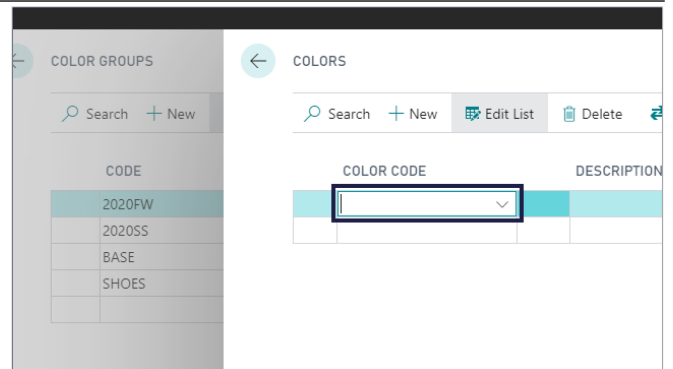
Click on the navigation menu item **Colors**



Shows the colors which belong to the color group.

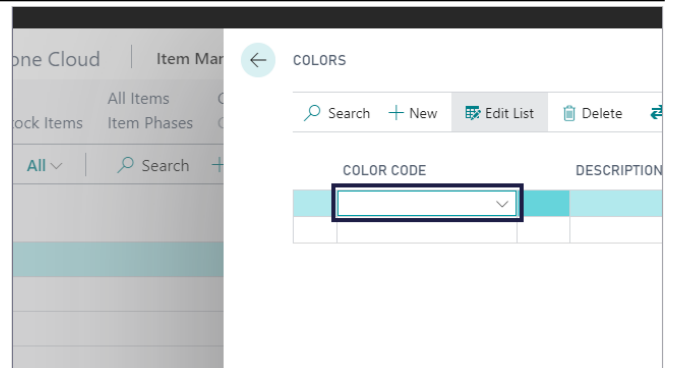
CODE	DESCRIPTION	SE
2020FW	2020 Fall / Winter Colors	202
2020SS	2018 Spring / Summer Colors	202
BASE	Base Colors	
SHOES	Colors for Shoes	

Click on the cell **Color Code**
Add the colors which belong to the color group.



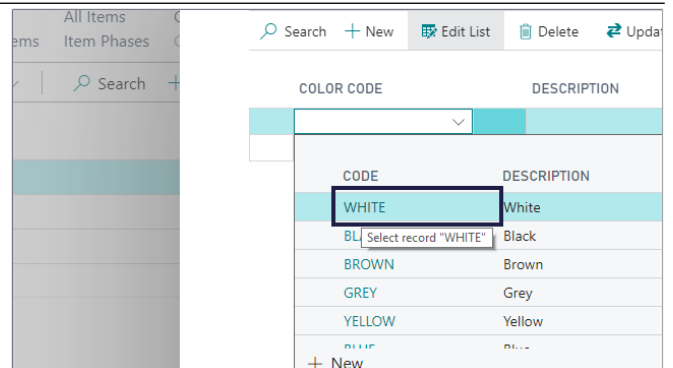
COLOR CODE	DESCRIPTION
<input type="text"/>	

Click on the cell **Color Code**



COLOR CODE	DESCRIPTION
<input type="text"/>	

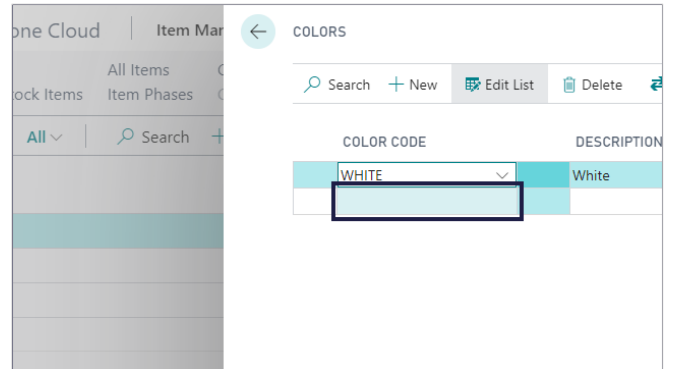
Click on the link in cell **Code** with the value **WHITE**



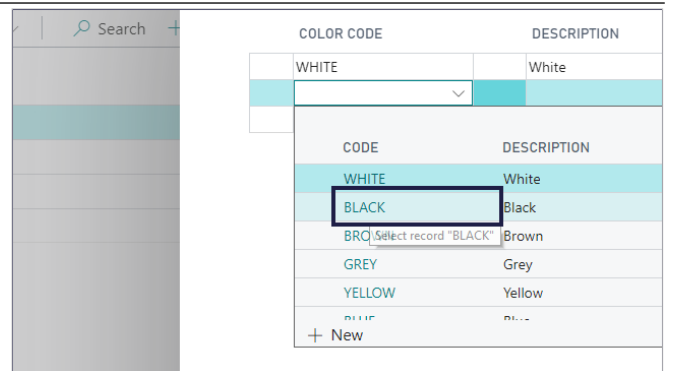
CODE	DESCRIPTION
WHITE	White
BL	Select record "WHITE" Black
BROWN	Brown
GREY	Grey
YELLOW	Yellow
BLUE	Blue
+ New	

K3 Pebblestone

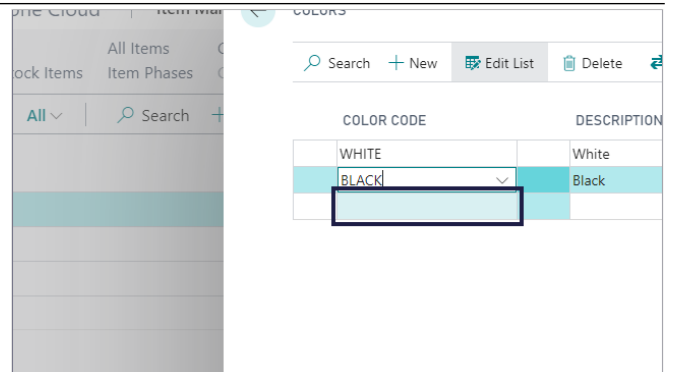
Click on the cell **Color Code**



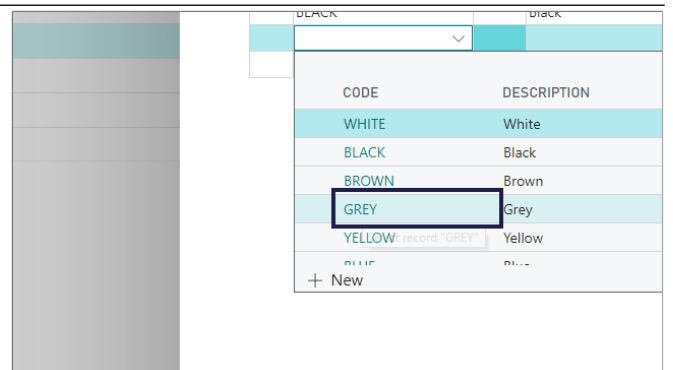
Click on the link in cell **Code** with the value **BLACK**



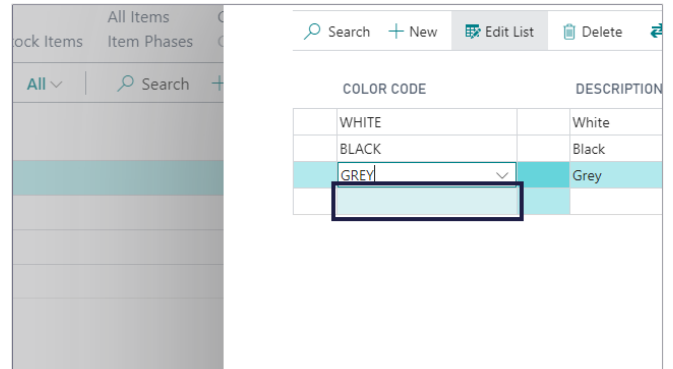
Click on the cell **Color Code**



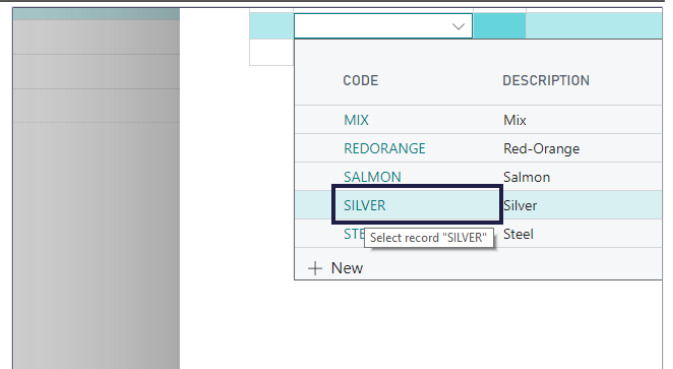
Click on the link in cell **Code** with the value **GREY**



Click on the cell **Color Code**



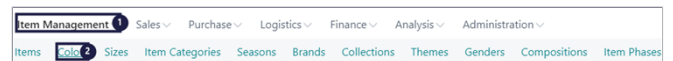
Click on the link in cell **Code** with the value **SILVER**



2.1.12. Colors

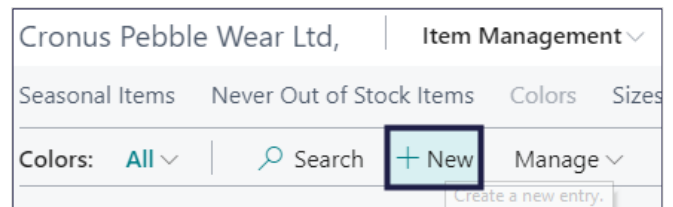
2.1.12.1. Navigate to colors

1. Click on the navigation menu item popup **Item Management**.
2. Click on the navigation menu item **Colors**.



2.1.12.2. Create a new color

1. Click on the navigation menu item **New**.



1. **Code.**
Add a code to identify the color.
2. **Description.**
Change the description for the color if needed.
3. **Sorting.**
Specifies the order in which the colors are shown in the matrixes, this will be generated automatically.
4. **Base Color Code.**
Add the base color code for the color.
5. **RGB Value.**
Specifies the number of the color value according to the Windows colour table for the color.
6. **Hex Value.**

Code	Description	Sorting	Base Color Code	RGB Value	Hex Value	Out of Use
WHITE	White	10	WHITE	16777215	#FFFFFF	
BLACK	Black	20	BLACK	0	#000000	
BROWN	Brown	30	BROWN	16512	#804000	
GREY	Grey	40	GREY	13619151	#CFCFCF	
YELLOW	Yellow	50	YELLOW	65535	#FFFF00	
BLUE	Blue	60	BLUE	16711680	#0000FF	
RED	Red	70	RED	255	#FF0000	

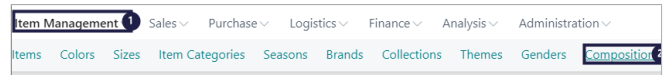
Specifies an alternative code to identify the color.

7. **Out of Use.**
Specifies whether a color is out of use. Colors that are out of use cannot be selected on a color group or item.

2.1.13. Compositions

2.1.13.1. Navigate to Compositions

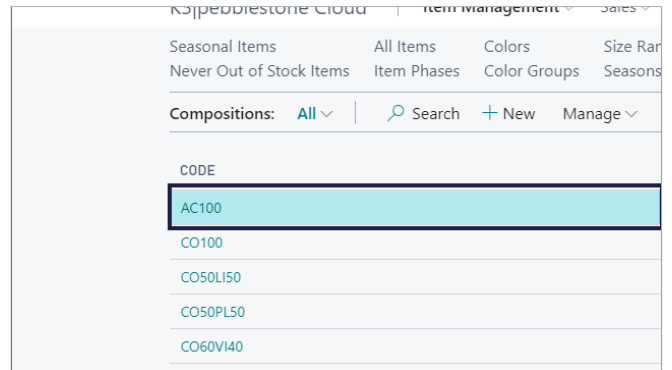
1. Click on the navigation menu item popup **Item Management**.
2. Click on the navigation menu item **Compositions**.



2.1.13.2. Compositions overview

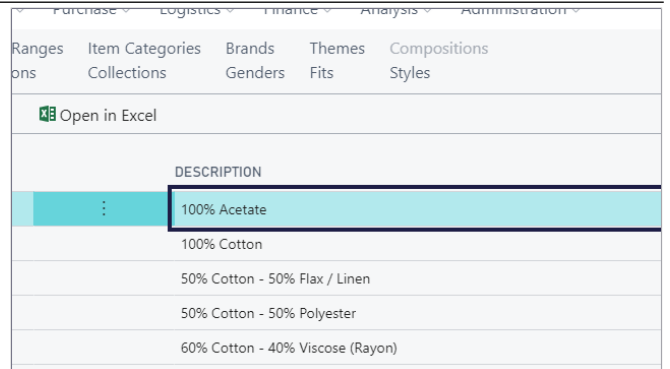
Code

Specifies the code that identifies the composition.



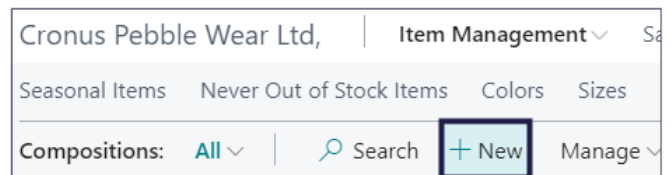
Description

Specifies the description of the composition.

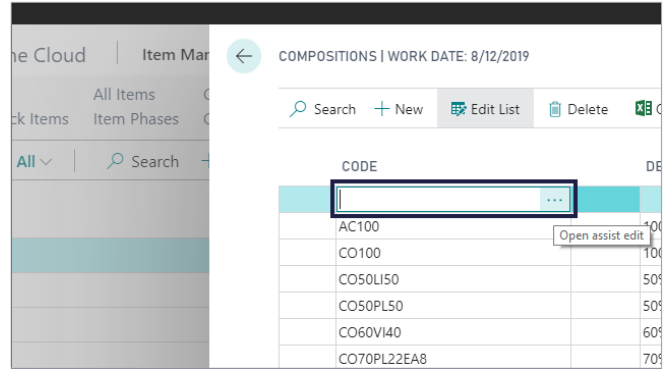


2.1.13.3. Create a new composition

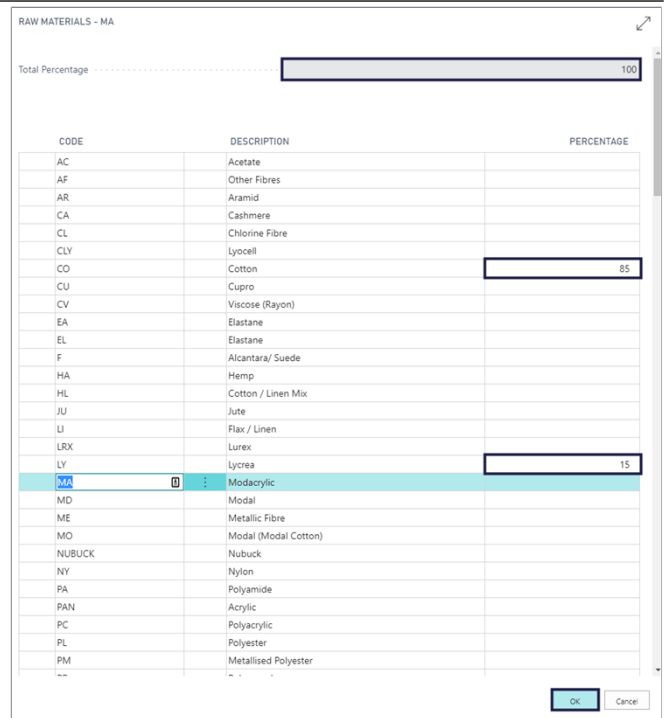
1. Click on the navigation menu item **New**.



Click on the link in cell Code Open assist edit

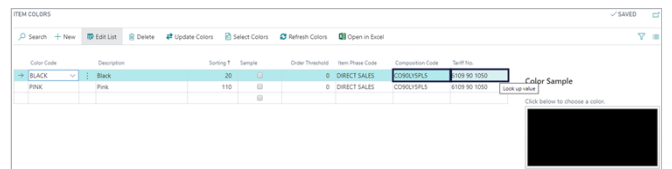


- **Percentage.**
- **Percentage.**
- **Total Percentage**, the total cannot be more than 100%.
- Click on the button **OK**.



2.1.13.4. Composition code and Tariff number on item colors

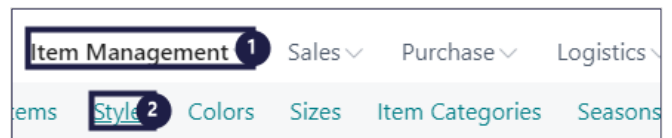
- **Composition Code.**
- **Tariff No..**



2.1.14. Styles

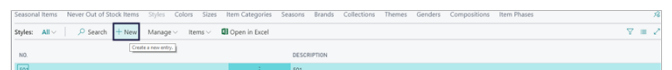
2.1.14.1. Navigate to styles

1. Click on the navigation menu item popup **Item Management**.
2. Click on the navigation menu item **Styles**.



2.1.14.2. Create a new style

1. Click on the navigation menu item **New**.



K3 Pebblestone

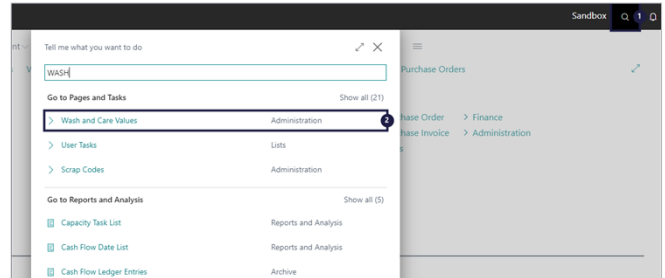
1. **No..**
Add a style number.
2. **Description.**
Add a description of the style.

NO.	DESCRIPTION
501	501

2.1.15. Wash and Care

2.1.15.1. Navigate to Wash and Care value

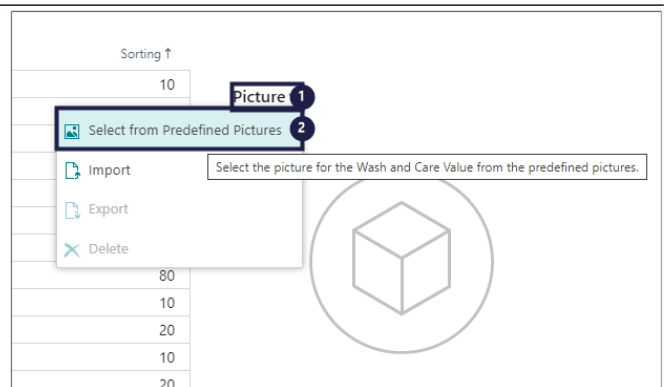
1. Enter **Tell me what you want to do. Quickly access actions, pages, reports, documentation, and apps and consulting services..**
2. Click on **Wash and Care Values Administration** .



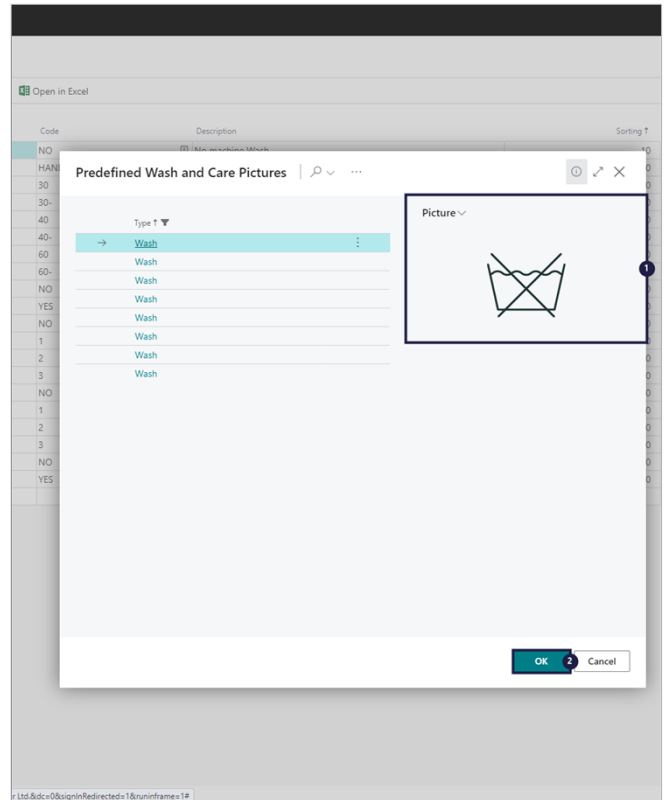
1. **Type.**
Specifies the type of the Wash and Care instruction, such as Wash, Bleach, Iron, etc..
2. **Code.**
Specifies a code to identify this Wash and Care instruction.
3. **Description.**
Specifies a text to describe the Wash and Care instruction.
4. **Sorting.**
Specifies the order in which the Wash and Care instructions are shown per type of instruction.

Type	Code	Description	Sorting	Picture
Wash	NO	No machine wash	10	
Wash	NO	Hand wash	20	
Wash	NO	80°C normal process, machine wash	30	
Wash	NO	80°C normal process, machine wash	40	
Wash	NO	80°C normal process, machine wash	50	
Wash	NO	80°C normal process, machine wash	60	
Wash	NO	80°C normal process, machine wash	70	
Wash	NO	80°C normal process, machine wash	80	
Wash	NO	80°C normal process, machine wash	90	
Bleach	NO	No bleaching	10	
Bleach	YES	Bleaching	20	
Tumble Dry	NO	Do not tumble dry	10	
Tumble Dry	1	Low heat, dry normal	20	
Tumble Dry	2	Medium heat, dry normal	30	
Tumble Dry	3	High heat, dry normal	40	
Iron	NO	Do not iron	10	
Iron	1	1° iron temperature maximal 110°C	20	
Iron	2	2° iron temperature maximal 150°C	30	
Iron	3	3° iron temperature maximal 200°C	40	
Dry Clean	NO	Do not dry clean	10	
Dry Clean	YES	Carbide dry cleaned	20	

1. **Picture.**
2. **Select the picture for the Wash and Care Value from the predefined pictures..**

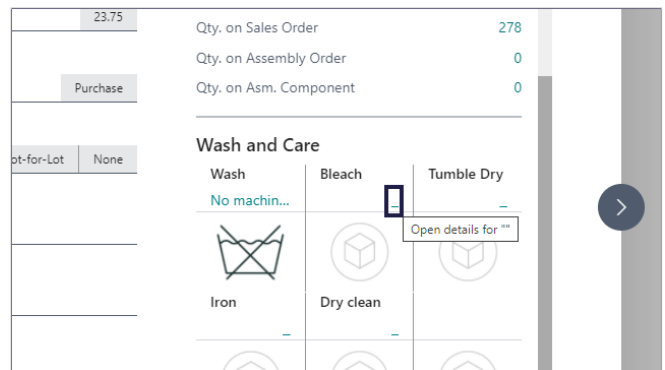


1. Click on the button **OK**.



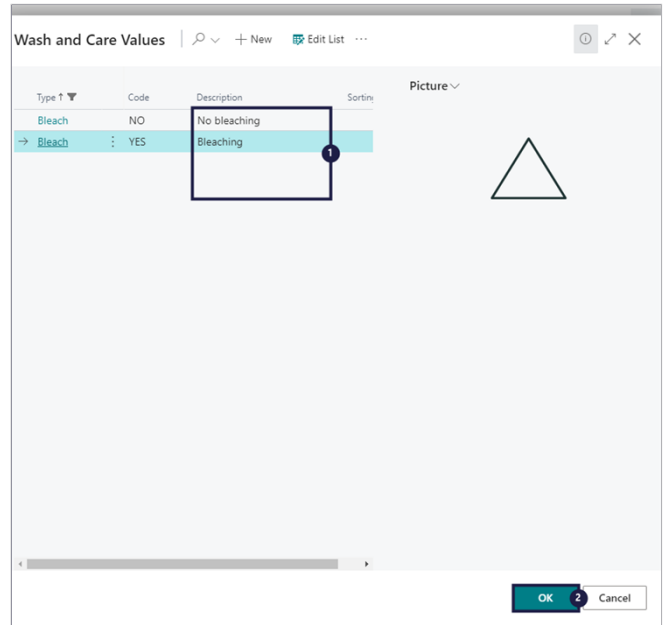
2.1.15.2.
Bleach, Open details for ""

Add wash and care value on item

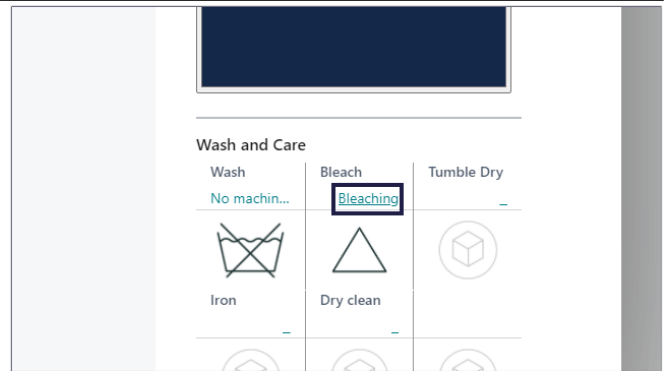


K3 Pebblestone

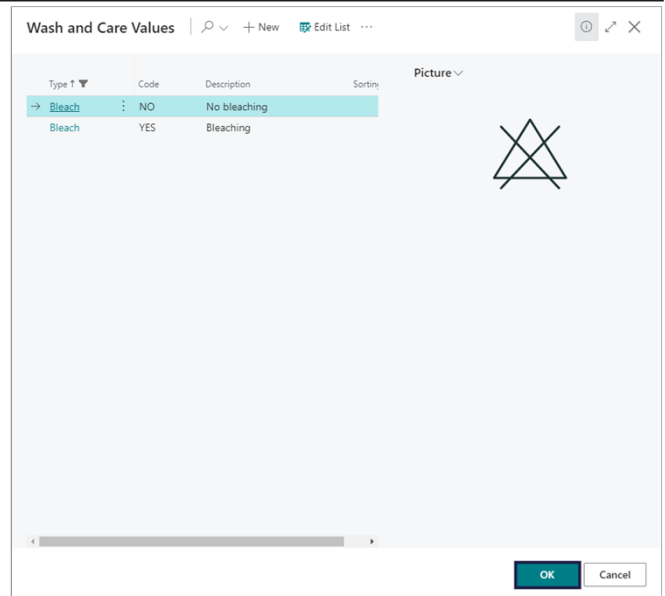
1. Click on the cell **Description** on any row.
2. Click on the button **OK**.



Bleach, Open details for "Bleaching".



1. Choose a different value for bleach if needed.



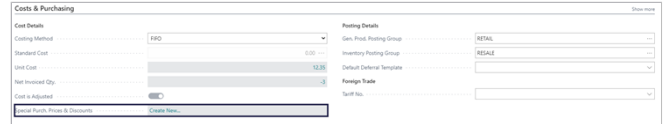
2.1.15.3. Add wash and care on item color level

2.2. Prices & Discounts

2.2.1. Special Purchase Prices and Discounts

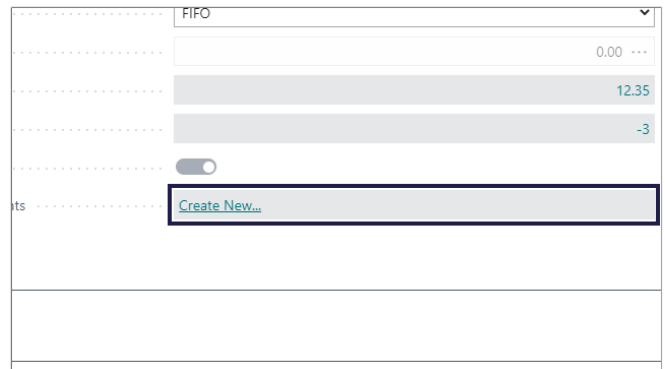
2.2.1.1. Navigate to Special Purchase Prices & discounts

1. Special Purch. Prices & Discounts Create New....

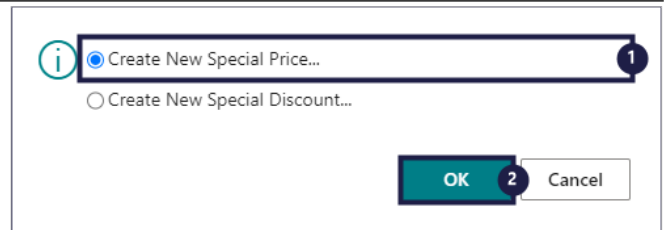


2.2.1.2. Create Special Purchase price

Click on the field **Special Purch. Prices & Discounts**



1. Click on the item **Create New Special Price...**
2. Click on the button **OK**.



1. **Vendor No. Filter.**
Specifies a filter for which purchase prices display.
2. **Item No. Filter.**
Specifies a filter for which purchase prices to display.
3. **Starting Date Filter.**
Specifies a filter for which purchase prices to display.



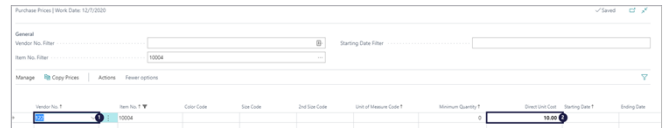
1. **Vendor No..**
Specifies the number of the vendor who offers the line discount on the item.
2. **Item No..**
Specifies the number of the item that the purchase price applies to.
3. **Color Code.**
Specifies the color code of the item on the line.
4. **Size Code.**
Specifies the size code of the item on the line.
5. **2nd Size Code.**
Specifies the second size code of the item on



- the line.
6. **Unit of Measure Code.**
Specifies how each unit of the item or resource is measured, such as in pieces or hours. By default, the value in the Base Unit of Measure field on the item or resource card is inserted.
 7. **Minimum Quantity.**
Specifies the minimum quantity of the item that you must buy from the vendor in order to get the purchase price.
 8. **Direct Unit Cost.**
Specifies the cost of one unit of the selected item or resource.
 9. **Starting Date.**
Specifies the date from which the purchase price is valid.
 10. **Ending Date.**
Specifies the date to which the purchase price is valid.

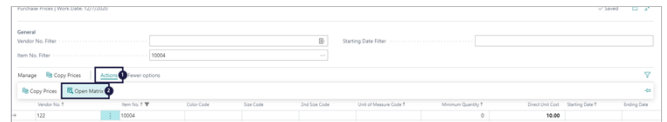
2.2.1.3. Add a Special purchase price

1. Choose **Vendor No.**.
2. Add **Direct Unit Cost.**

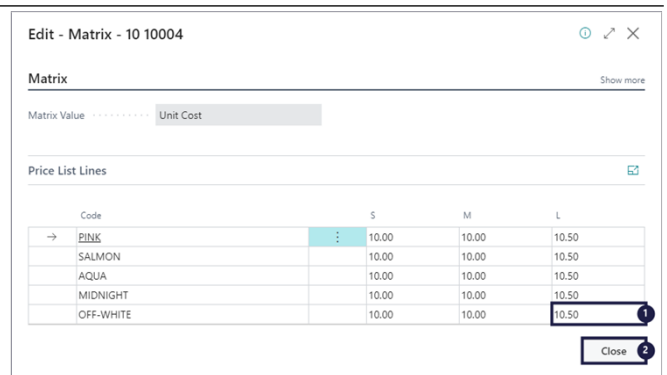


2.2.1.4. Different purchase prices on variant level.

1. Click on the navigation menu item popup **Actions**.
2. **View values for sales price lines on color-size combination level for the item..**

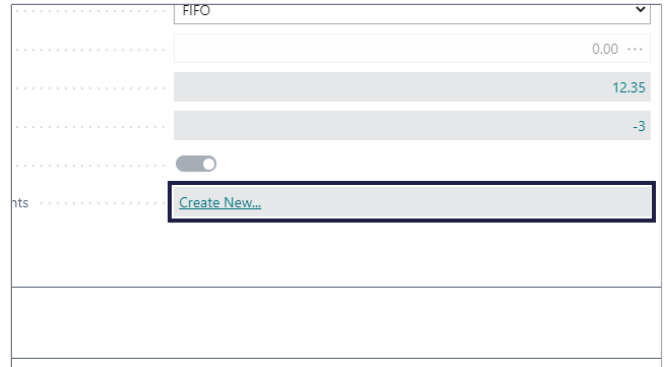


1. Change the price on variant level.
2. Click on the button **Close**.

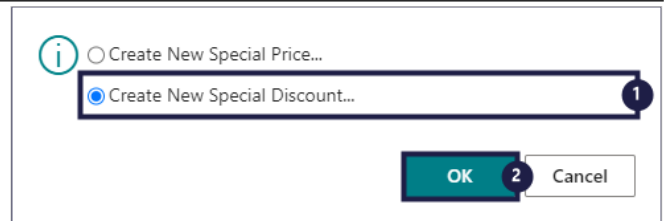


2.2.1.5. Create Special discount price

Click on the field **Special Purch. Prices & Discounts**



1. Click on the item **Create New Special Discount...**
2. Click on the button **OK**.



1. **Vendor No. Filter.**
Specifies a filter for which purchase line discounts display.
2. **Item No. Filter.**
Specifies a filter for which purchase line discounts to display.
3. **Starting Date Filter.**
Specifies a filter for which purchase line discounts to display.

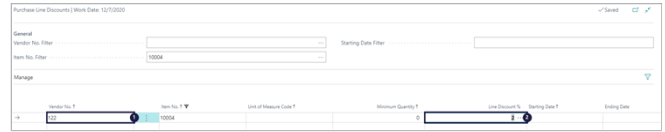


1. **Vendor No..**
Specifies the number of the vendor who offers the line discount on the item.
2. **Item No..**
Specifies the number of the item that the purchase line discount applies to.
3. **Unit of Measure Code.**
Specifies how each unit of the item or resource is measured, such as in pieces or hours. By default, the value in the Base Unit of Measure field on the item or resource card is inserted.
4. **Minimum Quantity.**
Specifies the minimum quantity of the item that you must buy from the vendor in order to receive the purchase line discount.
5. **Line Discount %.**
Specifies the discount percentage that is granted for the item on the line.
6. **Starting Date.**
Specifies the date from which the purchase line discount is valid.
7. **Ending Date.**
Specifies the date to which the purchase line discount is valid.



2.2.1.6. Add a Special discount price

1. Choose **Vendor No.**
2. Add **Line Discount %**.



2.2.2. Special sales prices & discount prices

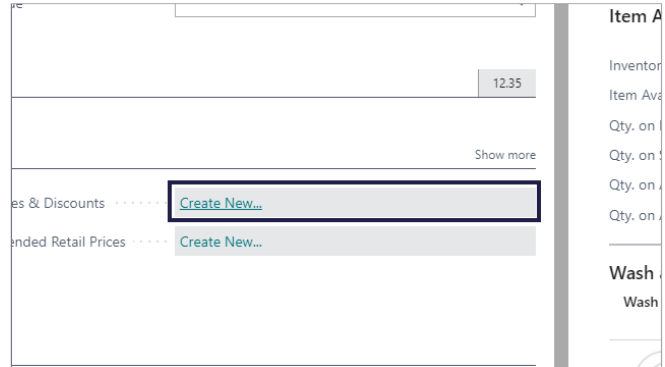
2.2.2.1. Navigate to Special sales & discount prices

1. **Special Sales Prices & Discounts Create New....**
2. **Open details for "Special Sales Prices & Discounts" "Create New..."**.

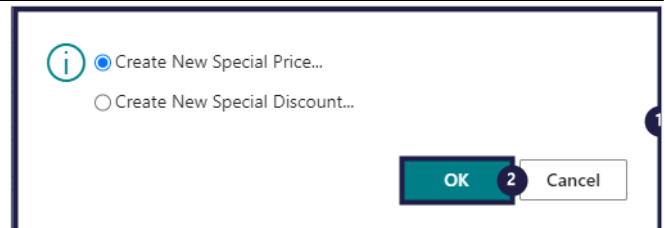


2.2.2.2. Create Special sales prices

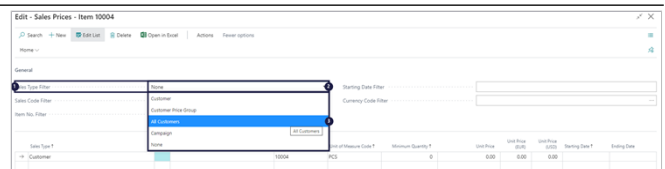
Move the mouse to the field **Special Sales Prices & Discounts**



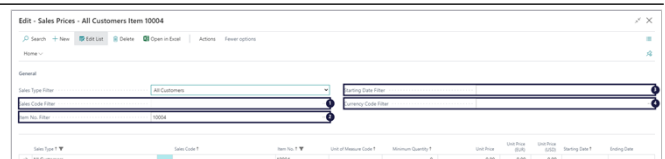
1. Click on **Create New Special Price....**
2. Click on the button **OK**.



1. **Sales Type Filter.**
Specifies a filter for which sales prices to display.
2. **Sales Type Filter.**
3. Click on an option from the list.

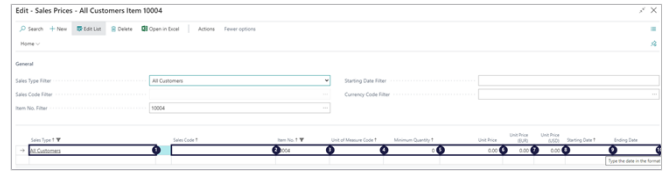


1. **Sales Code Filter.**
Specifies a filter for which sales prices to display.
2. **Item No. Filter.**
Specifies a filter for which sales prices to display.
3. **Starting Date Filter.**
Specifies a filter for which sales prices to display.
4. **Currency Code Filter.**
Specifies a filter for which sales prices to display.



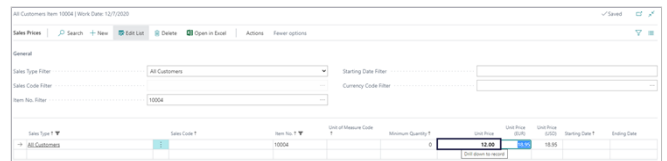
K3 Pebblestone

1. **Sales Type.**
Specifies the sales price type, which defines whether the price is for an individual, group, all customers, or a campaign.
2. **Sales Code.**
Specifies the code that belongs to the Sales Type.
3. **Item No..**
Specifies the number of the item for which the sales price is valid.
4. **Unit of Measure Code.**
Specifies how each unit of the item or resource is measured, such as in pieces or hours. By default, the value in the Base Unit of Measure field on the item or resource card is inserted.
5. **Minimum Quantity.**
Specifies the minimum sales quantity required to warrant the sales price.
6. **Unit Price.**
Specifies the price of one unit of the item or resource. You can enter a price manually or have it entered according to the Price/Profit Calculation field on the related card.
7. **Unit Price (EUR).**
Specifies the Unit Price in the foreign currency.
8. **Unit Price (USD).**
Specifies the Unit Price in the foreign currency.
9. **Starting Date.**
Specifies the date from which the sales price is valid.
10. **Ending Date.**
Specifies the calendar date when the sales price agreement ends.



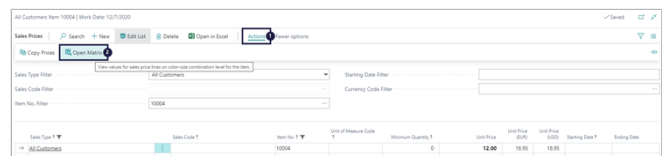
2.2.2.3. Add a Special sales price

1. Add the **Unit Price.**

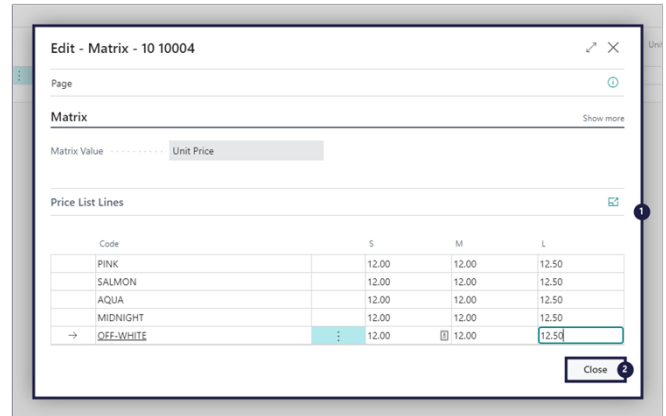


2.2.2.4. Different sales prices on variant level.

1. Click on the navigation menu item popup **Actions.**
2. **View values for sales price lines on color-size combination level for the item..**

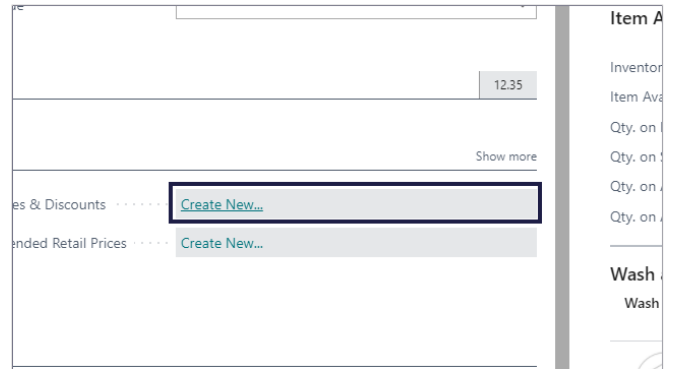


1. **Change the price on variant level..**
2. **Click on the button Close.**

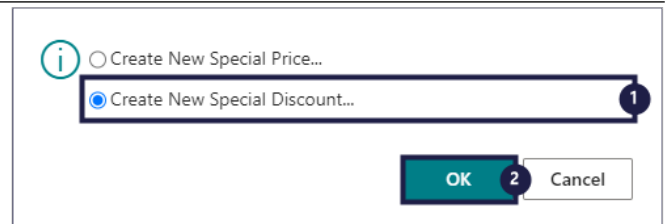


2.2.2.5. Create Special discount prices

Move the mouse to the field **Special Sales Prices & Discounts**



1. **Click on the item Create New Special Discount...**
2. **Click on the button OK.**

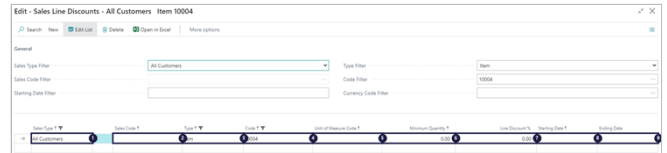


1. **Sales Type Filter.**
Specifies a filter for which sales line discounts to display.
2. **Sales Code Filter.**
Specifies one of the following values, depending on the value in the Sales Type field.
3. **Starting Date Filter.**
Specifies a filter for which sales line discounts to display.
4. **Type Filter.**
Specifies a filter for which sales line discounts to display.
5. **Code Filter.**
Specifies a filter for which sales line discounts to display.
6. **Currency Code Filter.**
Specifies a filter for which sales line discounts to display.



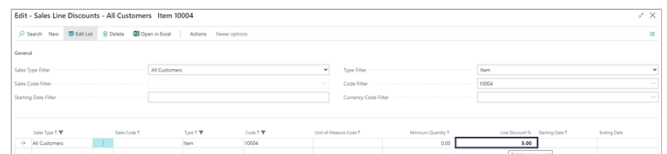
K3 Pebblestone

1. **Sales Type.**
Specifies the sales type of the sales line discount. The sales type defines whether the sales price is for an individual customer, customer discount group, all customers, or for a campaign.
2. **Sales Code.**
Specifies one of the following values, depending on the value in the Sales Type field.
3. **Type.**
Specifies the type of item that the sales discount line is valid for. That is, either an item or an item discount group.
4. **Code.**
Specifies one of two values, depending on the value in the Type field.
5. **Unit of Measure Code.**
Specifies how each unit of the item or resource is measured, such as in pieces or hours. By default, the value in the Base Unit of Measure field on the item or resource card is inserted.
6. **Minimum Quantity.**
Specifies the minimum quantity that the customer must purchase in order to gain the agreed discount.
7. **Line Discount %.**
Specifies the discount percentage that is granted for the item on the line.
8. **Starting Date.**
Specifies the date from which the sales line discount is valid.
9. **Ending Date.**
Specifies the date to which the sales line discount is valid.



