Showroom Sales Basic

These are your class materials. Please print them now and have available for your class.

Please DO NOT use a speaker phone. Not now and not at any point during the class as it makes it very difficult for other participants to hear the instructor clearly. You can have as many people as you like call into the same conference number to listen in. Also, please mute your phones whenever possible to cut down on background noise.

This class focuses on functions used by the Sales Person. We teach you how to:

- Navigate Studio Showroom
- Create new Quotes & Orders
- Turn Quotes into Orders
- Edit and update existing Quotes and Orders
- Use spell check (must have 1 full Microsoft Office product installed)
- Use lists to access information
- Use images with items
- Print and email
- Add new addresses

Client Accounts

- **Must be in Client Accounts to create anything new**
- Filtering – Blank boxes above columns
    - Filter for a vendor
    - Use * for wildcard
- Lookups (**arrows down**) vs **boxes** that open lists and allow filtering
    - Click the box below client to open the client list
- Sorting – Use the A-Z and Z-A to sort
- Color Coding – Change the color of something by clicking the color and then filter for that color
- Accessing and editing existing items
    - Click **view to open** an existing order
    - Click the **box** beside a quote or order to open
- Use the arrows to scroll back up the screen and view other items

Quotes

- Explanation of an item based program- Enter the item 1 time and “attach” applicable information to that item. All $ are attached to specific items.

  - The quote screen is broken into three areas:

  - Basic information, displayed at the top of the screen.
  - Items, displayed in the middle of the screen.
  - Item detail information, displayed at the bottom of the screen.

  - Item detail information is broken into 4 areas:

  - Codes
  - Cost
  - Description
  - Reminders

You can toggle between the item detail information at the bottom of the screen by clicking the appropriate button on the left side of the screen.

- Create a new Quote by clicking New next to Quote in the Client Accounts screen.

  - **Purchasing -** Purchasing is used if the items are being purchased by a purchasing agent, not the design client. This makes the Quote/Order/Invoice show the name of the purchasing agent, but the designer still gets credit for sale in sales reports.

  - **Attention -** The attention for the client. The attention defaults from the client if the attention is entered in the client file.

  - **Client P.O. -** The client's P.O. # or reference #. This is generally not entered until the quote is turned into an order.

  - **Resale # -** The client's Resale #. The Resale # defaults from the client if the Resale # is entered in the client file.

  - **Account # -** The client's account # with the manufacturer. The account # will automatically fill in if the account # is entered in the "Accounts Tab" for the client. The account # can also be manually entered.

  - **Ship To -** The address ID (ship to, client, vendor etc) of where the manufacturer is to ship the order to.

  - **Ship To Name and Address -** If you enter a ship to address ID, the name and address will automatically fill from the SITE in to the address list or you can manually enter a unique name and address, it does not need to exist in the address file.

  - **Quote Date -** The date the quote was originally created. You can manually update the quote date.

- **Salesperson 1 -** The salesperson responsible for the quote. Salesperson defaults from the client file if there is a salesperson entered in the client file. Salesperson may also generate sales commissions if there is a commission percentage entered in the employee file.

- **Salesperson 2 -** This represents a secondary salesperson. This may be a territory representative or a traveling salesperson. Salesperson 2 can also generate a sales commission but no tracking system exists for salesperson2.

- **Date 1 and Date 2** - These are optional date fields to be used for your specific needs. You can change the titles in the System Master File. They may represent the date a quote was updated or possibly the date a reserve was placed….

- **Sidemark -** The way you want the vendor to tag the item. The beginning of the sidemark defaults from the client file, and is searchable from the main Client Accounts screen. If you would rather not have the client as part of the default sidemark, empty the sidemark field on the codes tab of the client address.

- **Date required -** The date the client requires the merchandise also sometimes used as an estimated ship date. May type in text as well. (ex. 6 weeks).

- **Terms Client, F(freight) Terms Client and Ship Via Client -** These can default from the client record in the address file as long as these fields are blank in the vendor record. If they are filled in on the vendor record, they will then override what is entered in the client record. This can be very convenient in some situations. For example, I generally ask for a 50% deposit from most of my clients, but I have a manufacturer X that sells all custom pieces and requires 100% deposit before beginning work. In this case, I set my the Terms Client on my clients address records to 50% deposit, and leave the Terms Client blank in all vendors, except X. In the Terms Client on the address record for vendor X, I enter 100% Deposit or Proforma. This way every time I sell product from manufacturer X, I automatically ask my client for 100% up front.

