Patio Specialty Group

PSG Order Writer

User Manual

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Abstract

The PSG Ordering System keeps a record of Furniture Collections, Items that make up the Collections, Orders for Items, Representatives and Retailers. Collections and Items are uploaded to the database and maintained through a visual interface. Representatives and Retailers are maintained through a visual interface only. Orders progress through the system in stages defined by their Order Status. Only certain orders of defined status can be seen by various users. If there is no need for a user to act, the order is hidden from their view until the status of the order changes. There are several reports available and the users' permissions define how much data is revealed in each report.

Accessing the Program

The PSG Ordering System is located "in the cloud" on a server hosted by Amazon Web Services. Open your web browser and go to http://psg.agio-usa.com. While the program can be accessed in any web browser, we have found Google's Chrome browser to be best. Open the link and set the resultant page as a bookmark in your browser. There are several ways to quickly access web pages that are bookmarked in your browser. Browser bookmarks can be accessed through the browser or linked to shortcuts on your computer desktop. Help for the Program is available in the upper right left corner of the program screen (a link which displays this document) or by contacting the Agio-USA Information Technology Department at webmaster@agio-usa.com.

User Roles

The following Roles are defined in the system:

Developer
Administrator
Factory Merchandiser
Sales Representative
Account Manager
Marketing
Shipping
Retailer

The **Developer** and the **Administrator** have unlimited access to all functions of the program but have a limited role in the day-to-day operation. If data needs cleaned or errors arise, contact an Administrator for corrective action. The Administrator will pass any repairs that are beyond his expertise to the Developer.

The **Factory Merchandiser** is responsible for Item Management and Order Management.

> Item Management involves adding and editing Collections and Items. Items are never removed (deleted) from the system but rather there is a process by which Items can be dropped from Collections. These dropped Items are unable to be ordered until their status is reinstated in the system.
>
> Order Management is coordinating orders with the factories, working with Representatives to adjust quantities, finalize the orders, and ultimately booking & shipping the orders.

The **Sales Representative** maintains the database of Retailers in their territory and enters the orders for those retailers into the system, forwarding them to Factory when they are complete. Initially an order is in a pending state that only the Representative can see. When running reports, only the orders of the Retailers under the Representatives purview can be seen.

Account Managers can see all the orders and have rights to edit those orders for quantity and pricing adjustment.

Marketing is the role for maintaining Collections and all the images used throughout the program.

The **Shipping** role has the ultimate responsibility of finalizing the order and reporting its completion to the entire group.

The **Retailer** login is present for the creation of orders where the desired quantity is not known to the Representative. Retailers use a template created by the Representative to adjust quantities of items and “build” containers. They can also assign PO Numbers, Desired Ship Dates and preferred Brokers & Freight Forwarders.

Order Life Cycle

PSG Order Life Cycle

Credit Application Filed (Rep)

Credit Application Approved (POI (Dan))

Create Retailer in Database (POI (Judith))

Enter all Data for Retailer (Rep)
- Accounts Payable Contact
- Mailing Addresses
- Multiple ‘Ship To’ Locations
- Multiple Freight Forwarders or Brokers

Create a Pending Order (Rep)
- Choose the Port
- Choose the Pricing Level
- Choose the Retailer
- Choose the Mailing, Shipping, Forwarder and Broker if multiples exist
- Choose the Collection
- Add Item Quantities, Add to Cart and Add Cart to Order for one or two Collections
- Finalize the order by entering the PO Number, Desired Ship Dates and any order Notes
    - Notes may include special packaging, tariff discount or other pertinent info
- Existing Orders can also be Cloned into New Orders
    - Find the Order
    - Click Clone
    - Change the PO Number and Requested Ship Dates
    - Promote the Order’s Status

Create a Retailer Template (Rep)
- An alternate to the Method described above.
- POI Management creates a log in for your Retailer
- Choose the Collections your Retailer wants to order
- Retailer can manipulate the quantities to create a container
- The Order is in Pre-Pending status until the Representative can review it
- Finalize the order by entering the PO Number, Desired Ship Dates and any order Notes
    - Notes may include special packaging, tariff discount or other pertinent info