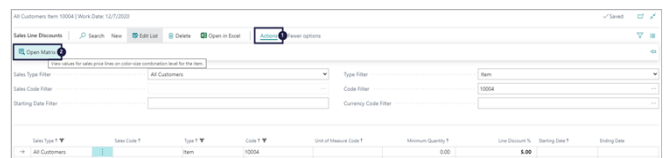
2.2.2.6. Add a Special discount price

1. Add the **Line Discount %**.

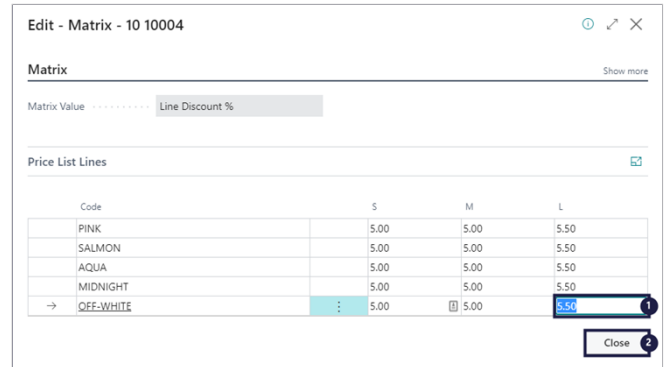


2.2.2.7. Different discounts on variant level

1. Click on the navigation menu item popup **Actions**.
2. **View values for sales price lines on color-size combination level for the item..**



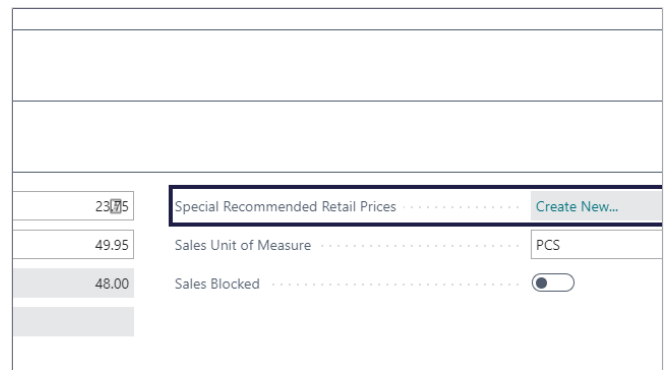
1. **Change the discount on variant level..**
2. **Click on the button Close.**



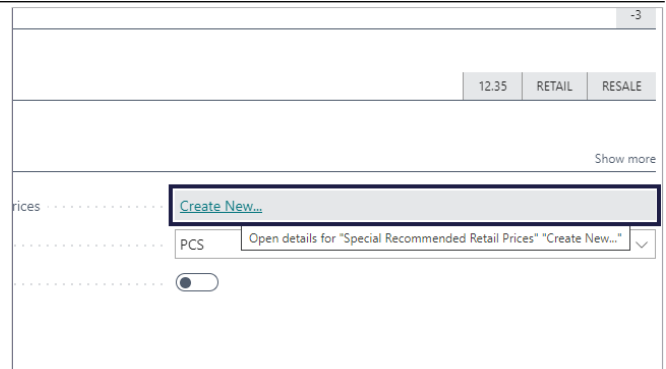
2.2.3. Recommended Retail Prices

2.2.3.1. Navigate to Special Recommended Retail Prices

Special Recommended Retail Prices Create New...



Open details for "Special Recommended Retail Prices" "Create New..."



2.2.3.2. Create recommended retail prices

1. **Price Group Code Filter.**
Specifies a filter for which Recommended Retail Prices to display.
2. **Item No. Filter.**
Specifies a filter for which Recommended Retail Prices to display.
3. **Starting Date Filter.**
Specifies a filter for which Recommended Retail Prices to display.
4. **Currency Code Filter.**
Specifies a filter for which Recommended Retail Prices to display.



K3 Pebblestone

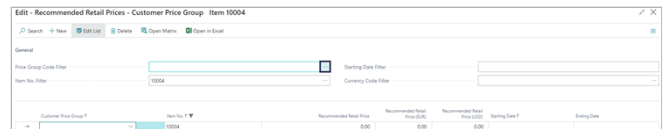
Specifies the price of one unit of the item or resource. You can enter a price manually or have it entered according to the Price/Profit Calculation field on the related card.



1. **Customer Price Group.**
Specifies the code that belongs to the Sales Type.
2. **Item No..**
Specifies the number of the item for which the sales price is valid.
3. **Recommended Retail Price.**
4. **Recommended Retail Price (EUR).**
Specifies the recommended retail price of one unit of the item or resource in the foreign currency.
5. **Recommended Retail Price (USD).**
Specifies the recommended retail price of one unit of the item or resource in the foreign currency.
6. **Starting Date.**
Specifies the date from which the sales price is valid.
7. **Ending Date.**
Specifies the calendar date when the sales price agreement ends.

2.2.3.3. Add recommended retail price

1. Click on the lookup button **Price Group Code Filter**.



1. Click on the link in cell **Code** on any row.

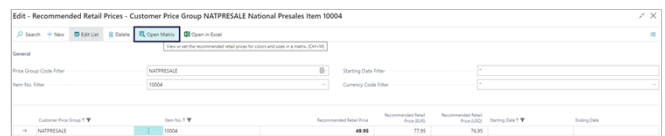
Code	Description	Allow Line Disc.	Allow Invoice Disc.	Price Includes VAT	VAT Bus. Posting Gr. (Price)
EU	Eu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	EU
FOREIGN	Foreign / other countries	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	EXPORT
NATIONAL	National	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	DOMESTIC
NATPRESALE	National Presales	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	DOMESTIC
US	United States	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	EXPORT
VAT	Including VAT	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

1. Add the **Recommended Retail Price**.
2. **Recommended Retail Price**.



2.2.3.4. Different recommended retail prices on variant level

1. **View or set the recommended retail prices for colors and sizes in a matrix. (Ctrl+M).**



K3 Pebblestone

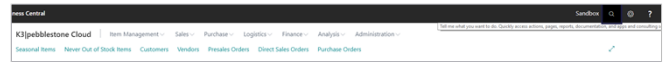
1. Change the recommended retail price for one size.
2. Click on the button **Close**.



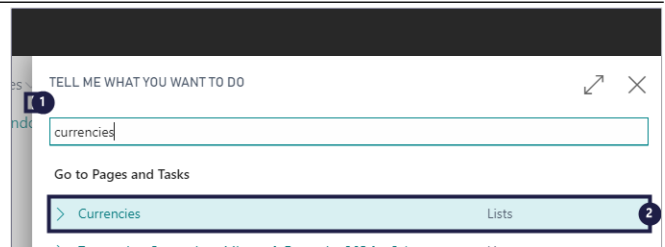
2.2.4. Pricing in different currencies

2.2.4.1. Navigate to Currencies

1. Click on the link TELL ME WHAT YOU WANT TO DO.

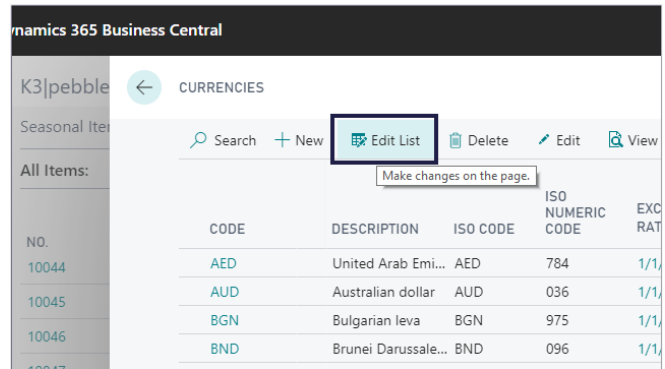


1. Enter the text **currencies**.
2. Click on **Currencies Lists**.



2.2.4.1.1. Choose the sales price currency

Click on the navigation menu item **Edit List**



Sales Price Currency

Check mark the boxes which sales prices must be available.

EXCHANGE RATE DATE	EXCHANGE RATE	EMU CURRENCY	PRICE CURRENCY	ROUNDING METHOD	REALIZED GAINS ACC.	L A
1/1/2017	0.233753	<input type="checkbox"/>	<input type="checkbox"/>		9330	93
1/1/2017	0.342995	<input type="checkbox"/>	<input type="checkbox"/>		9330	93
1/1/2017	0.316096	<input type="checkbox"/>	<input type="checkbox"/>		9330	93
1/1/2017	0.392997	<input type="checkbox"/>	<input type="checkbox"/>		9330	93
1/1/2017	0.245198	<input type="checkbox"/>	<input type="checkbox"/>		9330	93
1/1/2017	0.431903	<input type="checkbox"/>	<input type="checkbox"/>		9330	93
1/1/2017	0.543424	<input type="checkbox"/>	<input type="checkbox"/>		9330	93
1/1/2017	0.026618	<input type="checkbox"/>	<input type="checkbox"/>		9330	93
1/1/2017	0.1168	<input type="checkbox"/>	<input type="checkbox"/>		9330	93
1/1/2017	0.011217	<input type="checkbox"/>	<input type="checkbox"/>		9330	93
1/1/2017	0.6458	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	NEARWHOLE	9330	93
1/1/2017	0.301402	<input type="checkbox"/>	<input type="checkbox"/>		9330	93

Sales Price Rounding Method

EXCHANGE RATE	EMU CURRENCY	PRICE CURRENCY	ROUNDING METHOD	REALIZED GAINS ACC.	LOSSES ACC.	UNREALIZ... GAINS ACC.
3753	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	
2995	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	
6096	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	
2997	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	
5198	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	
1903	<input type="checkbox"/>	<input checked="" type="checkbox"/>		9330	9340	
3424	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	
6618	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	
1168	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	
1217	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	
6458	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	NEARWHOLE	9330	9340	
1402	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	

Specifies how the sales prices for this currencies are rounded. The system will automatically convert local prices to sales prices in this currency and then round it according to the Rounding Method setup. Choose the Sales Price Rounding Method you prefer.

EXCHANGE RATE	EMU CURRENCY	PRICE CURRENCY	ROUNDING METHOD	REALIZED GAINS ACC.	LOSSES ACC.	UNREALIZ... GAINS ACC.
392997	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	
245198	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	
431903	<input type="checkbox"/>	<input checked="" type="checkbox"/>		9330	9340	
543424	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	
026618	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	
0.1168	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	
011217	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	
0.6458	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	NEARWHOLE	9330	9340	
301402	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	
087635	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	
118165	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	
003674	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	
000097	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	
014401	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	

NEARWHOLE

EXCHANGE RATE	EMU CURRENCY	PRICE CURRENCY	ROUNDING METHOD	REALIZED GAINS ACC.	LOSSES ACC.	UNREALIZ... GAINS ACC.
0.233753	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	
0.342995	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	
0.316096	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	
0.392997	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	
0.245198	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	
0.431903	<input type="checkbox"/>	<input checked="" type="checkbox"/>	NEARWHOLE	9330	9340	
0.543424	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	
0.026618	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	
0.1168	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	
0.011217	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	
0.6458	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	NEARWHOLE	9330	9340	
0.301402	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	

2.2.4.1.2.

View the sales price currency on the item

Click on the field Special Sales Prices & Discounts on the item card

Country/Region of Origin Code ... US

Show less

37.20 Profit % 67.04

37.20 Special Sales Prices & Discounts ... [View Existing Prices and Discounts...](#)

89.95 Special Recommended Retail Pr... Create New... Open det

Allow Invoice Disc.

Item Disc. Group APPAREL

1.

Unit Price (CAD).

This is the currency which just have been setting up it specifies the price of the item in the foreign currency.

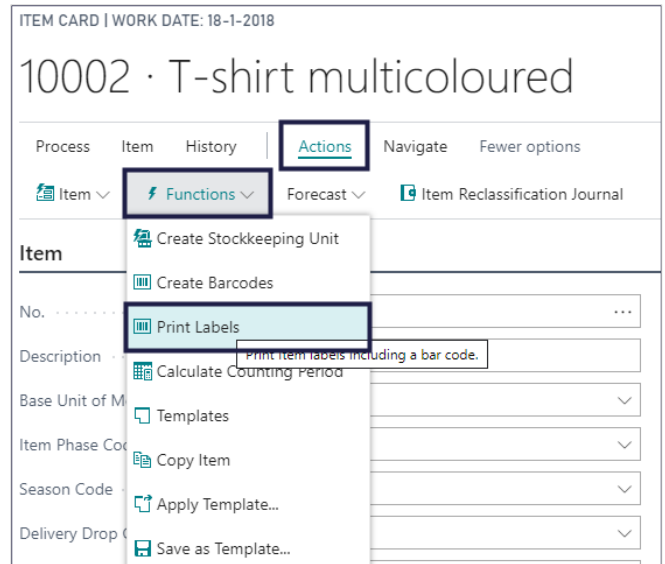
LINE TYPE	SALES TYPE	SALES CODE	TYPE	UNIT OF MEASURE CODE	MINIMUM QUANTITY	LINE DISCOUNT %	UNIT PRICE	UNIT PRICE (CAD)	UNIT PRICE (EUR)	UNIT PRICE (USD)
Sales Line Discount	Customer Price/Disc. Group	LARGE ACC	Item Disc. Group		25.00	5.00	0.00	0.00	0.00	0.00
Sales Line Discount	Customer Price/Disc. Group	RETAIL	Item Disc. Group		0.00	2.00	0.00	0.00	0.00	0.00
Sales Line Discount	Customer Price/Disc. Group	RETAIL	Item Disc. Group		25.00	3.00	0.00	0.00	0.00	0.00
Sales Price	Customer Price/Disc. Group	EU	Item		0.00	0.00	28.40	65.95	42.95	42.95
Sales Price	Customer Price/Disc. Group	NATIONAL	Item		0.00	0.00	27.00	63.95	41.95	42.95
Sales Price	Customer Price/Disc. Group	NATPRESALE	Item		0.00	0.00	27.00	62.95	41.95	41.95
Sales Price	All Customers		Item		0.00	0.00	27.43	63.95	42.95	42.95

2.3. Reports

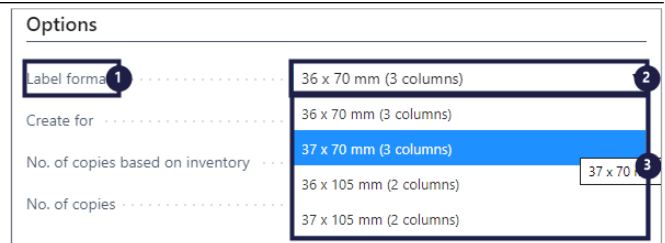
2.3.1. Barcode Labels

2.3.1.1. Navigate to Barcode labels on Item

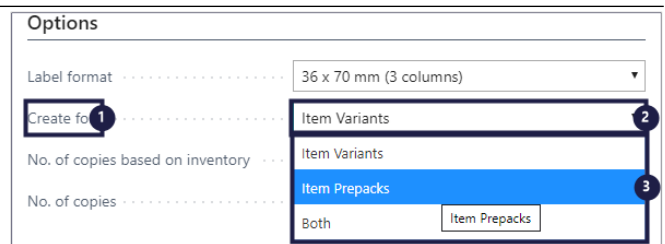
- Click on the navigation menu item popup **Actions**.
- Click on the navigation menu item popup **Functions**.
- Click on the navigation menu item **Print Labels**.



1. **Label format.**
Specifies the size of the labels and whether they are printed in two or three columns.
2. Click on the field **Label format**.
3. Click on an option from the list.



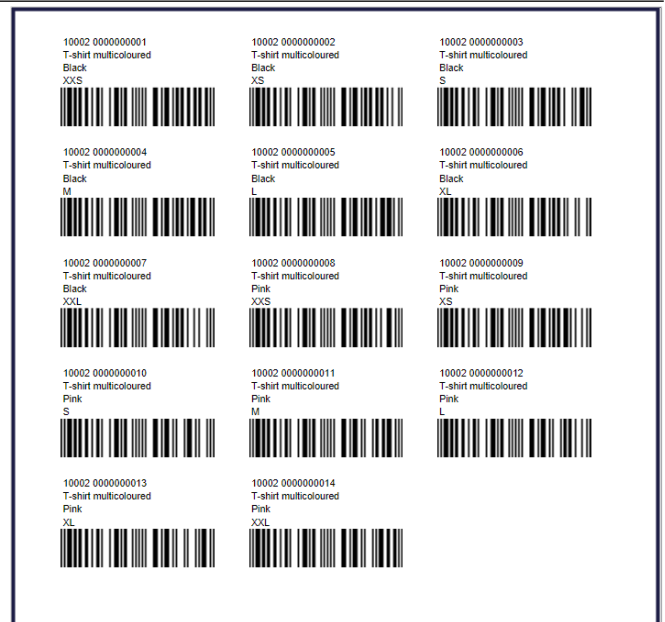
1. **Create for.**
Specifies if you want to print a label for each item variant, each item prepack, or both variants and prepacks.
2. Click on the field **Create for**.
3. Click on an option from the list.



K3 Pebblestone

1. **No. of copies based on inventory.**
Indicates whether or not you want to print as much labels as there are items, item variants, or prepacks on inventory.
2. **No. of copies.**
Specifies the number of labels you want to create if you have not choised to create the number of labels based on inventory.
3. Choose the filters.
4. Make a choise **Send to... Print Preview Cancel.**

- This is the outcome of the preview.



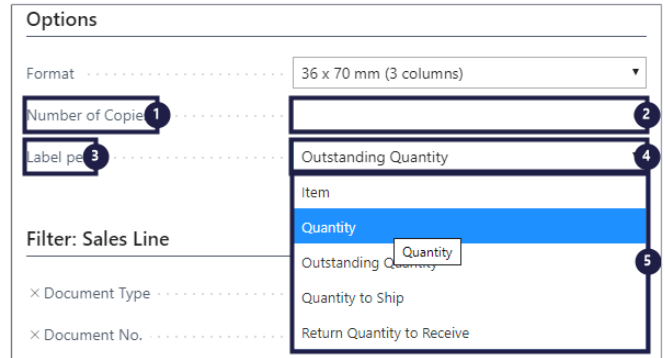
2.3.1.2.

Print barcode label from Sales order

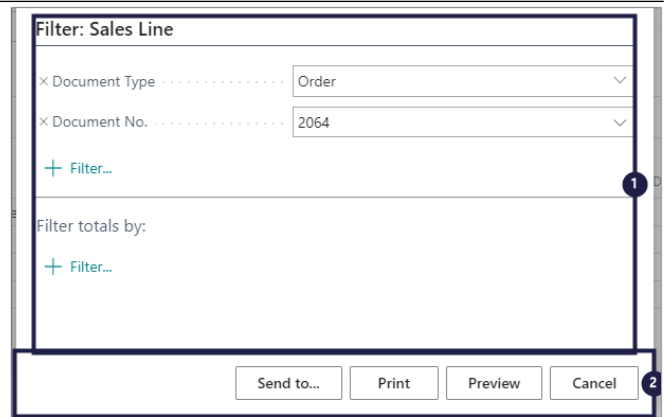
1. Click on the navigation menu item popup **Print/Send.**
2. Click on the navigation menu item **Print Labels.**

1. **Format.**
Specifies the size of the labels and whether they are printed in two or three columns.
2. Click on the field **Format.**
3. Click on an option from the list.

1. **Number of Copies.**
Specifies the number of labels you want to create if you have not chosen to create the number of labels based on inventory.
2. Choose the **Number of Copies.**
3. **Label per.**
Indicates whether or not you want to print as much labels as there are items, quantities, outstanding quantities, etc..
4. Click on the field **Label per.**
5. Click on an option from the list.



1. Choose the filters.
2. Move the mouse to **Send to... Print Preview Cancel.**

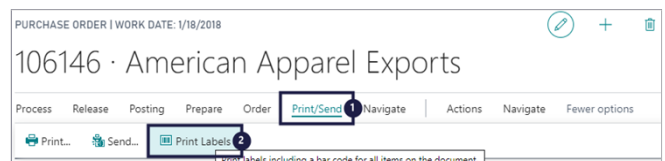


- This is the outcome of the preview.



2.3.1.3. Print barcode label from Purchase order

1. Click on the navigation menu item popup **Print/Send.**
2. Click on the navigation menu item **Print Labels.**



K3 Pebblestone

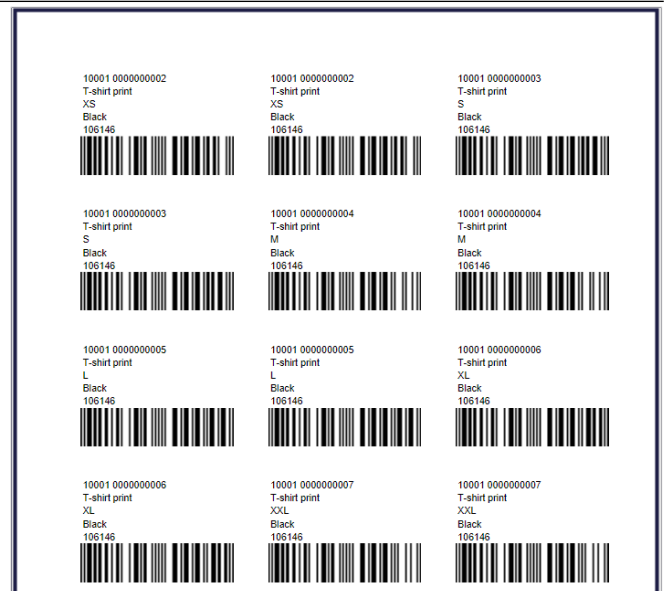
1. **Format.**
Specifies the size of the labels and whether they are printed in two or three columns.
2. Click on the field **Format**.
3. Click on an option from the list.

1. **Number of Copies.**
Specifies the number of labels you want to create if you have not chosed to create the number of labels based on inventory.
2. Choose the **Number of Copies**.

1. **Label per.**
Indicates whether or not you want to print as much labels as there are items, quantities, outstanding quantities, etc..
2. Click on the field **Label per**.
3. Click on an option from the list.

1. Choose the filters.
2. Move the mouse to **Send to... Print Preview Cancel**.

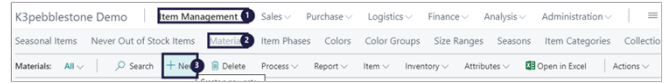
- This is the outcome of the preview.



2.4. Material creation

2.4.1. Create a new material

1. Click on the navigation menu item popup **Item Management**.
2. Click on the navigation menu item **Materials**.
3. Move the mouse to the navigation menu item **New**.



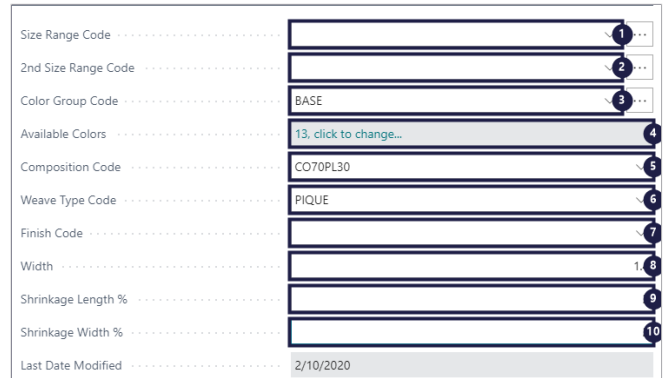
2.4.2. General

1. **No.** Specifies the number of the item. The field is either filled automatically from a defined number series, or you enter the number manually.
2. **Description.** Fill in a Description for the item.
3. **Base Unit of Measure.** Specifies the base unit used to measure the item, such as piece, box, or pallet. The base unit of measure also serves as the conversion basis for alternate units of measure.
4. **Item Phase Code.** Specifies the code which reflects the status of the item, item statuses can be used to block for certain activities. E.g. Shipping or sales order entry
5. **Season Code.** Choose the Season, if the Season does not exist create one.
6. **Delivery Drop Code.** Choose the Delivery drop, if the Delivery drop does not exist create one.
7. **Item Category Code.** Choose the Item Category, if the Item Category does not exist create one.
8. **Collection Code.** Choose the Collection, if the Collection does not exist create one.
9. **Brand Code.** Choose the Brand, if the Brand does not exist create one.
10. **Gender Code.** Choose the Gender, if the Gender does not exist create one.
11. **Theme Code.** Choose the Theme, If the Theme does not exist create one.

Item	
No.	E-10006
Description	Fabric Pique
Base Unit of Measure	M
Item Phase Code	BUYING
Season Code	NOOS
Delivery Drop Code	
Item Category Code	
Collection Code	CASUAL
Brand Code	
Gender Code	
Theme Code	

K3 Pebblestone

1. **Size Range Code.**
Choose the Size Range, if the Size Range does not exist create one.
2. **2nd Size Range Code.**
Choose the 2nd Size Range, if the 2nd Size Range does not exist create one.
3. **Color Group Code.**
Choose the Color Group, if the Color Group does not exist create the Color Group.
4. **Available Colors.**
Choose the Color, if the Color does not exist create the color(s).
5. **Composition Code.**
Choose the Composition if the Composition does not exist create one.
6. **Weave Type Code.**
Specifies the weave type of the item. The weave type is copied from the Main Material by default, but can also set specifically for the main item.
7. **Finish Code.**
Specifies how the item is finished. The finish is copied from the Main Material by default, but can also be set specifically for the main item.
8. **Width.**
Specifies the width of the fabric for the material.
9. **Shrinkage Length %.**
Specifies the shrinkage percentage of the length of the fabric.
10. **Shrinkage Width %.**
Specifies the shrinkage percentage of the width of the fabric.



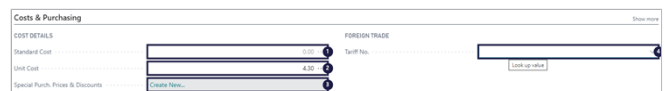
2.4.3. Inventory

- **Shelf No..**
Specifies where to find the item in the warehouse. This is informational only.



2.4.4. Costs & Purchasing

1. **Standard Cost.**
Specifies the unit cost that is used as an estimation to be adjusted with variances later. It is typically used in assembly and production where costs can vary.
2. **Unit Cost.**
Specifies the cost of one unit of the item or resource on the line.
3. **Special Purch. Prices & Discounts.**
Specifies special purchase prices and line discounts for the item.
4. **Tariff No..**
Specifies a code for the item's tariff number.



2.4.5. Prices & Sales

- Unit Price.**
Specifies the price of one unit of the item or resource. You can enter a price manually or have it entered according to the Price/Profit Calculation field on the related card.
- Recommended Retail Price.**
Specifies the recommended retail price for one unit of the item.
- Profit %.**
Specifies the profit margin that you want to sell the item at. You can enter a profit percentage manually or have it entered according to the Price/Profit Calculation field.
- Special Sales Prices & Discounts.**
Specifies special prices and line discounts for the item.
- Special Recommended Retail Prices.**
Specifies special recommended retail prices for the item.

2.5. Item creation

2.5.1. Tooltip

- All over in the application you can check if there is a tooltip. Hover the pointer over an item, without clicking it, and a tooltip may appear.

2.5.2. Create a new Item

- Click on the navigation menu item **Item**.

- Description.**
Choose which template you want to use for creating a new Item.
- Click on the button **OK**.

2.5.3. General

1. **No..**
Specifies the number of the item. The field is either filled automatically from a defined number series, or you enter the number manually.
2. **Description.**
Fill in a Description for the item.
3. **Base Unit of Measure.**
Specifies the base unit used to measure the item, such as piece, box, or pallet. The base unit of measure also serves as the conversion basis for alternate units of measure.
4. **Item Phase Code.**
Specifies the code which reflects the status of the item, item statuses can be used to block for certain activities. E.g. Shipping or sales order entry
5. **Season Code.**
Choose the Season, if the Season does not exist create one.
6. **Previous Seasons.**
Specifies the number of previous seasons that this item belongs to.
7. **Delivery Drop Code.**
Choose the Delivery drop, if the Delivery drop does not exist create one.
8. **Item Category Code.**
Choose the Item Category, if the Item Category does not exist create one.
9. **Collection Code.**
Choose the Collection, if the Collection does not exist create one.
10. **Brand Code.**
Choose the Brand, if the Brand does not exist create one.
11. **Gender Code.**
Choose the Gender, if the Gender does not exist create one.
12. **Theme Code.**
Choose the Theme, If the Theme does not exist create one.

Item	
No.	10084 .. 1
Description	Socks multicoloured 2
Base Unit of Measure	PCS 3
Item Phase Code	CLOSING SALES 4
Season Code	2020SS 5
Previous Seasons	6
Delivery Drop Code	2 7
Item Category Code	LEGWEAR 8
Collection Code	CASUAL 9
Brand Code	AWESOME 10
Gender Code	MEN 11
Theme Code	12

1. **Fit Code.**
Choose the Fit. If the Fit does not exist create one.
2. **Size Range Code.**
Choose the Size Range, if the Size Range does not exist create one.
3. **2nd Size Range Code.**
Choose the 2nd Size Range, if the 2nd Size Range does not exist create one.
4. **Color Group Code.**
Choose the Color Group, if the Color Group does not exist create the Color Group.
5. **Available Colors.**
Choose the Color, if the Color does not exist create the color(s).

		Show less
Fit Code		1
Size Range Code	SOCKS ..	2
2nd Size Range Code .....	...	3
Color Group Code .....	...	4
Available Colors	3, click to change...	5
Composition Code	CO80PL15EL5	6
Style No. ....	...	7
Main Material No. ....	...	8
Weave Type Code .....	...	9
Finish Code .....	...	10

K3 Pebblestone

- 6. **Composition Code.**
Choose the Composition if the Composition does not exist create one.
- 7. **Style No..**
Specifies the number of the style that the item belongs to.
- 8. **Main Material No..**
Specifies the number for the main material.
- 9. **Weave Type Code.**
Specifies the weave type of the item. The weave type is copied from the Main Material by default, but can also set specifically for the main item.
- 10. **Finish Code.**
Specifies how the item is finished. The finish is copied from the Main Material by default, but can also be set specifically for the main item.

2.5.4. Inventory

- 1. **Shelf No..**
Specifies where to find the item in the warehouse. This is informational only.

Inventory	
Shelf No.	<input type="text"/>

2.5.5. Cost & Purchasing

2.5.5.1. Cost Details

- 1. **Standard Cost.**
Specifies the unit cost that is used as an estimation to be adjusted with variances later. It is typically used in assembly and production where costs can vary.
- 2. **Unit Cost.**
Specifies the cost of one unit of the item or resource on the line.
- 3. **Special Purch. Prices & Discounts.**
Specifies special purchase prices and line discounts for the item, if there are no purchase prices or line discounts create purchase prices and discounts.

COST DETAILS	
Standard Cost	<input type="text" value="0.00"/> 1
Unit Cost	<input type="text" value="0.00"/> 2
Special Purch. Prices & Disco...	Create New... 3

2.5.5.2. Foreign Trade

- 1. **Tariff No..**
Add a code for the item's tariff number.

FOREIGN TRADE	
Tariff No.	<input type="text"/>

2.5.6. Price & Sales

- Unit Price.**
Specifies the price of one unit of the item or resource. You can enter a price manually or have it entered according to the Price/Profit Calculation field on the related card.
- Recommended Retail Price.**
Specifies the recommended retail price for one unit of the item.
- Profit %.**
Specifies the profit margin that you want to sell the item at. You can enter a profit percentage manually or have it entered according to the Price/Profit Calculation field.

Prices & Sales	
Unit Price	<input type="text" value="0.00"/> 1
Recommended Retail Price	<input type="text" value="0.00"/> 2
Profit %	<input type="text" value="0.00"/> 3

- Special Sales Prices & Discounts.**
Specifies special prices and line discounts for the item, if there are no prices and line discounts create prices and line discounts
- Special Recommended Retail Prices.**
Specifies special recommended retail prices for the item, if there are no recommended retail prices create recommended retail prices.

Special Sales Prices & Discou...	<input type="text" value="Create New..."/> 1
Special Recommended Retail ...	<input type="text" value="Create New..."/> 2

2.5.7. Replenishment

- Lead Time Calculation.**
Specifies a date formula for the amount of time it takes to replenish the item.
- Order Threshold.**
Specifies the order threshold for this item. The Order threshold can also be set on color level. If the quantities on the presales orders are below the order threshold, then the item is most likely discontinued.

Replenishment	
Lead Time Calculation	<input type="text" value="6M"/> 1
Order Threshold	<input type="text"/> 2

2.5.7.1. Purchase

- Move the mouse to the field **Vendor No..**
Specifies the vendor code of who supplies this item by default.
- Click on the lookup button **Vendor No..**
- Move the mouse to the cell **No.** on any row.

PURCHASE																											
Vendor No.	<input type="text"/>	1	2																								
Vendor Item No.	<table border="1"> <thead> <tr> <th>NO.</th> <th>NAME</th> <th>CITY</th> <th>POST CODE</th> </tr> </thead> <tbody> <tr> <td>100</td> <td>London Fashion Makers</td> <td>London</td> <td>N12 5XY</td> </tr> <tr> <td>101</td> <td>Malay-Dan Export Unit Sdn Bhd</td> <td></td> <td>MY-57000</td> </tr> <tr> <td>102</td> <td>esyen '13 Sdn Bhd</td> <td></td> <td>MY-42000</td> </tr> <tr> <td>103</td> <td>Tengah Butong Sdn Bhd</td> <td></td> <td>MY-88100</td> </tr> <tr> <td>104</td> <td>Service for Fashion Ltd.</td> <td></td> <td>ZA-3900</td> </tr> </tbody> </table>			NO.	NAME	CITY	POST CODE	100	London Fashion Makers	London	N12 5XY	101	Malay-Dan Export Unit Sdn Bhd		MY-57000	102	esyen '13 Sdn Bhd		MY-42000	103	Tengah Butong Sdn Bhd		MY-88100	104	Service for Fashion Ltd.		ZA-3900
NO.	NAME	CITY	POST CODE																								
100	London Fashion Makers	London	N12 5XY																								
101	Malay-Dan Export Unit Sdn Bhd		MY-57000																								
102	esyen '13 Sdn Bhd		MY-42000																								
103	Tengah Butong Sdn Bhd		MY-88100																								
104	Service for Fashion Ltd.		ZA-3900																								
Last Phys. Invt. Date																											
Last Counting Period Update																											
Next Counting Start Date	<input type="button" value="+ New"/> Select from full list																										

- Move the mouse to the field **Vendor Item No..**
Specifies the number that the vendor uses for this item, add it if needed.

Vendor Item No.	<input type="text"/>
----------------------	----------------------

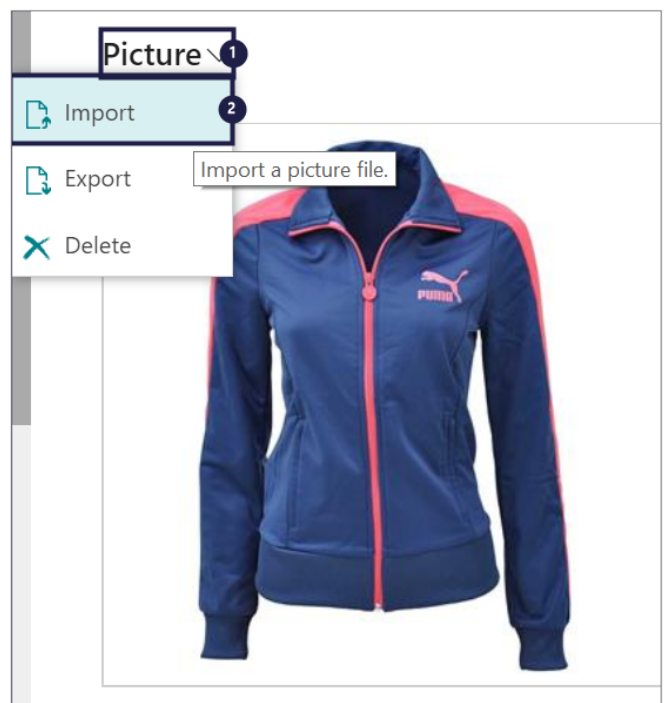
2.5.8. Warehouse

1. **Warehouse Class Code.**
Specifies the warehouse class code for the item.
2. **Put-away Template Code.**
Specifies the code of the put-away template by which the program determines the most appropriate zone and bin for storage of the item after receipt.
3. **Put-away Unit of Measure Code.**
Specifies the code of the item unit of measure in which the program will put the item away.
4. **Phys Invt Counting Period Code.**
Specifies the code of the counting period that indicates how often you want to count the item in a physical inventory.
5. **Last Phys. Invt. Date.**
Specifies the date on which you last posted the results of a physical inventory for the item to the item ledger.
6. **Last Counting Period Update.**
Specifies the last date on which you calculated the counting period. It is updated when you use the function Calculate Counting Period.
7. **Next Counting Start Date.**
Specifies the starting date of the next counting period.
8. **Next Counting End Date.**
Specifies the ending date of the next counting period.

Warehouse		Show more	
Warehouse Class Code		Last Phys. Invt. Date	
Put-away Template Code		Last Counting Period Update	
Put-away Unit of Measure Code		Next Counting Start Date	
Phys Invt Counting Period Code		Next Counting End Date	

2.5.9. Picture

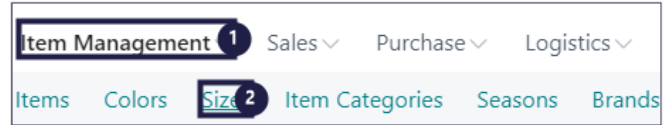
1. Click on the link **Actions for Picture.**
2. **Import.**
Choose import and add a picture.



2.6. One sample size for all genders

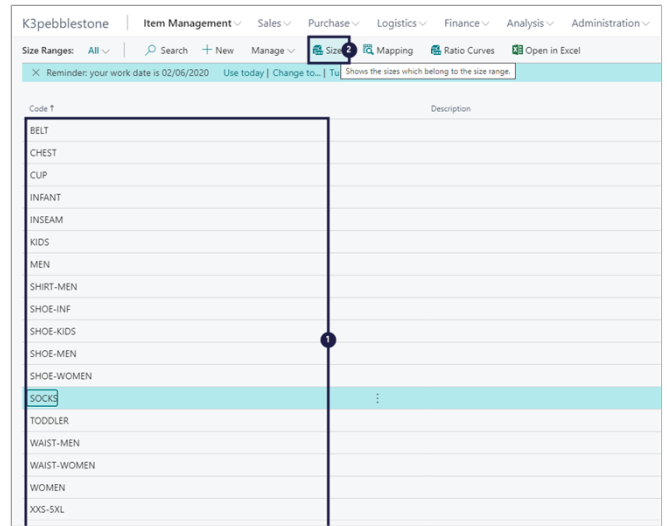
2.6.1. Navigate to Sizes

1. Click on the navigation menu item popup **Item Management**.
2. Click on the navigation menu item **Sizes**.



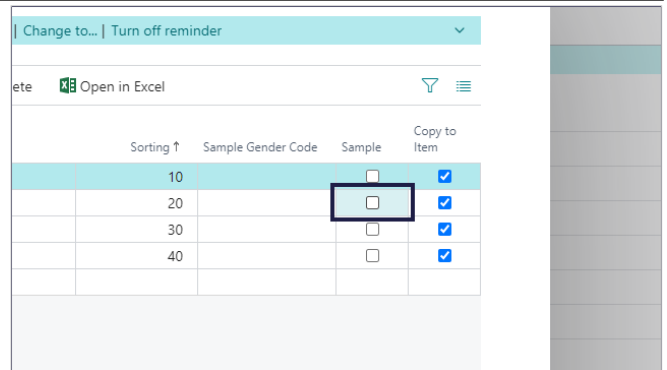
2.6.2. Sample size for all genders

1. Click on the cell **Code** on any row.
2. Click on the navigation menu item **Sizes**.

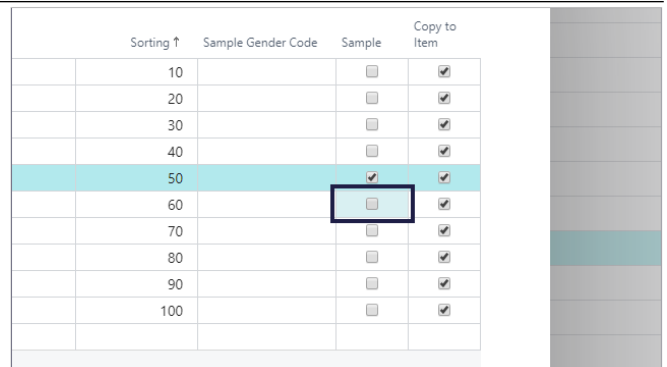


Sample

Mark the field "Sample" for the size which is the default sample for all genders.

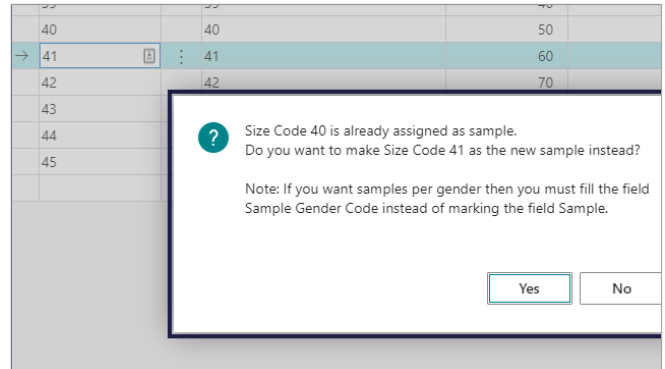


Sample

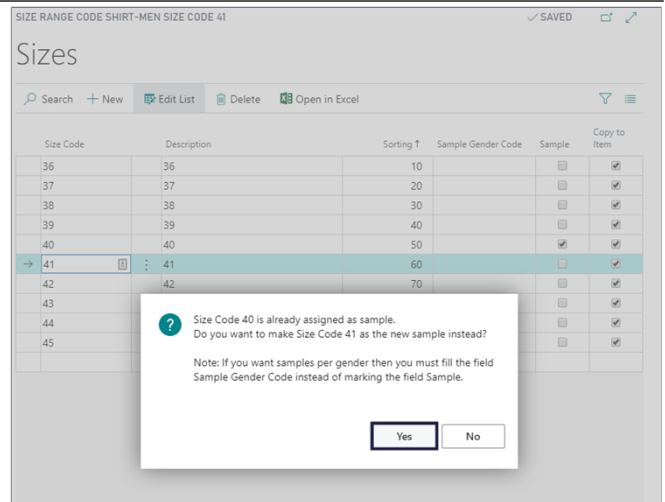


K3 Pebblestone

When you want another size as default sample for all genders then mark the field "Sample" for the other size. In this case you get the following question:

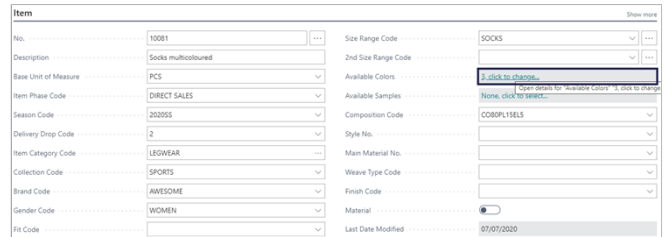


1. Click on the button **Yes**. When you click on the button No, Size 40 stays as default sample for all genders. When you click on the button Yes, Size 41 will become the default sample for all genders.

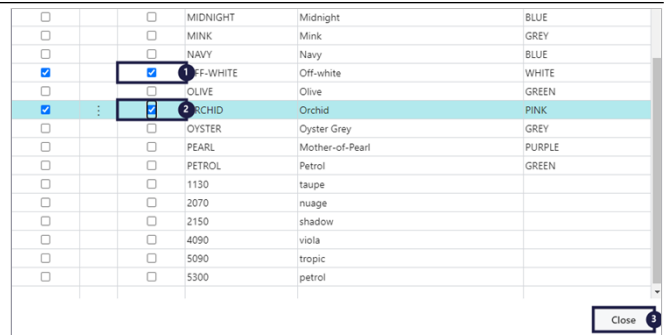


2.6.3. Sample size on the item card

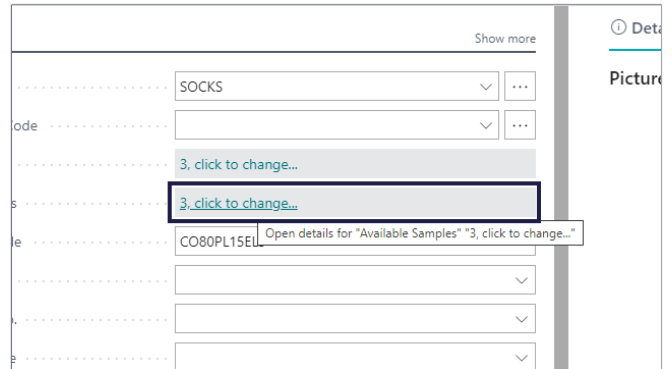
1. Available Colors.



1. **Sample.**
2. **Sample.**
3. Choose the sample colors. Click on the button **Close**.