- **Terms Vendor, F(freight) Terms Vendor and Ship Via Vendor -** These default from the vendor address record unless the client has an account with the manufacturer. If the client has an account (entered in the accounts tab of the client address record), the terms and account number will default from the client account.

- **Vendor -** The primary vendor on the quote. A quote may have multiple vendors associated with it. This is the primary vendor associated with the quote. You may not enter items on the quote until the vendor is filled in. This vendor will default to new items on the quote.

- **FOB -** FOB in accounting states which party is responsible for the freight, but most showrooms use it to show where the goods are shipping from. This defaults from the vendor address record.

- **Notes -** Internal notes regarding the quote. The notes are for showroom purposes only and do not print on the quote.

- **Special instructions** - Notes and/or special instructions regarding the quote. The instructions will print on the quote. Can add standard instructions to the list and then select from the list instead of typing the entire thing every time.

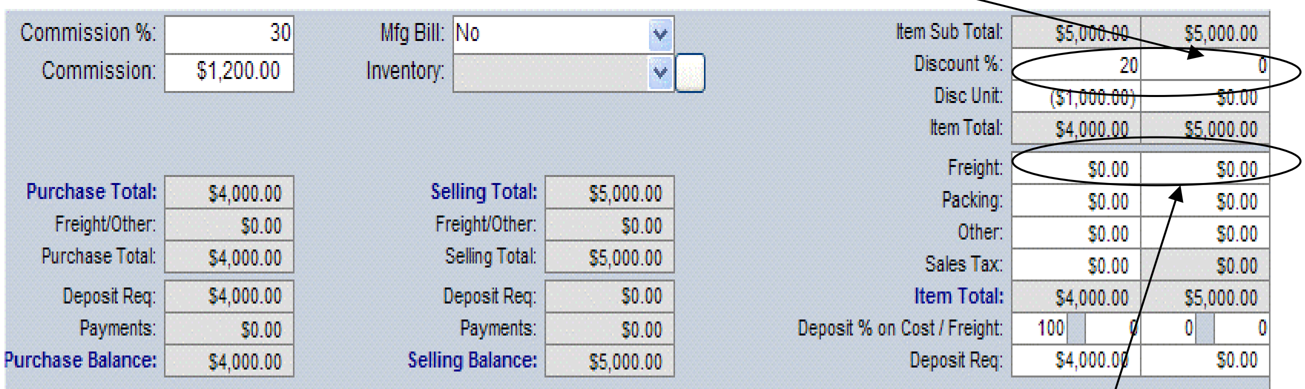
Items – Center of Quote Screen

- **Item Details -** Begin typing into the next blank vendor field or click the Add Item button to insert a new item onto the quote.
- **Vendor -** The vendor that the item will be purchased from. You may have items from multiple vendors on a quote. If the entire quote is turned into an order at the same time, separate orders will be created for each vendor and ship to.
- **Product # -** If the product # entered exists in the product catalog, item details (pricing and descriptions) will be completed automatically on the new item, alternately it will simply note the vendors product #.
- **Sales Code** - The sales code is chosen from a predefined list and is used for accounting purposes.
- **CFA -** If this is set to Yes, "CFA Requested" will appear in bold below the item details on the printed order. This may be set to Yes, No or Apr.
- **Reserve -** Fabric reserve #
- **Quantity, Unit and Description -** Self explanatory

Description F7

- **Additional description lines -** Enter additional description lines as needed. Each line is assigned a code which determines which lines will appear on each report. The options are:
    - B = Both vendor and client correspondence (quotes, orders, acknowledgements, and invoices)
    - C = Client (quotes, acknowledgements, and invoices)
    - V = Vendor (orders only)
    - S = Showroom (The lines will not show on any printed reports and are meant for showroom information only). Each of these lines will fit 50 characters.

- **Purchase and Selling -** Most commonly these two are the same at this level and are unit pricing. They may represent either Retail or Designer Net pricing. If they represent Retail, the client discount would be listed just below in the Selling Discount %, if this # represents Designer Net, the Selling Discount % would be 0.



- Purchase and Selling columns at the bottom right of the screen are for the item that is currently selected. Purchase Total and Selling Total at the bottom left of the screen total all items on the form.