PDF Print and Share the Order for Discussion (Rep and Retailer)

Promote the Pending Order to Ordered Status (Rep)

Review Order Items, Quantities and Desired Dates; Create Loading Plan (Factory)
- Acknowledge or Reject the Order following Review results

Acknowledged or Rejected Orders (Rep)
  Rejected Order
    Adjust the Order according to the Reject Order Comments
    PDF Print and Share the Revised Order
    Resubmit; Promote to Ordered Status
  Acknowledged Order
    Accept the Acknowledgement in the List of Your Orders

Book the Container through the chosen Freight Forwarder (Factory)
  Promote the order to Booked Status in the PSG interface

Load and Ship the Container (Factory)
  Promote the order to Shipped Status in the PSG interface

Order Status

An order has one of the following statuses in the system. At every change of status, the system generates an email message reporting the order progress. Each status is defined…

- ➔ Pre-Pending – Representatives make Templates of Programs and Retailers clone the Templates into Pre-Pending Orders. A single Template can be cloned multiple times creating multiple container orders.
- ➔ Pending – All new orders created in the system automatically have a status of Pending. A Pending Order can only be seen by the Retailer, the Representative that created it and the Administrator. This allows the Representative time to go back-and-forth with the Retailer to finalize the order. When the Retailer is happy with the selection line-up and the order appears to satisfy the cubic foot limitation of a shipping container, the Representative changes the Order status to 'Ordered.'
- ➔ Ordered – An order that has changed to this status can now be seen by the Factory Merchandiser. This gives the Merchandiser time to go back-and-forth with their factory production scheduler, shipping department and raw materials' specialists. If all is found to be well with the order, the Merchandiser changes its status to Acknowledged. However, it may be found that the order is deficient in some way. The final assessment of the container loading may require quantity adjustments. There may be fabric or other production issues that will prevent the order from shipping in its current state of quantity or desired dates. In that case the Merchandiser changes the order status to Rejected and the back-and-forth between the Representative and the Retailer is reinitiated. A comment section is available for the Merchandiser to explain in detail to the Representative why the order was rejected and what steps are recommended so that the order can receive a more positive result when it is resubmitted.
- ➔ Acknowledged – When an order is acknowledged by the Merchandiser it is a sign that all the requested items can be shipped in the requested time frame.
- ➔ Rejected – As described above, several factors can lead to an order receiving a Rejected status. It is the responsibility of the Representative to read the rejection comments and adjust the quantities or dates accordingly before resubmitting by changing the order status

to Ordered. A Rejected order immediately assumes the status of Pending rendering it invisible to all but the Retailer, the Representative and the Administrator.

- ➔ Booked – An acknowledged order sits in that status until the Merchandiser confirms that the Factory Shipping Department has arranged with the Retailer's Freight Forwarder for the container to be filled and loaded onto a vessel. When those arrangements are confirmed, the Merchandiser changes the order status to Booked and fills in the appropriate data as it applies to the booking.
- ➔ Shipped – Lastly, when confirmation of the entire process is received, the order status is changed to Shipped and the goods are now the property of the Retailer. Like Booked, there is a dialog box provided for the final ETD, ETA and Invoice Number to be loaded into the database.
- ➔ Cancelled – A cancelled order is hidden from view in most user interfaces unless specifically called up. A cancelled order does not subtract its quantities form the overall Projected Quantity. A cancelled order can be viewed by the Representative and Cloned into a new Pending Order.

