

# ***ORDER POWER!***

## Personalization

**User Guide**

**Release 4.0**



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## Personlization

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# Personalization

Personalization is the option to add individualized characteristics (name, initials, logo, etc.) to a standard product. **ORDER POWER!**'s Personalization feature prompts your order takers to ask the caller for the appropriate details when ordering a product. It also accounts for the costs associated with a particular personalization of that product. For example, when a caller calls to order coffee mugs, **ORDER POWER!** can prompt your order takers to ask for a name, initials, logo, etc., then inform the caller of the price, plus setup rates.

## Setting up Personalization

Setting up Personalization involves defining all the variations of the product for sale.

Steps for setting up Personalization	See page...
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### **Plan the elements of personalizing the Item**

In the example that follows, we will define all the elements needed for **ORDER POWER!** to prompt order takers for Personalization details during **Order Entry**, and to account the costs associated with the personalization of that product.

In this example, we are selling a mug that can be personalized with a logo and up to two lines of copy. We will use the following information:

Item to Personalize: MUGS 4 YOU					
Personalization Code: MUGS					
Personalization Type	Personalization Line	Req'd.	Personalization Property	Variation	Default
Ad copy & Logo	Copy Line 1	Y	FONT	ARIAL	Y
				TIMES	N
			COLOR	RED	N
				BLUE	Y
	Copy Line 2	N	FONT	ARIAL	Y
				TIMES	N
			COLOR	RED	N
				BLUE	Y
Buyer supplied Artwork	N	n/a	n/a	n/a	

**To define Personalization Codes**

Personalization Codes consist of the **Code** name, **Description**, plus the association to the **Personalization Types**.

- From the **ORDER POWER! Main Menu**, select: **Work with Files** **Personalization Codes** **F6** to display the *Personalization Maintenance panel* (figure 1).

```

OP! 4.0 DEVELOPMENT - CO# 001
Personalization Maintenance

Personalization Code
MUGS_____

Description Personalized Mugs_____

F1=Help F3=Exit F12=Cancel Delete N
  
```

*Personalization Maintenance panel (figure 1)*

- Complete this field:

**Personalization Code**

Type a name (such as MUGS or HATS) for the **Personalization Code**.

- Press **Enter** to display the **Description** field, then complete it:

**Description**

Type a description of the **Personalization Code** you are defining.

- Press **Enter** to update the record, then **F3** to redisplay the *Personalization Code Inquiry* panel.

**To define Personalization Types**

**Personalization Types** describes the sorts of **Personalization** available for a particular product group. You can assign only one **Property** to an **Item** at the time it is sold, however, each **Property** can include as many **Lines** as necessary (see “To define Personalization Lines (rules)” on page 6.)

- On the *Personalization Code Inquiry* panel, type **6** (Types) in the field beside the **Personalization Code** you just created, then press **Enter** to display the *Personalization Maintenance - Types* panel (figure 2).

OP! 4.0 DEVELOPMENT - CO# 001		Personalization Maintenance	Show Delete : <u>N</u>
Code/Desc	MUGS	Personalized Mugs	
----- Types -----			
2=Change		5=Display	
Type	Description	Del	
_ ADV TEXT	Ad copy to print on mug		
_ LOGO	Logo to print on mug		
_ TEXT&LOGO	Ad copy and/or logo		
F1=Help F3=Exit F6=Create F7=Bkwd F8=Fwd F10=Top F12=Cancel F18=Bot F21=Print			Bottom

*Personalization Maintenance - Types* panel (figure 2)

- Press **F6** (Create) to display the *Personalization Maintenance - Code/Desc* panel (figure 3).

```

OP! 4.0 DEVELOPMENT - CO# 001
Personalization Maintenance
Code/Desc
MUGS
Personalized Mugs
Type
_____

F1=Help F3=Exit

```

Personalization Maintenance - Code/Desc panel (figure 3)

- Complete this field:

**Type**

Type a name (such as TEXT or LOGO) for the **Type** code.