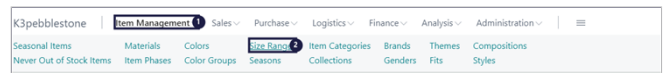
Available Samples



2.7. One sample size per gender

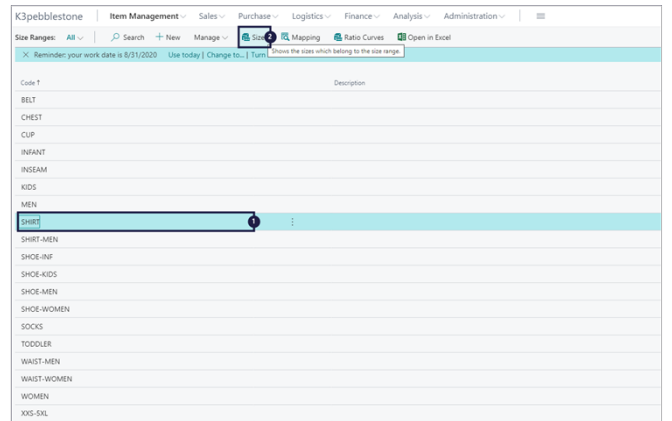
2.7.1. Navigate to sizes

1. Click on the navigation menu item popup **Item Management**.
2. Click on the navigation menu item **Size Ranges**.



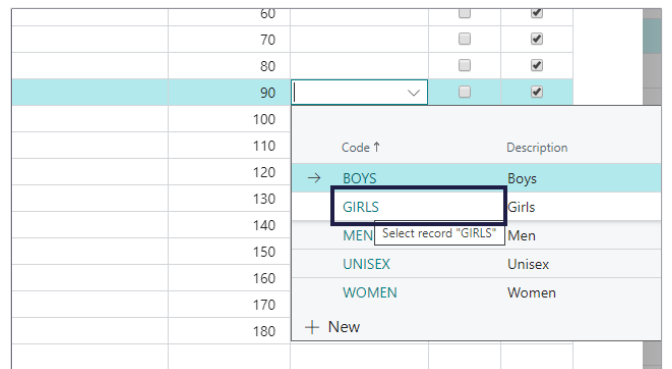
2.7.2. Samples sizes per gender

1. Click on the cell **Code** with the value **SHIRT**.
2. Click on the navigation menu item **Sizes**.



When you want to select one size as default sample for example gender Girls. Then fill the field "Sample Gender Code" with Girls for the size which is the default sample for gender GIRLS.

Click on the link in cell **Code** with the value **GIRLS**



K3 Pebblestone

Click on the link in cell **Code** with the value **BOYS**

70				
80				
90	GIRLS			
100				
110				
120				
130				
140	→ BOYS	Boys		
150	GIRLS	Girls		
160	MEN	Men		
170	UNISEX	Unisex		
180	WOMEN	Women		
+ New				

Click on the link in cell **Code** with the value **WOMEN**

160				
170				
180	→ BOYS	Boys		
	GIRLS	Girls		
	MEN	Men		
	UNISEX	Unisex		
	WOMEN	Women		
+ New				

Click on the link in cell **Code** with the value **MEN**

140				
150	WOMEN			
160				
170				
180				
	→ BOYS	Boys		
	GIRLS	Girls		
	MEN	Men		
	UNISEX	Unisex		
	WOMEN	Women		
+ New				

2.7.3. Samples size on item card

1. Gender Code.
2. Size Range Code.

ITEM CARD		10280 · T-shirt polo uni	
Notifications: 2 We have created a short video that explain's how-to create a Overview in k3pebblestone. | Reminder your work date is 8/31/2020			
Process Item History Actions Navigate Fewer options			
Item Show more			
No.	10280	Size Range Code	SHIRT
Description	T-shirt polo uni	2nd Size Range Code	
Base Unit of Measure	PCS	Available Colors	2, click to change...
Item Phase Code	DELIVERY	Available Samples	None, click to select...
Season Code	2021SS	Composition Code	CO70PL30
Delivery Drop Code	1	Style No.	
Item Category Code	SHIRTS	Main Material No.	M-10009
Collection Code	CASUAL	Weave Type Code	PIQUE
Brand Code	AWESOME	Finish Code	PRINTED
Gender Code	WOMEN	Material	
Fit Code		Last Date Modified	5/19/2020

Available Colors

Available Samples

2.8. Create a prepack

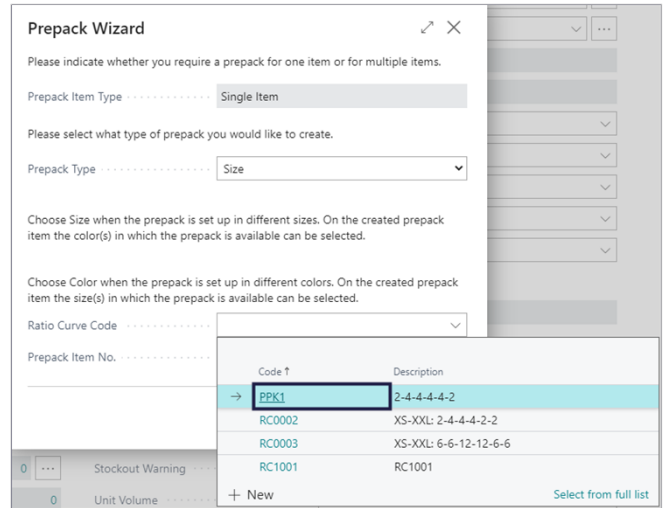
2.8.1. Prepack creation

1. Click on the navigation menu item **popup Item**.
2. Click on the link **Create a prepack for this item. Prepacks are not supported yet for items with two Size Ranges..**

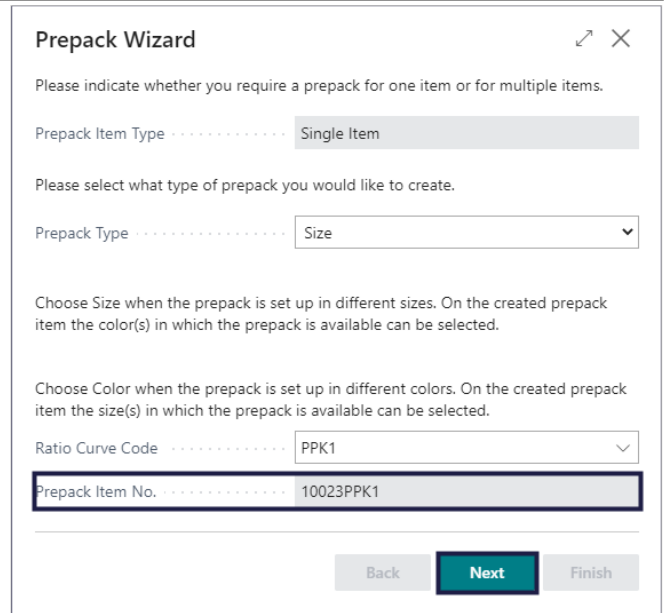
1. **Prepack Item Type Single Item.**
2. **Prepack Type Size Color.**
3. **Ratio Curve Code.**
4. Click on the lookup button **Ratio Curve Code**. Select the ratio curve that you want to apply for the size prepack.

K3 Pebblestone

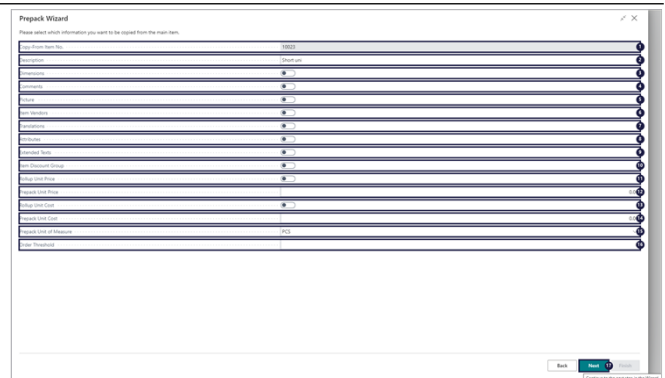
1. Choose a ratio curve or create a new one.



- **Prepack Item No. 10023PPK1.**
Enter a new item number for the prepack item.
- Click on the button **Next**.



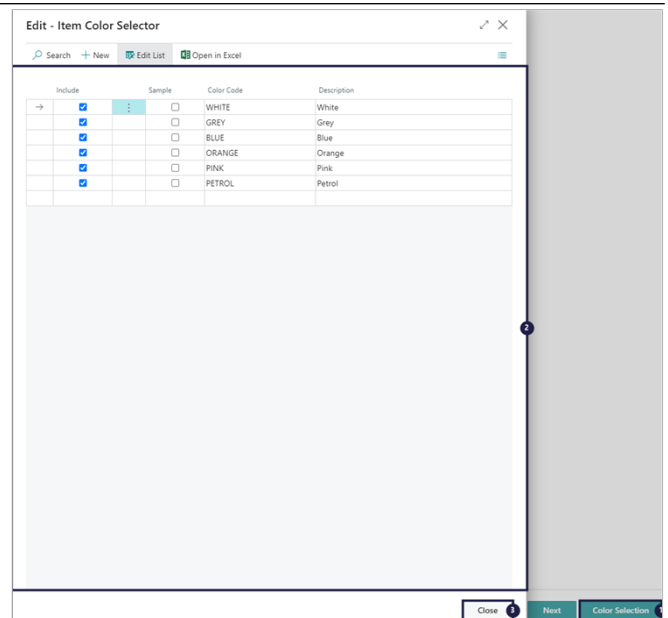
1. **Copy-From Item No. 10023.**
Specifies the item number for which a prepack item will be created. The item information is copied from this item to the new prepack item.
2. **Description.**
Specifies the description for the Prepack item.
3. **Dimensions.**
Indicates whether to copy dimensions from the Item.
4. **Comments.**
Indicates whether to copy comments from the Item.
5. **Picture.**
Indicates whether to copy picture from the Item.
6. **Item Vendors.**
Indicates whether to copy item vendors from the Item.
7. **Translations.**
Indicates whether to copy translations from the Item.



K3 Pebblestone

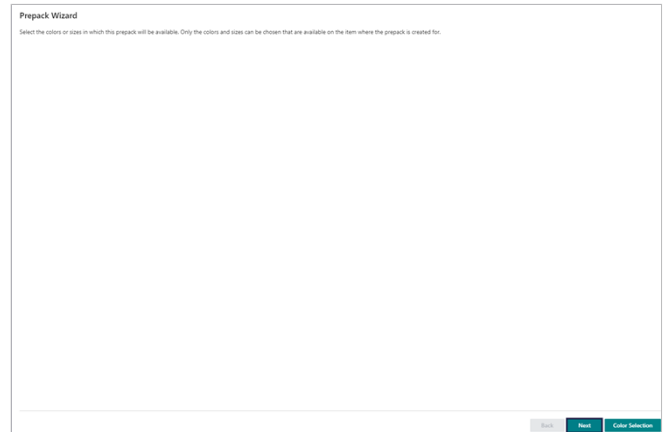
8. **Attributes.**
9. **Extended Texts.**
Indicates whether to copy extended texts from the Item.
10. **Item Discount Group**
.
11. **Rollup Unit Price.**
Indicates whether to rollup unit price.
12. **Prepack Unit Price.**
Specifies the new Unit Price for the prepack item.
13. **Rollup Unit Cost.**
Indicates whether to rollup unit cost.
14. **Prepack Unit Cost.**
Specifies the new Unit Cost for the prepack item.
15. **Prepack Unit of Measure.**
Specifies the new (Base) Unit of Measure for the prepack item.
16. **Order Threshold.**
Specifies the order threshold for this item. The Order threshold can also be set on color level. If the quantities on the presales orders are below the order threshold, then the item is most likely discontinued.
17. **Continue to the next step in the Wizard..**

1. **Color Selection.**
2. Choose the colors for this prepack, only the colors can be chosen that are available on the item where the prepack is created for.
3. Click on the button **Close**.

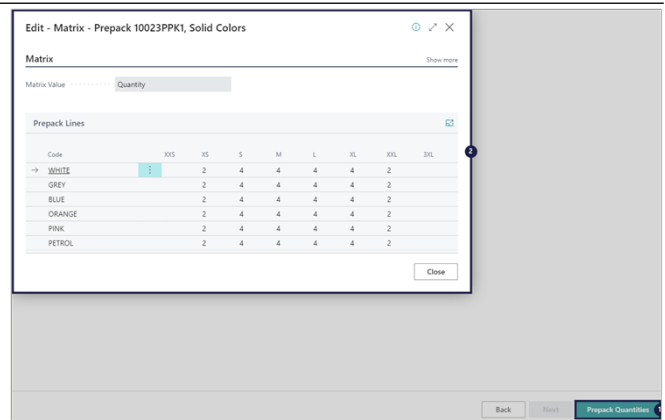


K3 Pebblestone

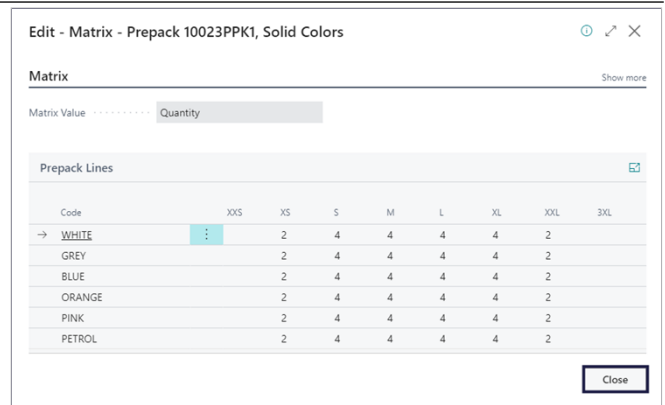
- Click on the button **Next**.



1. Click on the button **Prepack Quantities**.
2. The prepack quantities for this new prepack item.



- Click on the button **Close**.



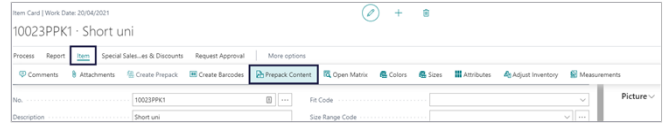
- Click on the button **Finish**.



2.9. Prepack content

2.9.1. Navigate to prepack content

- Click on the navigation menu item popup **Item**.
- Click on the link **View the prepack contents for this item..**



- Prepack content for this item.

Edit - Matrix - Prepack 10023PPK1, Solid Colors

Matrix Show less

Matrix Value Quantity Show Description

Prepack Lines

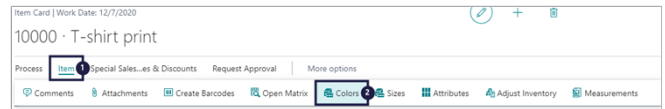
Description	XXS	XS	S	M	L	XL	XXL	3XL
→ White	2	4	4	4	4	4	2	
Grey	2	4	4	4	4	4	2	
Blue	2	4	4	4	4	4	2	
Orange	2	4	4	4	4	4	2	
Pink	2	4	4	4	4	4	2	
Petrol	2	4	4	4	4	4	2	

Close

2.10. Information on item colors

2.10.1. Navigate to item colors

1. Click on the navigation menu item popup **Item**.
2. Move the mouse to the link **View or edit the colors in which the item is available..**



1. **Color Code.**
Specifies a code to identify the color.
2. **Description.**
Specifies the description for the color.
3. **Sorting.**
Specifies the order in which the colors are shown in the matrixes.
4. **Order Threshold.**
Indicates the threshold for purchasing presales orders.
5. **Item Phase Code.**
Specifies the code of the Item Phase assigned to the color. The Item Phase can be used to block a color for specific processes.
6. **Composition Code.**
Specifies the composition of the color. Compositions specifies the usage percentages of raw materials.
7. **Tariff No..**
Specifies a code for the color's tariff number.

Item No. 10000 Color Code BLACK (Work Date: 12/7/2020)

Item Colors

Color Code	Description	Order Threshold	Item Phase Code	Composition Code	Material Code	Material Description	Material Quantity	Material Unit
0000	Black	0	DELIVERY	000015FLS	0100	100% Cotton	100	10000
0001	Red	0	DELIVERY	000015FLS	0100	100% Cotton	100	10000
0002	Blue	0	DELIVERY	000015FLS	0100	100% Cotton	100	10000
0003	Green	0	DELIVERY	000015FLS	0100	100% Cotton	100	10000
0004	Yellow	0	DELIVERY	000015FLS	0100	100% Cotton	100	10000
0005	Purple	0	DELIVERY	000015FLS	0100	100% Cotton	100	10000

Color Sample

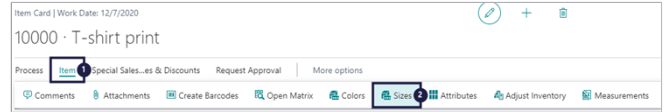
Wash and Care

Wash 30°C max. Iron 2° Iron No. Tumble Dry No Tumble Dry. Don't Dry Clean. Don't Bleach. Don't Iron.

2.11. Information on item sizes

2.11.1. Navigate to item sizes

1. Click on the navigation menu item popup **Item**.
2. Click on the link **View or edit the sizes in which the item is available..**



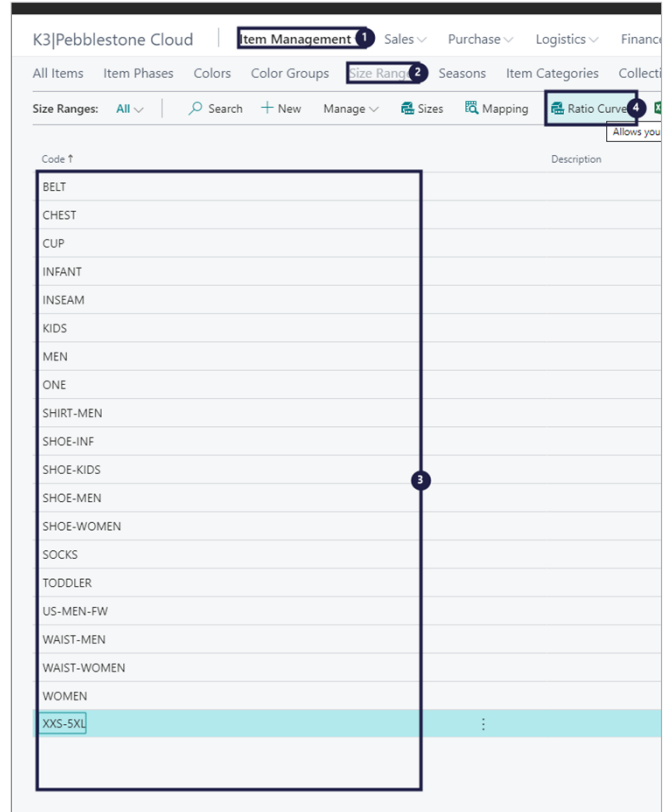
1. **Size Range Code.**
Specifies the size range where this size belongs to.
2. **Size Code.**
Specifies a code to identify the size.
3. **Description.**
Specifies the description for the size.
4. **Sorting.**
Specifies the order in which the sizes are shown in the matrixes.
5. **Default Sample Size.**
Indicates the sample size. Only one size within the size range can be a sample.
6. **VAT Prod. Posting Group.**
Specifies the VAT specification of the involved size to link transactions made for item variants for this size with the appropriate general ledger account according to the VAT posting setup.
7. **Gross Weight.**
Specifies the Gross weight of all item variants for this size.
8. **Net Weight.**
Specifies the net weight of all item variants for this size.

Size Range Code	Size Code	Description	Sorting	Default Sample Size	VAT Prod. Posting Group	Gross Weight	Net Weight
XS-S	XS	XS	10	<input type="checkbox"/>		1.5	1.5
S-S	S	S	20	<input type="checkbox"/>		1.5	1.5
M-S	M	M	40	<input type="checkbox"/>		1.5	1.5
L-S	L	L	60	<input type="checkbox"/>		1.5	1.5
XL-S	XL	XL	80	<input type="checkbox"/>		1.5	1.5
XXL-S	XXL	XXL	95	<input type="checkbox"/>		1.5	1.5

2.12. Ratio Curves

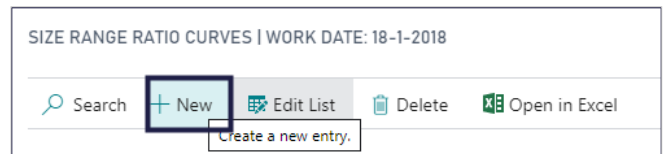
2.12.1. Navigate to Ratio Curves

1. Click on the navigation menu item popup **Item Management**.
2. Click on the navigation menu item **Size Ranges**.
3. Move the mouse to the cell **Code** on any row.
4. Click on the navigation menu item **Ratio Curves**.

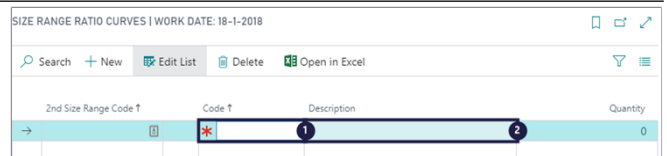


2.12.2. Create a new Ratio Curve

1. Click on the navigation menu item **New**.

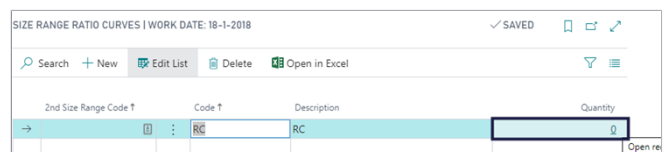


1. **Code.**
Specifies a code for the size range ratio curve.
2. **Description.**
Specifies a description for the size range ratio curve.

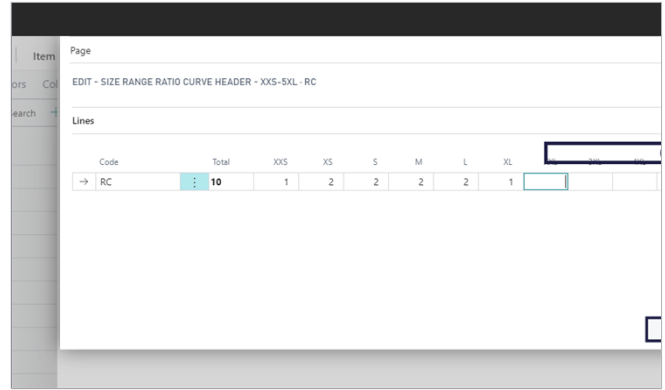


2.12.3. Fill quantities for the ratio curve

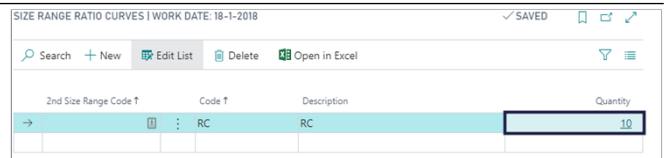
1. Click on the link in cell **Quantity** with the value **0**.



1. Click on the button **Close**.



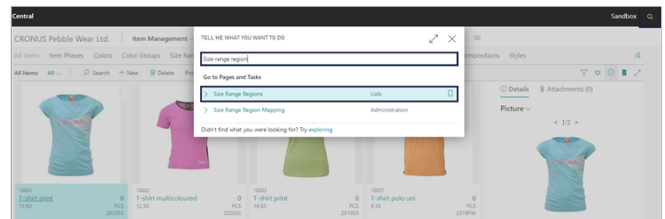
1. The **Quantity** are added.



2.13. Size Range Region

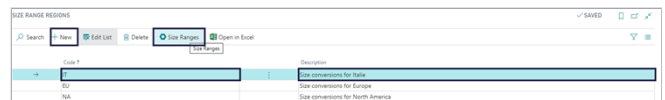
2.13.1. Navigate to size range region

- Click on the link **Tell me what you want to do**. **Quickly access actions, pages, reports, documentation, and apps and consulting services..**
- **Type to start search:**
- Choose **Size Range Regions Lists** .



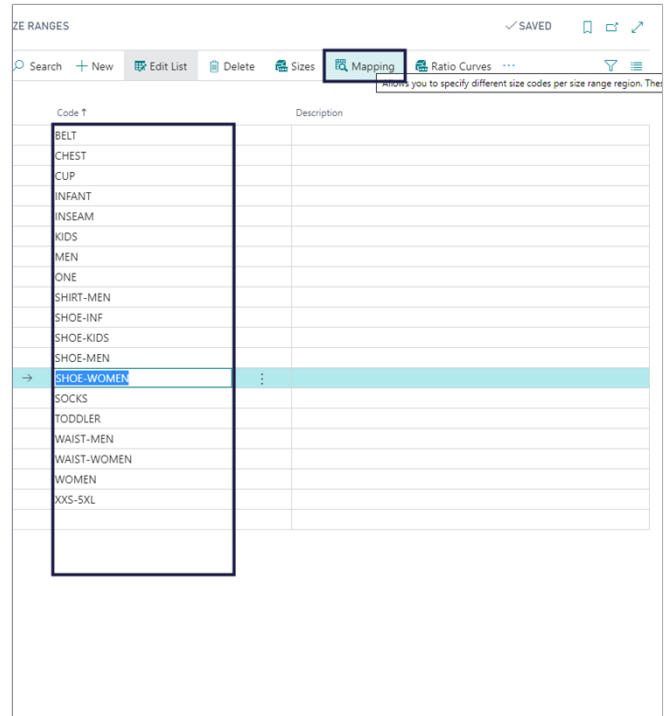
2.13.2. Create a size range region

- Click on the link **Create a new entry..**
- **Code.**
Enter a code for the new size range region.
- **Description.**
Enter a description for the code.
- Click on the navigation menu item **Size Ranges**.



2.13.3. Create a size range region mapping

- Click on the cell **Code** on any row.
- Click on the navigation menu item **Mapping**.

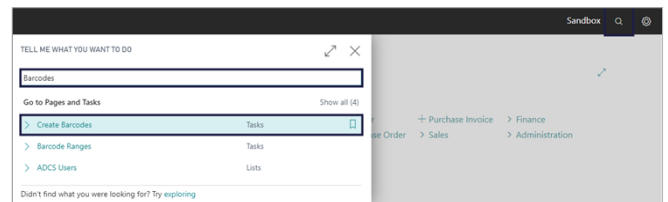


2.13.3.1. Size range region mapping

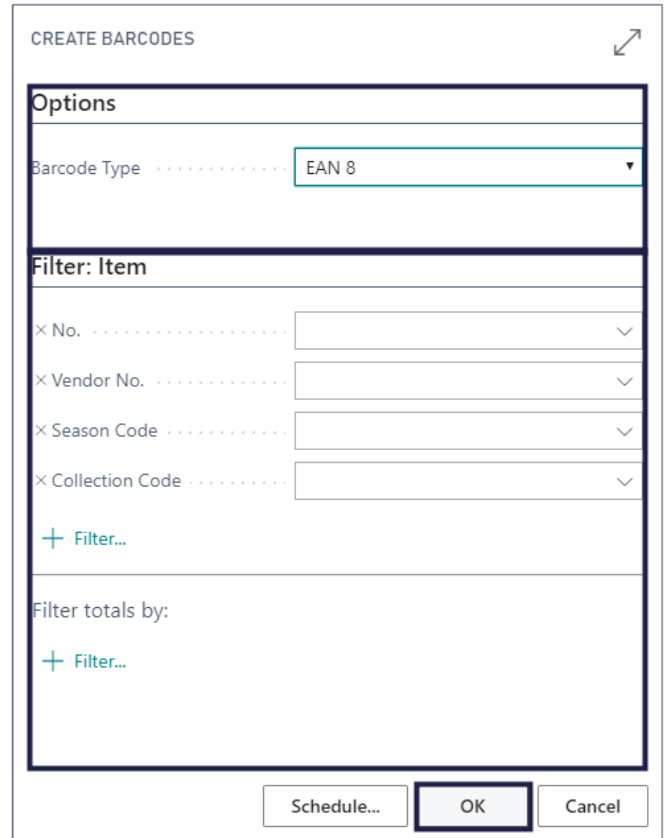
2.14. Create Barcodes

2.14.1. Navigate to Create Barcodes

- Click on the link **Tell me what you want to do.** Quickly access actions, pages, reports, documentation, and apps and consulting services..
- **Type to start search:**
- Choose **Create Barcodes Tasks** □.

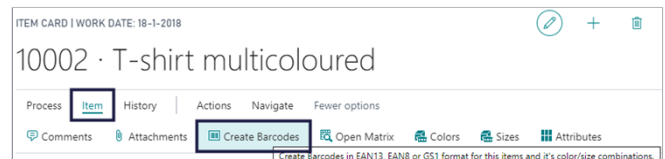


- Choose which barcode type you want to create.
- Choose the right filters.
- Click on the button **OK**.
The barcodes are being created.



2.14.2. Create Barcodes on an item

- Click on the navigation menu item popup **Item**.
- Click on the navigation menu item **Create Barcodes**.



- Choose which barcode type you want to create.
- Choose the right filters.
- Click on the button **OK**.
The barcodes are being created.

CREATE BARCODES

Options

Barcode Type GS1-7

Filter: Item

× No. 10002

× Vendor No.

× Season Code

× Collection Code

+ Filter...

Filter totals by:

+ Filter...

OK Cancel

2.14.3. Navigate to Cross Reference

- Click on the navigation menu item popup **Navigate**.
- Click on the navigation menu item popup **Item**.
- Click on the navigation menu item **Cross References**.

ITEM CARD | WORK DATE: 18-1-2018

10002 · T-shirt multicoloured

Process Item History Actions **Navigate** Fewer options

History Item Availability Purchases Sales Warehouse

Item

- Dimensions
- Cross References**
- Units
- Extended Texts
- Translations
- Substitutions

No.

Description Multicoloured

Base Unit of Meas.

Item Phase Code

Season Code 2020SS

2.15.Document node

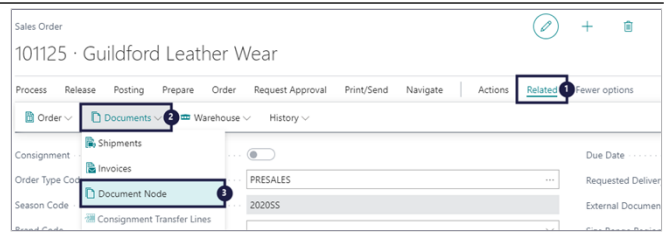
2.15.1. Navigate to Document node

The Sales / Purchase Document Node will link item ledger entries to the original order number. They also store the relation between the posted Shipment / Receipt and the Invoice.

The "Document Node" is always under the Related Tab

	Tab	Group	Action
Purchase Order	Related	Documents	Document Node
Purchase Return Order	Related	Documents	Document Node
Sales Order	Related	Documents	Document Node
Sales Order list	Related	Documents	Document Node
Sales Return Order	Related	Documents	Document Node
Posted Sales Shipment	Related		Document Node
Posted Sales Invoice	Related	Invoice	Document Node
Posted Return Receipt	Related	Return Rcpt.	Document Node
Posted Sales Credit Memo	Related	Cr. Memo	Document Node
Posted Purchase Receipt	Related	Receipt	Document Node
Posted Purchase Invoice	Related	Invoice	Document Node
Posted Return Shipment	Related	Return Shpt.	Document Node
Posted Purchase Credit Memo	Related	Cr. Memo	Document Node

1. Click on the navigation menu item popup **Related**.
2. Click on the navigation menu item popup **Documents**.
3. Click on the link **Shows the shipments and invoices related to this order..**



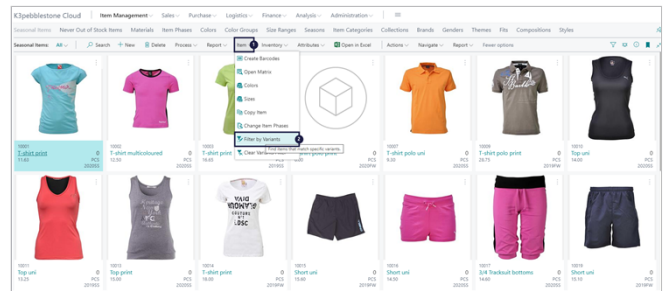
1. **Document Type.**
Specifies the Document Type of the unposted document.
2. **Document No..**
Specifies the Document No. of the unposted document.
3. **Shipment No..**
Specifies the number of the shipment or receipt for this document.
4. **Posted Invoice No..**
Specifies the number of the invoice or credit memo for this document.



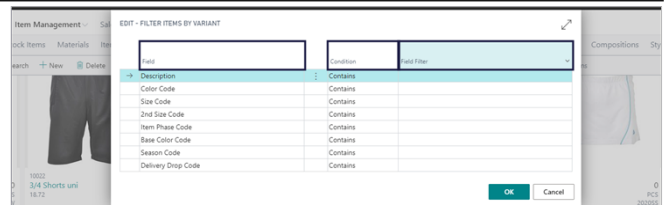
2.16.Filter by variants

2.16.1. Navigate to filter by variants

1. **Item.**
2. **Find items that match specific variants..**



- **Field.**
Specifies the name of the field to filter on.
- **Condition.**
Specifies the condition for the filter value.
Example: To specify that the value for a color code must start with blue, fill the fields as follows:
Condition field = Starts With. Value field = blue.
- **Field Filter.**



Specifies the filter value that the condition applies to.

- Move the mouse to the cell **Field Filter** - Enter **Field Filter**. Press the **TAB** key.
- Click on the button **OK**.

Field	Condition	Field Filter
Description	Contains	@*jacket*
→ Color Code	Contains	
Size Code	Contains	
2nd Size Code	Contains	
Item Phase Code	Contains	
Base Color Code	Contains	
Season Code	Contains	
Delivery Drop Code	Contains	

3. Sales

3.1. Sales Quote

3.1.1. Create a Sales Quote

Click on the navigation menu item **New**

3.1.2. General

- **Order Type Code** . . Specifies a code for the order type that this sales quote belongs to.
- Click on the lookup button **Order Type Code**.

Click on the link in cell **Code** on any row

Code	Description
DIRECT	Direct
NOOS	Never Out of Stock
PRESALES	Presales
LATE PRE	Late Presales

K3 Pebblestone

- **Season Code.**
Specifies a code for the season that this sales quote belongs to.
- Move the mouse to the field **Season Code**.

Sales Quote

Process Quote Request Approval Print/Send Release Navigate Actions Navigate Fewer options

General

Order Type Code PRESALES

Season Code 2020SS

Brand Code

Customer Name *

External Document No.

- **Brand Code.**
Specifies a code for the brand that this sales quote belongs to.
- Click on the lookup button **Brand Code**.
- Click on the link in cell **Code** on any row.

SALES QUOTE | WORK DATE: 1/18/2018

1005

Process Quote Request Approval Print/Send Release Navigate Actions Navigate Fewer options

General

Order Type Code PRESALES

Season Code 2020SS

Brand Code

Customer Name *

External Document No.

Code	Description
ADVENTURE	Adventure Sporting Goods Ltd.
AWESOME	Awesome Clothing Ltd.
CFS	Select record "AWESOME" Field Shop
NORTHWIND	Northwind Outdoor Goods Ltd.
PALLISER	PALLISER

Lines Manage Line Functions

Type	Style No.	No.
Item		

+ New Select from full list

- **Customer Name.**
Specifies the name of the customer who will receive the products and be billed by default.
- Click on the lookup button **Customer Name**.
- Click on the link in cell **No.** on any row.

SALES QUOTE | WORK DATE: 1/18/2018

1005

Process Quote Request Approval Print/Send Release Navigate Actions Navigate Fewer options

General

Order Type Code PRESALES

Season Code 2020SS

Brand Code AWESOME

Customer Name

External Document No.

No.	Name	Post Code	Phone No.
1000	Guildford Leather Wear	GU7 5GT	
1001	The Pop and Mom Shop	CB3 7GG	
1002	Postoffice Heathrow	N16 3AZ	
1003	Airline Ltd.	M61 2YG	
1004	Select record "1003" Group	DY5 4DJ	

Lines Manage Line Functions

Type	Style No.	No.
Item		

+ New Select from full list

- **External Document No..**
Specifies a document number that refers to the customer's or vendor's numbering system.

SALES QUOTE | WORK DATE: 1/18/2018

1005 · Airline Ltd.

Process Quote Request Approval Print/Send Release Navigate Actions Navigate Fewer options

General

Order Type Code PRESALES

Season Code 2020SS

Brand Code AWESOME

Customer Name Airline Ltd.

External Document No.

- **Contact.**
Specifies the name of the person to contact at the customer.

Contact Susan Metters

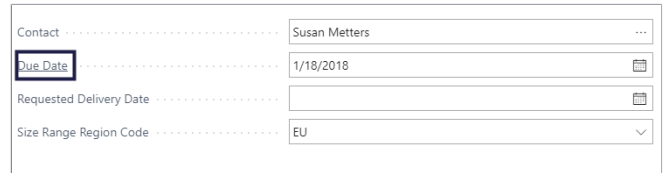
Due Date 1/18/2018

Requested Delivery Date

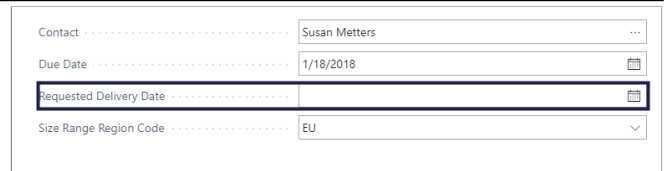
Size Range Region Code EU

K3 Pebblestone

- **Due Date.**
Specifies when the related sales invoice must be paid.

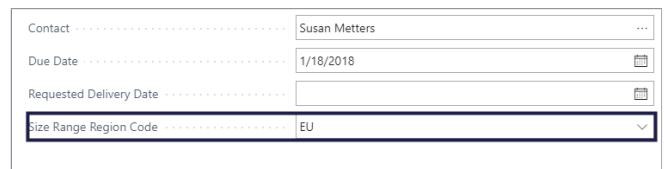


- **Requested Delivery Date.**
Specifies the date that the customer has asked for the order to be delivered.




3.1.3. Sales quote lines

- Move the mouse to **Size Range Region Code.**
Specifies the region code that is used to define mappings for size ranges



1. **Type.**
Specifies the type of transaction that will be posted with the document line. If you select Comment, then you can enter any text in the Description field, such as a message to a customer.
2. **Style No..**
Specifies the Style of the selected item. When you select a style number first the list of items to choose from will only show items which belong to this style.
3. **No..**
Specifies the number of a general ledger account, item, resource, additional cost, or fixed asset, depending on the contents of the Type field.
4. **Description.**
Specifies a description of the entry of the product to be sold. To add a non-transactional text line, fill in the Description field only.
5. **Location Code.**
Specifies the inventory location from which the items sold should be picked and where the inventory decrease is registered.
6. **Quantity.**
Specifies how many units are being sold.
7. **Unit of Measure Code.**
Specifies how each unit of the item or resource is measured, such as in pieces or hours. By default, the value in the Base Unit of Measure field on the item or resource card is inserted.
8. **Unit Price Excl. VAT.**
Specifies the price for one unit on the sales line.
9. **Unit Price Excl. VAT.**
Specifies the price for one unit on the sales line.
10. **Line Discount %.**



Type	Style No.	No.	Description	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. VAT	Unit Price	Line Discount %
Item	1	2013	print	AIN	1	3	10.40	10.40	

Specifies the discount percentage that is granted for the item on the line.

1. **Line Amount.**
Specifies the net amount, excluding any invoice discount amount, that must be paid for products on the line.
2. **Season Code.**
Specifies a code for the season that this quoted item belongs to.
3. **Delivery Drop Code.**
Specifies the code that defines the drop in which this item will be delivered, associated with the season.
4. **Department Code.**
Specifies the code for Shortcut Dimension 1, which is one of two global dimension codes that you set up in the General Ledger Setup window.
5. **Area Code.**
Specifies the code for Shortcut Dimension 2, which is one of two global dimension codes that you set up in the General Ledger Setup window.

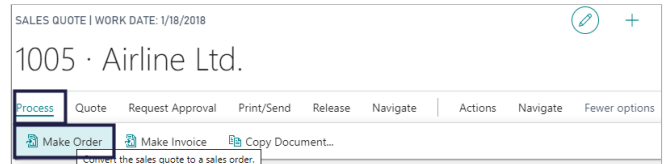
Line Amount	Season Code	Delivery Drop Code	Department Code	Area Code
104.00	1020SS	2	3	4

3.1.4. Make order from quote

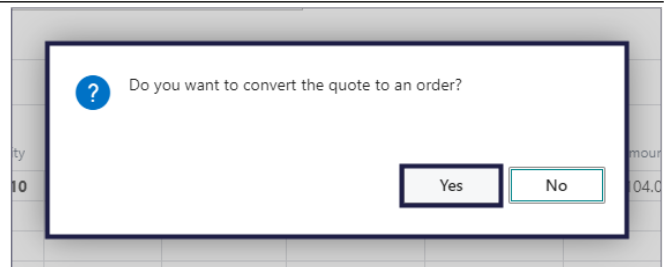
- Click on the navigation menu item popup **Release.**
- Click on the navigation menu item **Release.**



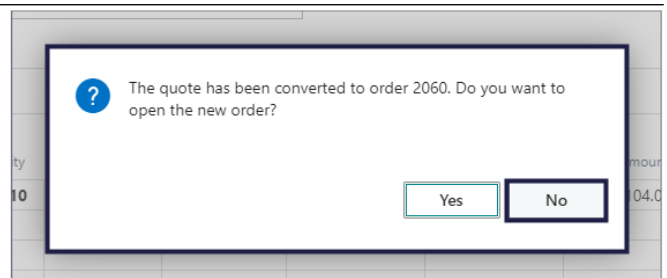
- Click on the navigation menu item popup **Process.**
- Click on the navigation menu item **Make Order.**



- Click on the button **Yes.**



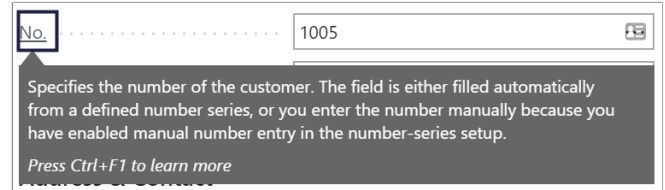
- Click on the button **No.**



3.2. Sales order creation

3.2.1. Tooltips

1. All over in the application you can check if there is a tooltip. Hover the pointer over an item, without clicking it, and a tooltip may appear.



3.2.2. Order Types

On the Order Type a season and or additional seasons can be attached.
Example:

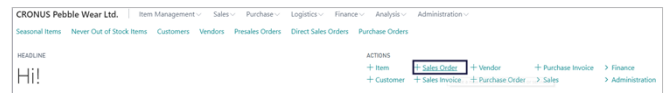
When choosing Order Type Presales the default season is filled on the Sales Order header.

1. **Code.**
2. **Description.**
3. **Type.**
4. **Default Season Code.**
5. **Additional Seasons.**

CODE	DESCRIPTION	TYPE	DEFAULT SEASON CODE	ADDITIONAL SEASONS
DIRECT	Direct	Direct	NOOS	(Define Filter...)
NOOS	Never Out of Stock	Direct	NOOS	(Define Filter...)
PRESALES	Presales	Presales	2020S	(Define Filter...)
LATE PRE	Late Presales	Late Presales		(Define Filter...)

3.2.3. Create a new Sales Order

1. Click on the navigation menu item **Sales Order**.



3.2.4. General

1. Move the mouse to the field **Order Type Code**.
2. Click on the lookup button **Order Type Code**.

General

Order Type Code 1

Season Code [dropdown]

Brand Code [dropdown]

Customer Name *

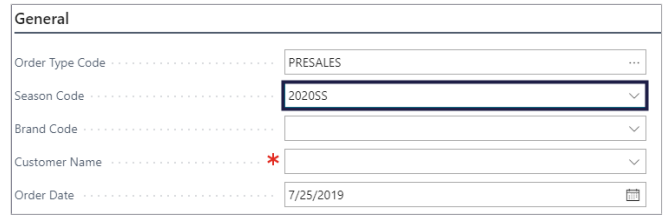
Order Date [calendar icon]

1. Choose a code for the order type that this sales order belongs to.

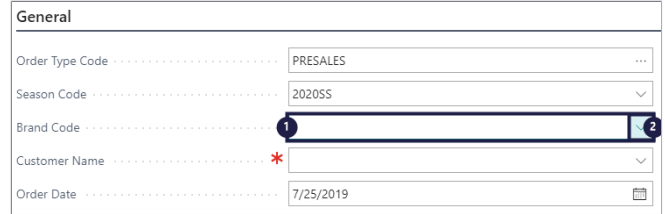
CODE	DESCRIPTION
DIRECT	Direct
NOOS	Never Out of Stock
PRESALES	Presales
LATE PRE	Late Presales

K3 Pebblestone

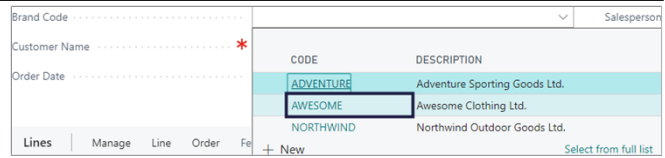
1. Move the mouse to the field **Season Code**. Specifies a code for the season that this sales order belongs to.