Item Management

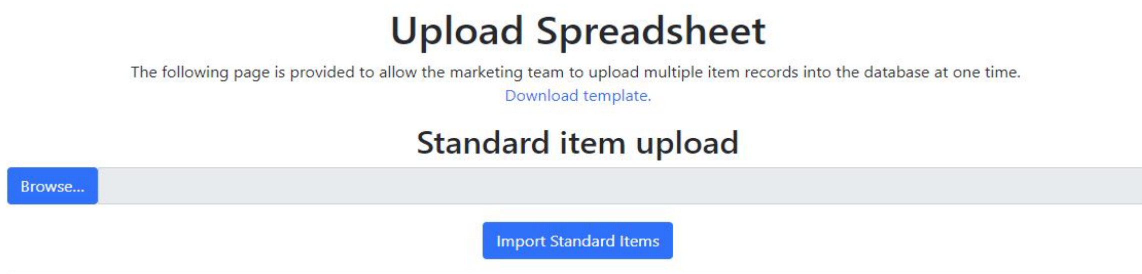
Records can be added one at a time, or in bulk. For security purposes, it is required that a user have the permission group of Marketing or Administrator. These groups allow access to the functions of adding and editing items. Selecting Marketing from the menu and then Add Single Item brings up a page where an individual item can be entered into the database. There is also Add Multiple Items (explained in detail below), Edit Item and Collections. Both Edit Item and Collections offer the user the ability to change data and add images in the system through a visual interface. Images of Individual Items are in Joint Photographic Experts Group (.jpeg) format. Collection Images are Portable Network Graphic (.png) format.

Bulk Item Importing

The bulk upload process requires the use of an Excel Spreadsheet to import the records, where each line is a furniture record. This Excel Spreadsheet should be created using the Template Spreadsheet linked on the Bulk Upload page.

The following list can be used to select and upload an Excel Spreadsheet for the addition of records to be used by Representatives to create orders to submit to China for manufacturing.

1. Log into *PSG Ordering System*
2. Select *Marketing* from the top right Menu Bar
3. Select *Add multiple items* from the drop--down

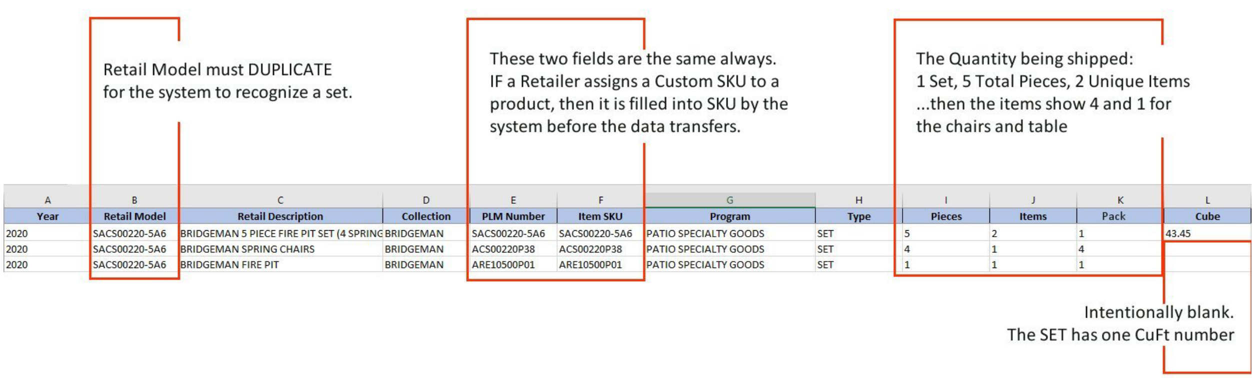


4. On the new page, select *Browse*
5. After the new pop-up window renders, navigate to the folder containing your spreadsheet to upload.
    a. Only one file can be uploaded at a time
6. Select spreadsheet and click *OK*
    a. Upon returning the web page, your filename will show on the browse line
7. Select *Import Standard Items* to start the process
8. Allow the process to work on uploading and working through the import process
    a. The system will provide a final **Success** report when completed.

The contents or label of each column is not reviewed by the import process, the only important factor is the order of columns; this cannot be deviated. Here are some important columns:

- ➔ Collection is used to tie items together when rendering on the ordering view.
- ➔ PLM Number is used to uniquely identify items.
- ➔ Shipping Port is used to group available items when initiating the ordering process; items from different shipping ports cannot be mixed in an order.
- ➔ FACMODNO is used later in the support process to build Bill of Material lists and identify import features of these parts (weave, fabrics, etc.).
- ➔ Projected Quantity is used to control the Factory Inventory by disallowing orders that would exceed the projected quantity.
- ➔ Ready Date is here as a reference only and does not affect the assignment of requested or prospective shipping date windows. The Factory has the ultimate control over the shipping date and can Reject an order if the dates do not comply with the projection.

