

HOW TO DECIDE WHICH CUSTOMER FAVORITES SETTING TO SELECT

Item Favorites can be used so that when a Sales Order or Invoice is created for a Customer Address, that address's favorite items will display first on the Catalog Page in blue text, providing the user with easy identification and easy order entry of commonly ordered items for that address. Within NorthScope, there are three different options for setting up item favorites for Customer Addresses – Address, Customer, and None. This setup is configured via the 'Use Favorites For' property on the Properties tab of the Customer record view in the Sales Order module. Likewise, within the Preferences Page of the Sales Order module the user can set the 'Default Item Favorites Level' to any of the three options so all newly created customers' 'Use Favorites For' value will default to the preference selection. Note that within the customer creation process this value can be adjusted.

ADDRESS

Select a 'Use Favorites For' value of Address for specific customer addresses that order different items. This means that each address belonging to that customer must have favorites individually setup for it as one address's favorites will not belong to all addresses for that customer. In addition, this setting prevents Favorites from being setup at the Customer level.

CUSTOMER

Select a 'Use Properties For' value of Customer for customer addresses that typically order the same items. This functionality works so that once a customer has favorites setup for it, all of its favorites are inherited by all of its addresses (not visibly on the address record) so that when an order is created for any of the customer's addresses, the favorites will display first. Note that selecting this value will cause Favorites to no longer editable at the address level.

NONE

Lastly, the status of none means favorites cannot be added at either level. This setting assumes the user does not use favorites at all for that customer or its addresses.

ADDITIONAL FAVORITES SETTINGS

In the Sales Order Preferences page, the 'Add Item Favorites Ordered X Times' and 'Add Item Favorites Ordered in X Days' preferences work together to provide the user the ability to have item favorites automatically added for the customer or customer address. Once these preference values are set, any item ordered by a customer or customer address (depending on if the customer's 'Use Favorites For' value is set to Customer or Address respectively) X number of times within X number of days will be added to the customer's or customer address's list of favorites. Finally, for these auto-

added item favorites to be automatically removed once they no longer fit the criteria, the user can set the 'Auto Remove Item Favorites' preference to Yes.