1. Move the mouse to the field **Brand Code**.
2. Click on the lookup button **Brand Code**.

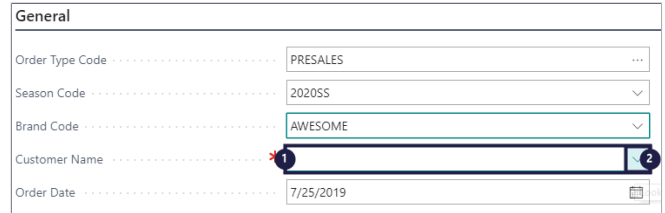


1. Choose a code for the brand that this sales order belongs to.

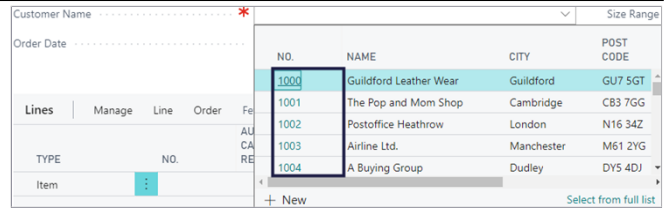


CODE	DESCRIPTION
ADVENTURE	Adventure Sporting Goods Ltd.
AWESOME	Awesome Clothing Ltd.
NORTHWIND	Northwind Outdoor Goods Ltd.

1. Move the mouse to the field **Customer Name**.
2. Click on the lookup button **Customer Name**.

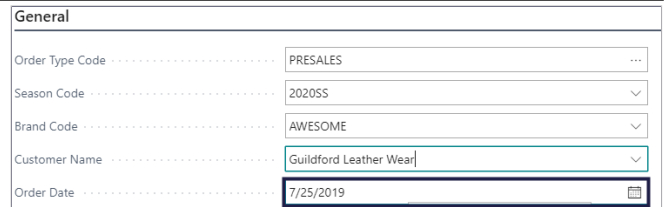


1. Choose the customer who will receive the products and be billed by default.



NO.	NAME	CITY	POST CODE
1000	Guildford Leather Wear	Guildford	GU7 5GT
1001	The Pop and Mom Shop	Cambridge	CB3 7GG
1002	Postoffice Heathrow	London	N16 3AZ
1003	Airline Ltd.	Manchester	M61 2YG
1004	A Buying Group	Dudley	DY5 4DJ

1. Move the mouse to the field **Order Date**. Specifies the date when the order was created.



1. **Requested Delivery Date.** Specifies the date that the customer has asked for the order to be delivered.
2. **External Document No..** Specifies a document number that refers to the customer's or vendor's numbering system.
3. **Salesperson Code.** Specifies the name of the salesperson who is assigned to the customer.
4. **Size Range Region Code.** Specifies the region code that is used to define mappings for size ranges.
5. **Status.** Specifies whether the document is open, waiting to be approved, has been invoiced for prepayment, or has been released to the next stage of processing.



3.2.5. Sales lines

Type

Click on the lookup button in the cell **Type**

Move the mouse to the cell **Option Values** with the value **Item**
Specifies the type of transaction that will be posted with the document line.

No.

Click on the lookup button in the cell **No.**

TYPE	NO.	AUTO CANCEL REMAINDER	DESCRIPTION
Item		<input type="checkbox"/>	

Click on the link in cell **No.** on any row
Specifies the number of a general ledger account, item, resource, additional cost, or fixed asset, depending on the contents of the Type field.

TYPE	NO.	AUTO CANCEL REMAINDER	DESCRIPTION
Item		<input type="checkbox"/>	

- 10001 T-shirt print
- 10002 T-shirt multicoloured
- 10010 Top uni
- 10013 Top print
- 10026 Skirt uni

Auto Cancel Remainder

Specifies if the remaining quantity will automatically be canceled when shipping less then the ordered quantity.

TYPE	NO.	AUTO CANCEL REMAINDER	DESCRIPTION
Item	10001	<input checked="" type="checkbox"/>	T-shirt print

Description

Specifies a description of the entry of the product to be sold. To add a non-transactional text line, fill in the Description field only.

NO.	AUTO CANCEL REMAINDER	DESCRIPTION	UNIT OF MEASURE CODE
10001	<input type="checkbox"/>	T-shirt print	PCS

K3 Pebblestone

Unit of Measure Code

Specifies the base unit used to measure the item, such as piece, box, or pallet.

AUTO CANCEL REMAINDER	DESCRIPTION	UNIT OF MEASURE CODE	LOCATION CODE	QUANTITY
<input type="checkbox"/>	T-shirt print	PCS	MAIN	
<input type="checkbox"/>				
<input type="checkbox"/>				

0.00 Total Incl. VAT (GBP) ...

0.00

Location Code

Specifies the inventory location from which the items sold should be picked and where the inventory decrease is registered.

DESCRIPTION	UNIT OF MEASURE CODE	LOCATION CODE	QUANTITY	UNIT PRICE
T-shirt print	PCS	MAIN		
		MAIN		

0.00 Total Incl. VAT (GBP) ...

0.00

Quantity

UNIT OF MEASURE CODE	LOCATION CODE	QUANTITY	UNIT PRICE	LINE DISCOUNT %
PCS	MAIN			

0.00 Total Incl. VAT (GBP) ...

0.00

Click on the lookup button in the cell **Quantity**
Fill in the quantities in the order matrix

UNIT OF MEASURE CODE	LOCATION CODE	QUANTITY	UNIT PRICE	LINE DISCOUNT %	LI AMOU
PCS	MAIN	<input type="button" value="..."/>			
		<input type="text" value="Look up value"/>			

0.00 Total Incl. VAT (GBP) ...

0.00

Quantity

Specifies how many units are being sold.

UNIT OF MEASURE CODE	LOCATION CODE	QUANTITY	UNIT PRICE	LINE DISCOUNT %
PCS	MAIN	12	8.58	
			8.58	
Total Incl. VAT (GBP)				

Unit Price

Specifies the price for one unit on the sales line.

UNIT OF MEASURE CODE	LOCATION CODE	QUANTITY	UNIT PRICE	LINE DISCOUNT %	LINE AMOUNT
PCS	MAIN	12	8.58		102.96
			8.58		
Total Incl. VAT (GBP)					

Line Discount %

Specifies the discount percentage that is granted for the item on the line.

LOCATION CODE	QUANTITY	UNIT PRICE	LINE DISCOUNT %	LINE AMOUNT	QTY. TO SHIP
MAIN	12	8.58		102.96	
Total Incl. VAT (GBP)					

Line Amount

Specifies the net amount, excluding any invoice discount amount, that must be paid for products on the line.

QUANTITY	UNIT PRICE	LINE DISCOUNT %	LINE AMOUNT	QTY. TO SHIP	QUANTITY SHIPPED
12	8.58		102.96		
			102.96		
VAT (GBP)					1

K3 Pebblestone

Qty. to Ship

Specifies the quantity of items that remain to be shipped.

UNIT PRICE	LINE DISCOUNT %	LINE AMOUNT	QTY. TO SHIP	QUANTITY SHIPPED
8.58		102.96		-
				10.73

Quantity Shipped

Specifies the quantity of items that remain to be shipped.

LINE DISCOUNT %	LINE AMOUNT	QTY. TO SHIP	QUANTITY SHIPPED	
	102.96		-	
				10.73

Outstanding Quantity

Specifies how many units of the item on the line have been unfulfilled.

LINE AMOUNT	QTY. TO SHIP	QUANTITY SHIPPED	OUTSTANDI... QUANTITY	QTY. TO INVOICE	QUANTITY INVOICED
102.96		-	12		-
				8.58	Total Incl. VAT (GBP)

Qty. to Invoice

Specifies the quantity that remains to be invoiced. It is calculated as Quantity minus Qty. Invoiced.

QTY. TO SHIP	QUANTITY SHIPPED	OUTSTANDI... QUANTITY	QTY. TO INVOICE	QUANTITY INVOICED	REQUES... DELIVERY DATE
	-	12		-	
				8.58	Total Incl. VAT (GBP)

K3 Pebblestone

Quantity Invoiced

Specifies how many units of the item on the line have been posted as invoiced.

QUANTITY SHIPPED	OUTSTANDI... QUANTITY	QTY. TO INVOICE	QUANTITY INVOICED	REQUES... DELIVERY DATE	SHIPMENT DATE	SE	CC
-	12		-		1/15/2020	20	
Open record "" in a new window							
8.58							Total Incl. VAT (GBP)

Requested Delivery Date

Specifies the date that the customer has asked for the order to be delivered.

UTSTANDI... QUANTITY	QTY. TO INVOICE	QUANTITY INVOICED	REQUES... DELIVERY DATE	SHIPMENT DATE	SEASON CODE	DELI... DROP	
12		-		/15/2020	2020SS	2	
Type the date in the format M/d/yyyy							
8.58							Total Incl. VAT (GBP)

Shipment Date

Specifies when items on the document are shipped or were shipped. A shipment date is usually calculated from a requested delivery date plus lead time.

QTY. TO INVOICE	QUANTITY INVOICED	REQUES... DELIVERY DATE	SHIPMENT DATE	SEASON CODE	DELIVERY DROP CODE	DEI... COI
	-		1/15/2020	2020SS	2	
Type the date in the format M/d/yyyy						
Total Incl. VAT (GBP)						

Season Code

Specifies a code for the season that this ordered item belongs to.

QUANTITY INVOICED	REQUES... DELIVERY DATE	SHIPMENT DATE	SEASON CODE	DELIVERY DROP CODE	DEPARTME... CODE	A
-		1/15/2020	2020SS			
2020SS						
. VAT (GBP)						

Delivery Drop Code

Specifies the code that defines the drop in which this item will be delivered, associated with the season.

REQUESTED DATE	SHIPMENT DATE	SEASON CODE	DELIVERY DROP CODE	DEPARTMENT CODE	AREA CODE
	1/15/2020	2020SS	2		

3.2.6. Invoice details

- Currency Code.**
Specifies the currency of amounts on the sales document.
- VAT Bus. Posting Group.**
Specifies the VAT specification of the involved customer or vendor to link transactions made for this record with the appropriate general ledger account according to the VAT posting setup.
- Payment Terms Code.**
Specifies a formula that calculates the payment due date, payment discount date, and payment discount amount.

- Department Code.**
Specifies the code for Shortcut Dimension 1, which is one of two global dimension codes that you set up in the General Ledger Setup window.
- Area Code.**
Specifies the code for Shortcut Dimension 2, which is one of two global dimension codes that you set up in the General Ledger Setup window.

3.2.7. Shipping and Billing

3.2.7.1. Shipping

- Ship-to.**
Specifies the address that the products on the sales document are shipped to. Default (Sell-to Address): The same as the customer's sell-to address.
Alternate Ship-to Address: One of the customer's alternate ship-to addresses.
Custom Address: Any ship-to address that you specify in the fields below.
- Contact.**
Specifies the name of the contact person at the address that products on the sales document will be shipped to.

K3 Pebblestone

3.2.7.2. Shipment method

- Code.**
Specifies how items on the sales document are shipped to the customer.
- Agent.**
Specifies which shipping agent is used to transport the items on the sales document to the customer.

SHIPMENT METHOD	
Code	EXW 1
Agent	FEDEX 2

3.2.7.3. Billing

- Bill-to.**
Specifies the customer that the sales invoice will be sent to. Default (Customer): The same as the customer on the sales invoice. Another Customer: Any customer that you specify in the fields below.
- Location Code.**
Specifies the location from where inventory items to the customer on the sales document are to be shipped by default.
- Shipment Date.**
Specifies when items on the document are shipped or were shipped. A shipment date is usually calculated from a requested delivery date plus lead time.

Bill-to	Default (Customer) 1
Location Code	MAIN 2
Shipment Date	7/29/2019 3

3.3. Use Prepack in Sales Order

3.3.1. Use Prepack in Sales Order

- Move the mouse to the column header **Main Item No..**
- Enter the Main Item number.
- Click on the link in cell **No.** with the value **10023**.

- Move the mouse to the lookup button in the cell **No..**
- Click on the cell **Description** on any row.

Click on the link in cell **Quantity**

Item Description	Location Code	Quantity	Auto Can... Re...	Qty. to Assemble to Order	Unit Me...
Short uni	MAIN	*	<input type="checkbox"/>		PCS

0.00 ... Total Excl. VAT (GBP) ...

1. Click on the cell **Prepack Qty.** - Enter **Prepack Qty.**
2. Click on the button **Close.**

1. **Quantity.**
Specifies how many units are being sold.
2. Move the mouse to the column header **Prepack Qty.**
Specifies the quantity within a prepack

3.4. Use Ratio Curves in Sales Order

3.4.1. Ratio Curves in Sales order

Open Matrix to fill in **Quantity**

Description	Location Code	Quantity	Auto Can... Re...	Unit of Measure Code
Poloshirt longsleeve striped	MAIN	*	<input checked="" type="checkbox"/>	PCS

Drill down to record

K3 Pebblestone

Click on the lookup button in the cell **Ratio Curve Code**

Code	Ratio Curve Code	Ratio Curve Quan...	Total	XXS	XS	S
NAVY	[Lookup Button]					
Total						

Choose a Ratio Curve.

Code	Description
RC	RC

Add the quantity for the **Ratio Curve Quantity**, press Tab.
The quantities will be filled based on the Ratio Curve.

Code	Ratio Curve Code	Ratio Curve Quan...	Total	XXS	XS	S
NAVY	RC	[Quantity]				
Total						

1. Click on the button **Close**.

3.5. Sales return order creation

3.5.1. Navigate to sales return order

1. **Sales.**
2. **Return Orders.**

3.5.2. Create a sales return order

Create a new entry..

3.5.3. General

1. **Customer No..**
Specifies the number of the customer associated with the sales return.
2. **Customer Name** The value for this field is required..
Specifies the name of the customer.
3. **Order Date.**
Specifies the date when the order was created.
4. **External Document No..**
Specifies a document number that refers to the customer's or vendor's numbering system.
5. **Status Open.**
Specifies whether the document is open, waiting to be approved, has been invoiced for prepayment, or has been released to the next stage of processing.



The screenshot shows the 'Sales Return Order' form with the 'General' tab selected. The form includes fields for Customer No., Customer Name, Order Date, External Document No., and Status. The Status field is set to 'Open'.

3.5.4. Sales lines

1. **Type.**
Specifies the type of transaction that will be posted with the document line. If you select Comment, then you can enter any text in the Description field, such as a message to a customer.
2. **No..**
Specifies the number of a general ledger account, item, resource, additional cost, or fixed asset, depending on the contents of the Type field.
3. **Description.**
Specifies a description of the entry of the product to be sold. To add a non-transactional text line, fill in the Description field only.
4. **Return Reason Code.**
Specifies the code explaining why the item was returned.
5. **Location Code.**
Specifies the location from where inventory items to the customer on the sales document are to be shipped by default.
6. **Quantity.**
Specifies how many units are being returned.
7. **Unit of Measure Code.**
Specifies how each unit of the item or resource is measured, such as in pieces or hours. By default, the value in the Base Unit of Measure field on the item or resource card is inserted.
8. **Unit Price.**
Specifies the price for one unit on the sales line.
9. **Line Discount %.**
Specifies the discount percentage that is granted for the item on the line.
10. **Line Amount.**



The screenshot shows the 'Lines' table header with the following columns: Type, No., Description, Return Reason Code, Location Code, Quantity, Unit of Measure Code, Unit Price, Line Discount %, Line Amount, and Return Qty to Receive.

K3 Pebblestone

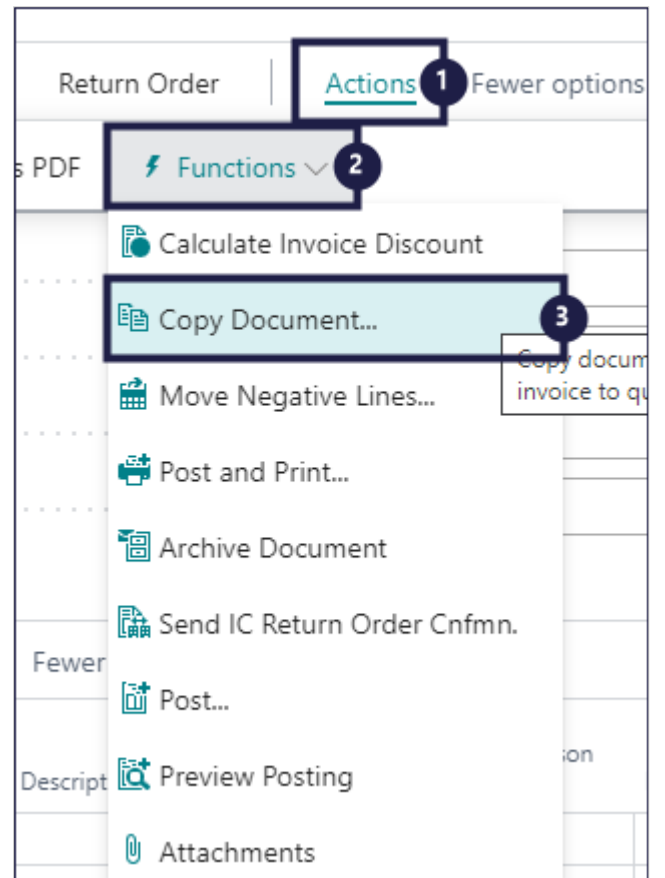
11. Specifies the net amount, excluding any invoice discount amount, that must be paid for products on the line.
Return Qty. to Receive.
 Specifies the quantity of items that remain to be shipped.

1. **Return Qty. Received.**
Specifies how many units of the item on the line have been posted as shipped.
2. **Outstanding Quantity.**
Specifies how many units of the item on the line have been unfulfilled.
3. **Qty. to Invoice.**
Specifies the quantity that remains to be invoiced. It is calculated as Quantity - Qty. Invoiced.
4. **Quantity Invoiced.**
Specifies how many units of the item on the line have been posted as invoiced.

Return Qty. Received	Outstanding Quantity	Qty. to Invoice	Quantity Invoiced
1	2	3	4
Open record ""			

3.5.4.1. Copy document

1. **Actions.**
2. **Functions.**
3. **Copy document lines and header information from another sales document to this document. You can copy a posted sales invoice into a new sales invoice to quickly create a similar document..**



1. **Document Type.**
Specifies the type of document that is processed by the report or batch job.
2. Click on an option from the list.

COPY SALES DOCUMENT

Options

Document Type Quote

Document No. *

Doc. No. Occurrence

Version No.

Sell-to Customer No.

Sell-to Customer Name

Include Header

Recalculate Lines

Quote

Blanket Order

Order

Invoice

Return Order

Credit Memo

Posted Shipment

Posted Invoice

Posted Return Receipt

Posted Credit Memo

Arch. Quote

Arch. Order

Arch. Blanket Order

Arch. Return Order

- Document No.**
Specifies the number of the document that is processed by the report or batch job.

MENT

Posted Invoice

*

Look up value

1. Click on an option from the list.
2. Click on the button **OK**.

No.	Customer No.	Customer Name	Currency Code	Due Date	Amount	Amount including VAT
103003	1020	Het Nieuwe Mode bedrijf		30/06/2020	139.00	139.00
103002	1020	Het Nieuwe Mode bedrijf		30/06/2020	81.00	81.00
→ 103001	: 1017	Orangerie		30/06/2020	97.20	97.20

OK Cancel

1. **Doc. No. Occurrence (Blank).**
Specifies the number of times the No. value has been used in the number series.
2. **Version No. (Blank).**
Specifies the version of the document to be copied.
3. **Sell-to Customer No. 1017.**
Specifies the sell-to customer number that will appear on the new sales document.
4. **Sell-to Customer Name Orangerie.**
Specifies the sell-to customer name that will appear on the new sales document.
5. **Include Header.**
Specifies if you also want to copy the information from the document header. When you copy quotes, if the posting date field of the new document is empty, the work date is used as the posting date of the new document.
6. **Recalculate Lines.**
Specifies that lines are recalculate and inserted on the sales document you are creating. The batch job retains the item numbers and item quantities but recalculates the amounts on the lines based on the customer information on the new document header. In this way, the batch job accounts for item prices and discounts that are specifically linked to the customer on the new header.
7. Click on the button **OK**.

3.5.5. Return reason code

1. **Return Reason Code.**
2. Click on the lookup button in the cell **Return Reason Code**.
3. Move the mouse to the cell **Code** on any row.

3.5.6. Invoicing details

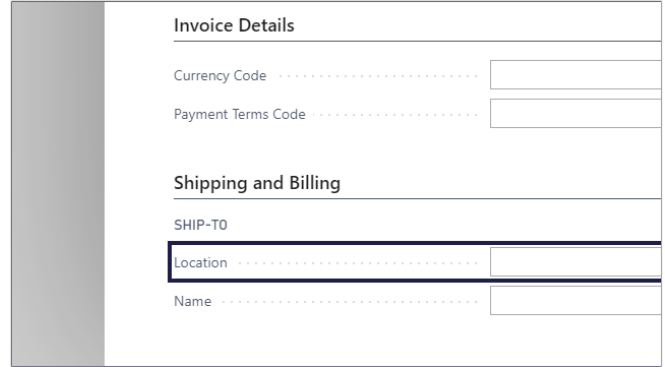
1. **Currency Code.**
Specifies the currency that is used on the entry.
2. **Payment Terms Code.**
Specifies a formula that calculates the payment due date, payment discount date, and payment discount amount.
3. **Shipment Date.**
Specifies when items on the document are shipped or were shipped. A shipment date is usually calculated from a requested delivery date plus lead time.

3.5.7. Shipping and billing

3.5.7.1. Ship-to

Location

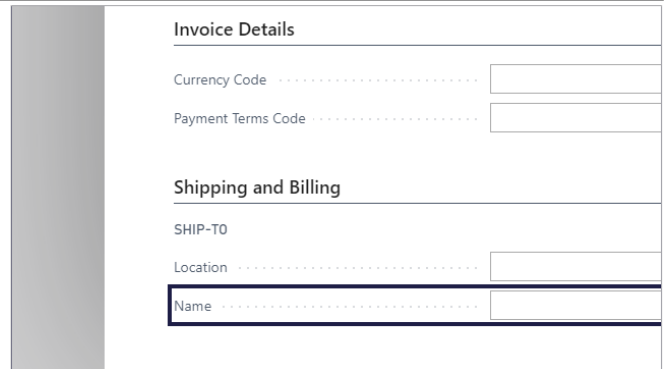
Specifies the location from where inventory items to the customer on the sales document are to be shipped by default.



The screenshot shows a form with two main sections: 'Invoice Details' and 'Shipping and Billing'. Under 'Shipping and Billing', there is a 'SHIP-TO' section with 'Location' and 'Name' fields. The 'Location' field is highlighted with a red box.

Name

Specifies the name that products on the sales document will be shipped to.

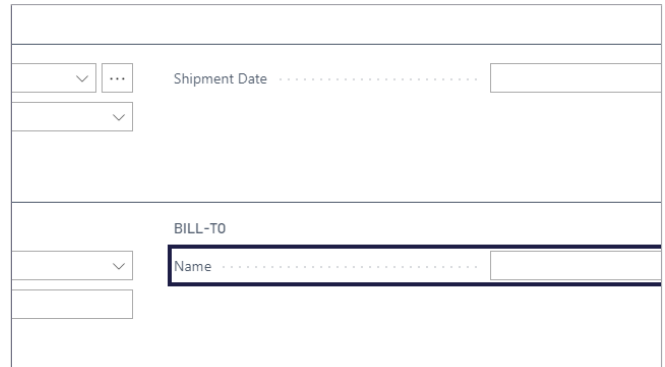


The screenshot shows the same form as above, but the 'Name' field in the 'SHIP-TO' section is highlighted with a red box.

3.5.7.2. Bill-to

Name

Specifies the customer to whom you will send the sales invoice, when different from the customer that you are selling to.

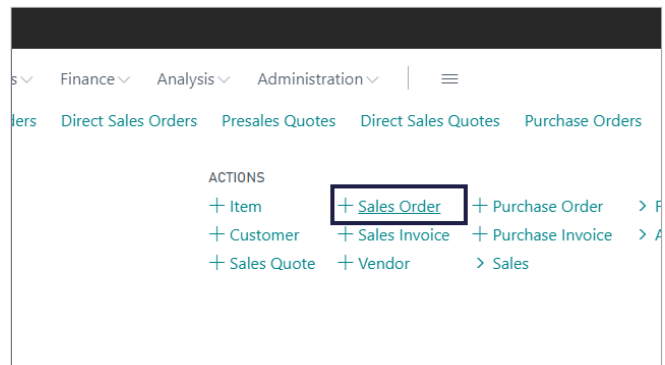


The screenshot shows a form with a 'SHIPMENT DATE' field and a 'BILL-TO' section. The 'BILL-TO' section has a 'Name' field highlighted with a red box.

3.6. Consignment order

3.6.1. Consignment order

Click on the navigation menu item **Sales Order**



The screenshot shows a navigation menu with categories like Finance, Analysis, and Administration. Under 'ACTIONS', the '+ Sales Order' item is highlighted with a red box.

K3 Pebblestone

Consignment

Indicates if the order is a consignment order. Consignment orders offer additional functionality for consignment scenario's.

Sales Order

Process Release Posting Prepare Order Print/Send Navigate More

General

Consignment

Order Type Code *

Season Code

Brand Code

Customer Name *

1. Click on the lookup button **Order Type Code**.

General

Consignment

Order Type Code *

Season Code

Brand Code

Customer Name *

Order Date

Click on the link in cell **Code** on any row

Search + New Edit List Delete Change Behavior Settings Open in

ORDER TYPES

Code	Description	Type ↑	Default Season Code
DIRECT	Direct	Direct	2020FW
NOOS	Never Out of Stock	Direct	NOOS
PRESALES	Presales	Presales	2021SS
LATE PRE	Late Presales	Late Presales	2021SS

1. Click on the lookup button **Customer Name**.

General

Consignment

Order Type Code PRESALES

Season Code 2021SS

Brand Code

Customer Name *

Order Date 6/2/2020

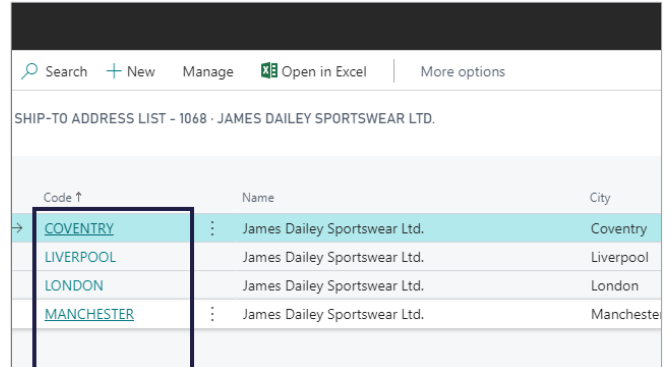
Click on the link in cell **No.** on any row
If a customer has multiple ship to addresses, a pop-up appears.

Search + New Manage Advanced View Open in Excel

CUSTOMERS

No. ↑	Name	Responsibility Center	Location Code	Post Code
1044	New Concepts Fashion		EAST	US-GA 3177
1045	Omni Consumer Products		EAST	US-IL 61236
1046	Metatorad Malaysia Sdn Bhd		EAST	MY-47400
1047	Gadgetron Accessories		EAST	MY-57000
1048	TraxTonic Sdn Bhd		EAST	MY-93450
1049	Somadis		EAST	MO-10100

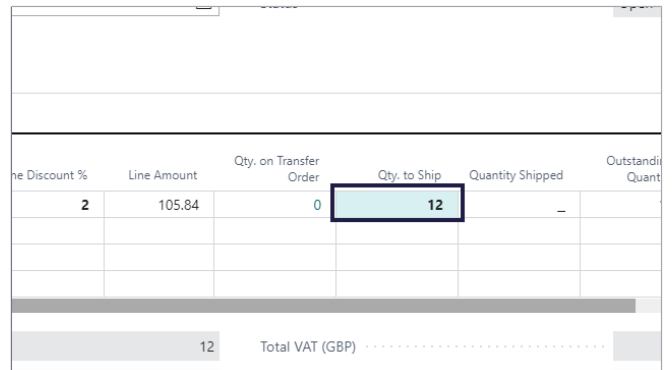
Click on the link in cell **Code** on any row



Code ↑	Name	City
COVENTRY	James Dailey Sportswear Ltd.	Coventry
LIVERPOOL	James Dailey Sportswear Ltd.	Liverpool
LONDON	James Dailey Sportswear Ltd.	London
MANCHESTER	James Dailey Sportswear Ltd.	Manchester

3.6.1.1. Manually quantity for Transfer order

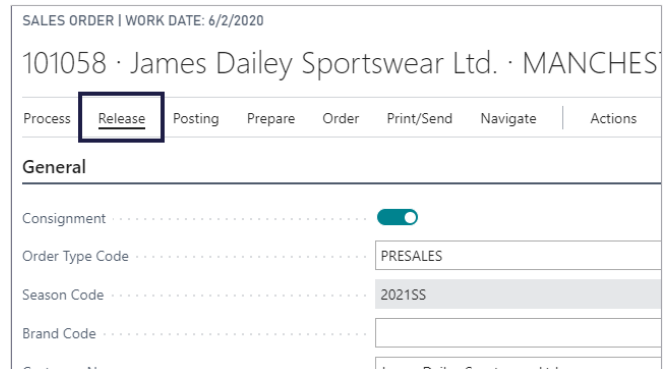
Qty. to Ship, needs to be filled manually, before creating the transfer order.



Line Amount	Qty. on Transfer Order	Qty. to Ship	Quantity Shipped
105.84	0	12	-
12		Total VAT (GBP)	

3.6.1.2. Create consignment transfer order

Click on the navigation menu item popup **Release**



SALES ORDER | WORK DATE: 6/2/2020

101058 · James Dailey Sportswear Ltd. · MANCHES

Process **Release** Posting Prepare Order Print/Send Navigate Actions

General

Consignment

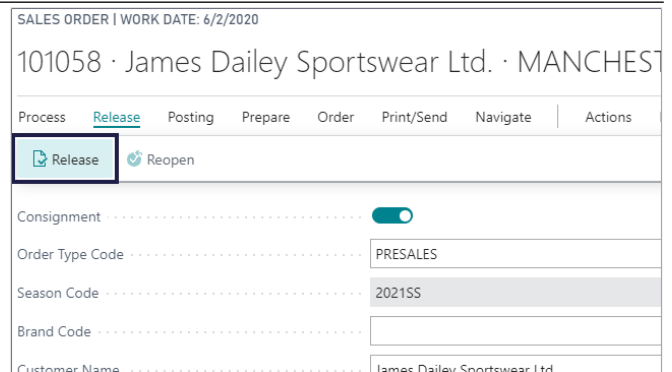
Order Type Code PRESALES

Season Code 2021SS

Brand Code

Customer Name James Dailey Sportswear Ltd.

Click on the link **Release the document to the next stage of processing. When a document is released, it will be included in all availability calculations from the expected receipt date of the items. You must reopen the document before you can make changes to it. (Ctrl+F9)**



SALES ORDER | WORK DATE: 6/2/2020

101058 · James Dailey Sportswear Ltd. · MANCHES

Process **Release** Posting Prepare Order Print/Send Navigate Actions

Release **Reopen**

Consignment

Order Type Code PRESALES

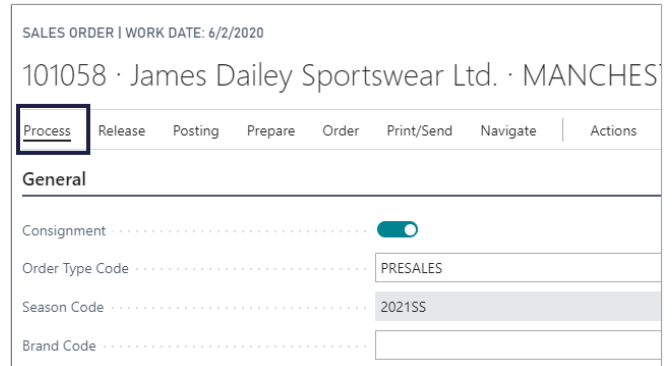
Season Code 2021SS

Brand Code

Customer Name James Dailey Sportswear Ltd.

K3 Pebblestone

Click on the navigation menu item popup **Process**



SALES ORDER | WORK DATE: 6/2/2020
101058 · James Dailey Sportswear Ltd. · MANCHES

Process | Release | Posting | Prepare | Order | Print/Send | Navigate | Actions

General

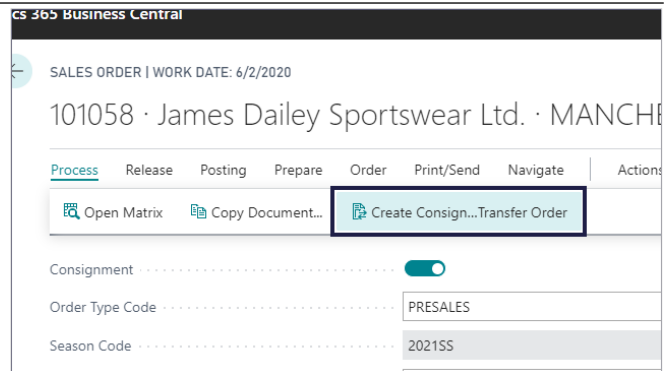
Consignment

Order Type Code PRESALES

Season Code 2021SS

Brand Code

Click on the link **Create Consignment Transfer Order. Create a Transfer Order for the Consignment Sales Order.**



CS 365 Business Central

SALES ORDER | WORK DATE: 6/2/2020
101058 · James Dailey Sportswear Ltd. · MANCHE

Process | Release | Posting | Prepare | Order | Print/Send | Navigate | Actions

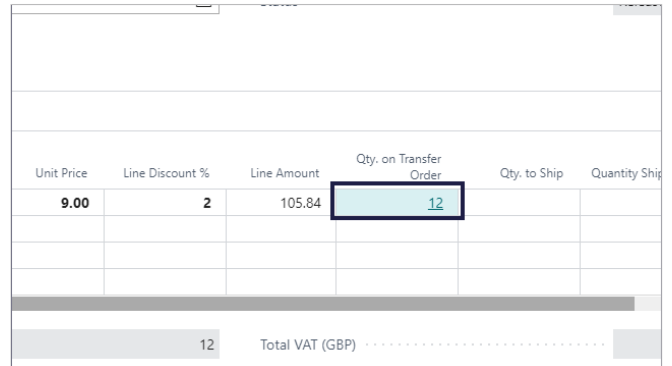
Open Matrix | Copy Document... | **Create Consign...Transfer Order**

Consignment

Order Type Code PRESALES

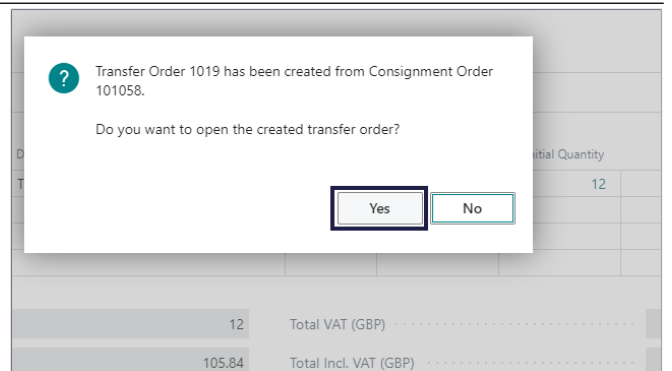
Season Code 2021SS

Qty. on Transfer Order
Specifies the quantity of items on transfer orders that remain to be shipped.



Unit Price	Line Discount %	Line Amount	Qty. on Transfer Order	Qty. to Ship	Quantity Ship
9.00	2	105.84	12		
			12	Total VAT (GBP)	

Click on the button **Yes**



Transfer Order 1019 has been created from Consignment Order 101058.

Do you want to open the created transfer order?

Yes | No

12 Total VAT (GBP)

105.84 Total Incl. VAT (GBP)

3.6.2. Transfer order

Transfer-from Code

Specifies the code of the location that items are transferred from.

TRANSFER ORDER | WORK DATE: 6/2/2020

1019

Report Release Posting Order Print/Send Navigate More options

General

Transfer-from Code MAIN

Transfer-to Code 1068-MAN

Direct Transfer

Transfer-to Code

Specifies the code of the location that the items are transferred to.

TRANSFER ORDER | WORK DATE: 6/2/2020

1019

Report Release Posting Order Print/Send Navigate More options

General

Transfer-from Code MAIN

Transfer-to Code 1068-MAN

Direct Transfer

Direct Transfer

Specifies that the transfer does not use an in-transit location. When you transfer directly, the Qty. to Receive field will be locked with the same value as the quantity to ship.

TRANSFER ORDER | WORK DATE: 6/2/2020

1019

Report Release Posting Order Print/Send Navigate More options

General


Transfer-from Code MAIN

Transfer-to Code 1068-MAN

Direct Transfer

In-Transit Code

Specifies the in-transit code for the transfer order, such as a shipping agent.

+ 

In-Transit Code OWN LOG.

Posting Date 6/2/2020

Status Released

K3 Pebblestone

Posting Date

Specifies the posting date of the transfer order.

The screenshot shows a form with several fields. The 'Posting Date' field is highlighted with a red box. A tooltip appears over the field, containing the text: 'Posting Date', 'Specifies the posting date of the transfer order.', and 'Learn more'. Other visible fields include 'In-Transit Code'.

Status

Specifies whether the transfer order is open or has been released for warehouse handling.

The screenshot shows a form with several fields. The 'Status' field is highlighted with a red box. A tooltip appears over the field, containing the text: 'Status', 'Released', and 'Learn more'. Other visible fields include 'In-Transit Code' (OWN LOG) and 'Posting Date' (6/2/2020).

Delivery Priority Code

Specifies the code that defines the Delivery Priority of this location. The delivery priority is used as a sorting sequence when allocating available stock to transfer orders.

The screenshot shows a form with several fields. The 'Delivery Priority Code' field is highlighted with a red box. A tooltip appears over the field, containing the text: 'Delivery Priority Code', 'PRIO 3', and 'Learn more'. Other visible fields include 'Shipment Date' (6/2/2020), 'Outbound Whse. Handling Time', and 'Shipment Method Code'. There is also a 'Transfer-from >' section.

3.6.3. Transfer order in the Delivery worksheet

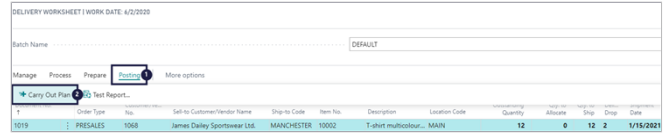
1. **Order Type.**
Specifies a code for the order type that this order belongs to.
2. **Ship-to Code.**
Specifies the Ship-to Code for the order line.
3. **Bill-to Customer/Vendor No..**
Specifies the number of the customer (sales order) or vendor (purchase return order) that you send the invoice to.
4. **Ship-to Name.**
Specifies the name of the customer (sales order) or vendor (purchase return order) that you deliver the items to.

The screenshot shows a 'DELIVERY WORKSHEET' interface. It features a table with columns: Document No., Order Line, Ship To, Bill To, Order Name, Ship To Code, Item No., Description, Location Code, Outstanding Quantity, Order Date, Ship Date, and Shipment Date. The first row shows document number 1019, order line 1000, and item 'T-shirt multicolor - M/M'. To the right of the table is a 'Item Picture' showing a pink t-shirt. Below the table is a 'Sales Details' section.

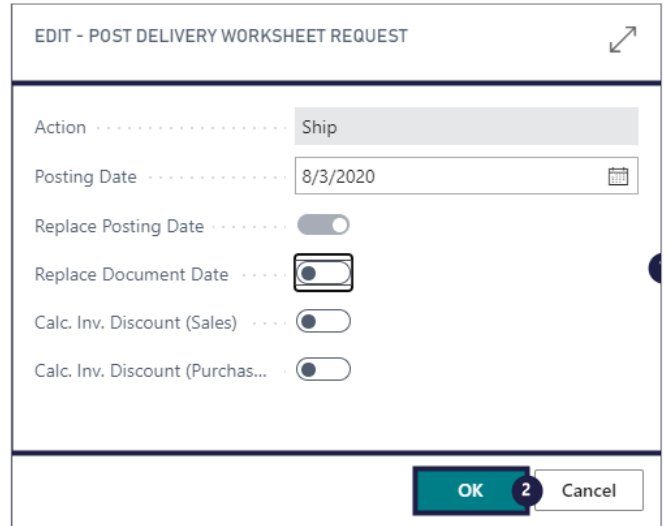
3.6.3.1. Create Inventory pick for Transfer order in Delivery

worksheet.

1. **Posting.**
2. **Carry Out Plan.**

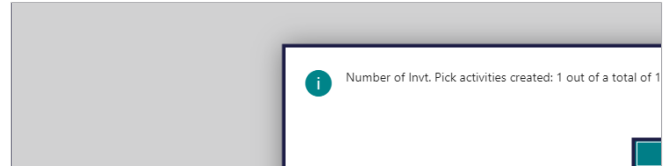


1. Fill in or enable the necessary fields - Enter **Date.**
2. Click on the button **OK.**



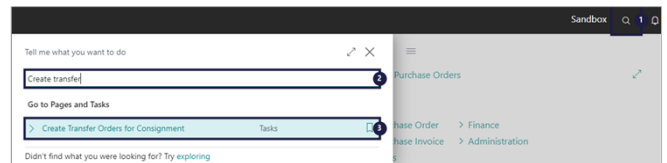
Inventory pick is created.

1. Click on the button **OK.**



3.7. Create transfer order for consignment

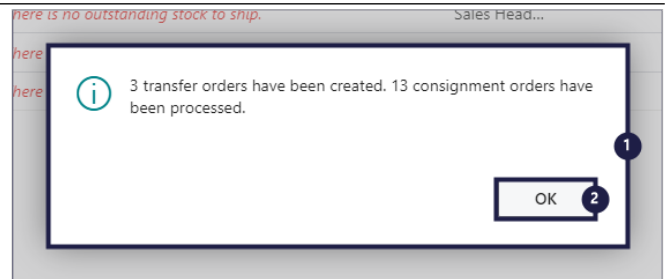
1. Click on the link **Tell me what you want to do. Quickly access actions, pages, reports, documentation, and apps and consulting services..**
2. Move the mouse to the field **Type to start search:** - Enter **Create transfer.**
3. Click on **Create Transfer Orders for Consignment Tasks** □.



K3 Pebblestone

1. Set the filters for which you want to create transfer orders.
2. Click on the button **OK**.

1. Click on the button **OK**.



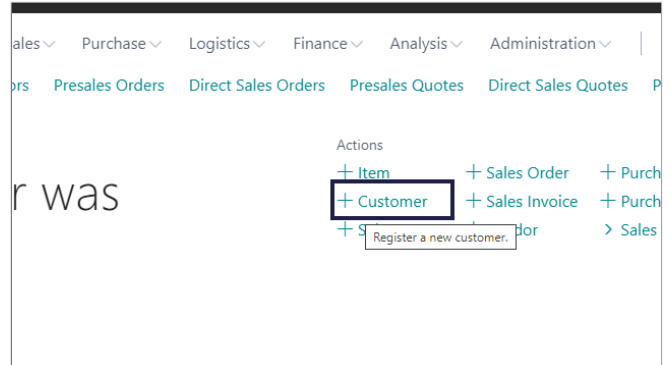
1. **Message Type.**
Specifies if the message is an error, a warning, or information.
2. **Description.**
Specifies the message.
3. **Context.**
Specifies the context record.
4. **Context Field Name.**
Specifies the field where the error occurred.
5. **Source.**
Specifies the record source of the error.
6. **Source Field Name.**
Specifies the field where the error occurred.
7. **Additional Information.**
Specifies more information than the information shown in the Description field.
8. **Support Uri.**
Specifies the URL of an external web site that offers additional support.

Message	Description	Context	Context Field Name	Source	Source Field Name	Additional Information	Support Uri
Error	There is no outstanding stock to ship.	Sales Header: Order 101031	Sales Header: Order 101031	Consignment			
Error	There is no outstanding stock to ship.	Sales Header: Order 101025	Sales Header: Order 101025	Consignment			
Error	There is no outstanding stock to ship.	Sales Header: Order 101044	Sales Header: Order 101044	Consignment			
Error	There is no outstanding stock to ship.	Sales Header: Order 101055	Sales Header: Order 101055	Consignment			
Error	There is no outstanding stock to ship.	Sales Header: Order 101087	Sales Header: Order 101087	Consignment			
Error	There is no outstanding stock to ship.	Sales Header: Order 101058	Sales Header: Order 101058	Consignment			
Error	There is no outstanding stock to ship.	Sales Header: Order 101091	Sales Header: Order 101091	Consignment			
Error	There is no outstanding stock to ship.	Sales Header: Order 101110	Sales Header: Order 101110	Consignment			
Error	There is no outstanding stock to ship.	Sales Header: Order 101112	Sales Header: Order 101112	Consignment			

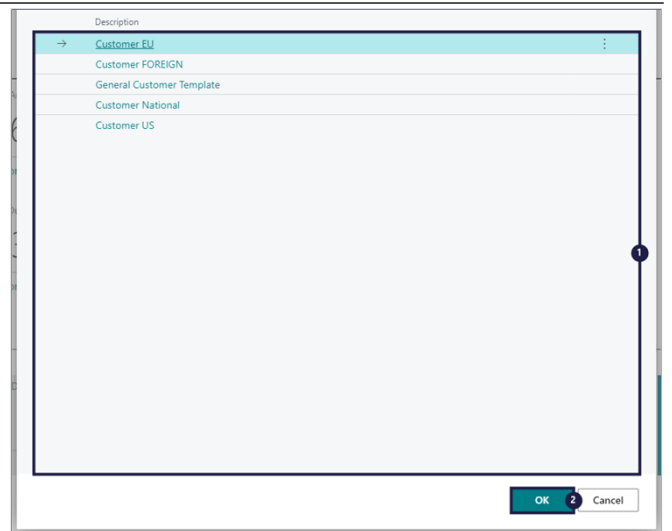
3.8. Customer creation

3.8.1. Create a new customer

Click on the link **Register a new customer**.