Entering Data for SET is different. Here is a guide to Set entry:

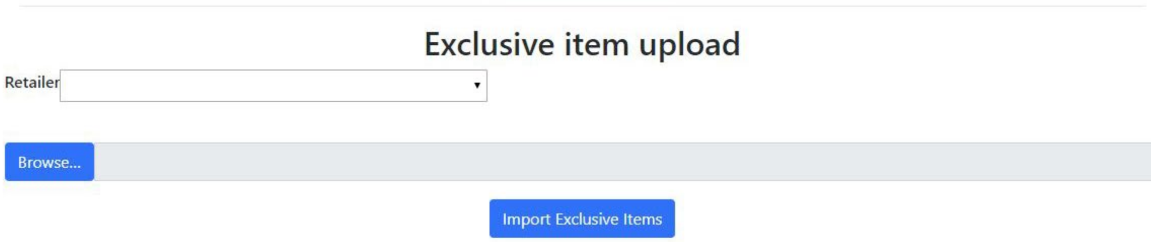


A	B	C	D	E	F	G	H	I	J	K	L
Year	Retail Model	Retail Description	Collection	PLM Number	Item SKU	Program	Type	Pieces	Items	Pack	Cube
2020	SACS00220-5A6	BRIDGEMAN 5 PIECE FIRE PIT SET (4 SPRING	BRIDGEMAN	SACS00220-5A6	SACS00220-5A6	PATIO SPECIALTY GOODS	SET	5	2	1	43.45
2020	SACS00220-5A6	BRIDGEMAN SPRING CHAIRS	BRIDGEMAN	ACS00220P38	ACS00220P38	PATIO SPECIALTY GOODS	SET	4	1	4	
2020	SACS00220-5A6	BRIDGEMAN FIRE PIT	BRIDGEMAN	ARE10500P01	ARE10500P01	PATIO SPECIALTY GOODS	SET	1	1	1	

The remainder of the data entry for a set is the same as for an individual item.

Exclusive Collections

The PSG System has the ability hold item data that is exclusive to a single Retailer and only display it to the correct Representative at the correct time; when creating an order for the Retailer to whom the Exclusive Collection is assigned. The upload interface for Exclusive Collections is on the same page and just below the normal upload interface.



The procedure is the same with one exception: you must choose a retailer from the drop-down list before proceeding to initiate the upload.

Retailer Entry and Maintenance

On the Retailer page there is a list to edit and an Add New link which presents the user with a blank form. Retailers have many pieces of information associated with them.

Where this symbol is seen, multiple entries are possible. Multiple contacts and addresses in specific fields are customizable at order creation. Many Retailers have multiple Ship To addresses or multiple Freight Forwarders in Asia.


Whether adding new or editing, be sure to save your work using the Diskette icon or discard changes using the Trash Bin icon. The Trash Bin icon also deletes existing choices in the contacts fields.

Creating an Order

This phase of the Program works very much like an on-line shopping cart. Choose which port from which the container(s) will sail; collections from different factory regions cannot be mixed. Next choose the desired Pricing Level for the order followed by selecting the Retailer from the drop-down list. Ensure that, if multiple entries exist, the correct Bill To, Ship To, Freight Forwarder and Broker is chosen. When complete, click SELECT at the bottom of the page.

On the next page, choose the Collection from the drop-down list and the page will be populated with all the items available for the chosen collection. If the Retailer uses in-house SKU numbers, those can be added here along with the desired quantity. Click Add to Cart when satisfied with this part of the order. Additional items from other collections can also be added to the cart in the same manner. Remember, your options are limited to the factory region (FOB Port) chosen at the beginning of the process.

When the item selection process is complete (the total cubic feet is shown within the Cart icon) click the Cart icon to review the order. The Representative can add Retailer SKUs or adjust quantities here. If quantities are adjusted, click the Update Order button to see the new totals. When satisfied click Submit or click Cancel to empty the cart and return to the items list to start again.

Remember from the earlier reading that a newly created order holds the status of PENDING and can only be seen by the Retailer and the Representative who created it. On the Home Screen there is an Orders button with an option to view all orders. Here Pending Orders can be promoted to Ordered status or cancelled. Only when an order is promoted to Ordered status, will it be seen by the Factory Merchandisers.