- Press **Enter** to display *Personalization Maintenance details panel* (figure 4).

```

OP! 4.0 DEVELOPMENT - CO# 001
Personalization Maintenance
Personalized Mugs
Code/Desc MUGS
Type/Desc ADV TEXT Ad copy to print on mug _____

?GL Personal. Class SRT ?Override Warehouse ____
Allow Discount 1 N Y/N Setup: Charge 5.00
Allow Discount 2 N Y/N Description Personalize Mugs _____
Print Detail Ship Docs N Y/N Cost 12.00
Price Print S Labor/Material
("S"ummary,"D"etail,"C"ombined) Cost per unit 2.0000

Delete N

F1=Help F3=Exit F4=?List F12=Cancel

```

Personalization Maintenance details panel (figure 4)

- Complete these fields:

**Type/Desc**

Type a description of the **Personalization Code** you are defining.



**?GL Personal. Class**

Type the name of the **GL Personalization Class**, or press **F4** to select from a list. **ORDER POWER!** uses **GL Personalization Classes** to indicate which GL accounts are affected by Personalization Sales, Cost of Personalized Goods Sold, etc. (For more information about this, see “To define GL Personalization Classes” on page 11.)

**?Override Warehouse**

Type the name of a warehouse to be used to release personalization orders separately from other orders (or press **F4** to select from a list). For example, you can specify a factory to ship the mugs to be personalized.

**Allow Discount 1**

Type **Y**(es) to indicate that the price of personalization is discountable.

**Allow Discount 2**

Type **Y**(es) to indicate that the price of personalization is discountable.

**Setup: Charge**

Type **Y**(es) to create a one-time charge for setup of the personalization (regardless of quantity ordered). You can attach one setup charge per customer order line.

**Setup: Description**

Type a description of the setup being charged.

**Setup: Cost**

Type the cost of setup.

**Price Print ("S"ummary,"D"etail,"C"ombined)**

Type a code to indicate the level of pricing detail to be printed on the invoice:

**S**(ummary) Prints one total amount for personalization charges  
**D**(etail) Prints detail of each personalization charge  
**C**(ombined) Combines personalization price with selling price of item

**Labor/Material Cost per unit**

Type the total standard labor and material cost of personalizing this item. This affects GL cost of goods sold.

6. Press **Enter** to display the **Lines** section of the *Personalization Maintenance details panel* (figure 5).

OP! 4.0 DEVELOPMENT - CO# 001			
Personalization Maintenance			Show Delete : N
Code/Desc	MUGS	Personalized Mugs	
Type/Desc	ADV TEXT	Ad copy to print on mug	
GL Personal. Class	SRT	Override Warehouse	
Allow Discount 1	N Y/N	Setup: Charge	5.00
Allow Discount 2	N Y/N	Description Personalize Mugs	
Print Detail Ship Docs	N Y/N	Cost	.00
Price Print	S	Labor/Material	
("S"ummary,"D"etail,"C"ombined)		Cost per unit	2.0000 Delete
----- Lines -----			
2=Change 3=Copy 5=Display 6=Properties 7=Prc 11=Cls Prc 12=Spc Prc			
17=Cont Prc 18=Media Prc 20=Book Prc			
Line#	OE Description	Mandatory	Del
— 001	Ad copy line 1	Y	
— 001	Ad copy line 2	Y	
— 001	Buyer supplies logo	Y	
			Bottom
F1=Help F3=Exit F6=Create F7=Bkwd F8=Fwd F10=Top F12=Cancel F18=Bot F21=Print			

Personalization Maintenance details panel (figure 5)

### To define Personalization Lines (rules)

**Personalization Lines** (rules) describe the appearance of each graphic element, or line of copy that appears on a personalized product. You can assign only one **Personalization Type** to an **Item** at the time it is sold, however, each **Type** can include as many **Lines** as necessary. There are two types of rules that you can apply to **Personalization Properties**:

**Text Rules** Describe the appearance of words that appear on the product. This rule can be used to specify the size, color, font, number of letters, etc.



You must define at least one **Line** (rule) for each **Property**.

**Art Rules** Describe the appearance of art (typically a logo) that appears on the product.

1. On the *Personalization Maintenance details panel* (figure 5) press **F6** (Create) to display the

OP! 4.0 DEVELOPMENT - CO# 001	
Personalization Maintenance	
Lines Description	
Code/Desc	MUGS
Type/Desc	ADV TEXT
Line/Desc	001
Minimum # of Characters	___
Maximum # of Characters	___
Mandatory Entry	_ Y/N
Delete	
F1=Help F3=Exit F12=Cancel	

Personalization Maintenance - Lines Description panel (figure 6)

- Complete these fields:

**Line/Desc**

Type a description of the **Line** (rule) you are creating.