1. Choose which template you want to use for creating a new Customer.
2. Click on the button **OK**.



3.8.2. General

General

1. **No..**
Specifies the number of the customer. The field is either filled automatically from a defined number serie, or you enter the number manually.
2. **Name .**
Fill in the Customers name.
3. **Balance (LCY).**
Specifies the payment amount that the customer owes for completed sales. This value is also known as the customer's balance.
4. **Balance Due (LCY).**
Specifies payments from the customer that are overdue per today's date.
5. **Credit Limit.**
Specifies the maximum amount you allow the customer to exceed the payment balance before warnings are issued.
6. **Blocked.**
Specifies which transactions with the

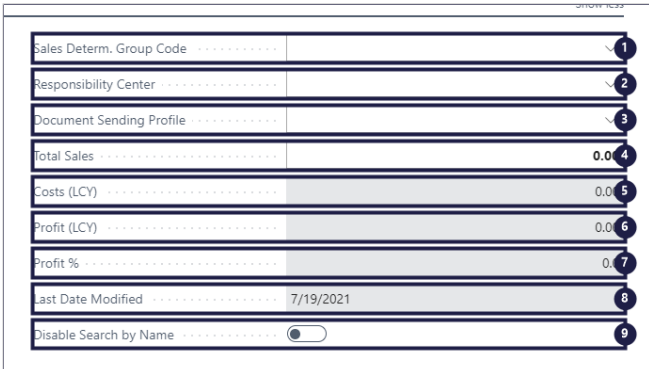


K3 Pebblestone

- customer that cannot be processed, for example, because the customer is insolvent.
- 7. **Privacy Blocked.**
Specifies whether to limit access to data for the data subject during daily operations. This is useful, for example, when protecting data from changes while it is under privacy review.
- 8. **Salesperson Code.**
Specifies a code for the salesperson who normally handles this customer's account.
- 9. **Sales Manager Code.**
Specifies a code for the sales manager who normally handles this customer's account.

General

- 1. **Sales Determination Group Code.**
Specifies to which sales determination group the customer belongs.
- 2. **Responsibility Center.**
Specifies the code for the responsibility center that will administer this customer by default.
- 3. **Document Sending Profile.**
Specifies the preferred method of sending documents to this customer, so that you do not have to select a sending option every time that you post and send a document to the customer. Sales documents to this customer will be sent using the specified sending profile and will override the default document sending profile.
- 4. **Total Sales.**
Specifies your total sales turnover with the customer in the current fiscal year. It is calculated from amounts excluding VAT on all completed and open invoices and credit memos.
- 5. **Costs (LCY) .**
Specifies how much cost you have incurred from the customer in the current fiscal year.
- 6. **Profit (LCY) .**
Specifies how much profit you have made from the customer in the current fiscal year.
- 7. **Profit % .**
Specifies how much profit you have made from the customer in the current fiscal year, expressed as a percentage of the customer's total sales.
- 8. **Last Date Modified.**
Specifies when the customer card was last modified.
- 9. **Disable Search by Name.**
Specifies that you can change customer name in the document, because the name is not used in search.



The screenshot shows a customer card form with the following fields and values:

Sales Determ. Group Code		1
Responsibility Center		2
Document Sending Profile		3
Total Sales	0.0	4
Costs (LCY)	0.0	5
Profit (LCY)	0.0	6
Profit %	0.	7
Last Date Modified	7/19/2021	8
Disable Search by Name	<input type="checkbox"/>	9

3.8.3. Address & Contact

Address

1. **Address.**
Specifies the customer's address. This address will appear on all sales documents for the customer.
2. **Address 2.**
Specifies additional address information.
3. **Country/Region Code.**
Specifies the country/region of the address.
4. **City.**
Specifies the customer's city.
5. **Post Code.**
Specifies the postal code.
6. **Phone No..**
Specifies the customer's telephone number.

Contact

1. **Mobile Phone No..**
Specifies the customer's mobile telephone number.
2. **Email.**
Specifies the customer's email address.
3. **Fax No..**
Specifies the customer's fax number.
4. **Home Page.**
Specifies the customer's home page address.
5. **Language Code.**
Specifies the language to be used on printouts for this customer.
6. **Contact Code.**
Specifies the contact number for the customer.
7. **Contact Name.**
Specifies the name of the person you regularly contact when you do business with this customer.

3.8.4. Invoicing

Invoicing

1. **Bill-to Customer.**
Specifies a different customer who will be invoiced for products that you sell to the customer in the Name field on the customer card.
2. **VAT Registration No..**
Specifies the customer's VAT registration number for customers in EU countries/regions.
3. **GLN.**
Specifies the customer in connection with electronic document sending.
4. **Use GLN in Electronic Documents.**
Specifies whether the GLN is used in electronic documents as a party identification number.

K3 Pebblestone

5. **Copy Sell-to Addr. to Qte From Company.**
Specifies which customer address is inserted on sales quotes that you create for the customer.

Posting details

1. **Gen. Bus. Posting Group EU.**
Specifies the customer's trade type to link transactions made for this customer with the appropriate general ledger account according to the general posting setup.
2. **VAT Bus. Posting Group EU.**
Specifies the customer's VAT specification to link transactions made for this customer to.
3. **Customer Posting Group EU.**
Specifies the customer's market type to link business transactions to.

Prices and Discounts

1. **Currency Code.**
Specifies the default currency for the customer.
2. **Customer Price Group EU.**
Specifies the customer price group code, which you can use to set up special sales prices in the Sales Prices window.
3. **Customer Disc. Group.**
Specifies the customer discount group code, which you can use as a criterion to set up special discounts in the Sales Line Discounts window.
4. **Allow Line Disc..**
Specifies if a sales line discount is calculated when a special sales price is offered according to setup in the Sales Prices window.
5. **Invoice Disc. Code C00010.**
Specifies a code for the invoice discount terms that you have defined for the customer.
6. **Prices Including VAT.**
Specifies if the Unit Price and Line Amount fields on document lines should be shown with or without VAT.

3.8.5. Payments

Payments

1. **Application Method Manual.**
Specifies how to apply payments to entries for this customer.
2. **Partner Type.**
Specifies for direct debit collections if the customer that the payment is collected from is a person or a company.
3. **Payment Terms Code.**
Specifies a code that indicates the payment terms that you require of the customer.
4. **Payment Method Code.**

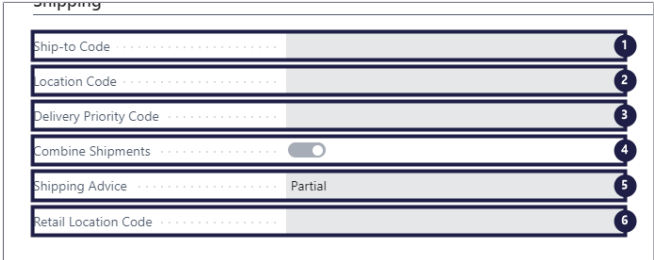
K3 Pebblestone

- 5. Specifies how the customer usually submits payment, such as bank transfer or check.
Reminder Terms Code.
 - 6. Specifies how reminders about late payments are handled for this customer.
Fin. Charge Terms Code.
 - 7. Specifies finance charges are calculated for the customer.
Cash Flow Payment Terms Code.
 - 8. Specifies a payment term that will be used to calculate cash flow for the customer.
Print Statements.
 - 9. Specifies whether to include this customer when you print the Statement report.
Last Statement No..
 - 10. Specifies the number of the last statement that was printed for this customer.
Block Payment Tolerance.
 - 11. Specifies that the customer is not allowed a payment tolerance.
Preferred Bank Account Code.
 - 12. Specifies the customer's bank account that will be used by default when you process refunds to the customer and direct debit collections.
Special Payment Conditions
- Specifies special payment conditions for customers.

3.8.6. Shipping

Shipping

- 1. **Ship-to Code.**
Specifies the code for another shipment address than the customer's own address, which is entered by default.
- 2. **Location Code.**
Specifies from which location sales to this customer will be processed by default.
- 3. **Delivery Priority Code.**
Specifies the code that defines the Delivery Priority of this customer. The delivery priority is used as a sorting sequence when allocating available stock to sales orders.
- 4. **Combine Shipments.**
Specifies if several orders delivered to the customer can appear on the same sales invoice.
- 5. **Shipping Advice Partial.**
Specifies if the customer accepts partial shipment of orders.
- 6. **Retail Location Code.**
Specifies which location code has been created to track and register the stock levels for the goods that are delivered and sold in the customer's location (typically a store). The location is considered to be owned by the customer, but the stock levels are tracked for



consignment scenarios or replenishment as a service or Vendor Managed Inventories.

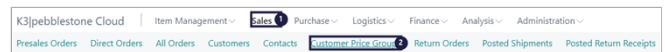
Shipment Method

1. **Code.**
Specifies which shipment method to use when you ship items to the customer.
2. **Agent.**
Specifies which shipping company is used when you ship items to the customer.
3. **Agent Service.**
Specifies the code for the shipping agent service to use for this customer.
4. **Shipping Time.**
Specifies how long it takes from when the items are shipped from the warehouse to when they are delivered.
5. **Size Range Region Code.**
Specifies the region code that is used to define mappings for size ranges.
6. **Base Calendar Code.**
Specifies a customizable calendar for shipment planning that holds the customer's working days and holidays.
7. **Customized Calendar.**
Specifies that you have set up a customized version of a base calendar.

3.9. Customer Price Groups

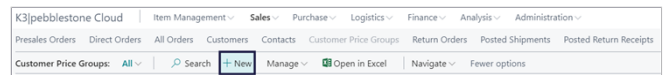
3.9.1. Navigate to Customer Price Groups

1. Click on the navigation menu item **Sales**.
2. Click on the navigation menu item **Customer Price Groups**.



3.9.2. Create a new Customer Price Group

1. Click on the navigation menu item **New**.



Code

Add a code to identify the price group.

CODE	DESCRIPTION
*	
EU	Prices for Customers with
NATIONAL	Prices for National Custo
NATPRESALE	Presales Order Prices for

K3 Pebblestone

Description

Add the description of the customer price group.

CODE	DESCRIPTION	ALLOW LINE DISC.
NL		<input checked="" type="checkbox"/>
EU	Prices for Customers within the EU	<input checked="" type="checkbox"/>
NATIONAL	Prices for National Customers	<input checked="" type="checkbox"/>
NATPRESALE	Presales Order Prices for National Customers	<input checked="" type="checkbox"/>

Allow Line Disc.

Specifies if a line discount will be calculated when the sales price is offered.

DESCRIPTION	ALLOW LINE DISC.	ALLOW INVOI... DISC.	PRICE INCLU... VAT	VAT BUS. POSTING GR. (PRICE)
Netherlands	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Prices for Customers within the EU	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	EU
Prices for National Customers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	DOMESTIC
Presales Order Prices for National Customers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	DOMESTIC

Allow Invoice Disc.

Specifies whether the ordinary invoice discount calculation will apply to customers in this price group.

DESCRIPTION	ALLOW LINE DISC.	ALLOW INVOI... DISC.	PRICE INCLU... VAT	VAT BUS. POSTING GR. (PRICE)
Netherlands	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Prices for Customers within the EU	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	EU
Prices for National Customers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	DOMESTIC
Presales Order Prices for National Customers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	DOMESTIC

Price Includes VAT

Specifies whether the prices given for this price group will include VAT.

DESCRIPTION	ALLOW LINE DISC.	ALLOW INVOI... DISC.	PRICE INCLU... VAT	VAT BUS. POSTING GR. (PRICE)
Netherlands	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Prices for Customers within the EU	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	EU
Prices for National Customers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	DOMESTIC
Presales Order Prices for National Customers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	DOMESTIC

VAT Bus. Posting Gr. (Price)

	ALLOW LINE DISC.	ALLOW INVOI... DISC.	PRICE INCLU... VAT	VAT BUS. POSTING GR. (PRICE)
the EU	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	EU
s	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	DOMESTIC
ional Customers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	DOMESTIC
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Click on the cell **VAT Bus. Posting Gr. (Price)**

	ALLOW LINE DISC.	ALLOW INVOI... DISC.	PRICE INCLU... VAT	VAT BUS. POSTING GR. (PRICE)
the EU	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	EU
s	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	DOMESTIC
ional Customers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	DOMESTIC
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

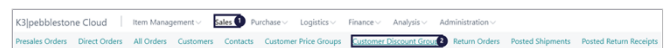
Click on the cell **Code** on any row
Choose the VAT business group code for this price group.

	ALLOW LINE DISC.	ALLOW INVOI... DISC.	PRICE INCLU... VAT	VAT BUS. POSTING GR. (PRICE)
customers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	DOMESTIC
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

3.10. Customer Discount Groups

3.10.1. Navigate to Customer Discount Groups

1. Click on the navigation menu item popup **Sales**.
2. Click on the navigation menu item **Customer Discount Groups**.



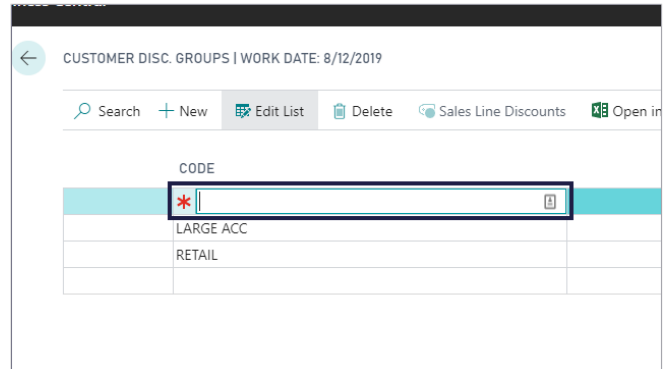
3.10.2. Create a new Customer Discount Group

1. Click on the navigation menu item **New**.

CODE	DESCRIPTION
LARGE ACC	Large account
RETAIL	Retail

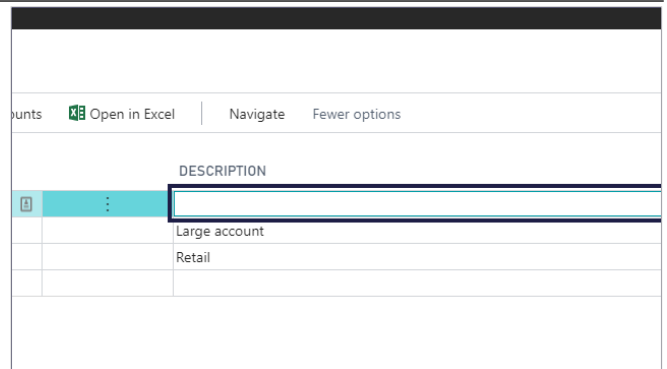
Code

Add a code for the customer discount group.



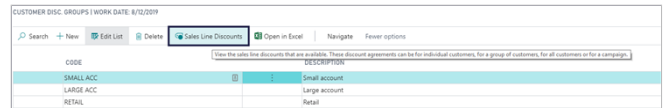
Description

Add a description for the customer discount group.



3.10.3. Create a new Sales Line Discount

1. Click on the navigation menu item **Sales Line Discounts**.



3.10.3.1. General

1. **Sales Type Filter.**
Specifies the sales type of the sales line discount.
2. **Sales Code Filter.**
Specifies a filter for which sales line discounts to display.
3. **Starting Date Filter.**
Specifies the date from which the sales line discount is valid.
4. **Type Filter.**
Specifies the type of item that the sales discount line is valid for.
5. **Code Filter.**
Specifies one of two values, depending on the value in the Type field.
6. **Currency Code Filter.**
Specifies the code for a currency that the invoice discount terms on the line applies to. Leave the field blank to set up invoice discount terms in default currency.



3.10.3.2. Sales Line Discount

Sales Type

Choose the sales type of the sales line discount. The sales type defines whether the sales price is for an individual customer, customer discount group, all customers, or for a campaign.

Sales Code

Click on the lookup button in the cell **Sales Code**

K3 Pebblestone

Move the mouse to the cell **Code** on any row
Choose one of the following values, depending on the
value in the Sales Type field.

SALES TYPE ▼	SALES CODE ▼	TYPE
Customer Disc. Group		Item

CODE	DESCRIPTION
LARGE ACC	Large account
RETAIL	Retail
SMALL ACC	Small account
+ New	

Type

new Edit List Delete Open in Excel

SALES CODE ▼	TYPE	CODE
SMALL ACC	Item	Item

Click on an option from the list
Choose the type of item that the sales discount line is
valid for. That is, either an item or an item discount
group.

SALES CODE ▼	TYPE	CODE
SMALL ACC	Item	Item

Item	Item Disc. Group
------	------------------

Code

Open in Excel

SALES CODE ▼	TYPE	CODE	UNIT OF MEASURE CODE
SMALL ACC	Item Disc. Group		

Click on the lookup button in the cell **Code**

TYPE	CODE	UNIT OF MEASURE CODE	MINIMUM QUANTITY
Item Disc. Group	<input type="text"/>	<input type="button" value="Look up value"/>	0.00

Move the mouse to the cell **Code** on any row
Choose a value, depending on the value in the Type field.

TYPE	CODE	UNIT OF MEASURE CODE	MINIMUM QUANTITY
Item Disc. Group	<input type="text"/>	<input type="button" value="Look up value"/>	0.00

CODE	DESCRIPTION
APPAREL	
FOOTWEAR	
+ New	

Unit of Measure Code

Specifies how each unit of the item or resource is measured, such as in pieces or hours. By default, the value in the Base Unit of Measure field on the item is inserted.

TYPE	CODE	UNIT OF MEASURE CODE	MINIMUM QUANTITY
Item Disc. Group	FOOTWEAR	<input type="text"/>	0.00

Minimum Quantity

Add the minimum quantity that the customer must purchase in order to gain the agreed discount.

CODE	UNIT OF MEASURE CODE	MINIMUM QUANTITY	LINE DISCOUNT %
FOOTWEAR		<input type="text" value="0.00"/>	0.00

K3 Pebblestone

Line Discount %

Add the discount percentage that is granted for the item on the line.

UNIT OF MEASURE CODE	MINIMUM QUANTITY	LINE DISCOUNT %	STARTING DATE	ENDING DATE
	25.00	<input type="text" value="0.00"/>		

Starting Date

Add the date from which the sales line discount is valid.

MINIMUM QUANTITY	LINE DISCOUNT %	STARTING DATE	ENDING DATE
25.00	2.00	<input type="text" value=""/>	<input type="text" value=""/>

Ending Date

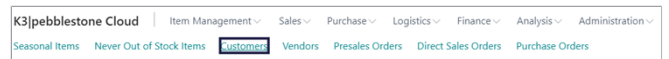
Add the date to which the sales line discount is valid.

MINIMUM QUANTITY	LINE DISCOUNT %	STARTING DATE	ENDING DATE
25.00	2.00	<input type="text" value=""/>	<input type="text" value=""/>

3.11. Order Type pricing

3.11.1. Navigate to Order Type pricing

1. Click on the navigation menu item **Customers**.



1. Move the mouse to the cell **No.** on any row. Choose the customer you want to set de Order Type pricing for.
2. Click on the link in cell **No.** with the value **1000**.

NO.	NAME
1000	Guildford Leather Wear
1001	The Pop and Mom Shop
1002	Postoffice Heathrow
1003	Airline Ltd.
1004	A Buying Group
1005	Wilger Young Fashion
1006	Melanie's Shoe Shop
1007	Britney's Fashion
1008	Basin Corporate Wear
1009	Candoxy Headquarters
1010	CRONUS Pebble Wear Awesome
1011	CRONUS Pebble Wear Northwind
1012	CRONUS Pebble Wear Adventure
1013	Grand Hotel
1014	Fashion store Van der Gilde
1015	Dutch Sporting Goods
1016	KLM Facility Services
1017	Orangerie
1018	All Copy
1019	Prestige
1020	Het Nieuwe Mode bedrijf
1021	Candoxy Nederland BV
1022	Francematic Manière

1. Click on the navigation menu item popup **Navigate**.
2. Click on the link **Prices and Discounts**.
3. Click on the navigation menu item **Price Group Setup**.

1000 · Guildford Leather Wear

X You can create contacts automatically from newly created customers. Create contacts from customers | Disable

New Document Request Approval Navigate Customer Actions **Navigate** 1 Report Fewer opt

Customer History Prices and Discounts 2 Sales Documents

No. Invoice Discounts

Name Discount Group Setup

Prices

Address & Contact Price Group Setup 3

Line Discounts

3.11.2. Set-up a different price group per Order Type

1. **Order Type Code.**
2. Click on the lookup button in the cell **Order Type Code**.
3. Click on the cell **Code** on any row. Choose the order type for which you want to set up special discounts.

CUSTOMER NO. 1000 ORDER TYPE CODE CUSTOMER PRICE GROUP

CODE DESCRIPTION

DIRECT Direct

NOOS Never Out of Stock

PRESALES Presales

LATE PRE Late Presales

+ New Select from full list

K3 Pebblestone

1. **Customer Price Group.**
2. Click on the lookup button in the cell **Customer Price Group.**
3. Click on the cell **Code** on any row. Choose the customer price group code for this order type.

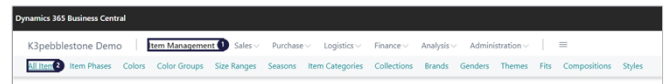
CUSTOMER NO.	ORDER TYPE CODE	CUSTOMER PRICE GROUP
1000	PRESALES	

CODE	DESCRIPTION	ALLG. INVOIC.	ALLG. DISC.
EU	Prices for Customers within the EU	✓	✓
NATIONAL	Prices for National Customers	✓	✓
INTPRESALE	Presales Order Prices for National Cust...	✓	✓

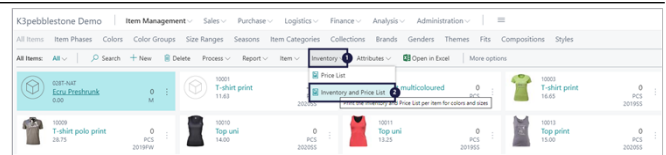
3.12.Inventory and price list

3.12.1. Navigate to Inventory and Price list

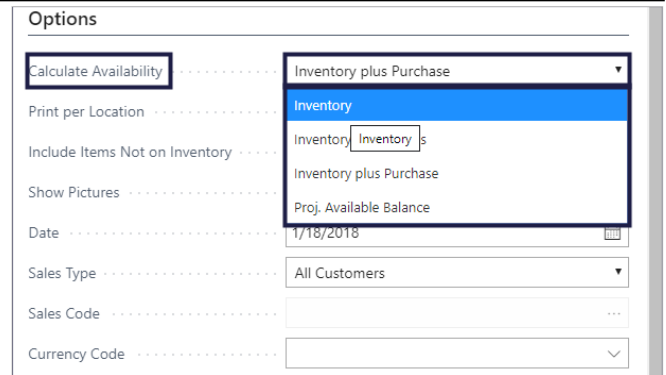
1. Click on the navigation menu item popup **Item Management.**
2. Click on the navigation menu item **All Items.**



1. Click on the link **Inventory.**
2. Click on the navigation menu item **Inventory and Price List.**



- **Calculate Availability.**
Specifies the kind of availability you want to show on the report
- Click on the field **Calculate Availability.**
- Click on an option from the list.



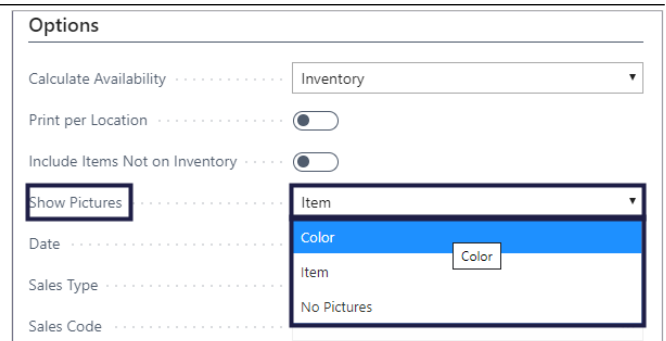
- **Print per Location.**
Specifies if you want to group the items per location



- **Include Items Not on Inventory.**
Indicates whether you want to show items that are not available



- **Show Pictures.**
Indicates whether you want to show a picture for each color, each item, or no pictures at all
- Click on the field **Show Pictures.**
- Click on an option from the list.



K3 Pebblestone

- **Date.**
Specifies the calendar date when the sales price and recommended retail price agreements ends

Options

Calculate Availability Inventory

Print per Location

Include Items Not on Inventory

Show Pictures Color

Date 1/18/2018

- **Sales Type.**
Specifies the sales price type, which defines whether the sales price is for an individual, group, all customers, or a campaign
- Click on the field **Sales Type.**
- Click on an option from the list.

Options

Calculate Availability Inventory

Print per Location

Include Items Not on Inventory

Show Pictures Color

Date 1/18/2018

Sales Type All Customers

Sales Code

Currency Code

Filter: Item

- **Sales Code.**
Specifies the code that belongs to the Sales Type

Date 1/18/2018

Sales Type All Customers

Sales Code

Currency Code

- **Currency Code.**
Specifies the code for the currency of the sales prices and recommended retail prices
- Click on the lookup button **Currency Code.**
- Move the mouse to the cell **Code** on any row.

Currency Code

Filter: Item

Code 1	Description
AED	United Arab Emirates dirham
AUD	Australian dollar
BGN	Bulgarian leva
BND	Brunei Darussaleam dollar
BRL	Brazilian real
CAD	Canadian dollar

Filter totals by:

+ New

Select from full list

Choose the filters

Currency Code

Filter: Item

x No. 10195

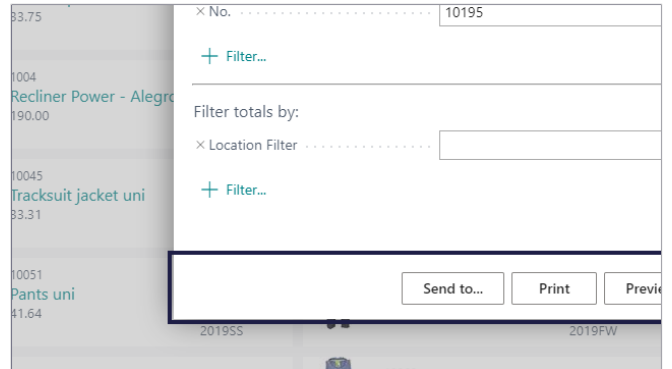
+ Filter...

Filter totals by:

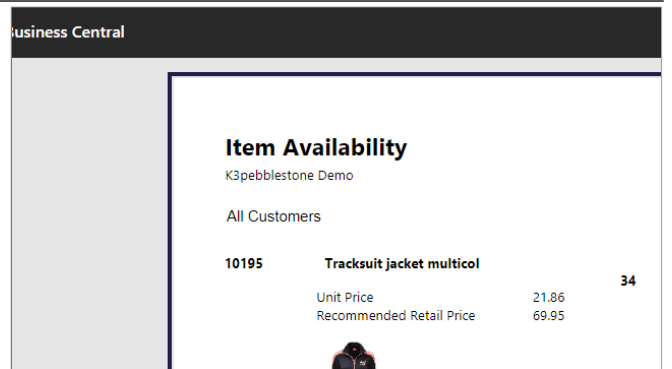
x Location Filter

+ Filter...

Make a choice **Send to...** **Print Preview** **Cancel**



This is the outcome of the inventory and price list

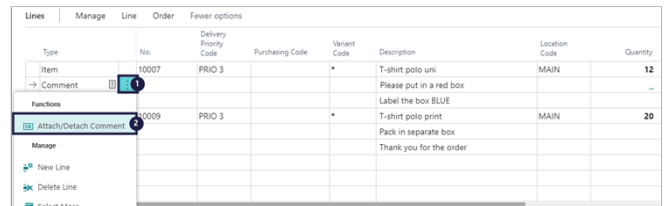


3.13. Comment lines

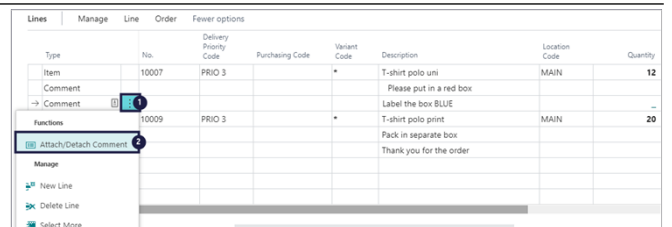
3.13.1. Attach comment line

Comment lines on sales and purchase documents can relate to an ordered item, resource, or g/l account line (VAS, instructions for the vendor or explanation for the customer).

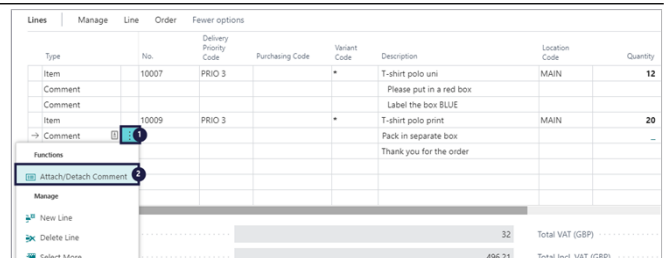
1. Click on the row menu button.
2. Click on the menu item **Attach/Detach Comment**.



1. Click on the row menu button.
2. Click on the menu item **Attach/Detach Comment**.



1. Click on the row menu button.
2. Click on the menu item **Attach/Detach Comment**.



3.13.2. Comment line on orderconfirmation

1. Click on the navigation menu item popup **Print/Send**.
2. Click on the link **Print a sales order confirmation..**

1. Click on the button **Preview**.

3.13.3. Comment line from special order to purchase order

Purchasing Code

Attached comments to a special order line are copied to the purchase document.

Lines	Manage	Line	Order	Fewer options		
Type	No.	Delivery Priority Code	Purchasing Code	Variant Code	Descrip	
Item	: 10007	PRI0 3	SPEC ORDER		T-shir	
Comment					Plea	
Comment					Labe	
→ Item	: 10009	PRI0 3	SPEC ORDER	*	T-shir	
Comment					Pack	
Comment					Thank	

1. Purchase order.

Type	No.	Description	Location Code	Quantity	Unit of Measure	Direct Unit Cost	Line Discount %	Line Amount	Qty
Item	10007	T-shirt polo uni	MAIN	12	PCS	4.59		55.08	
Comment		Please put in a red box							
Comment		Label the box BLUE							
Item	10009	T-shirt polo print	MAIN	20	PCS	15.51		310.20	
Comment		Pack in separate box							
Item Quantity				32	Total VAT (USD)			0.00	
Total Excl. VAT (USD)				365.28	Total Incl. VAT (USD)			365.28	

1. Click on the navigation menu item popup **Print/Send**.
2. Click on the link **Prepare to print the document**. The report request window for the document opens where you can specify what to include on the print-out.

1. Click on the button **Preview**.

Print Settings

Selected printer: (Browser)

Saved Settings

Changes to the options and filters below will be saved only to: 'Last used options and filters'

Use default values from: Last used options and filters

Options

No. of Copies: 0

Show Internal Information:

Archive Document:

Log Interaction:

Filter: Purchase Order

× Document Type: Order

× No.: 106023

× Buy-from Vendor No.: 121

× No. Printed:

+ Filter...

Filter totals by:

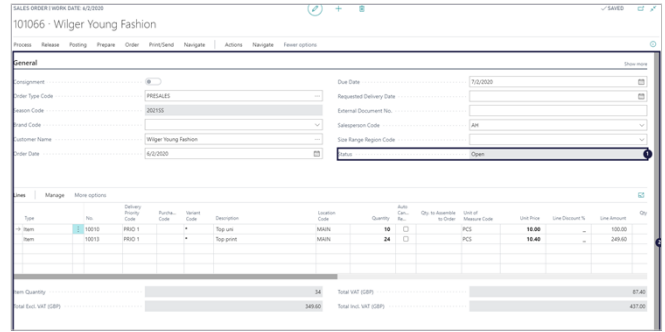
+ Filter...

Buttons: Send to... Print **Preview** Cancel

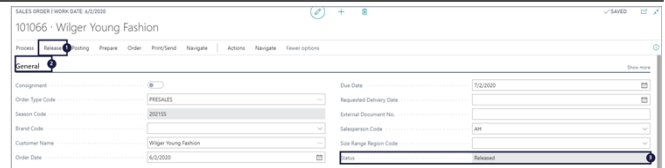
3.14. Initial quantity sales order

3.14.1. Activate initial quantity

1. **Status Open.**
Specifies whether the document is open, waiting to be approved, has been invoiced for prepayment, or has been released to the next stage of processing.



1. Click on the navigation menu item popup **Release**.
2. Click on the link **Release the document to the next stage of processing**. When a document is released, it will be included in all availability calculations from the expected receipt date of the items. You must reopen the document before you can make changes to it. (Ctrl+F9).
3. **Status Released.**
Specifies whether the document is open, waiting to be approved, has been invoiced for prepayment, or has been released to the next stage of processing.



Initial Quantity

Specifies how many units have been ordered originally. The Quantity is set when the order is released.

Location Code	Quantity	Initial Quantity	Registered Differences	Auto Can... Re...	Qty
MAIN	10	10	-	<input type="checkbox"/>	
MAIN	24	24	-	<input type="checkbox"/>	

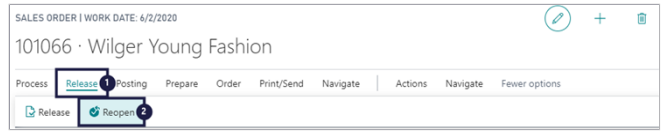
Registered Differences

Specifies how many units of the item have been registered as change.

Location Code	Quantity	Initial Quantity	Registered Differences	Auto Can... Re...	Qty. to Assemble to Order	Unit Me...
MAIN	10	10	-	<input type="checkbox"/>		PCS
MAIN	24	24	-	<input type="checkbox"/>		PCS

3.14.2. Registered differences

1. Click on the navigation menu item popup **Release**.
2. Click on the link **Reopen the document to change it after it has been approved. Approved documents have the Released status and must be opened before they can be changed..**



Click on the link in cell **Quantity** with the value **10**

Location	Location Code	Quantity	Initial Quantity	Registered Differences
ni	MAIN	10	10	
rint	MAIN	24	24	

1. **Reason Code Neg. Change.**
Specifies the reason code that will be used to register a negative change.
2. **Reason Code Pos. Change.**
Specifies the reason code that will be used to register a positive change.
3. Delete the quantities for size 34 and 44.
4. Click on the button **Close**.

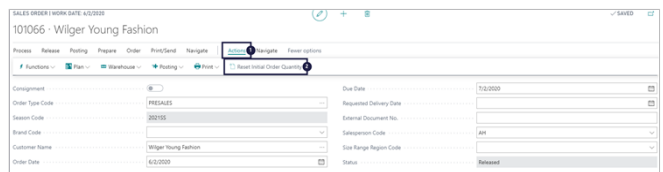


Click on the link in cell **Registered Differences** with the value **-2**

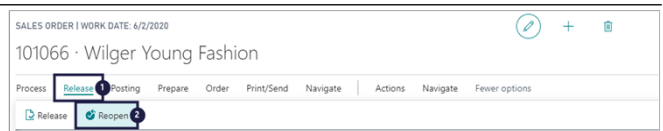
Location Code	Quantity	Initial Quantity	Registered Differences	Auto Can... Re...	Qty. to Assemble to Order	Unit Me...
MAIN	8	10	-2	<input type="checkbox"/>		PCS
MAIN	24	24		<input type="checkbox"/>		PCS

3.14.3. Reset Initial order quantity

1. Click on the navigation menu item popup **Actions**.
2. **Reopens the sales order and allows you to enter quantities without register order differences. When differences exist you must confirm this action and all differences will be removed.**

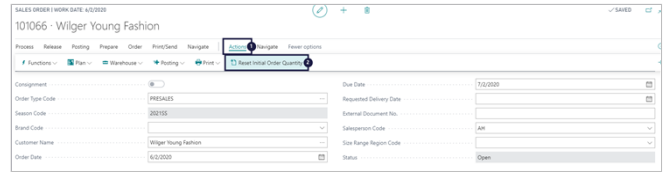


1. Click on the navigation menu item popup **Release**.
2. Click on **Reopen**.

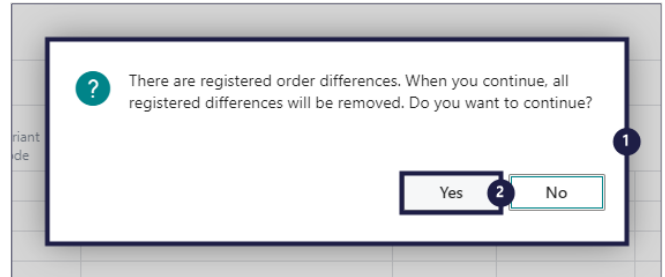


K3 Pebblestone

1. Click on the navigation menu item popup **Actions**.
2. Click on **Reset Initial Order Quantity**.



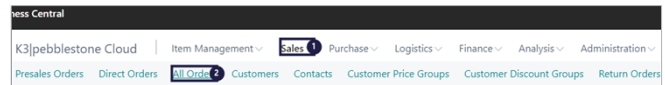
1. There are registered order differences. When you continue, all registered differences will be removed. Do you want to continue?.
2. Click on the button **Yes**.



3.15. Batch open en release Sales Orders

3.15.1. Navigate to all orders

1. Click on the navigation menu item popup **Sales**.
2. Click on the navigation menu item **All Orders**.



3.15.1.1. Open and release orders

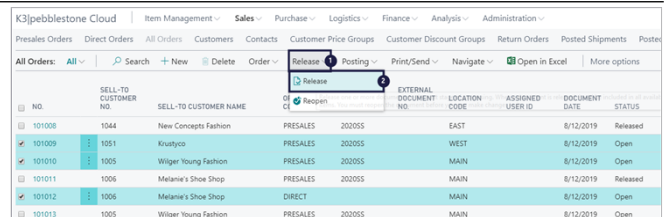
1. Move the mouse to the cell **Status** with the value **Open**.
2. Click on the row menu button.
3. Click on the menu item **Select More**.

NO.	SELL-TO CUSTOMER NO.	SELL-TO CUSTOMER NAME	ORDER TYPE CODE	REASON CODE	EXTERNAL DOCUMENT NO.	LOCATION CODE	ASSIGNED USER ID	DOCUMENT DATE	STATUS	COMP. SHIP.	AMOUNT INVOICED (LST)	AMOUNT SALES TAX	AMOUNT INCLUDING VAT
101008	1044	New Concepts Fashion	PRESALES	202055		EAST		8/12/2019	Released	No	0.00	0.00	4394.52
101009	1051	Krustyco	PRESALES	202055		WEST		8/12/2019	Open	No	0.00	0.00	1306.00
101010	1005	Wilger Young Fashion	PRESALES	202055		MAIN		8/12/2019	Open	No	0.00	0.00	480.00
101011	1006	Melanie's Shoe Shop	PRESALES	202055		MAIN		8/12/2019	Released	No	0.00	0.00	1440.00
101012	1006	Melanie's Shoe Shop	DIRECT			MAIN		8/12/2019	Open	No	0.00	0.00	264.16
101013	1005	Wilger Young Fashion	PRESALES	202055		MAIN		8/12/2019	Open	No	0.00	0.00	0.00
101014	1005	Wilger Young Fashion	NOOS			MAIN		8/12/2019	Open	No	0.00	0.00	0.00

Select row which you want to release

NO.	NO.	SELL-TO CUSTOMER NAME	CODE
<input type="checkbox"/>	101008	1044 New Concepts Fashion	PRESALES
<input checked="" type="checkbox"/>	101009	1051 Krustyco	PRESALES
<input checked="" type="checkbox"/>	101010	1005 Wilger Young Fashion	PRESALES
<input type="checkbox"/>	101011	1006 Melanie's Shoe Shop	PRESALES
<input type="checkbox"/>	101012	1006 Melanie's Shoe Shop	DIRECT
<input type="checkbox"/>	101014	1005 Wilger Young Fashion	PRESALES
<input type="checkbox"/>	101015	1005 Wilger Young Fashion	PRESALES
<input type="checkbox"/>	101016	1007 Britney's Fashion	PRESALES
<input type="checkbox"/>	101017	1005 Wilger Young Fashion	PRESALES

1. Click on the navigation menu item popup **Release**.
2. Release one or more documents to the next stage of processing. When a document is released, it will be included in all availability calculations from the expected receipt date of the items. You must reopen the document before you can make changes to it..



1. A pop-up appears: **3 Sales Orders have been released.**
2. Click on the button **OK.**



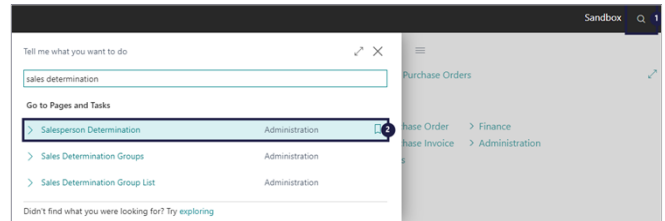
1. Check if the **Status** of the orders are **Released.**

NO.	SELL-TO CUSTOMER NO.	SELL-TO CUSTOMER NAME	ORDER TYPE CODE	SEASON CODE	EXTERNAL DOCUMENT NO.	LOCATION CODE	ASSIGNED USER ID	DOCUMENT DATE	STATUS	COMP. SHPP.
101008	1044	New Concepts Fashion	PRESALES	2020SS		EAST		8/12/2019	Released	No
101009	1051	Knuttyco	PRESALES	2020SS		WEST		8/12/2019	Released	No
101010	1005	Wliger Young Fashion	PRESALES	2020SS		MAIN		8/12/2019	Released	No
101011	1006	Melania's Shoe Shop	PRESALES	2020SS		MAIN		8/12/2019	Released	No
101012	1006	Melania's Shoe Shop	DIRECT			MAIN		8/12/2019	Released	No
101013	1005	Wliger Young Fashion	PRESALES	2020SS		MAIN		8/12/2019	Open	No
101014	1005	Wliger Young Fashion	NOOS	NOOS		MAIN		8/12/2019	Open	No
101015	1005	Wliger Young Fashion	PRESALES	2020SS		MAIN		8/12/2019	Open	No
101016	1007	Britney's Fashion	PRESALES	2020SS		MAIN		8/12/2019	Released	No
101017	1005	Wliger Young Fashion	PRESALES	2020SS		MAIN		8/12/2019	Open	No
101018	1005	Wliger Young Fashion	PRESALES	2020SS		MAIN		8/12/2019	Open	No
101019	1005	Wliger Young Fashion	DIRECT	2019SS		MAIN		8/12/2019	Open	No
101020	1000	Gulford Leather Wear				MAIN		8/12/2019	Released	No

3.16.Salesperson Determination

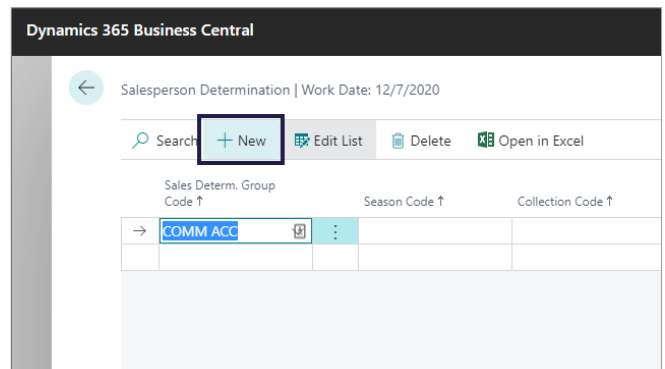
3.16.1. Navigate to Salesperson Determination

1. Click on the link **Tell me what you want to do. Quickly access actions, pages, reports, documentation, and apps and consulting services.** - Enter the text **sales determination.**
2. Click on **Salesperson Determination Administration** .