The above icons appear as part of every order record. The Red Check is there only if the order has been acknowledged and is awaiting action by Representative. All acknowledged orders must be counter acknowledged by the Representative who created it. It is a cross-check built into the system to ensure all parties are aware of the terms and totals. The other icons are, in order from left to right, PRINT, EDIT and CLONE.

Print opens the order in a new window in a format perfect for sending to a printer or exporting to PDF format.

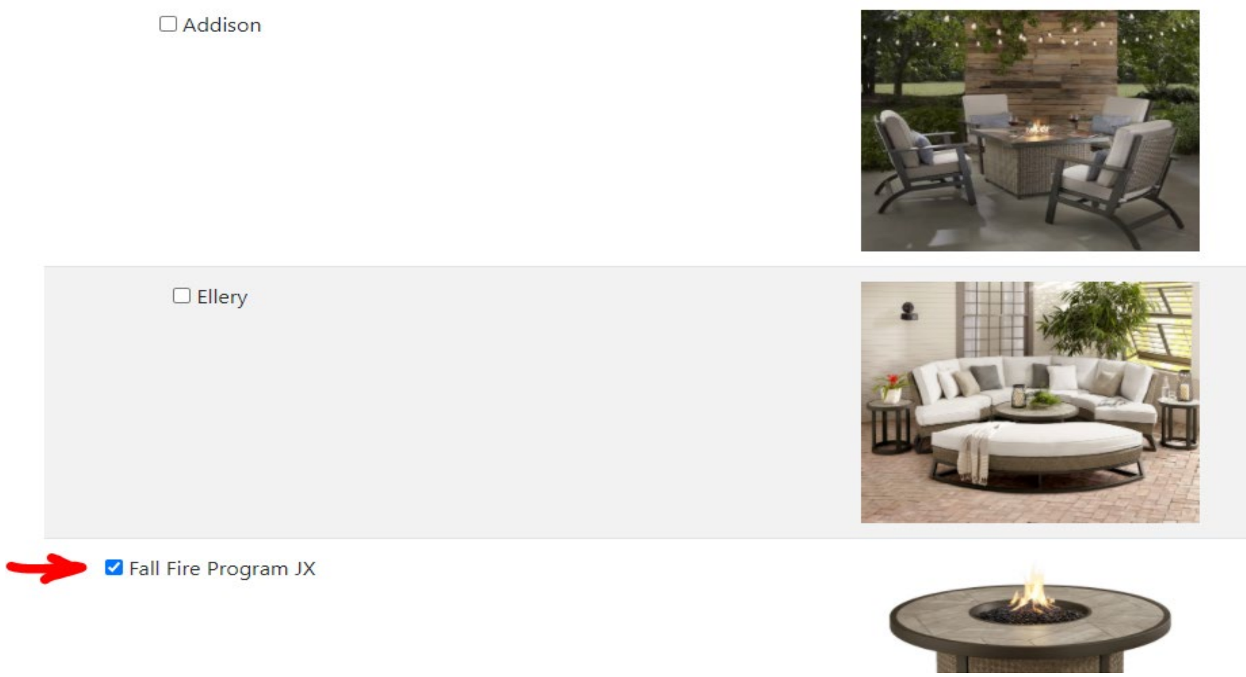
Edit reopens the order in its next-to-last step of order creation. You can add Retailer SKUs, adjust quantities, and remove or add items to the order.

Clone creates a new pending order with a blank PO Number and Blank Shipping Dates.