- Amounts in the Item Totals are included in commission calculations, whereas freight, packing and other (below the item totals) are not included in commissions.

- When entering a separate line item for freight (which would be the case when the freight is paid to a vendor different than the product vendor), enter the cost of the freight in the freight field.

- **Deposit % on Cost/Freight -** 100% deposit on $4000 = Deposit Req: $4000.00. The deposit % may be removed and a deposit requested may be manually entered.

- **Mfg Bill, Commission % and Commission -** Defaults from the vendor address record. Commission % and commission are normally only relevant for Mfg Bill Yes orders. The commission % may be removed completely and a commission amount may be manually entered.

- **Inventory -** Used when selling goods from inventory. The vendor must be “Inventory” when selling goods from inventory.

Codes F5

- **Quote Order and Invoice # -** All represent the selected item (only the quote # can be changed or removed)

- **Taxable -** To tax an item, selling (at least) must be set to Yes and a Tax % must be entered. This represents the selected item only. Each item on the order must be set individually.

- **Department –** Automatically defined by the employee record, but may be overridden at the time the quote is created.

- **Code 1 and Code 2 -** User defined, may be used to identify individual items. Used with inventory items to define locations.

- **Salesperson 1 and Salesperson 2 commissions -** Calculated based on commission percentage defaulted from the employee record and multiplied on the selling cost.

- **Add to order -** Used to add an item to a pre-existing order.

Hide Cost F9 - Used to hide the purchase cost columns. Based on the employee record, this may be hidden by default to prevent clients from viewing purchase costs where clients have the ability to see the salespersons screen. The salesperson may toggle between Hide Cost and Show Cost. When the purchase cost is hidden by employee default, the selling unit cost entered will auto fill into the purchase unit cost. This may also be “locked” to prevent salespeople from seeing purchase cost at all.

Reminders F8 - Used to create an electronic to do list. See “Reminders” for more information.

Image - Click to view images stored in the Images folder within the Studio Showroom folder on the server. Choose the appropriate image and click “save” to attach the image to the item. A green box will appear when an image is attached.

Paperless - Allows viewing of documents attached to an item. The item must be on an order to view the documents.

Print F10 - Print, email or export your report into Excel. The email button will open the Outlook or Outlook express and automatically enter an email address if one is entered in the related address record.

Email Formats - The default email format in Studio Showroom is SNP. This cannot be changed at this time. You can however, change the format at the time you email.

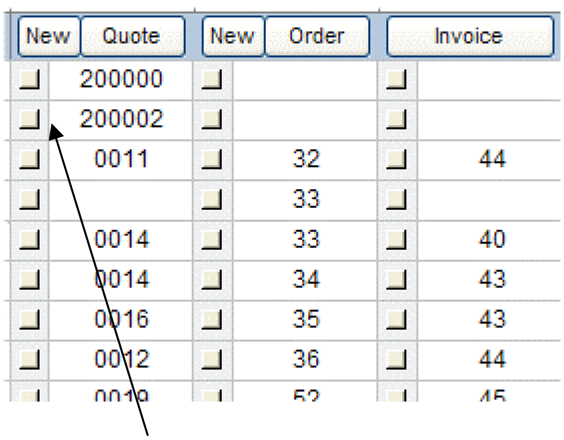
- RTF – Rich Text Format, no graphics will be included in the email. This all text email can be opened and viewed by any Windows computer and does not require any additional software.
- SNP – Microsoft Snapshot Viewer, this format includes all graphics, but also requires that the receiver have the Snap Shot Viewer installed before they can view the attached report. The email that you send always includes a link to download the free Snap Shot Viewer. It is only required to be installed the first time an SNP format email is viewed.

Turn a Quote into an Order - From within the Client Accounts screen, click the little box in the Order column that corresponds to the item that you would like to place on an order. You may select multiple items at one time. Studio will automatically split items with different vendors and ship to's onto different orders.

Navigating Studio Showroom

Pre-existing quotes orders and invoices can be opened in various ways

- From within the Client Accounts screen click the little box to the left of the number of the form that you would like to open.



Open quote 20002

- From within the Quotes / Orders / Invoice lists (tabs)

Forms can also be very conveniently searched and opened from within their respective lists. Click Orders to see a list of all existing orders (valid and voided). After locating the desired order, click View to the left of the order number to open and edit the order.