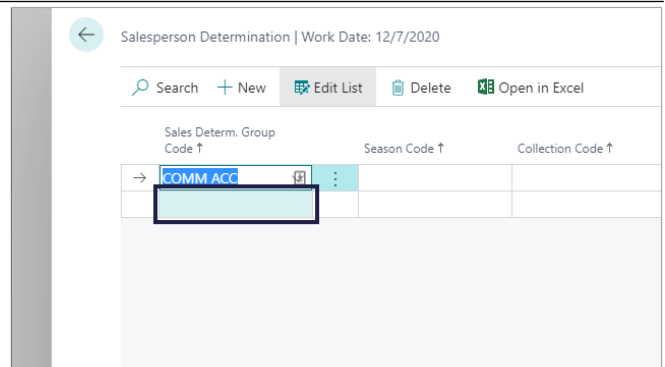
3.16.2. Create a new Salesperson Determination

Create a new entry.



Sales Determ. Group Code

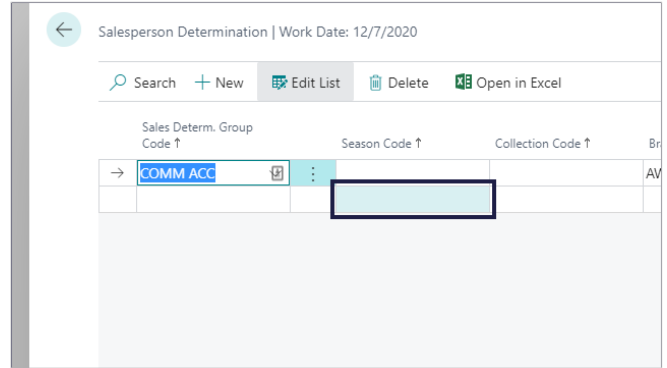
Specifies the sales determination group code that must be used on the sales document to determine the salesperson and sales manager.



K3 Pebblestone

Season Code

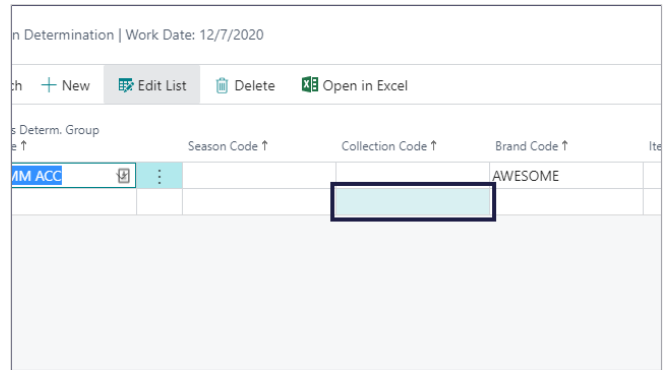
Specifies the season code that must be used on the sales document line to determine the salesperson and sales manager.



Sales Determ. Group Code ↑	Season Code ↑	Collection Code ↑	Br
→ COMM ACC			AV

Collection Code

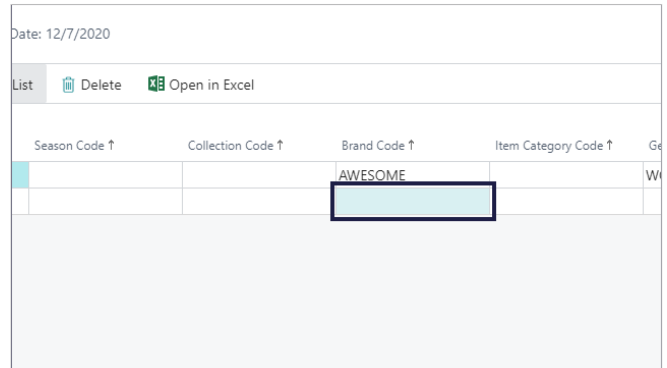
Specifies the collection code that must be used on the sales document line to determine the salesperson and sales manager.



Sales Determ. Group Code ↑	Season Code ↑	Collection Code ↑	Brand Code ↑	Item
COMM ACC		AWESOME		

Brand Code

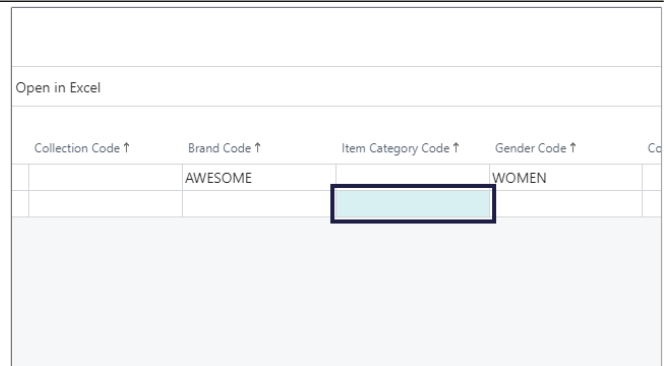
Specifies the brand code that must be used on the sales document line to determine the salesperson and sales manager.



Sales Determ. Group Code ↑	Season Code ↑	Collection Code ↑	Brand Code ↑	Item Category Code ↑	Ge
COMM ACC			AWESOME		W

Item Category Code

Specifies the item category code that must be used on the sales document line to determine the salesperson and sales manager.



Sales Determ. Group Code ↑	Season Code ↑	Collection Code ↑	Brand Code ↑	Item Category Code ↑	Gender Code ↑	Cc
COMM ACC			AWESOME		WOMEN	

K3 Pebblestone

Gender Code

Specifies the gender code that must be used on the sales document line to determine the salesperson and sales manager.

Brand Code ↑	Item Category Code ↑	Gender Code ↑	Country/Region Code ↑	Sta
AWESOME		WOMEN		

Country/Region Code

Specifies the country/region code that must be used on the sales document to determine the salesperson and sales manager.

Item Category Code ↑	Gender Code ↑	Country/Region Code ↑	Starting Date ↑	Endin
	WOMEN			

Starting Date

Specifies the date from which the sales person determination is valid.

Gender Code ↑	Country/Region Code ↑	Starting Date ↑	Ending Date	Salespers
WOMEN				PS

Ending Date

Specifies the date to which the sales person determination is valid.

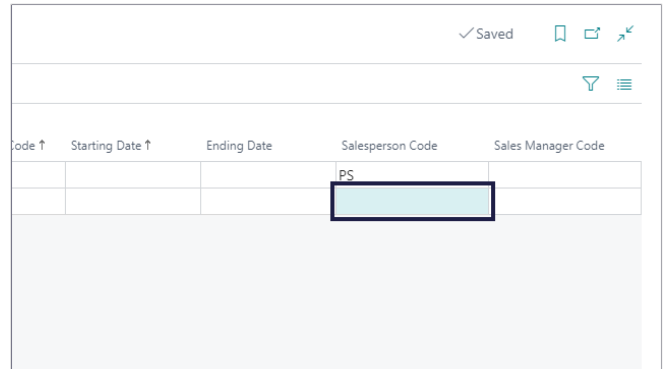
Country/Region Code ↑	Starting Date ↑	Ending Date	Salesperson Code	Sales
			PS	

✓ Saved

K3 Pebblestone

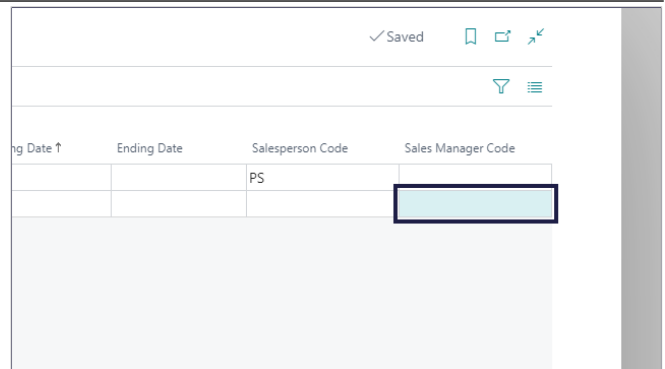
Salesperson Code

Specifies the Salesperson Code. This Salesperson Code is chosen in the sales line based on sales determination group, season, collection, brand, item category, gender and country/region in the sales document.



Sales Manager Code

Specifies the Sales Manager Code. This Sales Manager Code is chosen in the sales line based on sales determination group, season, collection, brand, item category, gender and country/region in the sales document.

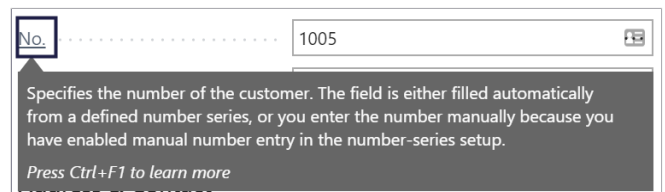


4. Purchase

4.1. Vendor creation

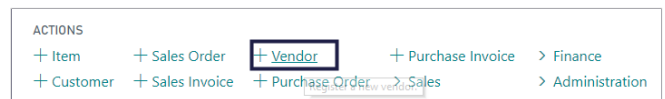
4.1.1. Tooltips

1. All over in the application you can check if there is a tooltip. Hover the pointer over an item, without clicking it, and a tooltip may appear.

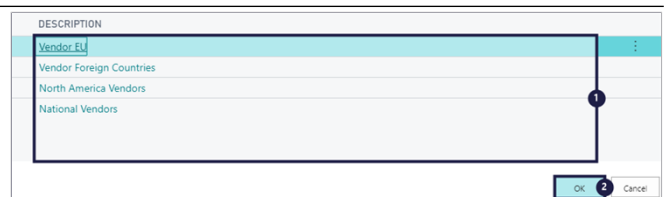


4.1.2. Create a new Vendor

1. Click on the navigation menu item **Vendor**.

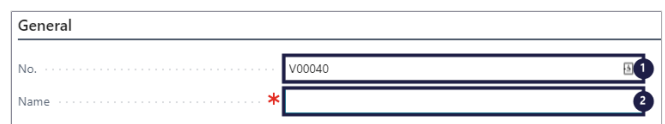


1. **Description.**
Choose which template you want to use for creating the new Vendor.
2. Click on the button **OK**.



4.1.3. General

1. **No..**
Specifies the number of the Vendor. The field is either filled automatically from a defined number serie, or you enter the number

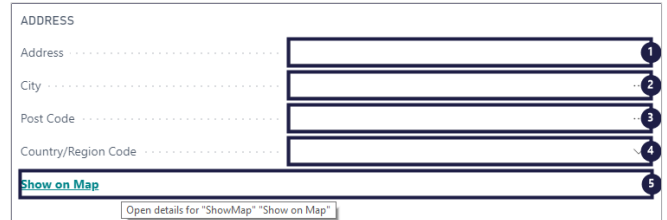


- manually.
- Name.**
Specifies the vendor's name. You can enter a maximum of 30 characters, both numbers and letters.

4.1.4. Address & Contacts

4.1.4.1. Address

- Address.**
Add the address.
- City.**
Add the City from the dropdown, if the City does not exist create one.
- Post Code.**
Add the Post Code from the dropdown, if the Post code does not exist create a one.
- Country/Region Code.**
Add the Country Code from the dropdown, if the Country does not exist create one.
- Open details for "ShowMap" "Show on Map".**



ADDRESS

Address 1

City 2

Post Code 3

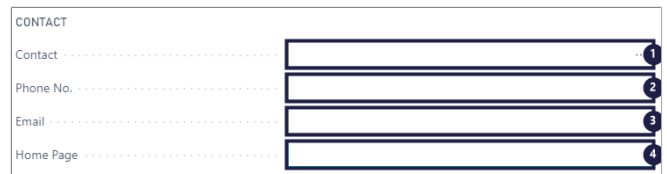
Country/Region Code 4

Show on Map 5

Open details for "ShowMap" "Show on Map"

4.1.4.2. Contacts

- Contact.**
Add the name of the person you regularly contact when you do business with this vendor.
- Phone No..**
Add the Phone Number.
- Email.**
Add the vendor's email address.
- Home Page.**
Add the vendor's web site.



CONTACT

Contact 1

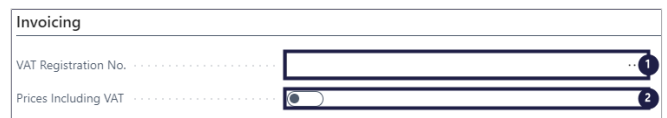
Phone No. 2

Email 3

Home Page 4

4.1.5. Invoicing

- VAT Registration No..**
Add the vendor's VAT registration number.
- Prices Including VAT, No.**
Specifies if the Unit Price and Line Amount fields on document lines should be shown with or without VAT.



Invoicing

VAT Registration No. 1

Prices Including VAT 2

4.1.6. Payments

- Payment Terms Code.**



Payments

Payment Terms Code 1

Payment Method Code 2

Cash Flow Payment Terms Code CM

K3 Pebblestone

Choose a Payment Term code from the dropdown, if the Payment Term code does not exist create one.

2. **Payment Method Code.**

Choose how to make payment, such as with bank transfer, cash, or check. if the Payment Method code does not exist create one.

3.

Cash Flow Payment Terms Code.

Choose a Cash Flow Payment Term code from the dropdown, if the Cash Flow Payment Term code does not exist create one.

4.1.7. Receiving

1. **Location Code.**

Choose a Location code from the dropdown, if the Location code does not exist create one.

2. **Shipment Method Code.**

Add the delivery conditions of the related shipment, such as free on board (FOB). If the Shipment Method Code does not exist create one.

3.

Lead Time Calculation.

Add a date formula for the amount of time it takes to replenish the item.

4. **Customized Calendar.**

Specifies if you have set up a customized calendar for the vendor.

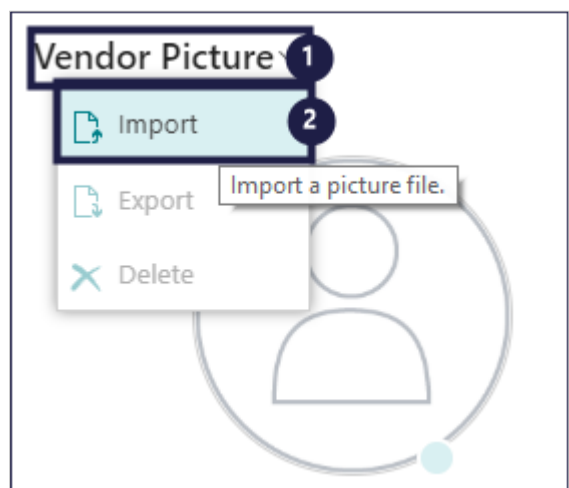


4.1.8. Picture

1. Click on the link **Actions for Vendor Picture.**

2. **Import.**

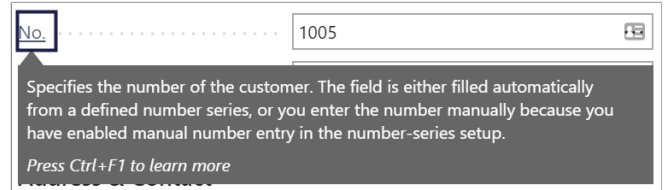
Choose import and add a picture.



4.2. Purchase order creation

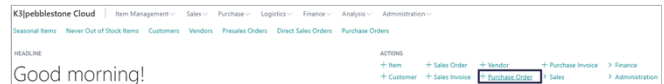
4.2.1. Tooltips

1. All over in the application you can check if there is a tooltip. Hover the pointer over an item, without clicking it, and a tooltip may appear.



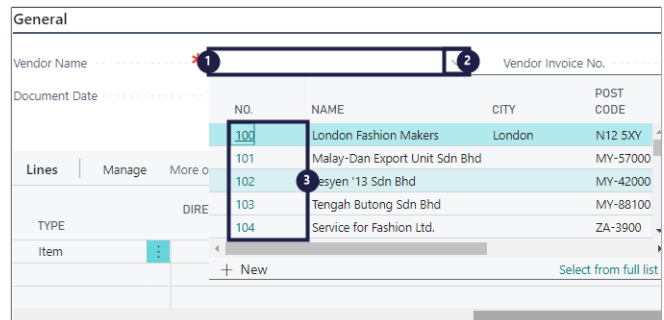
4.2.2. Create a new Purchase Order

1. Click on the navigation menu item **Purchase Order**.



4.2.3. General

1. Move the mouse to the field **Vendor Name**.
2. Click on the lookup button **Vendor Name**.
3. Choose the name of the vendor who delivers the products. . .



1. Move the mouse to the field **Document Date**. Specifies the date when the related document was created.



1. **Vendor Invoice No..**
Specifies the document number of the original document you received from the vendor. You can require the document number for posting, or let it be optional. By default, it's required, so that this document references the original.
2. **Vendor Order No..**
Add the vendor's order number, if needed.
3. **Purchaser Code.**
Specifies which purchaser is assigned to the vendor.
4. **Status.**
Specifies whether the record is open, waiting to be approved, invoiced for prepayment, or released to the next stage of processing.



4.2.4. Purchase Lines

Type

Document Date 8/2/2019

Lines | Manage | More options

TYPE	STYLE NO.	NO.	AUTO CANCEL REMAINDER
Item			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>

Total Excl. VAT (USD)

Total VAT (USD)

Click on the lookup button in the cell **Type**

Document Date 8/2/2019

Lines | Manage | More options

TYPE	STYLE NO.	NO.	AUTO CANCEL REMAINDER
Item			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>

Look up value

Total Excl. VAT (USD)

Total VAT (USD)

Move the mouse to the cell **Option Values** with the value **Item**
Specifies the type of transaction that will be posted with the document line. If you select Comment, then you can enter any text in the Description field, such as a message to a vendor.

TYPE	STYLE NO.	NO.	AUTO CANCEL REMAINDER	DESCRIPTION
Item			<input type="checkbox"/>	
			<input type="checkbox"/>	
			<input type="checkbox"/>	

OPTION VALUES

- Comment
- G/L Account
- Item

Select from full list

Invoice Details

Currency Code USD Department

Expected Receipt Date Area Code

Style No.

Document Date 8/2/2019

Lines | Manage | More options

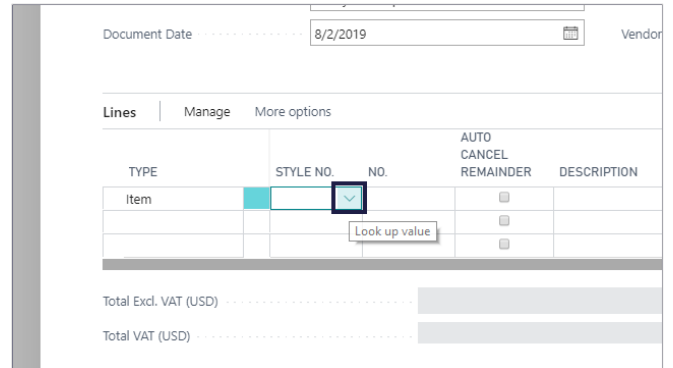
TYPE	STYLE NO.	NO.	AUTO CANCEL REMAINDER	DESCO
Item			<input type="checkbox"/>	
			<input type="checkbox"/>	
			<input type="checkbox"/>	

Total Excl. VAT (USD)

Total VAT (USD)

K3 Pebblestone

Click on the lookup button in the cell **Style No.**



Document Date: 8/2/2019

Vendor: []

Lines | Manage | More options

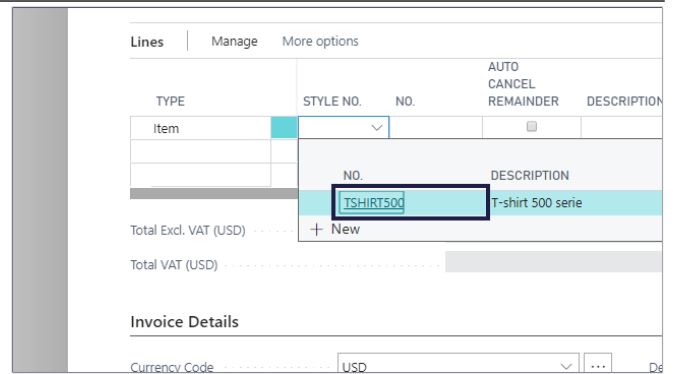
TYPE	STYLE NO.	NO.	AUTO CANCEL REMAINDER	DESCRIPTION
Item	[dropdown]		<input type="checkbox"/>	
			<input type="checkbox"/>	
			<input type="checkbox"/>	

Look up value

Total Excl. VAT (USD) []

Total VAT (USD) []

Move the mouse to the cell **No.** on any row
Choose the Style number.



Lines | Manage | More options

TYPE	STYLE NO.	NO.	AUTO CANCEL REMAINDER	DESCRIPTION
Item	[dropdown]		<input type="checkbox"/>	
			<input type="checkbox"/>	
			<input type="checkbox"/>	

NO. DESCRIPTION

TSHIRT500 T-shirt 500 serie

+ New

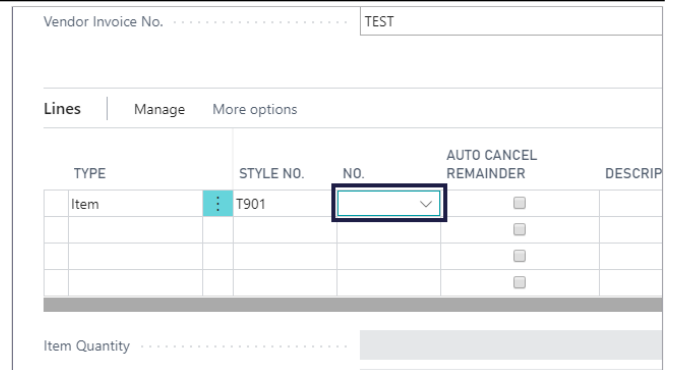
Total Excl. VAT (USD) []

Total VAT (USD) []

Invoice Details

Currency Code: USD

No.



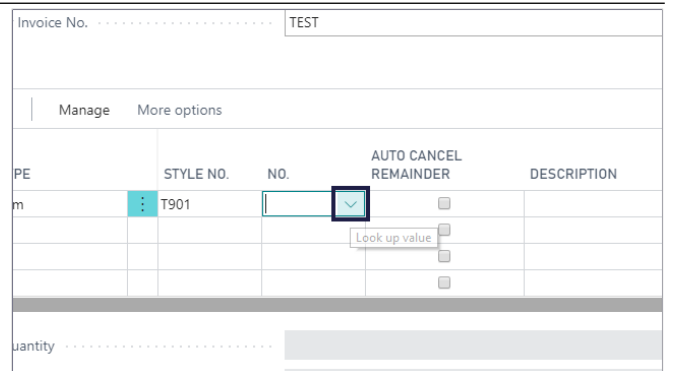
Vendor Invoice No.: TEST

Lines | Manage | More options

TYPE	STYLE NO.	NO.	AUTO CANCEL REMAINDER	DESCRIPTION
Item	T901	[dropdown]	<input type="checkbox"/>	
			<input type="checkbox"/>	
			<input type="checkbox"/>	

Item Quantity []

Click on the lookup button in the cell **No.**



Invoice No.: TEST

Manage | More options

PE	STYLE NO.	NO.	AUTO CANCEL REMAINDER	DESCRIPTION
m	T901	[dropdown]	<input type="checkbox"/>	
			<input type="checkbox"/>	
			<input type="checkbox"/>	

Look up value

Quantity []

K3 Pebblestone

Click on the cell **No.** on any row
Choose the item, number of a general ledger account, resource, additional cost, or fixed asset, depending on the contents of the Type field.

TYPE	STYLE NO.	NO.	AUTO CANCEL REMAINDER	DESCRIPTION
Item	T901		<input type="checkbox"/>	
		10003	<input type="checkbox"/>	T-shirt print

Item Quantity + New

Total Excl. VAT (USD)

Auto Cancel Remainder

Specifies if the remaining quantity will automatically be canceled when receiving less than the ordered quantity.

Invoice No. TEST

STYLE NO.	NO.	AUTO CANCEL REMAINDER	DESCRIPTION
T901	10003	<input type="checkbox"/>	T-shirt print

ty

Description

Specifies a description of the entry of the product to be sold. To add a non-transactional text line, fill in the Description field only.

TEST Status

NO.	NO.	AUTO CANCEL REMAINDER	DESCRIPTION	LOCATION CODE
	10003	<input type="checkbox"/>	T-shirt print	MAIN
		<input type="checkbox"/>	T-shirt print	

0 Total VAT (USD)

Location Code

Specifies a code for the location where you want the items to be placed when they are received.

Status

AUTO CANCEL REMAINDER	DESCRIPTION	LOCATION CODE	QUANTITY	UNIT OF MEASURE CODE
<input type="checkbox"/>	T-shirt print	MAIN		PCS
<input type="checkbox"/>		MAIN		

0 Total VAT (USD)

Quantity

Status Open				
DESCRIPTION	LOCATION CODE	QUANTITY	UNIT OF MEASURE CODE	DIRECT UNIT COST
T-shirt print	MAIN	<input type="text"/>	PCS	
0 Total VAT (USD)				

Click on the lookup button in the cell **Quantity**
Fill in the quantities in the order matrix

Status Open				
DESCRIPTION	LOCATION CODE	QUANTITY	UNIT OF MEASURE CODE	DIRECT UNIT COST
T-shirt print	MAIN	<input type="text"/>	PCS	
0 Total VAT (USD)				

Quantity

Specifies the number of units of the item specified on the line.

Status Open				
DESCRIPTION	LOCATION CODE	QUANTITY	UNIT OF MEASURE CODE	DIRECT UNIT COST
T-shirt print	MAIN	<input type="text" value="480"/>	PCS	
480 Total VAT (USD)				

Unit of Measure Code

Specifies how each unit of the item or resource is measured, such as in pieces or hours. By default, the value in the Base Unit of Measure field on the item or resource card is inserted.

Status Open				
LOCATION CODE	QUANTITY	UNIT OF MEASURE CODE	DIRECT UNIT COST	LINE DISCOUNT %
MAIN	480	<input type="text" value="PCS"/>		
480 Total VAT (USD)				

K3 Pebblestone

Direct Unit Cost

Specifies the cost of one unit of the selected item or resource.

Status Open					
LOCATION CODE	QUANTITY ↑	UNIT OF MEASURE CODE	DIRECT UNIT COST	LINE DISCOUNT %	LINE AMOUNT
MAIN	480	PCS	<input type="text"/>		
Total VAT (USD)					

Line Discount %

Specifies the discount percentage that is granted for the item on the line.

Status Open					
QUANTITY ↑	UNIT OF MEASURE CODE	DIRECT UNIT COST	LINE DISCOUNT %	LINE AMOUNT	QTY. TO RECEIVE
480	PCS		<input type="text"/>		480
					0.00

Line Amount

Specifies the net amount, excluding any invoice discount amount, that must be paid for products on the line.

Status Open					
UNIT OF MEASURE CODE	DIRECT UNIT COST	LINE DISCOUNT %	LINE AMOUNT	QTY. TO RECEIVE	QUANT RECEIVE
PCS			<input type="text"/>	480	
					0.00

Qty. to Receive

Specifies the quantity of items that remains to be received.

Status					
DIRECT UNIT COST	LINE DISCOUNT %	LINE AMOUNT	QTY. TO RECEIVE	QUANTITY RECEIVED	QTY. TO INVOICE
			<input type="text" value="480"/>	-	480
			480	Total VAT (USD)	

K3 Pebblestone

Quantity Received

Specifies how many units of the item on the line have been posted as received.

LINE DISCOUNT %	LINE AMOUNT	QTY. TO RECEIVE	QUANTITY RECEIVED	QTY INVC
		480	-	
0.00				

Qty. to Invoice

Specifies the quantity that remains to be invoiced. It is calculated as Quantity - Qty. Invoiced.

LINE AMOUNT	QTY. TO RECEIVE	QUANTITY RECEIVED	QTY. TO INVOICE	QUANTITY INVOICED	PLANNED RECEIPT DATE
	480	-	480	-	
480 Total VAT (USD) 0.00					

Quantity Invoiced

Specifies how many units of the item on the line have been posted as invoiced.

QTY. TO RECEIVE	QUANTITY RECEIVED	QTY. TO INVOICE	QUANTITY INVOICED	PLANNED RECEIPT DATE	EXPECTED RECEIPT DATE	SE/COI
480	-	480	-		2/12/2020	20
0.00						

Planned Receipt Date

Specifies the date when the item is planned to arrive in inventory.

QUANTITY RECEIVED	QTY. TO INVOICE	QUANTITY INVOICED	PLANNED RECEIPT DATE	EXPECTED RECEIPT DATE	SE/COI
-	480	-	2/12/2020	201	
0.00					

Expected Receipt Date

Specifies the date you expect the items to be available in your warehouse. If you leave the field blank, it will be calculated as follows: Planned Receipt Date + Safety Lead Time + Inbound Warehouse Handling Time = Expected Receipt Date.

QTY. TO INVOICE	QUANTITY INVOICED	PLANNED RECEIPT DATE	EXPECTED RECEIPT DATE	SE/COI
480	-		2/12/2020	201

Season Code

Specifies a code for the season that this ordered item belongs to.

QUANTITY INVOICED	PLANNED RECEIPT DATE	EXPECTED RECEIPT DATE	SEASON CODE	DELIVERY DROP CODE
-		2/12/2020	2019SS	

Delivery Drop Code

Specifies a code for the delivery drop that this item belongs to.

PLANNED RECEIPT DATE	EXPECTED RECEIPT DATE	SEASON CODE	DELIVERY DROP CODE
	2/12/2020	2019SS	2

Item Quantity	480	Total VAT (USD)	20.00
Total Excl. VAT (USD)	232.00	Total Incl. VAT (USD)	252.00

- Item Quantity.**
Specifies the Total Quantity field on all lines of type Item in the document.
- Total Excl. VAT (USD).**
Specifies the sum of the value in the Line Amount Excl. VAT field on all lines in the document minus any discount amount in the Invoice Discount Amount field.
- Total VAT (USD).**
Specifies the sum of VAT amounts on all lines in the document.
- Total Incl. VAT (USD).**
Specifies the sum of the value in the Line Amount Incl. VAT field on all lines in the document minus any discount amount in the Invoice Discount Amount field.

4.2.5. Invoice details

- Currency Code.**
Specifies the currency of amounts on the

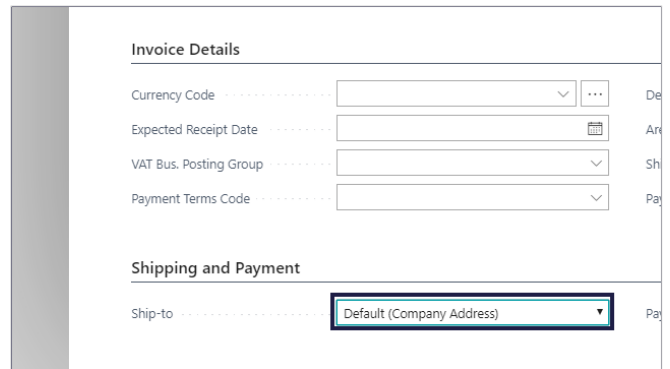
Currency Code	USD	Shipment Method Code	ETW
Expected Receipt Date		Payment Reference	
VAT Bus. Posting Group	EXPORT	Creditor No.	
Payment Terms Code	14 DAYS	Requested Receipt Date	

- purchase document.
- 2. **Expected Receipt Date.**
Specifies the date you expect the items to be available in your warehouse. If you leave the field blank, it will be calculated as follows:
Planned Receipt Date + Safety Lead Time + Inbound Warehouse Handling Time = Expected Receipt Date.
- 3. **VAT Bus. Posting Group.**
Specifies the VAT specification of the involved customer or vendor to link transactions made for this record with the appropriate general ledger account according to the VAT posting setup.
- 4. **Payment Terms Code.**
Specifies a formula that calculates the payment due date, payment discount date, and payment discount amount.
- 5. **Shipment Method Code.**
Specifies the delivery conditions of the related shipment, such as free on board (FOB).
- 6. **Payment Reference.**
Specifies the payment of the purchase invoice.
- 7. **Creditor No..**
Specifies the number of the vendor.
- 8. **Requested Receipt Date.**
Specifies the date that you want the vendor to deliver to the ship-to address.

4.2.6. Shipping & Payment

Ship-to

Specifies the address that the products on the purchase document are shipped to. Default (Company Address): The same as the company address specified in the Company Information window.



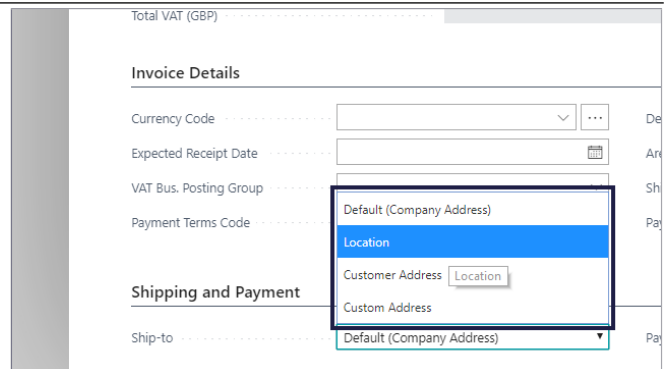
The screenshot shows a software interface with two main sections: 'Invoice Details' and 'Shipping and Payment'. In the 'Invoice Details' section, there are four dropdown menus: 'Currency Code', 'Expected Receipt Date', 'VAT Bus. Posting Group', and 'Payment Terms Code'. In the 'Shipping and Payment' section, there is a 'Ship-to' dropdown menu which is highlighted with a blue box and shows 'Default (Company Address)' as the selected option.

Default (Company Address)

Location: One of the company's location addresses.

Customer Address: Used in connection with drop shipment.

Custom Address: Any ship-to address that you specify in the fields below.



The screenshot shows a software interface with two main sections: 'Invoice Details' and 'Shipping and Payment'. In the 'Invoice Details' section, there are four dropdown menus: 'Currency Code', 'Expected Receipt Date', 'VAT Bus. Posting Group', and 'Payment Terms Code'. In the 'Shipping and Payment' section, there is a 'Ship-to' dropdown menu which is highlighted with a blue box and shows a list of options: 'Default (Company Address)', 'Location', 'Customer Address', and 'Custom Address'.

Pay-to

Click on the item **Default (Vendor)** in the list
Choose the vendor that the purchase document will
be paid to.

Default (Vendor): The same as the vendor on the
purchase document.

Another Vendor: Any vendor that you specify in the
fields below.

4.3. Use Ratio Curves in Purchase Order

4.3.1. Ratio Curves in Purchase Order

Click on the link in cell **Quantity**

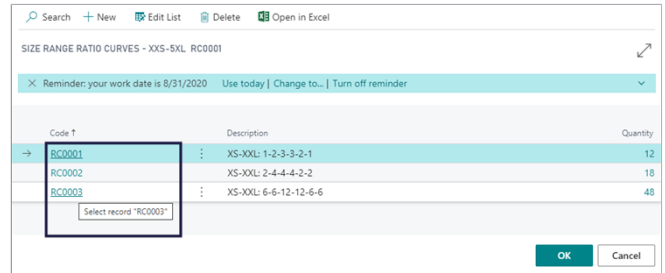
Description	Location Code	Quantity	Auto Can... Re...	Unit of Measure Code	Dir...
T-shirt print	MAIN	*		PCS	

Click on the lookup button in the cell **Ratio Curve
Code**

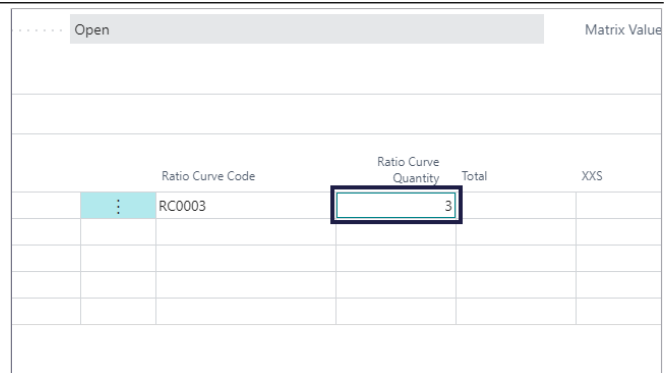
Ratio Curve Code	Ratio Curve Quantity	Total	XXS
:			

K3 Pebblestone

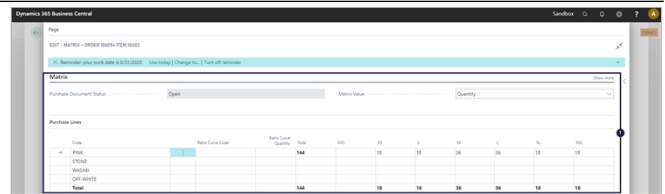
1. Click on the link in cell **Code** on any row.



Add the quantity for the **Ratio Curve Quantity**, press Tab. The quantities will be filled based on the Ratio Curve.



1. Click on the button **Close**.

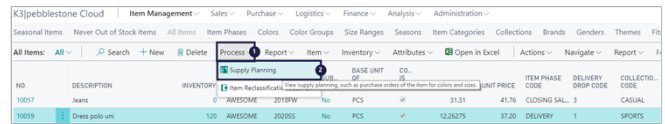


4.4. Item Supply Planning

4.4.1. Navigate to Item supply planning

4.4.2. Item supply planning

1. Click on the navigation menu item popup **Process**.
2. Click on the link **View supply planning**.



1. **Code.**
Specifies at first level the Item Code, at second and third level it show the Variant Component.
2. **Description.**
Specifies the description of the Item.
3. **Outstanding Quantity.**
Specifies how many units of the item are outstanding.
4. **Quantity.**
Specifies how many units of the item have been specified.
5. **Received Quantity.**
Specifies how many units of the item are received.
6. **Expected Receipt Date.**
Specifies the expected receipt date of the item specified on the line.



7. **Requested Receipt Date.**
Specifies the date that the vendor should to deliver to the ship-to address. The value in the field is used to calculate the latest date you can order the items to have them delivered on the requested receipt date.
8. **Planned Receipt Date.**
Specifies the date when the item is planned to arrive in inventory.

4.4.3. Item supply planning details

1. Click on the link **Show the details for this item and inbound document.**

CODE	DESCRIPTION	OUTSTANDING QUANTITY	QUANTITY	RECEIVED QUANTITY	EXPECTED RECEIPT DATE	REQUESTED RECEIPT DATE	PLANNED RECEIPT DATE
10605	One's girl unit	510	510	5			

1. **Source Document.**
Specifies the source type document on the line.
2. **Document No..**
Specifies the document number on the line.
3. **Item No..**
Specifies the number of the involved entry or record, according to the specified number series.
4. **Description.**
Specifies a description of the item on the line.
5. **Location Code.**
Specifies the location code of the item specified on the line.
6. **Unit of Measure.**
Specifies the unit of measure of the item on the line.
7. **Expected Receipt Date.**
Specifies the expected receipt date of the item specified on the line.
8. **Requested Receipt Date.**
Specifies the date that the vendor should to deliver to the ship-to address. The value in the field is used to calculate the latest date you can order the items to have them delivered on the requested receipt date.
9. **Planned Receipt Date.**
Specifies the date when the item is planned to arrive in inventory. Forward calculation: planned receipt date = order date + vendor lead time (per the vendor calendar and rounded to the next working day in first the vendor calendar and then the location calendar). If no vendor calendar exists, then: planned receipt date = order date + vendor lead time (per the location calendar). Backward calculation: order date = planned receipt date - vendor lead time (per the vendor calendar and rounded to the previous working day in first the vendor calendar and then the location calendar). If no vendor calendar exists, then: order date = planned receipt date - vendor lead time (per the location calendar).

SOURCE DOCUMENT	DOCUM. NO.	ITEM NO.	DESCRIPTION	LOCATION CODE	UNIT OF MEASURE	EXPECTED RECEIPT DATE	REQUESTED RECEIPT DATE	PLANNED RECEIPT DATE	SIZE RANGE CODE	COLOR GROUP CODE	COLOR CODE	SIZE CODE
Purchase Cr...	10605	2-1009	Midnight-34	MAIN	Piece	12/15/2019	12/15/2019	12/15/2019	WOMEN	202055	MIDNIGHT	34
Purchase Cr...	10605	10059	Midnight-38	MAIN	Piece	12/15/2019	12/15/2019	12/15/2019	WOMEN	202055	MIDNIGHT	38
Purchase Cr...	10605	10059	Midnight-40	MAIN	Piece	12/15/2019	12/15/2019	12/15/2019	WOMEN	202055	MIDNIGHT	40
Purchase Cr...	10605	10059	Midnight-42	MAIN	Piece	12/15/2019	12/15/2019	12/15/2019	WOMEN	202055	MIDNIGHT	42
Purchase Cr...	10605	10059	Midnight-44	MAIN	Piece	12/15/2019	12/15/2019	12/15/2019	WOMEN	202055	MIDNIGHT	44
Purchase Cr...	10605	10059	Off-white-34	MAIN	Piece	12/15/2019	12/15/2019	12/15/2019	WOMEN	202055	OFF-WHITE	34
Purchase Cr...	10605	10059	Off-white-36	MAIN	Piece	12/15/2019	12/15/2019	12/15/2019	WOMEN	202055	OFF-WHITE	36
Purchase Cr...	10605	10059	Off-white-38	MAIN	Piece	12/15/2019	12/15/2019	12/15/2019	WOMEN	202055	OFF-WHITE	38
Purchase Cr...	10605	10059	Off-white-40	MAIN	Piece	12/15/2019	12/15/2019	12/15/2019	WOMEN	202055	OFF-WHITE	40
Purchase Cr...	10605	10059	Off-white-42	MAIN	Piece	12/15/2019	12/15/2019	12/15/2019	WOMEN	202055	OFF-WHITE	42
Purchase Cr...	10605	10059	Off-white-44	MAIN	Piece	12/15/2019	12/15/2019	12/15/2019	WOMEN	202055	OFF-WHITE	44

10. **Size Range Code.**
Specifies which kind of horizontal components, typically sizes, you want to use for this item. The components in this group are used to create item variants.
11. **Color Group Code.**
Specifies which kind of vertical components, typically colors, you want to use for this item. The components in this group are used to create item variants.
12. **Color Code.**
Specifies a code to identify the item vertical component. An item vertical component refers to an element (e.g. color) that is available to this item.
13. **Size Code.**
Specifies a code to identify the item horizontal component. An item horizontal component refers to an element (e.g. size) that is available to this item.

1. **Quantity.**
Specifies how many units of the item have been specified.
2. **Outstanding Quantity.**
Specifies how many units of the item are outstanding.
3. **Qty. to Invoice.**
Specifies the quantity to invoice of the item specified on the line.
4. **Qty. to Receive.**
Specifies the quantity to receive of the item specified on the line.
5. **Outstanding Amount.**
Specifies the outstanding amount of the item specified on the line.
6. **Quantity Received.**
Specifies the quantity received of the item specified on the line.
7. **Quantity Invoiced.**
Specifies the quantity invoiced of the item specified on the line.

QUANTITY	OUTSTANDL. QUANTITY	QTY. TO INVOICE	QTY. TO RECEIVE	OUTSTANDL. AMOUNT	QUANTITY RECEIVED	QUANTITY INVOICED
40	40	40	40	756.00	0	0
46	46	46	46	869.40	0	0
46	46	46	46	869.40	0	0
34	34	34	34	642.60	0	0
26	26	26	26	491.40	0	0
8	8	8	8	151.20	0	0
34	34	34	34	642.60	0	0
46	46	46	46	869.40	0	0
52	52	52	52	982.80	0	0
40	40	40	40	756.00	0	0
20	20	20	20	378.00	0	0

4.5. Requisition Worksheet

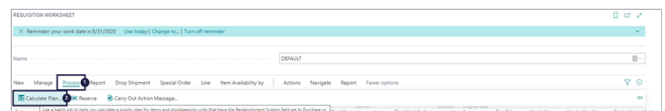
4.5.1. Navigate to Requisition Worksheet

1. Click on the navigation menu item popup **Purchase**.
2. Click on the navigation menu item **Requisition Worksheet**.



4.5.2. Calculate plan

1. Click on the navigation menu item popup **Process**.
2. Click on the navigation menu item **Calculate**



Plan....

1. **Starting Date.**
Specifies the date to use for new orders. This date is used to evaluate the inventory.
2. **Ending Date.**
Specifies the date where the planning period ends. Demand is not included beyond this date.
3. **Use Forecast.**
Specifies a forecast that should be included as demand when running the planning batch job.
4. **Exclude Forecast Before.**
Specifies how much of the selected forecast to include, by entering a date before which forecast demand is not included.
5. **Respect Planning Parameters for Supply Triggered by Safety Stock.**
Specifies that planning lines triggered by safety stock will respect the following planning parameters: Reorder Point, Reorder Quantity and Maximum Inventory in addition to all order modifiers. If you do not select this check box, planning lines triggered by safety stock will only cover the exact demand quantity.
6. Choose the filters, if needed.
7. Click on the button **OK**.

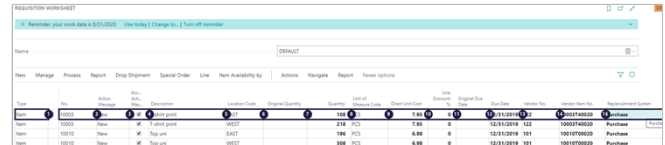
The plan is being calculated.