Creating an Order Template

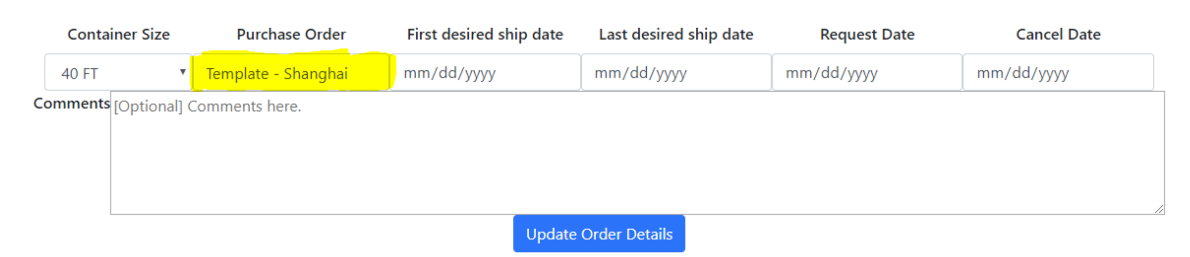
The Retailer and the Representative may decide that it will be the responsibility of the Retailer to adjust quantities and create the container orders to be sent to the factory for approval. The Representative can, instead of clicking New Order, click New Template. A Template is a list of items that the Retailer wishes to order without any reference to quantities. Templates can only be created based on FOB Point in the same way that orders cannot mix items from different ports.

After choosing the FOB Port, Pricing Level and the desired Retailer the Representative adds Collections to the Template…



…and finishes by clicking Create Template.

Edit the Template by changing the *PO Number* to more specifically describe the mix: “Template – Addison and Aurora”, for example. Click UPDATE to save the change.



This is what your Retailer will see under Templates:

PO/Order	Actions	Order Date	Retailer	Total Cubes	Total Amount	Status
Template - Addison and Au		2019/08/13	CAPITAL IRON	0.00	$0.00	Template

Once the Template(s) are created, the Retailer can log in using their credentials and clone the Template into an order. Note that the Template remains intact and the cloned order is in the state of Pre-Pending. Multiple Pre-Pending orders can be cloned from the same Template so the Representative should include all the Collections/Items in which the Retailer has interest. Items can be removed, but not added, to Pre-Pending Orders created from Templates.

Retailer Access

After the Representative creates the Order Template, the Retailer can enter the system, clone the template into an order and adjust quantities. The total dollars and total cubic feet of an order appear at the bottom and change dynamically when the quantities are adjusted, and the order is updated.

There are also areas for the Retailer to add PO Numbers, Desired Ship Dates and the preferred Broker & Freight Forwarder for this order. Retailers with multiple Brokers, Forwarders and ‘Ship to’ Addresses can choose among the multiple choices and make their preferences a permanent part of the order.

There are seven buttons across the top of the page header for the Retailer role.

HOME – Click this any time you wish to return to the main page.

HELP – A link to the latest version of the ‘HOW TO’ PDF document. The current version is attached to this email.

LOGOUT – As the name implies…
YOUR NAME – Click here to edit your USER information including changing your password.

RETAILER – Click here to edit your COMPANY information. Multiple contacts for each category can be entered. Ensure there is at least one of each in every category. See the PDF document for more information.

TEMPLATES – These are the Templates from which Orders are created. The template does not change and is always there for you to clone into a new order. Your Representative will notify you when the Templates are created.

MY ORDERS – These are the orders that you created, and the orders created for you by your Representative.

PRINT EDIT CLONE

The above icons appear as part of every order record in TEMPLATE and MY ORDERS:

PRINT opens the order in a new window in a format perfect for sending to a printer or exporting to PDF format.

EDIT reopens the order in its next-to-last step of order creation. You can add Retailer SKUs and adjust quantities.

CLONE in MY ORDERS creates a new, identical pending order with a blank PO Number and Blank Shipping Dates.

CLONE in TEMPLATES creates a new order based on the template. Be sure to enter a quantity for each item you want to order; zero quantity line items go away when you click update to create an order.

Reports

There are several reports built into the system. Not all reports are available to all users.

Reports for Administrators (shows all Retailers)
Order Log
Sales by SKU
Sales by Customer
Sales by Collection
Production Planning
SKU Report

Reports for Representatives (only those Retailers represented)
Order Log
Catalog (external link)
Price List
Fact Tag Worksheet
SKU Report

Order Log – The Representatives can run their version of the Order Log. Previously this report was sent weekly but now it is on demand, up-to-date whenever it is called. The Patio Order Log is dynamic; it appears differently depending upon who is calling it up. For example, the Administrator see all the orders for all the Retailers. The Representative can see only those orders placed for Retailers in his purview. The Retailer's version of the Order Log shows only their orders.