**Minimum # of Characters**

Type the minimum number of characters that can appear on the item being personalized. This field only applies to **Text Rules** only.

**Maximum # of Characters**

Type the maximum number of characters that can appear on the item being personalized. This field only applies to **Text Rules** only.

**Mandatory Entry**

Type **Y(es)** to enforce this rule by designating this as a mandatory field during **Order Entry**.



If you type anything in the **Minimum** and **Maximum # of Characters** fields, the order taker will be prompted to enter text on the **Order Entry** panel.

So...if you are defining an **Art Rule**, leave them blank.

- Press **Enter** to update the **Line** record and redisplay the *Personalization Maintenance details panel* (figure 5).

**To define Properties**

- On the **Lines** section of the *Personalization Maintenance* details panel (figure ), type **6** (Properties) beside the **Line#** for which you want to create **Properties** to display the *Personalization Maintenance - Properties panel* (figure 7).

```

OP! 4.0 DEVELOPMENT - CO# 001
Personalization Maintenance
Line Description
Code/Desc MUGS Personalized Mugs Min # of Characters 3
Type/Desc TEXT&LOGO Ad copy and/or logo Max # of Characters 30
Line/Desc 001 Ad copy line 1 Mandatory Entry Y Y/N
Delete N
----- Properties -----
2=Change 5=Display 6=Variation 7=Prc 11=Cls Prc 12=Spc Prc 17=Cont Prc
18=Media Prc 20=Book Prc
Property Mandatory Y/N Default Variation
--- FONT N ARIAL
--- COLOR N RED
---
---
---
---
---
---
F1=Help F3=Exit F6=Create F12=Cancel F21=Print List

```

*Personalization Maintenance - Properties panel* (figure 7)

- Press **F6** (Create) to display the *Add* mode, then complete these fields:

**Property**

Type a name for the **Property** you are creating.

**Mandatory Y/N**

Type **Y(es)** to designate this as a mandatory field during **Order Entry**.

3. Press **Enter** to update the record and close the *Add* mode.

To select the **Default Variation**, you will need to return to this panel later on, after defining the **Variations** of each **Property**.

**To define Variations**

1. On the *Personalization Maintenance - Properties panel (figure 7)*, type **6** (Variation) beside the **Property** you want to create **Variations** of, then press **Enter** to display the *Personalization Maintenance - Variations panel (figure 8)*.

```

OP! 4.0 DEVELOPMENT - CO# 001
Personalization Maintenance          Show Delete : N

Code/Desc MUGS      Personalized Mugs
Type/Desc TEXT&LOGO Ad copy and/or logo
Line/Desc 001      Ad copy line 1
Prop/Desc  FONT    FONT
----- Variations -----
2=Change 7=Prc 11=Cls Prc 12=Spc Prc 17=Cont Prc 18=Media Prc 20=Book Prc

Variation      Description      Del
-- ARIAL      Sans Serif typeface
-- TIMES      Serif typeface

Bottom
F1=Help F3=Exit F6=Create F7=Bkwd F8=Fwd F10=Top F12=Cancel F18=Bot F21=Print
  
```

*Personalization Maintenance - Variations panel (figure 8)*

2. Press **F6** (Create) to display the *Personalization Maintenance - Variations code panel (figure 9)*.

```

OP! 4.0 DEVELOPMENT - CO# 001
Personalization Maintenance
Property Variations
Code/Desc MUGS      Personalized Mugs
Type/Desc TEXT&LOGO Ad copy and/or logo
Line/Desc 001      Ad copy line 1
Prop/Desc  FONT    FONT
----- Variations -----

Variation Code  ARIAL

Description     Sans Serif typeface

Delete N

F1=Help F3=Exit F12=Cancel
  
```

*Personalization Maintenance - Variations code panel (figure 9)*

2. Complete this field:

#### **Variation Code**

Type a name (such as ARIAL or RED) for the **Variation Code**.

3. Press **Enter** to display the **Description** field, then complete it:

#### **Description**

Type a description of the **Variation Code** you are defining.

4. Press **Enter** to update the record, then **F3** to redisplay the *Personalization Maintenance - Variations panel (figure 8)*.

You can now select the **Default Variation** of each **Property**. If you set a default for a mandatory Property, the user can leave that field blank, and it will be filled with the default variation during **Order Entry**.