The outcome of the calculated plan.

Type	No.	Action Message	Acc... Acti... Mes...	Description
Item	10003	New	<input checked="" type="checkbox"/>	T-shirt print
Item	10003	New	<input checked="" type="checkbox"/>	T-shirt print
Item	10010	New	<input checked="" type="checkbox"/>	Top uni
Item	10010	New	<input checked="" type="checkbox"/>	Top uni
Item	10025	New	<input checked="" type="checkbox"/>	Skirt uni
Item	10025	New	<input checked="" type="checkbox"/>	Skirt uni
Item	10026	New	<input checked="" type="checkbox"/>	Skirt uni
Item	10026	New	<input checked="" type="checkbox"/>	Skirt uni
Item	10029	New	<input checked="" type="checkbox"/>	Short multicoloured
Item	10029	New	<input checked="" type="checkbox"/>	Short multicoloured

K3 Pebblestone

1. **Type.**
Specifies the type of requisition worksheet line you are creating.
2. **No..**
Specifies the number of the involved entry or record, according to the specified number series.
3. **Action Message.**
Specifies an action to take to rebalance the demand-supply situation.
4. **Accept Action Message.**
Specifies whether to accept the action message proposed for the line.
5. **Description.**
Specifies a description of the entry of the product to be sold. To add a non-transactional text line, fill in the Description field only.
6. **Location Code.**
Specifies a code for an inventory location where the items that are being ordered will be registered.
7. **Original Quantity.**
Specifies the quantity stated on the production or purchase order, when an action message proposes to change the quantity on an order.
8. **Quantity.**
Specifies the number of units of the item or resource specified on the line.
9. **Unit of Measure Code.**
Specifies how each unit of the item or resource is measured, such as in pieces or hours. By default, the value in the Base Unit of Measure field on the item or resource card is inserted.
10. **Direct Unit Cost.**
Specifies the cost of one unit of the selected item or resource.
11. **Line Discount %.**
Specifies the discount percentage that is granted for the item on the line.
12. **Original Due Date.**
Specifies the date when you can expect to receive the items.
13. **Due Date.**
Specifies the due date stated on the production or purchase order, when an action message proposes to reschedule an order.
14. **Vendor No..**
Specifies the number of the vendor who will ship the items in the purchase order.
15. **Vendor Item No..**
Specifies the number that the vendor uses for this item.
16. **Replenishment System.**
Specifies which kind of order to use to create replenishment orders and order proposals.



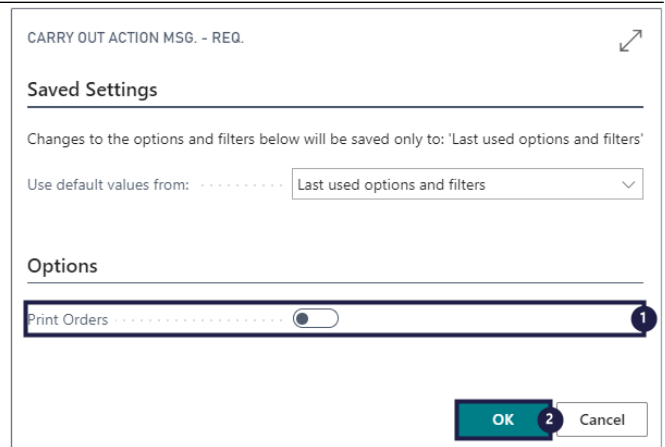
Item	No.	Description	Location Code	Original Quantity	Quantity	Direct Unit Cost	Due Date	Replenishment System
1000	1000	Item	1000	100	100	1.00	12/31/2018	Purchase
1000	1000	Item	1000	100	100	1.00	12/31/2018	Purchase
1000	1000	Item	1000	100	100	1.00	12/31/2018	Purchase

4.5.3. Creating PO from requisition Worksheet

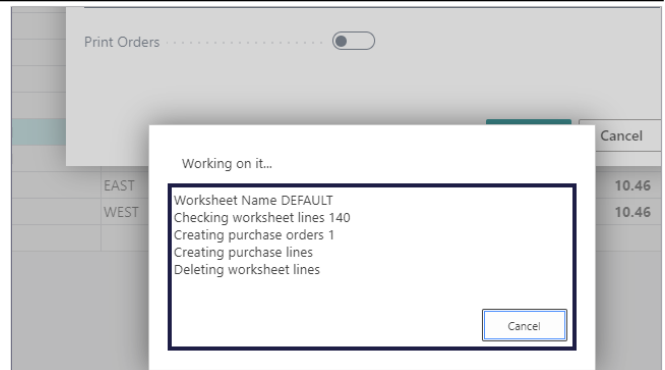
1. Click on the navigation menu item popup **Process**.
2. **Carry Out Action Message...**, Use a batch job to help you create actual supply orders from the order proposals..



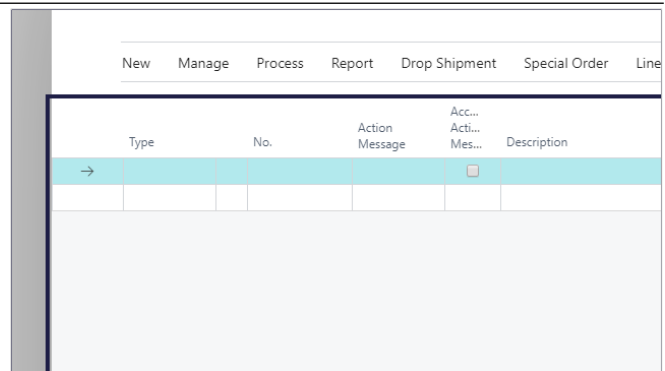
1. **Print Orders.** Specifies whether to print the purchase orders after they are created.
2. Click on the button **OK**.



The purchase orders are being created.

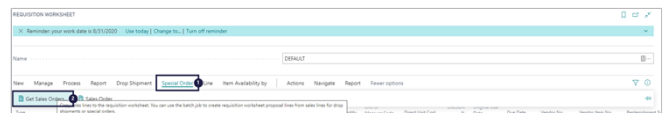


The purchase orders are created, go to the purchase orders.



4.5.4. Special order

1. Click on the navigation menu item popup **Special Order**.
2. Click on the navigation menu item **Get Sales Orders....**



K3 Pebblestone

1. **Retrieve dimensions from Item Sales Line.** Specifies the source of dimensions that will be copied in the batch job. Dimensions can be copied exactly as they were used on a sales line or can be copied from the items used on a sales line.
2. Choose the filters, if needed.
3. Click on the button **OK**.

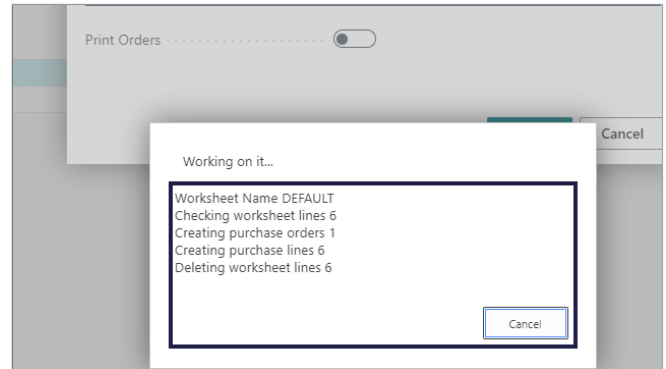
1. Click on the navigation menu item popup **Process**.
2. **Carry Out Action Message..., Use a batch job to help you create actual supply orders from the order proposals..**

Print Orders

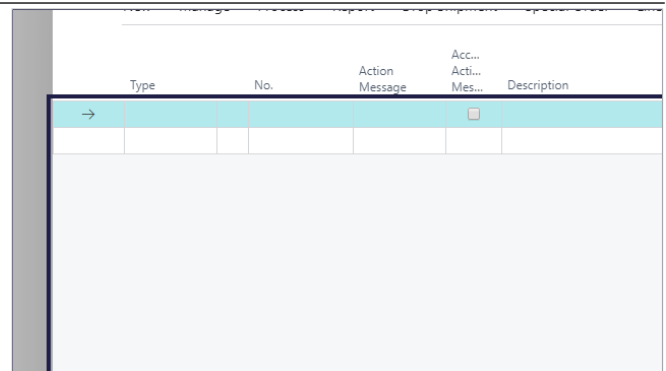
Specifies whether to print the purchase orders after they are created.

Click on the button **OK**

The purchase orders are being created.

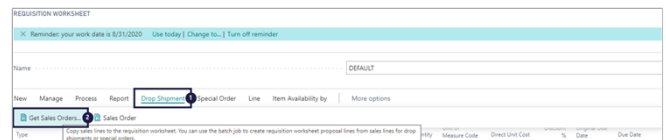


The purchase orders are created, go to the purchase orders.

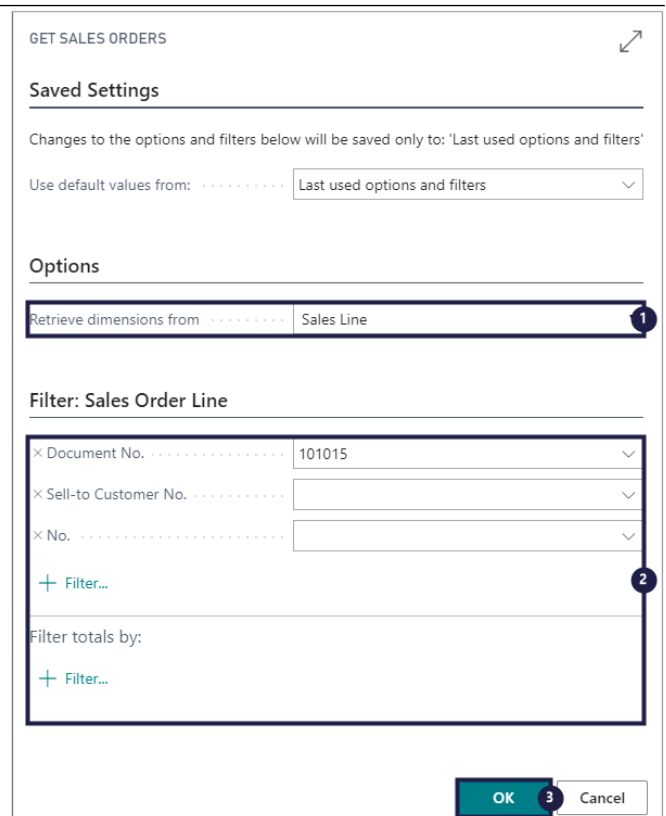


4.5.5. Drop Shipment

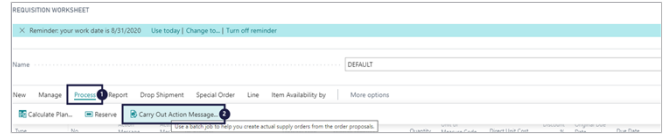
1. Click on the navigation menu item popup **Drop Shipment**.
2. Click on the navigation menu item **Get Sales Orders....**



1. **Retrieve dimensions from Item Sales Line.** Specifies the source of dimensions that will be copied in the batch job. Dimensions can be copied exactly as they were used on a sales line or can be copied from the items used on a sales line.
2. Choose the filters, if needed.
3. Click on the button **OK**.

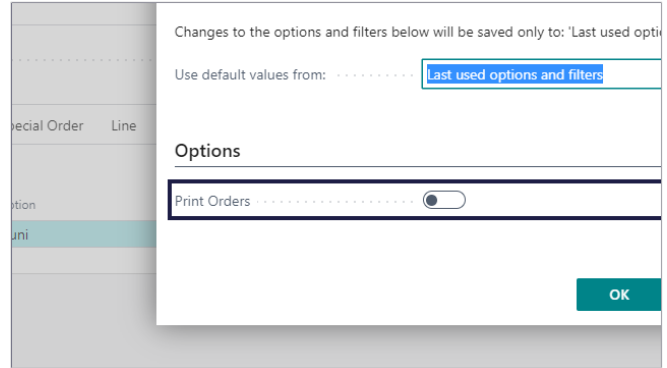


1. Click on the navigation menu item popup **Process**.
2. **Carry Out Action Message...**, Use a batch job to help you create actual supply orders from the order proposals..

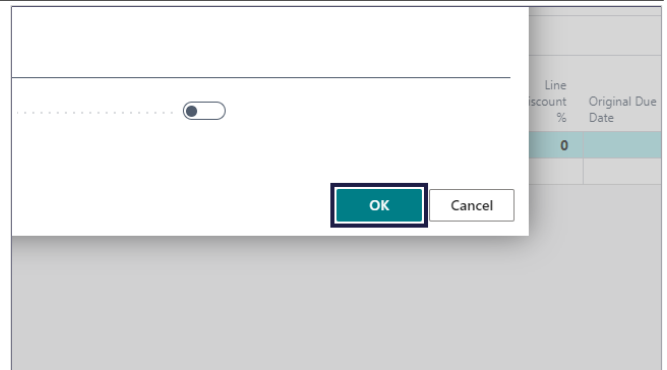


Print Orders

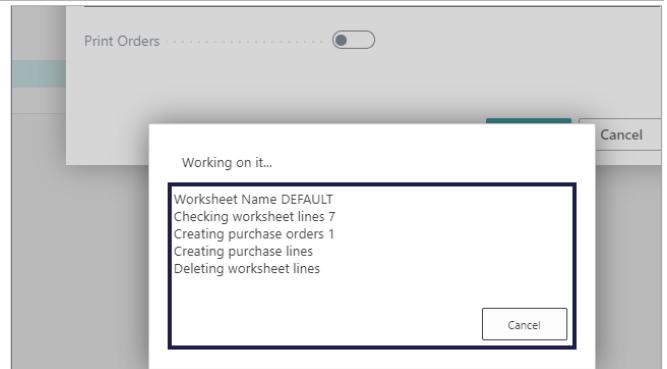
Specifies whether to print the purchase orders after they are created.



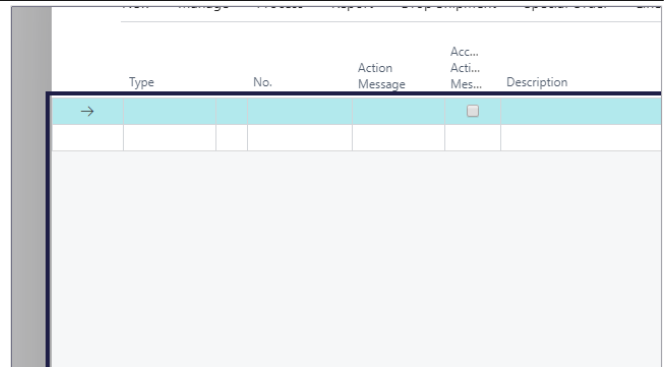
Click on the button **OK**



The purchase orders are being created.



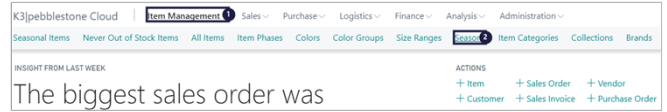
The purchase orders are created, go to the purchase orders.



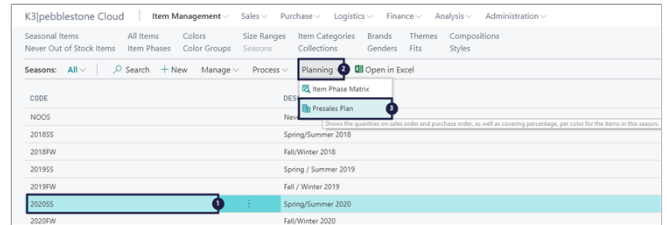
4.6. Presales Plan

4.6.1. Presales Plan

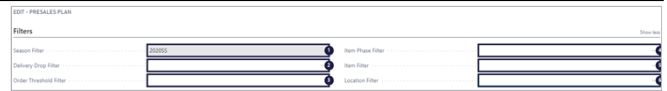
1. Click on the navigation menu item popup **Item Management**.
2. Click on the navigation menu item **Seasons**.



1. Click on the cell **Code** with the value **2020SS**.
2. Click on the navigation menu item popup **Planning**.
3. Click on the navigation menu item **Presales Plan**.



1. **Season Filter.**
Specifies a filter for the seasons, to determine which items are displayed in the Presales Plan.
2. **Delivery Drop Filter.**
Specifies a filter for the delivery drops, to determine which items are displayed in the Presales Plan.
3. **Order Threshold Filter.**
Specifies a filter for the Order Threshold to determine which items and/or colors are displayed in the Presales Plan. When a color is within the filter the item is always shown as it's parent.
4. **Item Phase Filter.**
Specifies a filter for the item phases to determine which items are displayed in the Presales Plan.
5. **Item Filter.**
Specifies a filter for the items to delimit the items that are shown in the Presales Plan.
6. **Location Filter.**
Specifies a filter for the locations. The quantities (e.g. Qty. on Presales Orders and Inventory) shown in the Presales Plan will be delimited on demand and supply for these locations.



1. **Type.**
Specifies the type of the line. The line can represent an item or an color.
2. **Code.**
Specifies at first level the Item No. and at second level the color code.
3. **Description.**
Specifies at first level the item description and the color description at second level.
4. **Qty. on Presales Order.**
Specifies the outstanding quantities on presales orders.
5. **Additional Qty. to Purchase.**
Specifies the total manually entered additional

TYPE	CODE	DESCRIPTION	QTY ON PRESALES ORDER	ADDITIONAL QTY TO PURCHASE	TOTAL DEMAND	ORDER THRESHOLD	IGNORE THRESHOLD COVERAGE	ITEM PHASE CODE	NEW ITEM CODE	NEW ITEM NO.	NEW COLOR CODE	REPL.
Item	0001	Blue/green	370	0	370	200	100%	00	00	00	00	00
Color	BLAKE	Blue	210	0	210	0%	0%	00	00	00	00	00
Color	PINK	Pink	0	0	0	0%	0%	00	00	00	00	00
Color	ICE	Ice	110	0	110	0%	0%	00	00	00	00	00

K3 Pebblestone

- quantities. Additional quantities can be registered on color-size-location level in a matrix.
6. **Total Demand.**
Specifies the total demand, which is the sum of the quantities on presales orders and the manually entered additional quantities to purchase. The total demand is zero when the value is below the order threshold.
 7. **Order Threshold.**
Specifies the order threshold for an item or a color. Items or colors can be automatically blocked for future sales when the total demand is below the order threshold.
 8. **Threshold Coverage.**
Specifies the Total Demand as a percentage of the Order Threshold.
 9. **Ignore Order Threshold.**
When set the Order Threshold is ignored and the Total Demand is used when creating the presales purchase orders.
 10. **Item Phase Code.**
Specifies the current Item Phase Code of the Item or the Color. Item statuses can be used to block for certain activities. E.g. Shipping or sales order entry.
 11. **New Item Phase Code.**
Specifies the new Item Phase Code of the Item or the Color, which can be applied using the Apply New Item Phases action. By assigning a new Item phase the item can be blocked or unblocked for certain activities. Within the Presales Plan the item or color is typically blocked completely or blocked for sales order entry.
 12. **New Item No..**
Specifies the new Replacement Item No., which can be used as an alternative for the currently blocked items. When the New Item Phases are applied, then a replacement document is created. This document will be used by the sales department to replace cancelled items on existing sales orders.
 13. **New Color Code.**
Specifies the new Color Code for the new Item No., which can be used as an alternative for the currently blocked colors. When the New Item Phases are applied, then a replacement document is created. This document will be used by the sales department to replace cancelled items on existing sales orders.

1. **Replacement.**
Specifies the Replacement No. or the number of Replacements that has been created for the sales department to replace cancelled items on existing sales orders.
2. **Expected Revenue.**
Specifies the expected revenue for this item

REPLACEM..	EXPECTED REVENUE	EXPECTED COSTS	SUPPLY COVERAGE	DELIVERY DROP CODE	BRAND CODE	VENDOR NO.	VENDOR NAME
1	3,737.64	3,555.70	0%	2	AWESOME	120	American Apparel Exports
	2,577.64	2,440.94	0%	2	AWESOME	120	American Apparel Exports
	0.00	0.00	0%	2	AWESOME	120	American Apparel Exports
	1,160.00	1,114.76	0%	2	AWESOME	120	American Apparel Exports
	650.64	619.30	0%	2	AWESOME	120	American Apparel Exports

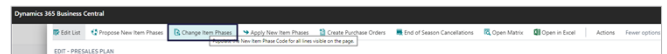
or color. The expected revenue is based on the Outstanding Amount of the sales orders and a forecasted revenue for the additional quantities to purchase, which is based on the unit price of the item.

3. **Expected Costs.**
Specifies the expected costs for this item or color. The expected costs are based on the total demand and the unit cost of the item.
4. **Supply Coverage.**
Specifies the supply (current inventory and outstanding quantities on purchase orders) as a percentage of the quantities on presales orders.
5. **Delivery Drop Code.**
Specifies the code that defines the drop in which this item or color will be delivered, associated with the season.
6. **Brand Code.**
Specifies the code of the brand that the item belongs to.
7. **Vendor No..**
Specifies the Vendor No. where the item will be purchased from.
8. **Vendor Name.**
Specifies the name of the vendor where the item will be purchased from.

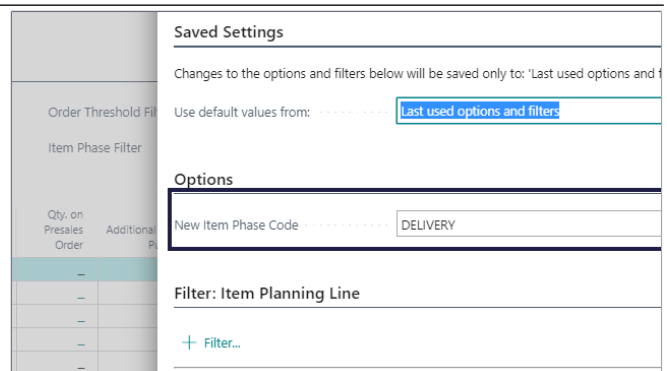
4.7. Change item phases on presales plan

4.7.1. Change item phases on the presales plan

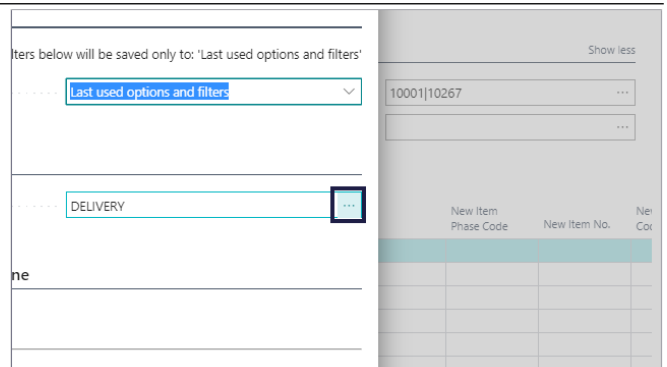
- Click on the navigation menu item **Change Item Phases**.



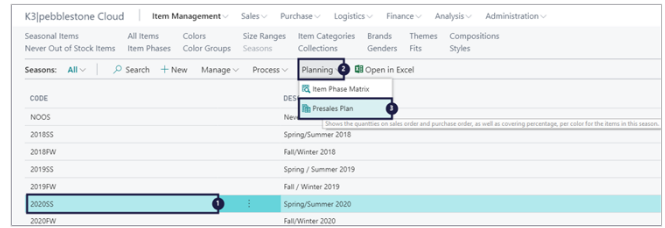
New Item Phase Code



Click on the lookup button **New Item Phase Code**



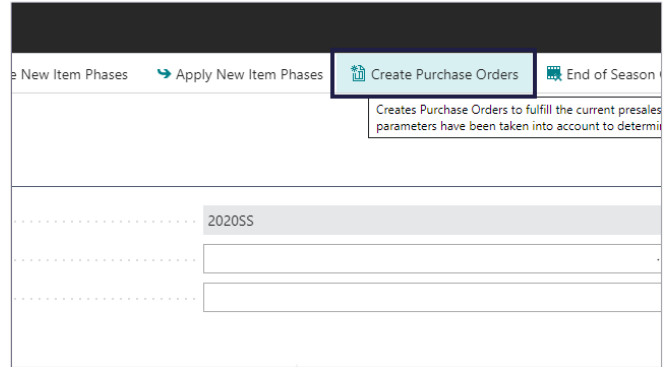
1. Click on the cell **Code** with the value **2020SS**.
2. Click on the navigation menu item popup **Planning**.
3. Click on the navigation menu item **Presales Plan**.



4.8.2. Create Purchase orders

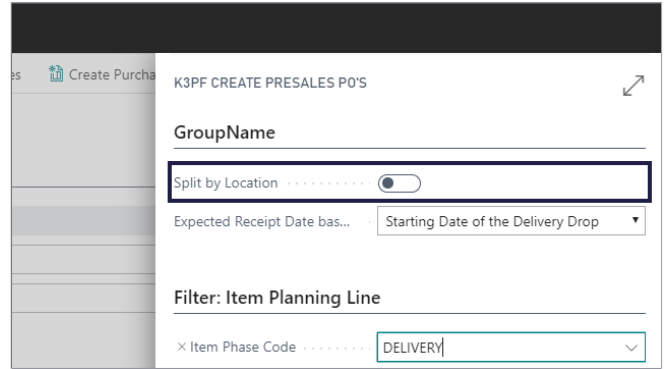
Click on the link **Creates Purchase Orders** to fulfill the current presales orders for the Quantities to Purchase. Inventory levels, current availability and item planning parameters have been taken into account to determine what is being purchased.

A pop-up appears.

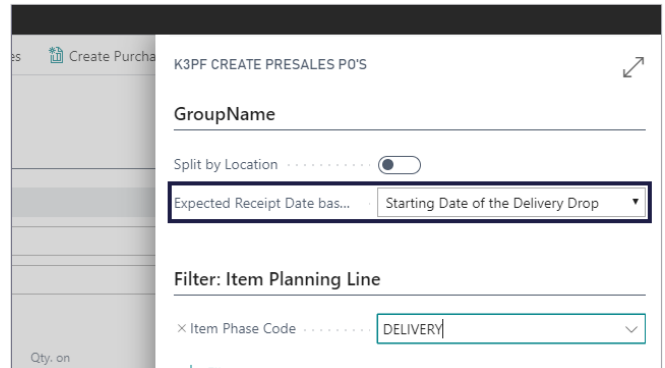


Split by Location

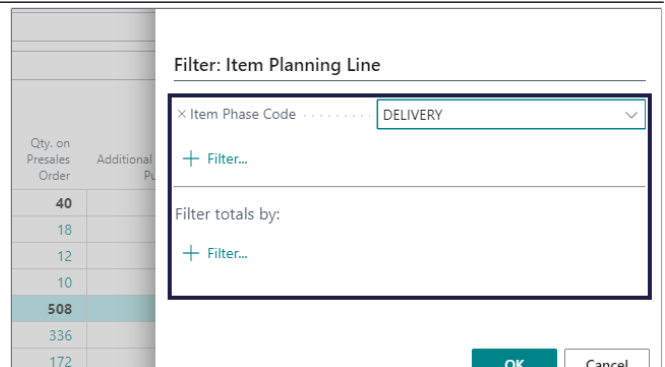
If enabled then purchase orders are created per vendor and location.



Select how the Expected Receipt Date on the purchase order lines should be determined.

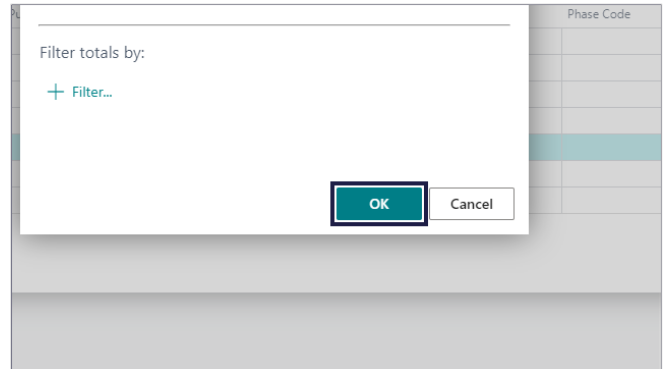


Add filters on which the purchase orders should be based.

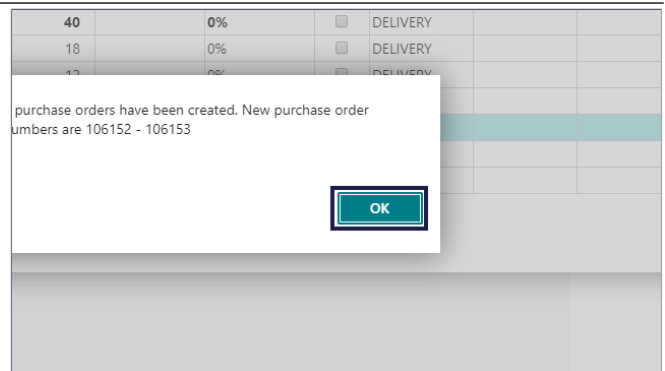


K3 Pebblestone

Click on the button **OK**



Purchase orders are being created.
Click on the button **OK**



Supply Coverage

Specifies the supply (current inventory and outstanding quantities on purchase orders) as a percentage of the quantities on presales orders.

Replacement	Expected Revenue	Expected Costs	Supply Coverage	Delivery Drop Code	Brand Code
---	400,00	384,40	100%	2	AWESOME
---	180,00	172,98	100%	2	AWESOME
---	120,00	115,32	100%	2	AWESOME
---	100,00	96,10	100%	2	AWESOME
---	5.576,72	7.045,96	100%	3	AWESOME
---	3.684,98	4.660,32	100%	3	AWESOME
---	1.891,74	2.385,64	100%	3	AWESOME

4.9. Replacement and cancellation by wholesaler

4.9.1. Replacement proposal

- Click on the navigation menu item **Propose New Item Phases**.
The new Item Phase is proposed.
- When you want to replace items because minimum has not been reached, enter this first.
Click on the navigation menu item **Apply New Item Phases**.

4.9.2. Replacement

- Click on the **Replacement** number in cell **Replacement**.
The replacement worksheet will open.

4.9.3. Replacement worksheet

1. **No..**
Replacement Worksheet document No.
2. **Description.**
Specifies the replacement worksheet description.
3. **Reason Code.**
Specifies the reason code for the replacement worksheet.
4. **Status New In progress Finished.**
Specifies whether the document is new, in progress, or has been finished.

The screenshot shows a web-based form titled 'EDIT - REPLACEMENT - REPL_000001'. It has a 'General' section with two dropdown menus: 'Reason Code' and 'Status'. The 'Reason Code' dropdown is currently empty, and the 'Status' dropdown is set to 'New'.

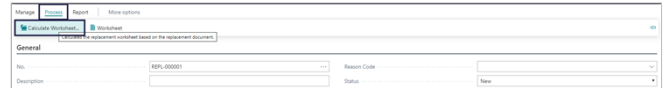
1. **Replacement Method.**
Indicates whether the item, color and/or size on the line will be replaced or cancelled.
2. **Price Adjustment.**
Indicates whether a price charge is applicable or that the current prices will be remained.
3. **Recalculate Shipment Date.**
Indicates whether the shipment date will be recalculated or that the current shipment date on the order lines will be remained.
4. **Item No..**
Specifies the number of the item on the replacement line that will be replaced or cancelled.
5. **Item Description.**
Specifies a description of the item on the replacement line that will be replaced or cancelled.
6. **Color Code.**
Specifies the code of the color on the replacement line that will be replaced or cancelled.
7. **Size Code.**
Specifies the code of the size on the replacement line that will be replaced or cancelled.
8. **2nd Size Code.**
Specifies the code of the additional size, for example waist or inseam for the item on the replacement line that will be replaced or cancelled.
9. **New Item No..**
Specifies the number of the item that will replace the item selected in the Item No. field.
10. **New Color Code.**
Specifies the code of the color that will replace the color selected in the Color Code field.
11. **New Size Code.**
Specifies the code of the size that will replace the size selected in the Size Code field.
12. **New 2nd Size Code.**
Specifies the code of the additional size, for example waist or inseam for the item that will replace the size selected in the 2nd Size

The screenshot shows a table with 12 columns. The columns are: Replacement Method, Price Adjustment, Recalculate Shipment Date, Item No., Item Description, Color Code, Size Code, 2nd Size Code, New Item No., New Color Code, New Size Code, and New 2nd Size Code. The first row contains the values: 'Replace', 'None', 'No', '101', '101', '101', '101', '101', '101', '101', '101', '101'.

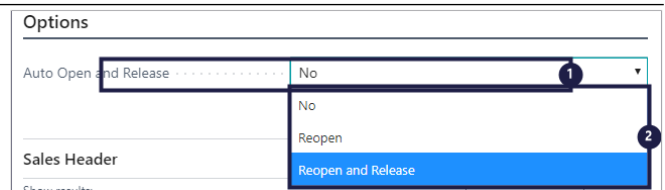
13. Code field.
Reason Code.
 Specifies the reason code, a supplementary source code that enables you to identify the reason for the replacement or cancellation on this line.

4.9.4. Calculate Worksheet

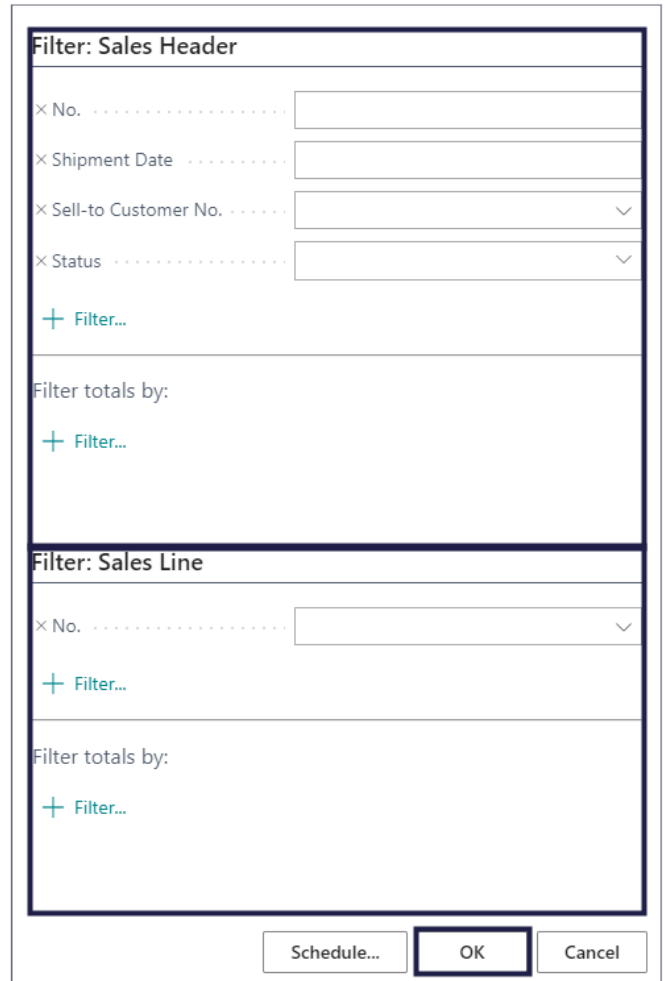
- Click on the navigation menu item popup **Process**.
- Click on the navigation menu item **Calculate Worksheet...**
 The edit calculate worksheet will open.



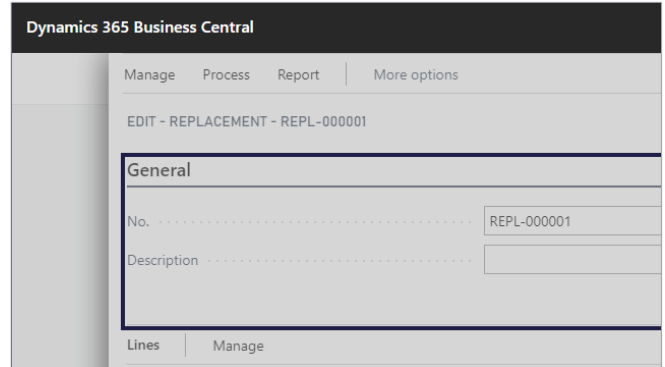
- Move the mouse to **Auto Open and Release No Reopen Reopen and Release**.
- Choose if you want to **Reopen and Release** the order.



- If needed choose the right filters for Sales Header.
- If needed choose the right filters for Sales Line.
- Click on the button **OK**.

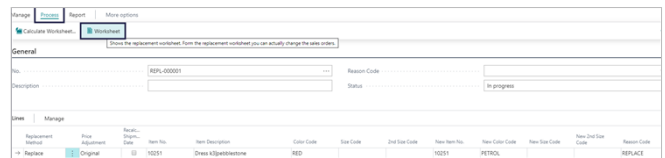


The status changed into, in progress.



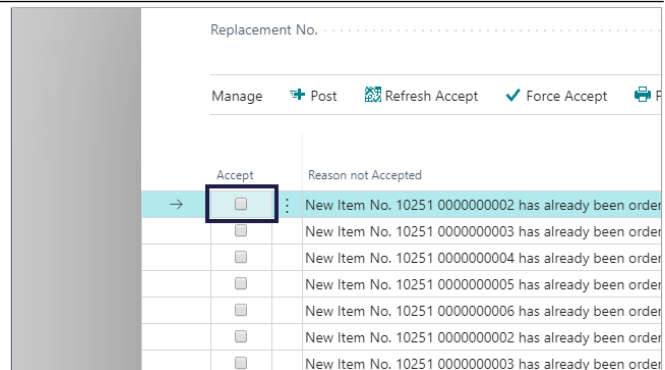
4.9.5. Worksheet

- Click on the navigation menu item popup **Process**.
- Click on the navigation menu item **Worksheet**. The calculated worksheet will open.



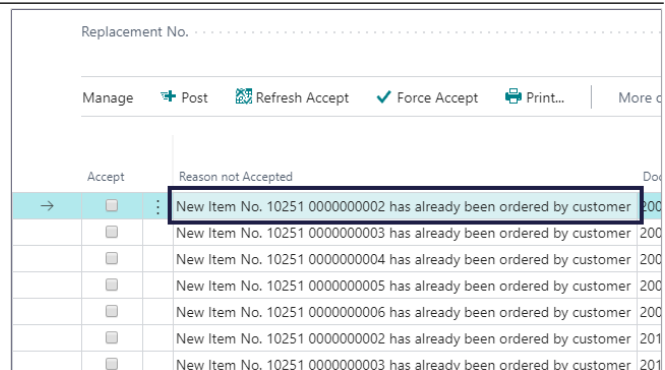
Accept

Indicates whether to accept the proposed changes for this line.



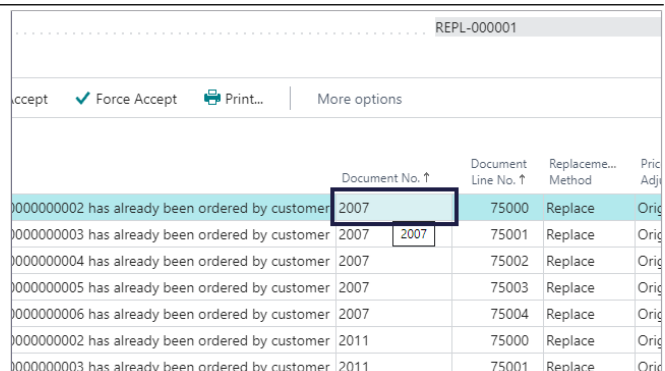
Reason not Accepted

Specifies a code to explain why you don't want to accept the proposed changes for this line.



Document No.


Specifies the number of the sales order that represents the line.



K3 Pebblestone

Document Line No.

Specifies the line number of the sales order line.

REPL-000001					
Accept  Print... More options					
	Document No. ↑	Document Line No. ↑	Replaceme... Method	Price Adjustment	Recalcul Shipmer
ready been ordered by customer	2007	75000	Replace	Original	
ready been ordered by customer	2007	75001	Replace	Original	
ready been ordered by customer	2007	75002	Replace	Original	
ready been ordered by customer	2007	75003	Replace	Original	
ready been ordered by customer	2007	75004	Replace	Original	
ready been ordered by customer	2011	75000	Replace	Original	
ready been ordered by customer	2011	75001	Replace	Original	

Replacement Method

Indicates whether the item, color and/or size on the line will be replaced or cancelled.

REPL-000001						
Print... More options						
	Document No. ↑	Document Line No. ↑	Replaceme... Method	Price Adjustment	Recalculate Shipment Date	Aut
ered by customer	2007	75000	Replace	Original	<input type="checkbox"/>	No
ered by customer	2007	75001	Replace	Original	<input type="checkbox"/>	No
ered by customer	2007	75002	Replace	Original	<input type="checkbox"/>	No
ered by customer	2007	75003	Replace	Original	<input type="checkbox"/>	No
ered by customer	2007	75004	Replace	Original	<input type="checkbox"/>	No
ered by customer	2011	75000	Replace	Original	<input type="checkbox"/>	No
ered by customer	2011	75001	Replace	Original	<input type="checkbox"/>	No

Price Adjustment

Indicates whether a price charge is applicable or that the current prices will be remained.

REPL-000001						
More options						
	Document No. ↑	Document Line No. ↑	Replaceme... Method	Price Adjustment	Recalculate Shipment Date	Auto Reopen and Re
ner	2007	75000	Replace	Original	<input type="checkbox"/>	No
ner	2007	75001	Replace	Original	<input type="checkbox"/>	No
ner	2007	75002	Replace	Original	<input type="checkbox"/>	No
ner	2007	75003	Replace	Original	<input type="checkbox"/>	No
ner	2007	75004	Replace	Original	<input type="checkbox"/>	No
ner	2011	75000	Replace	Original	<input type="checkbox"/>	No
ner	2011	75001	Replace	Original	<input type="checkbox"/>	No

Recalculate Shipment Date

Indicates whether the shipment date will be recalculated or that the current shipment date on the order lines will be remained.

REPL-000001						
No. ↑	Document Line No. ↑	Replaceme... Method	Price Adjustment	Recalculate Shipment Date	Auto Reopen and Release	Item N
	75000	Replace	Original	<input type="checkbox"/>	No	10251
	75001	Replace	Original	<input type="checkbox"/>	No	10251
	75002	Replace	Original	<input type="checkbox"/>	No	10251
	75003	Replace	Original	<input type="checkbox"/>	No	10251
	75004	Replace	Original	<input type="checkbox"/>	No	10251
	75000	Replace	Original	<input type="checkbox"/>	No	10251
	75001	Replace	Original	<input type="checkbox"/>	No	10251

K3 Pebblestone

Auto Reopen and Release

Indicates whether the sales order will be automatically reopened and replaced to apply the replacement

Item No.	Replace Method	Price Adjustment	Recalculate Shipment Date	Auto Reopen and Release	Item No.	Variant Code
10	Replace	Original	<input type="checkbox"/>	No	10251	00000000
11	Replace	Original	<input type="checkbox"/>	No	10251	00000000
12	Replace	Original	<input type="checkbox"/>	No	10251	00000000
13	Replace	Original	<input type="checkbox"/>	No	10251	00000000
14	Replace	Original	<input type="checkbox"/>	No	10251	00000000
10	Replace	Original	<input type="checkbox"/>	No	10251	00000000
11	Replace	Original	<input type="checkbox"/>	No	10251	00000000

Item No.

Specifies the number of the item on the line that will be replaced or cancelled.

Item No.	Auto Reopen and Release	Item No.	Variant Code	Variant Description
10251	No	10251	0000000008	Dress k3|pebblestone
10251	No	10251	0000000009	Dress k3|pebblestone
10251	No	10251	0000000010	Dress k3|pebblestone
10251	No	10251	0000000011	Dress k3|pebblestone
10251	No	10251	0000000012	Dress k3|pebblestone
10251	No	10251	0000000008	Dress k3|pebblestone
10251	No	10251	0000000009	Dress k3|pebblestone

Variant Code

Specifies the code of the item variant on the line that will be replaced or cancelled.

Auto Reopen and Release	Item No.	Variant Code	Variant Description
No	10251	0000000008	Dress k3|pebblestone Red-36
No	10251	0000000009	Dress k3|pebblestone Red-38
No	10251	0000000010	Dress k3|pebblestone Red-40
No	10251	0000000011	Dress k3|pebblestone Red-42
No	10251	0000000012	Dress k3|pebblestone Red-44
No	10251	0000000008	Dress k3|pebblestone Red-36
No	10251	0000000009	Dress k3|pebblestone Red-38

Variant Description

Specifies the description of the item variant on the line that will be replaced or cancelled.

Auto Reopen and Release	Item No.	Variant Code	Variant Description	New Item No.	New Variant Code
	10251	0000000008	Dress k3|pebblestone Red-36	10251	000
	10251	0000000009	Dress k3|pebblestone Red-38	10251	000
	10251	0000000010	Dress k3|pebblestone Red-40	10251	000
	10251	0000000011	Dress k3|pebblestone Red-42	10251	000
	10251	0000000012	Dress k3|pebblestone Red-44	10251	000
	10251	0000000008	Dress k3|pebblestone Red-36	10251	000
	10251	0000000009	Dress k3|pebblestone Red-38	10251	000

K3 Pebblestone

New Item No.