Report - Order Log

Retailer	PO	Order Date	Amount	Container Size	Cube	Acknowledged	Status	Request Date	ETD	ETA	Destination	Factory
AMINI'S GALLERIA		2019/07/16	$32,621.00	40 FT	3,422.03		Canceled				Tulsa OK	JX
KNOXVILLE WHOLESALE FURNITURE		2019/07/16	$77,651.00	40 FT	8,483.89		Canceled					JX
KNOXVILLE WHOLESALE FURNITURE		2019/07/16	$104,151.00	40 FT	11,684.49		Pending					SD
SAV-MART		2019/08/01	$3,829.78		886.90		Pending				Wenatchee WA	TJ
SAV-MART	Template - Tianjin	2019/08/01	$0.00		0.00		Template				Wenatchee WA	TJ

Sales by Item (Administrators)

Report - Sales by SKU

Collection	Item Sku	Status	Quantity	Amount
MANHATTAN	ADS05000P02	Pending	13	$507.00
MANHATTAN	ADS05000P02	Template	0	$0.00
MANHATTAN	ADS05001P02	Pending	11	$649.00

Sales by Retailer

Report - Sales by Customer

Customer	Company	Amount
	SAV-MART	$3,829.78
Arash Amini	AMINI'S GALLERIA	$32,621.00
Jane Wear	KNOXVILLE WHOLESALE FURNITURE	$181,802.00

Sales by Collection

Report - Sales by Collection

Collection	Amount
MANHATTAN	$3,829.78
OAK GROVE	$83,391.00
SYDNEY	$28,311.00
TRENTON	$102,721.00

Production Planning Report

Report - Production Planning

This report shows all *Ordered* and *Acknowledged* orders without any filters to year.

Search:

Collection	Primary SKU	Description	Retailer	PO #	Status	Date Ordered	Date Acknowledged	Quantity
Accessories	AAS21019P09	Sydney Chair- Deep Seating C Spring (B17-15A)	DARVIN FURNITURE	19111	Ordered	20220121	20211214	52
Accessories	ACS00220P45	Bridgeman Chair- Alum Deep Seating Rocker (B15-03)	DARVIN FURNITURE	19111	Ordered	20220121	20211214	52
Accessories	ACV02401P05	Lexinton Chair- Alum Deep Seating Swivel Rocker	AMERICAN FURNITURE WAREHOUSE	907283	Acknowledged	20211201	20211203	216

Dynamic Fact Tag Report

apricity OUTDOOR by agio

ADDISON

Product Fact Tag Worksheet

sunbrella

Construction	
Description	Adirondack inspired set with mix material motion chairs and woodgrain inspried procelain top fire pit
Order	Woven Mixed Container - Factory: Jiaxing Shipping Port: Shanghai
Frame	Aluminum
Finish	B19-15
Occasional Table Tops	Aluminum

Fabric	
Solid Fabric	A16-392GR Cast Silver 40433-0000 Content: 100% Sunbrella Acrylic
Coordinating Fabric	A20-198GR Chartres Sapphire Content: 100% Sunbrella Acrylic
Cushions	High grade 100% polyester wrapped around a layer of polyurethane foam. Polyester fills the cushion for comfort and the foam maintains shape and fullness. Polyester and foam equipped with a drain through feature.

Item Details

Item Description	Model Number	Carton Dimensions (inches)			Product Dimensions (inches)			Net Weight (lbs)	Gross Weight (lbs)	PCS/CTN	CUBE
		L	W	H	L	W	H				
Addison motion lounge chair	AGX03320	36.61	28.74	29.92	34.65	30.91	36.02			2	18.22
Addison 42" sqaure porcelain top fire pit	ART02800	38.78 46.26	38.78 3.54	27.17 46.26	41.81	41.81	24.61			1pc/2ctns	26.68
Top ID#:Porcelain #0639-8											
With: Burner cover#B19-15 beads: Amber ,Weather Cover											

Additional Information	
Recommended Care	Clean with mild soap and warm water
Warranty	https://www.apricityoutdoor.com/warranty/

All Agio furniture should come with attached warranty and maintenance tag. For more information, visit the customer information section at www.agio-usa.com