#### **To select a Default Variation**

1. On the *Personalization Maintenance - Variations panel (figure 8)* press **F3** to redisplay the *Personalization Maintenance - Properties panel (figure 7)*.
2. Type **2** (Change) in the field beside the **Property** for which you want to create a **Default Variation**. Press **Enter** to display the *Personalization Maintenance - Types panel (figure 2)*.
3. Complete this field:

#### **?Default Variation**

Type the name of the **Variation** you want to set as the default for this **Property** (or press **Or** press **Or** press **F4** to select from a list. to select from a list. to select one from a list).

3. Press **Enter** update the record, then **F3** to redisplay the *Personalization Code Inquiry panel*.

## Supplement to Work with Files

Two **ORDER POWER!** master files require some set up before using **Personalization**:

- You can set up the **Item** record to require input of **Personalization** information, if you want the user prompted by **ORDER POWER!** during **Order Entry**
- You can define **GL Personalization Classes**, if you want **ORDER POWER!** to track which GL accounts are affected by sales and costs associated with personalized products being sold.

### To Set Up Personalization in the Item record

**ORDER POWER!** can prompt your order takers to ask the caller for the appropriate details when ordering a personalized product. This requires some set up in the **Item** record itself. These steps are written for **ORDER POWER!** users already familiar with the existing procedure to create an **Item**.



To create a new **Item**, begin as usual. When you reach the third **Item Update panel 3** (figure 10) see step 4 below.

1. From the **ORDER POWER! Main Menu**, select: **Work with Files** **Items** to display the **Item Selection** panel.
2. Complete this field:

#### Item Code

Type the name of the **Item** you want to display a **Personalization** prompt in **Order Entry**.

Press **Enter** to display the **Item Inquiry** panel. If you have entered a complete **Item Code**, the **Item** you are looking for appears at the top of the list.

3. Type **2** (Change) in the field beside the **Item** you want to maintain. Press **Enter** three times to display the **Item Update panel 3** (figure 10).

OP! 4.0 DEVELOPMENT - CO# 001			
Item Update			
Item	MUG 4 YOU		
Description	Personalized mug w/ Adv copy and/or logo		
?Personalization Cd	MUG	Required	Y
?Seasonality Code	___		
?Substitution Group	___		
?Up-sell Group	___		
Up-sell Message	_____		
Safety Stock in Days	___	Shelf Life	___
Default Shipping Instructions	_____		
Zero Price	A	A/E/W	
?Shipping/Handling Calculation Method	___	Chart Id	___
Replenishment Overfill %	_____		
Item Info 1	_____	Order Detail Info	Mandatory
Shp-to	_____	1.....	N
NMSC Code	_____	2.....	N
		3.....	N
F1=Help F3=Exit F4=?List F6=Ext Desc F12=Cancel F23=User F24=More Keys			

Item Update panel 3 (figure 10)

- Complete these fields:

**?Personalization Cd**

Type the name of the **Personalization Codes** you have defined for this **Item**, or press **F4** to select it from a list

**Required**

Type **Y(es)** if this **Item** cannot be sold without **Personalization**. If **Personalization** is optional, the order taker can request it during **Order Entry**.

- Press **Enter** twice to update the record and redisplay the **Item Inquiry** panel.

**To define GL Personalization Classes**

**ORDER POWER!** uses **GL Personalization Classes** to indicate which GL accounts are affected by Personalization Sales, Cost of Personalized Goods Sold, etc.

- From the **ORDER POWER! Main Menu**, select: **Work with Files** **GL Personalization Classes** **F6** to display the **GL Personalization Class Prompt panel** (figure 11).

OP! 4.0 DEVELOPMENT - CO# 001		
GL Personalization Class Update		
Description	GL Class	
Personalized mugs	M4U	
	Dept	Account
Sales Personalize	000	00000
Returned Personalization	000	00000
Cost of Personalize Sold	000	00000
Cost of Personalize Return	000	00000
Labor & Materials	000	00000
Labor & Materials Return	000	00000

F1=Help F3=Exit F12=Cancel Delete N

*GL Personalization Class Prompt panel (figure 11)*

- Complete this field:

**GL Class**

Type a name for the **GL Personalization Code**.

- Press **Enter** to display the remaining fields, then complete them:

**Description**

Type a description of the **GL Personalization Code** you are defining.