Specifies the number of the item that will replace the item selected in the Item No. field.

Variant Code	Variant Description	New Item No.	New Variant Code	New Variant Description
000000008	Dress k3|pebblestone Red-36	10251	000000002	Dress k3|pebblestone Petrol-36
000000009	Dress k3|pebblestone Red-38	10251	000000003	Dress k3|pebblestone Petrol-38
000000010	Dress k3|pebblestone Red-40	10251	000000004	Dress k3|pebblestone Petrol-40
000000011	Dress k3|pebblestone Red-42	10251	000000005	Dress k3|pebblestone Petrol-42
000000012	Dress k3|pebblestone Red-44	10251	000000006	Dress k3|pebblestone Petrol-44
000000008	Dress k3|pebblestone Red-36	10251	000000002	Dress k3|pebblestone Petrol-36
000000009	Dress k3|pebblestone Red-38	10251	000000003	Dress k3|pebblestone Petrol-38

New Variant Code

Specifies the code of the item variant that will replace the item variant selected in the Variant Code field.

Variant Description	New Item No.	New Variant Code	New Variant Description
Dress k3|pebblestone Red-36	10251	000000002	Dress k3|pebblestone Petrol-36
Dress k3|pebblestone Red-38	10251	000000003	Dress k3|pebblestone Petrol-38
Dress k3|pebblestone Red-40	10251	000000004	Dress k3|pebblestone Petrol-40
Dress k3|pebblestone Red-42	10251	000000005	Dress k3|pebblestone Petrol-42
Dress k3|pebblestone Red-44	10251	000000006	Dress k3|pebblestone Petrol-44
Dress k3|pebblestone Red-36	10251	000000002	Dress k3|pebblestone Petrol-36
Dress k3|pebblestone Red-38	10251	000000003	Dress k3|pebblestone Petrol-38

New Variant Description

Specifies the description of the item variant that will replace the item variant selected in the Variant Code field.

Variant Description	New Item No.	New Variant Code	New Variant Description	Outstanding Quantity
Dress k3|pebblestone Red-36	10251	000000002	Dress k3|pebblestone Petrol-36	1
Dress k3|pebblestone Red-38	10251	000000003	Dress k3|pebblestone Petrol-38	2
Dress k3|pebblestone Red-40	10251	000000004	Dress k3|pebblestone Petrol-40	3
Dress k3|pebblestone Red-42	10251	000000005	Dress k3|pebblestone Petrol-42	3
Dress k3|pebblestone Red-44	10251	000000006	Dress k3|pebblestone Petrol-44	1
Dress k3|pebblestone Red-36	10251	000000002	Dress k3|pebblestone Petrol-36	1
Dress k3|pebblestone Red-38	10251	000000003	Dress k3|pebblestone Petrol-38	1

Outstanding Quantity

Specifies how many units on the order line have not yet been shipped.

New Variant Code	New Variant Description	Outstanding Quantity	Reason Code	Order Status
000000002	Dress k3|pebblestone Petrol-36	1	REPLACE	Open
000000003	Dress k3|pebblestone Petrol-38	2	REPLACE	Open
000000004	Dress k3|pebblestone Petrol-40	2	REPLACE	Open
000000005	Dress k3|pebblestone Petrol-42	3	REPLACE	Open
000000006	Dress k3|pebblestone Petrol-44	3	REPLACE	Open
000000002	Dress k3|pebblestone Petrol-36	1	REPLACE	Open
000000003	Dress k3|pebblestone Petrol-38	1	REPLACE	Open

K3 Pebblestone

Reason Code

Specifies the Reason Code that reflects why the cancellation or replacement occurred.

New Variant Description	Outstanding Quantity	Reason Code	Order Status	Special Order	Drop Shipment
Dress k3|pebblestone Petrol-36	1	REPLACE	Open	<input type="checkbox"/>	<input type="checkbox"/>
Dress k3|pebblestone Petrol-38	2	REPLACE	Open	<input type="checkbox"/>	<input type="checkbox"/>
Dress k3|pebblestone Petrol-40	2	REPLACE	Open	<input type="checkbox"/>	<input type="checkbox"/>
Dress k3|pebblestone Petrol-42	3	REPLACE	Open	<input type="checkbox"/>	<input type="checkbox"/>
Dress k3|pebblestone Petrol-44	3	REPLACE	Open	<input type="checkbox"/>	<input type="checkbox"/>
Dress k3|pebblestone Petrol-36	1	REPLACE	Open	<input type="checkbox"/>	<input type="checkbox"/>
Dress k3|pebblestone Petrol-38	1	REPLACE	Open	<input type="checkbox"/>	<input type="checkbox"/>

Order Status

Specifies whether the document is open, waiting to be approved, has been invoiced for prepayment, or has been released to the next stage of processing..

Description	Outstanding Quantity	Reason Code	Order Status	Special Order	Drop Shipment
estone Petrol-36	1	REPLACE	Open	<input type="checkbox"/>	<input type="checkbox"/>
estone Petrol-38	2	REPLACE	Open	<input type="checkbox"/>	<input type="checkbox"/>
estone Petrol-40	2	REPLACE	Open	<input type="checkbox"/>	<input type="checkbox"/>
estone Petrol-42	3	REPLACE	Open	<input type="checkbox"/>	<input type="checkbox"/>
estone Petrol-44	3	REPLACE	Open	<input type="checkbox"/>	<input type="checkbox"/>
estone Petrol-36	1	REPLACE	Open	<input type="checkbox"/>	<input type="checkbox"/>
estone Petrol-38	1	REPLACE	Open	<input type="checkbox"/>	<input type="checkbox"/>

Special Order

Specifies that the item on the sales line is a special-order item.

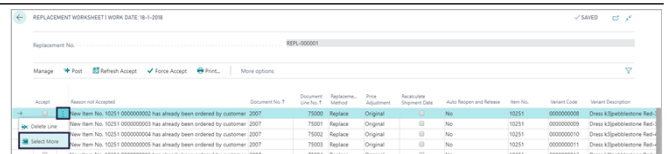
Outstanding Quantity	Reason Code	Order Status	Special Order	Drop Shipment
6	1 REPLACE	Open	<input type="checkbox"/>	<input type="checkbox"/>
8	2 REPLACE	Open	<input type="checkbox"/>	<input type="checkbox"/>
0	2 REPLACE	Open	<input type="checkbox"/>	<input type="checkbox"/>
2	3 REPLACE	Open	<input type="checkbox"/>	<input type="checkbox"/>
4	3 REPLACE	Open	<input type="checkbox"/>	<input type="checkbox"/>
6	1 REPLACE	Open	<input type="checkbox"/>	<input type="checkbox"/>
8	1 REPLACE	Open	<input type="checkbox"/>	<input type="checkbox"/>

Drop Shipment

Specifies if your vendor ships the items directly to your customer.

Outstanding Quantity	Reason Code	Order Status	Special Order	Drop Shipment
1	REPLACE	Open	<input type="checkbox"/>	<input type="checkbox"/>
2	REPLACE	Open	<input type="checkbox"/>	<input type="checkbox"/>
2	REPLACE	Open	<input type="checkbox"/>	<input type="checkbox"/>
3	REPLACE	Open	<input type="checkbox"/>	<input type="checkbox"/>
3	REPLACE	Open	<input type="checkbox"/>	<input type="checkbox"/>
1	REPLACE	Open	<input type="checkbox"/>	<input type="checkbox"/>
1	REPLACE	Open	<input type="checkbox"/>	<input type="checkbox"/>

- Click on the row menu button.
- Click on the menu item **Select More**.



Document No.	Document Date	Reason Code	Order Status	Special Order	Drop Shipment
7500	2023	REPLACE	Open	<input type="checkbox"/>	<input type="checkbox"/>
7500	2023	REPLACE	Open	<input type="checkbox"/>	<input type="checkbox"/>
7500	2023	REPLACE	Open	<input type="checkbox"/>	<input type="checkbox"/>
7500	2023	REPLACE	Open	<input type="checkbox"/>	<input type="checkbox"/>
7500	2023	REPLACE	Open	<input type="checkbox"/>	<input type="checkbox"/>
7500	2023	REPLACE	Open	<input type="checkbox"/>	<input type="checkbox"/>

K3 Pebblestone

- Click on the column header **Selected**.
- Click on the navigation menu item **Force Accept**.
- Click on the navigation menu item **Post**.

- Click on the button **Yes**.

- The replacement has been booked.

- The status changed into, finished.

5. Logistics

5.1. Delivery plan

5.1.1. Navigate to Delivery worksheet

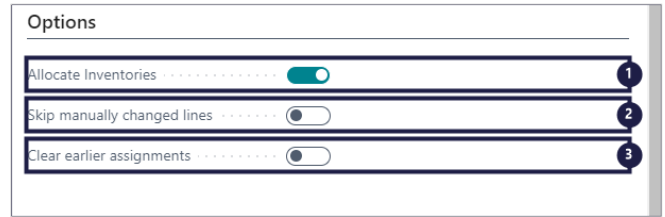
Click on the navigation menu item popup **Logistics**.
Click on the navigation menu item **Delivery Worksheet**.

5.1.2. Calculate Plan

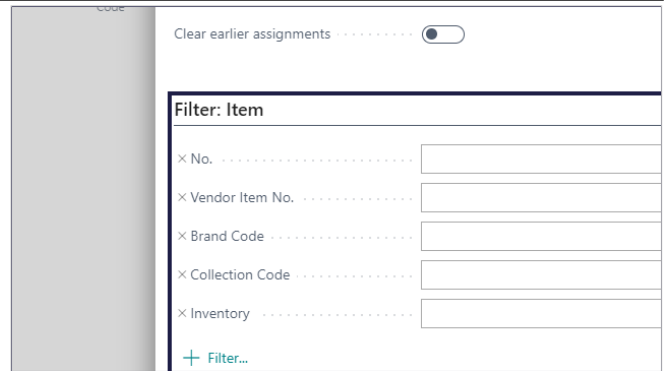
1. Click on the navigation menu item popup **Prepare**.
2. Click on the navigation menu item **Calculate Plan**.

K3 Pebblestone

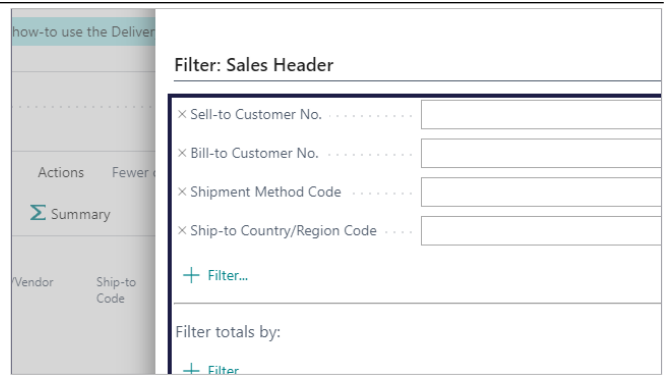
1. Click on **Allocate Inventories**.
Immediately allocate available inventories to the added delivery worksheet lines.
2. Click on **Skip manually changed lines**.
Skip lines that have been modified manually.
3. Click on **Clear earlier assignments**.
Set all Qty's to ship to zero, before allocating the available inventories to delivery worksheet lines.



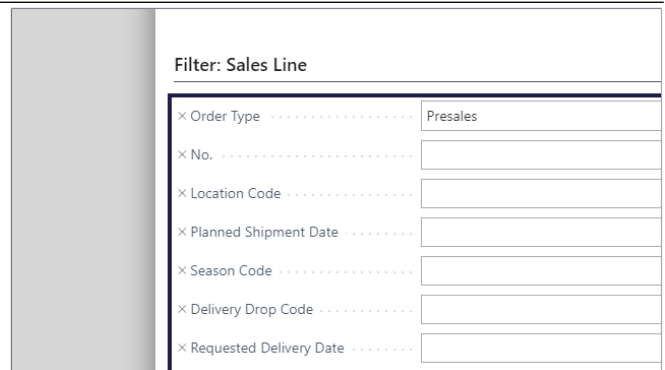
Choose the filter for Item, if needed.



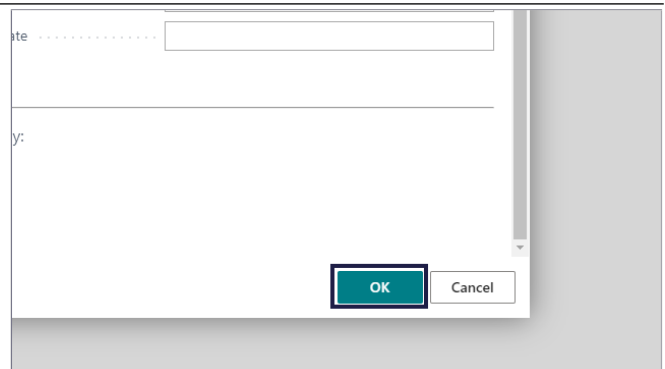
Choose the filter for Sales Header, if needed.



Choose the filter for Sales line, if needed.



Click on the button **OK**



5.1.3. Delivery worksheet lines

1. **Document No..**
Specifies the document number of the source document.
2. **Sell-to Customer/Vendor No..**
Specifies the Sell-to Customer/Vendor No. for the order line.
3. **Sell-to Customer/Vendor Name.**
Specifies the name of Sell-to Customer/Vendor for the order line.
4. **Ship-to Code.**
Specifies the Ship-to Code for the order line.
5. **Item No..**
Specifies the Item No. of the order line.
6. **Description.**
Specifies the order line description.
7. **Outstanding Quantity.**
Specifies how many units on the delivery line have not yet been shipped.
8. **Qty. to Allocate.**
Specifies how many units of the delivery line quantity that you can to assign to this line.
9. **Qty. to Ship.**
Specifies the quantity of items that remain to be shipped.
10. **Delivery Drop.**
Specifies the delivery drop of the line.
11. **Shipment Date.**
Specifies the shipment date of the line.
12. **Auto Cancel Remainder.**
Specifies whether the remainder quantities on the order will be auto cancelled.

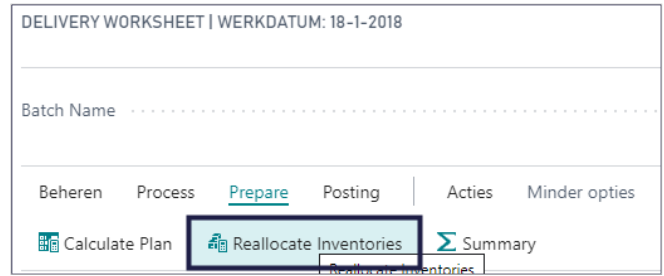
Document No.	Sell-to Customer/Vendor No.	Sell-to Customer/Vendor Name	Ship-to Code	Item No.	Description	Outstanding Quantity	Qty. to Allocate	Qty. to Ship	Shipment Date	Auto Cancel Remainder	
1013	1005	Wilger Young Fashion		10195	Trackout jacket multi...	37	0	37	2	1/15/2019	☑
1013	1005	Wilger Young Fashion		10200	Top longleeve print	29	29	0	2	1/15/2019	☒
1013	1005	Wilger Young Fashion		10203	Jacket un.	24	24	0	1	12/15/2018	☒

1. Move the mouse to the column header **Order Type.**
Specifies the Order Type of the Order.
2. Move the mouse to the column header **Season Code.**
Specifies the Season Code value for Item.
3. Move the mouse to the column header **Delivery Priority.**
Specifies the delivery priority for the line.
4. Move the mouse to the column header **Planned Shipment Date.**
Specifies the planned shipment date of the line.
5. Move the mouse to the column header **Shipping Agent Code.**
Specifies the shipping agent code for the line.
6. Move the mouse to the column header **Posting Status.**
Specifies the posting status of the line.

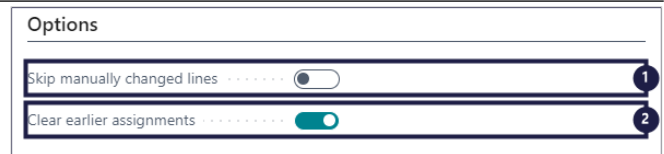
Order Type	Season Code	Delivery Priority	Planned Shipment Date	Shipping Agent Code	Posting Status
PRESALES	2019SS		12/15/2018	TNT	Open
PRESALES	2019SS		1/15/2019	TNT	Open
PRESALES	2019SS		12/15/2018	TNT	Open
PRESALES	2019SS		12/15/2018	TNT	Open

5.1.4. Reallocate Inventories

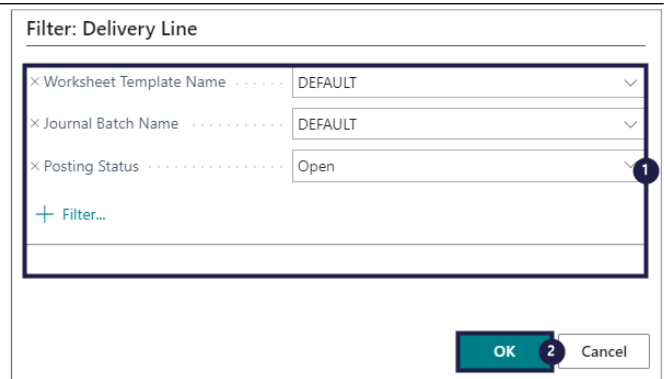
Click on the navigation menu item **Reallocate Inventories**.



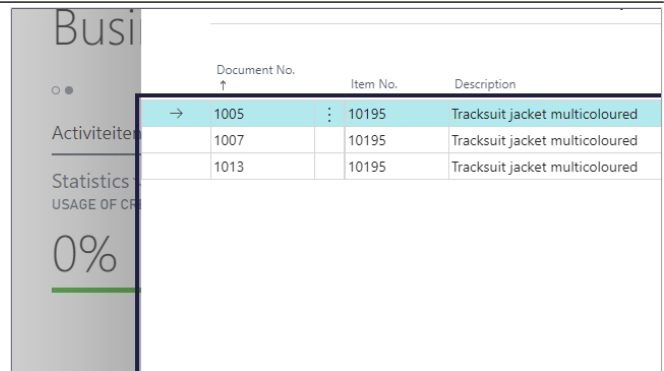
1. **Skip manually changed lines.**
Skip lines that have been modified manually.
2. **Clear earlier assignments.**
Set all Qty's to ship to zero, before allocating the available inventories to delivery worksheet lines.



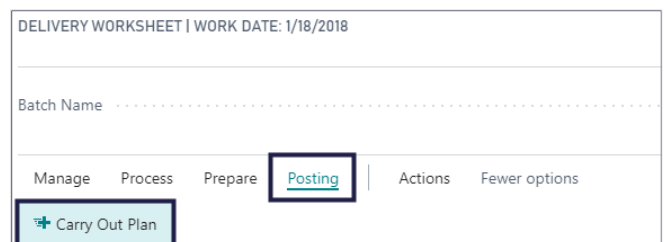
1. Choose the filters if needed.
2. Click on the button **OK**.



After reallocate inventories the quantity to ship will change, if there is inventory.



- Click on the navigation menu item popup **Posting**.
- Click on the navigation menu item **Carry Out Plan**.
A pop-up appears.



K3 Pebblestone

1. **Action Ship.**
2. **Posting Date.**
3. **Replace Posting Date.**
4. **Replace Document Date.**
5. **Calc. Inv. Discount (Sales).**
6. **Calc. Inv. Discount (Purchase).**
7. **Click on the button OK.**
If quantity to ship is filled, it will create inventory picks after posting.

EDIT - POST DELIVERY WORKSHEET REQUEST

1. Action Ship

2. Posting Date

3. Replace Posting Date

4. Replace Document Date

5. Calc. Inv. Discount (Sales)

6. Calc. Inv. Discount (Purchas... ..

7. OK Cancel

Working on it... Processing: 0

10200						
10202						
10194						
10195	Tracksuit jacket multi...	35	0	35	2	
10202	Jacket uni	24	24	0	1	
10194	Hoodie print	47	47	0	1	
10200	Top long sleeve print	20	20	0	2	
10202						
10208						
10194						
10200	top long sleeve print	29	29	0	2	
10202	Jacket uni	24	24	0	1	
10194	Hoodie print	47	47	0	1	
10200	Top long sleeve print	20	20	0	2	

If there is an error or warning it will appear.

DELIVERY WORKSHEET | WORK DATE: 1/18/2018

As error or warning occurred during operation Batch processing of Sales Header records. Details

Batch Name: DEFAULT

5.1.5. Summary

Click on the navigation menu item popup **Prepare**.
Click on the navigation menu item **Summary**.

DELIVERY WORKSHEET | WORK DATE: 1/18/2018

Batch Name

Manage Process **Prepare** Posting Actions Fewer options

Calculate Plan Reallocate Inventories **Summary**

1. **Document No..**
Specifies the document number of the source document.
2. **Bill-to Customer/Vendor No..**
Specifies the Bill-to Customer or Bill-to vendor of the Document No.
3. **Outstanding Qty. (Base).**
Specifies the Outstanding Qty. (Base) for the selected Dimension Field
4. **Qty. to Ship (Base).**
Specifies the Qty. to Ship (Base) for the selected Dimension Field.
5. **To Ship (LCY).**

Actions

EDF - DELIVERY WORKSHEET SUMMARY

Worksheet Template Name: DEFAULT Dimension Field: Document No.

Source Batch Name: DEFAULT

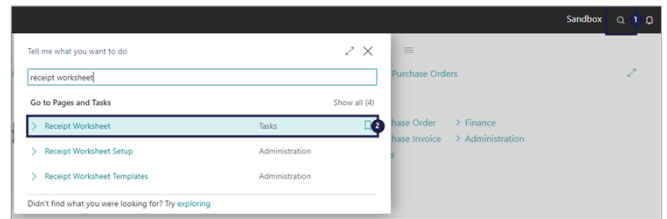
Document No.	Bill-to Customer/Vendor No.	Outstanding Qty. (Base)	Qty. to Ship (Base)	To Ship (LCY)	Open %	Open
1005	1019	78	7	153.00	9%	Pending Approval
1007	1031	114	0	0.00	0%	Open
1008	1027	100	0	0.00	0%	Open
1009	1000	100	0	0.00	0%	Open
1010	1022	124	0	0.00	0%	Open
1011	1028	40	0	0.00	0%	Open
1012	1026	124	0	0.00	0%	Open
1013	1005	135	35	395.41	28%	Open

- 6. Specifies the amount to ship in LCY for the selected Dimension Field.
Actual Fill %.
Specifies the % of quantity that will be shipped for the selected Dimension Field.
- 7. **Posting Status.**
Posting status gives the indication that the goods can be shipped with or without approval.
The Sales orders which needs approval, will have posting status pending approval, they will stay in the Delivery Worksheet and in the delivery worksheet summary.

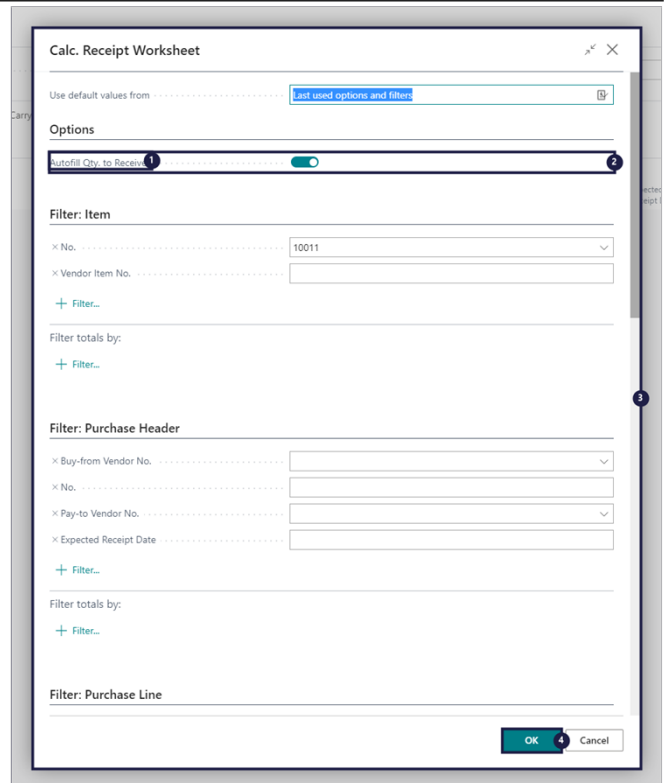
5.2. Receipt worksheet

5.2.1. Navigate to receipt worksheet

1. Click on the link **Tell me what you want to do. Quickly access actions, pages, reports, documentation, and apps and consulting services.** - Enter the text **receipt worksheet**.
2. Click on **Receipt Worksheet Tasks** .

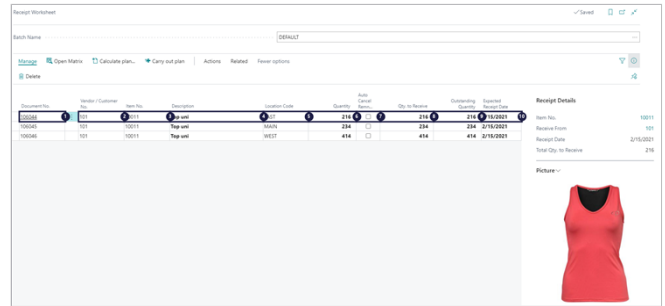


1. **Autofill Qty. to Receive.**
2. **Indicates whether Qty. to Receive will be filled automatically with Outstanding Quantity, when the receipt worksheet lines are generated..**
3. **Place the filters you need..**
4. Click on the button **OK**.

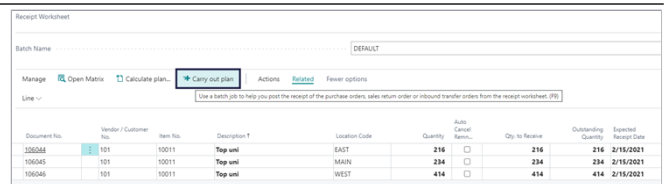


K3 Pebblestone

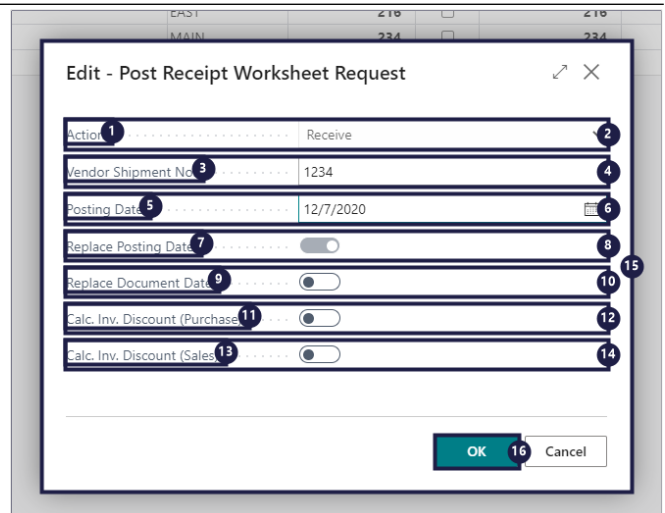
1. **Document No..**
Specifies the number of the purchase order, the sales return order, or the inbound transfer on the worksheet.
2. **Vendor / Customer No..**
Specifies the number for the vendor on the purchase order, or the number for the customer on a sales return order. A blank value is shown for an inbound transfer.
3. **Item No..**
Specifies the number of the item on the receipt line.
4. **Description.**
Specifies a description of the entry of the product to be received.
5. **Location Code.**
Specifies the code for the inventory location where the item on the receipt line will be registered.
6. **Quantity.**
Specifies the number of units of the item included on the purchase order line, the sales return order line, or the inbound transfer line.
7. **Auto Cancel Remnants.**
Specifies whether the remnants on the order will be auto cancelled.
8. **Qty. to Receive.**
Specifies the quantity of items that remains to be received.
9. **Outstanding Quantity.**
Specifies the quantity of items that can be received in the source document line on the receipt line.
10. **Expected Receipt Date.**
Specifies the date you expect the items to be available in your warehouse.



1. **Carry out plan, Use a batch job to help you post the receipt of the purchase orders, sales return order or inbound transfer orders from the receipt worksheet. (F9).**

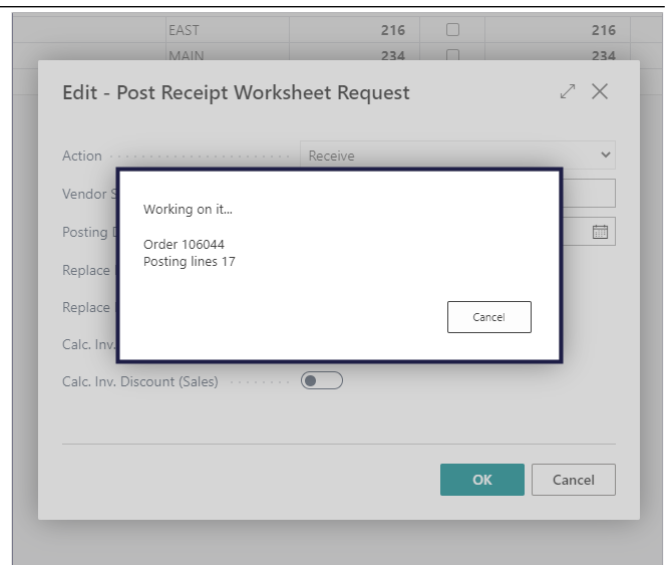


1. **Action.**
2. **Specifies how the source document lines will be processed. When you select Update, the Quantity to Receive field in the source document line will be updated..**
3. **Vendor Shipment No..**
4. **Specifies the vendor's shipment number..**
5. **Posting Date.**
6. **Specifies the posting date of the record..**
7. **Replace Posting Date.**
8. **Indicates whether the posting date on the source document will be replaced by the specified posting date..**
9. **Replace Document Date.**
10. **Indicates whether the document date on the source document will be replaced by**

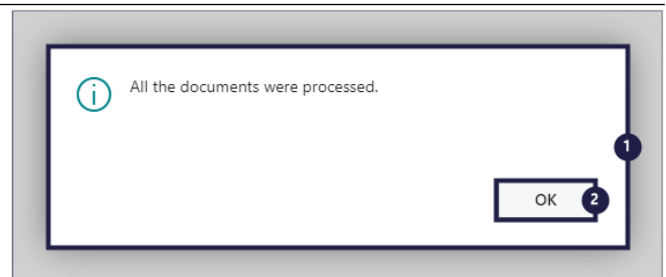


- the posting date..
- 11. **Calc. Inv. Discount (Purchase).**
- 12. **Specifies if the invoice discount amount is automatically calculated with purchase documents. If this check box is selected, then the invoice discount amount is calculated automatically when you post the purchase order..**
- 13. **Calc. Inv. Discount (Sales).**
- 14. **Specifies if the invoice discount amount is automatically calculated with sales documents. If this check box is selected, then the invoice discount amount is calculated automatically when you post the sales return order..**
- 15. **Edit - Post Receipt Worksheet Request.**
- 16. Click on the button **OK**.

- 1. **Working on it... .**



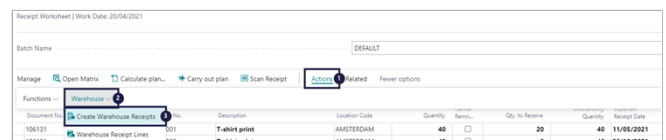
- 1. **All the documents were processed..**
- 2. Click on the button **OK**.



5.3. Create Warehouse receipt

5.3.1. Create warehouse receipt

- 1. Click on the navigation menu item popup **Actions**.
- 2. Click on the navigation menu item popup **Warehouse**.
- 3. Click on the navigation menu item **Create Warehouse Receipts**.



1. **Delete Receipt Worksheet.**
Specifies if all existing receipt worksheet lines will be removed after the Warehouse Receipts are created.
2. Set filters if needed.
3. Click on the button **OK**.

1 Warehouse Receipt Header has been created.

6. Presales Plan

6.1. Presales Plan

6.1.1. Presales Plan

1. Click on the navigation menu item popup **Item Management**.
2. Click on the navigation menu item **Seasons**.

1. Click on the cell **Code** with the value **2020SS**.
2. Click on the navigation menu item popup **Planning**.
3. Click on the navigation menu item **Presales Plan**.

1. **Season Filter.**
Specifies a filter for the seasons, to determine which items are displayed in the Presales

K3 Pebblestone

- Plan.
2. **Delivery Drop Filter.**
Specifies a filter for the delivery drops, to determine which items are displayed in the Presales Plan.
3. **Order Threshold Filter.**
Specifies a filter for the Order Threshold to determine which items and/or colors are displayed in the Presales Plan. When a color is within the filter the item is always shown as it's parent.
4. **Item Phase Filter.**
Specifies a filter for the item phases to determine which items are displayed in the Presales Plan.
5. **Item Filter.**
Specifies a filter for the items to delimit the items that are shown in the Presales Plan.
6. **Location Filter.**
Specifies a filter for the locations. The quantities (e.g. Qty. on Presales Orders and Inventory) shown in the Presales Plan will be delimited on demand and supply for these locations.

1. **Type.**
Specifies the type of the line. The line can represent an item or an color.
2. **Code.**
Specifies at first level the Item No. and at second level the color code.
3. **Description.**
Specifies at first level the item description and the color description at second level.
4. **Qty. on Presales Order.**
Specifies the outstanding quantities on presales orders.
5. **Additional Qty. to Purchase.**
Specifies the total manually entered additional quantities. Additional quantities can be registered on color-size-location level in a matrix.
6. **Total Demand.**
Specifies the total demand, which is the sum of the quantities on presales orders and the manually entered additional quantities to purchase. The total demand is zero when the value is below the order threshold.
7. **Order Threshold.**
Specifies the order threshold for an item or a color. Items or colors can be automatically blocked for future sales when the total demand is below the order threshold.
8. **Threshold Coverage.**
Specifies the Total Demand as a percentage of the Order Threshold.
9. **Ignore Order Threshold.**
When set the Order Threshold is ignored and the Total Demand is used when creating the presales purchase orders.

TYPE	CODE	DESCRIPTION	QTY ON PRESALES ORDER	ADDITIONAL QTY TO PURCHASE	TOTAL DEMAND	ORDER THRESHOLD	THRESHOLD COVERAGE	IGNORE ORDER THRESHOLD	ITEM PHASE CODE	NEW ITEM CODE	NEW ITEM NO.	NEW COLOR CODE	REFL
Item	0001	Blue/gray	370	0	370	200	100%		PRESALES				
COMP	BLAC	Black	210	0	210	200	100%		PRESALES				
COMP	PINK	Pink	0	0	0	0%			PRESALES				
COMP	ICE	Ice	110	0	110	0%			PRESALES				

K3 Pebblestone

10. **Item Phase Code.**
Specifies the current Item Phase Code of the Item or the Color. Item statuses can be used to block for certain activities. E.g. Shipping or sales order entry.
11. **New Item Phase Code.**
Specifies the new Item Phase Code of the Item or the Color, which can be applied using the Apply New Item Phases action. By assigning a new Item phase the item can be blocked or unblocked for certain activities. Within the Presales Plan the item or color is typically blocked completely or blocked for sales order entry.
12. **New Item No..**
Specifies the new Replacement Item No., which can be used as an alternative for the currently blocked items. When the New Item Phases are applied, then a replacement document is created. This document will be used by the sales department to replace cancelled items on existing sales orders.
13. **New Color Code.**
Specifies the new Color Code for the new Item No., which can be used as an alternative for the currently blocked colors. When the New Item Phases are applied, then a replacement document is created. This document will be used by the sales department to replace cancelled items on existing sales orders.

1. **Replacement.**
Specifies the Replacement No. or the number of Replacements that has been created for the sales department to replace cancelled items on existing sales orders.
2. **Expected Revenue.**
Specifies the expected revenue for this item or color. The expected revenue is based on the Outstanding Amount of the sales orders and a forecasted revenue for the additional quantities to purchase, which is based on the unit price of the item.
3. **Expected Costs.**
Specifies the expected costs for this item or color. The expected costs are based on the total demand and the unit cost of the item.
4. **Supply Coverage.**
Specifies the supply (current inventory and outstanding quantities on purchase orders) as a percentage of the quantities on presales orders.
5. **Delivery Drop Code.**
Specifies the code that defines the drop in which this item or color will be delivered, associated with the season.
6. **Brand Code.**
Specifies the code of the brand that the item belongs to.

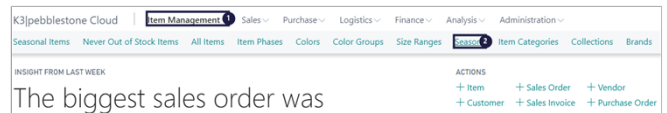
REPLACEM.	EXPECTED REVENUE	EXPECTED COSTS	SUPPLY COVERAGE	DELIVERY DROP CODE	BRAND CODE	VENDOR NO.	VENDOR NAME
1	3,737.64	3,555.70	0%	2	AWESOME	120	American Apparel Exports
-	2,577.64	2,440.94	0%	2	AWESOME	120	American Apparel Exports
-	0.00	0.00	0%	2	AWESOME	120	American Apparel Exports
-	1,160.00	1,114.76	0%	2	AWESOME	120	American Apparel Exports
-	650.64	619.30	0%	5	AWESOME	120	American Apparel Exports

7. **Vendor No..**
Specifies the Vendor No. where the item will be purchased from.
8. **Vendor Name.**
Specifies the name of the vendor where the item will be purchased from.

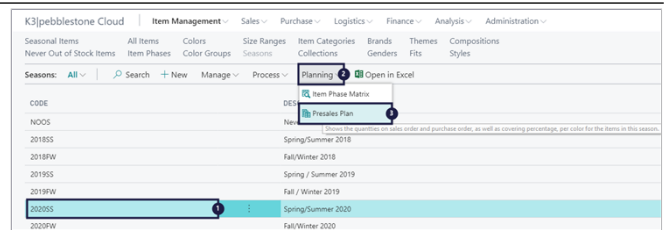
6.2. Create PO via Presale plan

6.2.1. Navigate to the Presales Plan

1. Click on the navigation menu item popup **Item Management**.
2. Click on the navigation menu item **Seasons**.

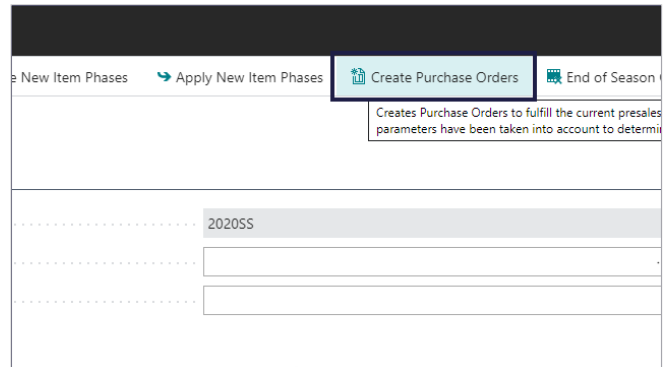


1. Click on the cell **Code** with the value **2020SS**.
2. Click on the navigation menu item popup **Planning**.
3. Click on the navigation menu item **Presales Plan**.



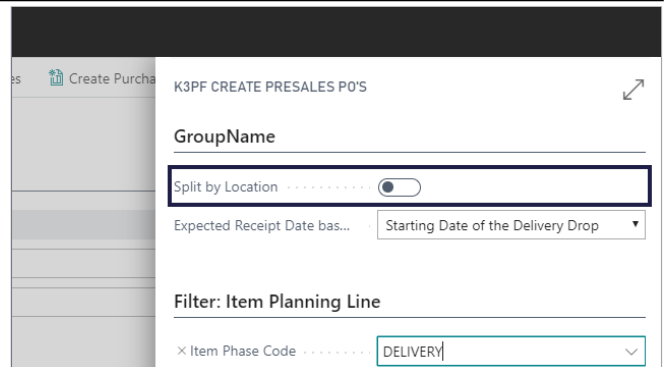
6.2.2. Create Purchase orders

Click on the link **Creates Purchase Orders** to fulfill the current presales orders for the Quantities to Purchase. Inventory levels, current availability and item planning parameters have been taken into account to determine what is being purchased.
A pop-up appears.



Split by Location

If enabled then purchase orders are created per vendor and location.



K3 Pebblestone

Select how the Expected Receipt Date on the purchase order lines should be determined.

K3PF CREATE PRESALES PO'S

GroupName

Split by Location

Expected Receipt Date bas... Starting Date of the Delivery Drop

Filter: Item Planning Line

Item Phase Code DELIVERY

Add filters on which the purchase orders should be based.

Qty. on Presales Order	Additional Pl...
40	
18	
12	
10	
508	
336	
172	

Filter: Item Planning Line

Item Phase Code DELIVERY

+ Filter...

Filter totals by:

+ Filter...

OK Cancel

Click on the button **OK**

Filter totals by:

+ Filter...

OK Cancel

Purchase orders are being created.
Click on the button **OK**

purchase orders have been created. New purchase order numbers are 106152 - 106153

OK

Supply Coverage

Specifies the supply (current inventory and outstanding quantities on purchase orders) as a percentage of the quantities on presales orders.

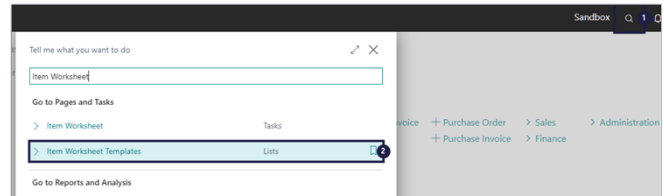
Replacement	Expected Revenue	Expected Costs	Supply Coverage	Delivery Drop Code	Brand Code
---	400.00	384.40	100%	2	AWESOME
---	180.00	172.98	100%	2	AWESOME
---	120.00	115.32	100%	2	AWESOME
---	100.00	96.10	100%	2	AWESOME
---	5,576.72	7,045.96	100%	3	AWESOME
---	3,684.98	4,660.32	100%	3	AWESOME
---	1,891.74	2,385.64	100%	3	AWESOME

7. Item worksheet

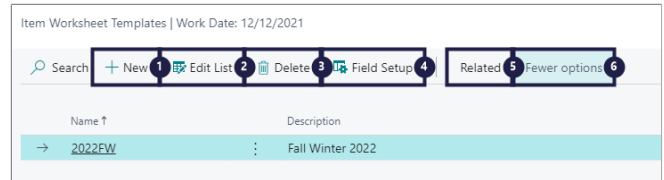
7.1. Item Worksheet Templates setup

Navigate to Item worksheet templates

1. Click on the link **Search** - Enter the text **Item Worksheet**.
2. Click on **Item Worksheet Templates Lists**.



1. **New**
Create a new entry..
2. **Edit List**
Make changes on the page..
3. **Delete**
Delete the selected row..
4. **Field Setup**
when choosing the assist edit you can change which fields are visible or not in the item worksheet..
5. **Related**.
6. **Fewer options**
Hide secondary actions.

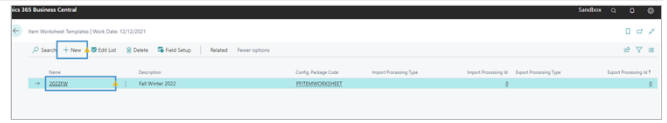


1. **Name.**
Specifies the name of the item worksheet template you are creating.
2. **Description.**
Specifies a brief description of the item worksheet template you are creating.
3. **Config. Package Code.**
Specifies the Configuration Package that will be used to import / export items, item colors and item sizes combined as a RapidStart package or by Excel.
4. **Import Processing Type.**
Specifies the type of object that will be used to import data into the worksheet.
5. **Import Processing Id.**
Specifies the object id that will be used to import data into the worksheet.
6. **Export Processing Type.**
Specifies the type of object that will be used to export the data in the worksheet.



- Export Processing Id.**
Specifies the object id that will be used to export the data in the worksheet.

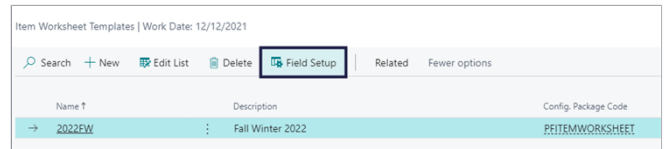
- New:** Create a new entry.
- Name:** When you have create a new item worksheet template, just give it a name. After you give it a name the configuration package code PFITEMWORKSHEET is automatically added.



7.2. Field Setup Item worksheet

Navigate to Field Setup

- Field Setup**
when choosing the assist edit you can change which fields are visible or not in the item worksheet..



- Field No..**
Specifies the field number.
- Field Caption.**
Specifies the field caption.
- Visible.**
Determines whether the field is visible or not.
- Mandatory.**
Determines whether the field is mandatory visible. If mandatory is set, then visible is set too and you cannot change this.