**GL Dept** and **GL Account** are defined in the General Ledger account number format as **CCC-DDD-AAAAA**, where **DDD** is the department number and **AAAAA** is the account number.

4. Type the **GL Dept** and **GL Account** numbers for the following fields:

**Sales Personalize**  
**Cost of Personalize Sold**  
**Cost of Personalize Return**  
**Labor & Materials**  
**Labor & Materials Return**

5. Press **Enter** to update the record, then **F3** to redisplay the **GL Personalization Class Inquiry** panel.



## Supplement to Order Entry

Personalization is available from the **Order Entry** panel if you have completed the **Personalization Code** field in the **Item** record (see “To Set Up Personalization in the Item record” on page 10). If you typed **Y(es)** in the **Required** field, **ORDER POWER!** automatically prompts the order taker to enter **Personalization** information.

### To use Personalization

These steps are written for **ORDER POWER!** users already familiar with the existing **Order Entry** process.

1. On the **Order Entry Item Selection** panels, complete the order header information, then the following fields:

#### ?Item / Search Words

Type the number of the **Item** to be personalized in the field, or press **F4** to select it from a list.

#### Quantity

Type the total number of units of this item you are ordering.



If you typed **N** (no) in the **Required** field in the **Item** record, the **Order Entry - Personalization Type selection window** (figure 12) does not automatically appear.

2. Press **Enter** to display the **Order Entry - Personalization Type selection window** (figure 12).

You can access it by pressing **F10** (Add!) on the **Order Entry Item Selection** panel.

```

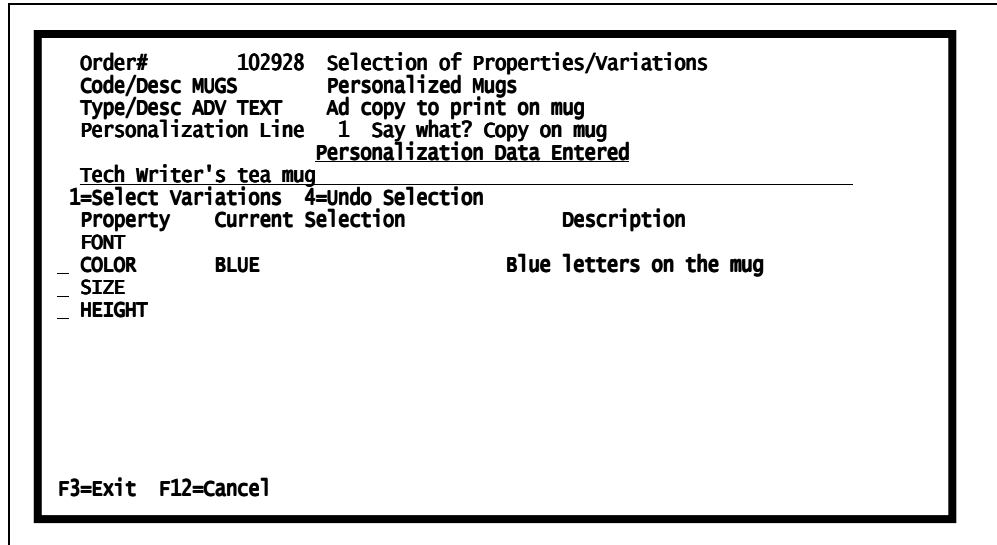
OP! 4.0 DEVELOPMENT - CO# 001
O
C Pstn : Personalization Types 0
C
- Code MUGS Personalized Mug -
1=Enter Personalization Information /M
Type Description
- ADV TEXT Ad copy to print on mug
- LOGO Logo to print on mug
- TEXT&LOGO Ad copy and/or logo

- Bottom -
?I F1=Help F3=Exit F9=Retrieve F10=Top F11=Retrieve/Edit F12=Cancel e
MU F18=Bottom 1
F
F F19=Qty Available F20=Totals F21=Fold F22=Delete F23=Review F24=More Opt 5
  
```

*Order Entry - Personalization Type selection window (figure 12)*

3. Type **1** (Enter Personalization Information) in the field beside the **Personalization Type** you want to use, then press **Enter** to display the **Enter Personalization Information window** (figure 13).





*Selection of Properties and Variations window (figure 14)*

6. Press **Enter** to accept the defaults, or type **1** (Select Variations) to make any changes.

**ORDER POWER!** redisplay the *Order Entry Item Selection* panel.

