

PURCHASING AND PRICING

Menu 5 - Price Maintenance/Price Books

Description: Run report for customer specific list-less pricing setup in M-5.15

Menu Path: M-5.36 List Less Matrix Pricing (ft only)

Why Use it: List pricing may change without notice. Run this report at the first of each month to monitor list price changes. This is a great report to show special pricing setup in M-5.15 for list less scenarios. Will show contract#, customer#, customer name, product master vendor, prod#, prod description, discount pointer, discount percent, net sell price, branch cost, branch cost GP%, direct cost, direct cost GP%, and quantity sold in the last 12 months.

How to use it: Pricing must be setup in M-5.15. We recommend to print this report the first of each month to monitor list price changes.

1. Access M-5.36 - List Less Matrix Pricing (ft only)
2. Enter Customer number or <ENTER> for all –Enter customer to report specific pricing for a specific customer. Hit <ENTER> to see how a program might be affecting all customers.
3. Enter program or <ENTER> for all -

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List Less Pricing from the Menu-5.15 price matrix

Enter customer number or <enter> for all ?jld
Enter program or <enter> for all ?_
    
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Sample Report from M-5.36 List Less Matrix Pricing (ft only)

13:10:42 23 Jul 2008														
cont.no.....	a.cust.no.	cust.name.....	PM.VEND A.	PROD.NO.....	description.....	dp.ea	dperc.	each	sell.price..	branch.cost	gp%.bc....	dir.cost..	gp%.dc....	sold.12mo
JLD	Jeff D	Testing and Air	A499	B10-222	TEF2 068Z3204 VALVE	23	57.74	50.00	34.620	30.76	36.956	26.08		4
JLD	Jeff D	Testing and Air	A499	B10-223	TEY2 068Z3215 VALVE	23	61.97	45.00	34.620	23.06	36.956	17.87		2
JLD	Jeff D	Testing and Air	A499	B10-224	TEX2 068Z3209 VALVE	23	64.06	42.52	34.620	18.57	36.956	13.08		
JLD	Jeff D	Testing and Air	A437	S88-558	1645 mtr-2 speed spc shaf	23	65.10	100.00	79.940	20.06	79.938	20.06		-17

[405] 4 items listed out of 192 items.

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Menu 8 - Inventory Control

Description: Add prompt to report to only show items that have been purchased.

Menu Path: M-8.9.14 Inventory by Vend/Prod Class

Why Use it: A new prompt has been added to this report, which will remove items without purchasing activity.

How to use it: Run the report normally, but at the new prompt, answer 'Y' to see only those items purchased. This report will only include those items purchased using a Purchase Order written on the system. See screen shot below;

1. Run M-8.9.14
2. Enter WAREHOUSE (3N)
3. Enter SORT OPTION
4. ENTER VENDOR NUMBER
5. INCLUDE DISCONTINUED ITEMS
6. *DO YOU ONLY WANT TO SEE THOSE ITEMS THAT HAVE BEEN PURCHASED –Enter 'Y' to only see those items with purchasing activity.*

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INVENTORY BY VENDOR

ENTER WAREHOUSE (3N) OR <ENTER> FOR ALL :001

SORT OPTION: 1) BY VENDOR
              2) BY PRODUCT CLASS
ENTER 1 OR 2 :1

ENTER VENDOR NUMBER, OR <CR> FOR ALL :933

INCLUDE DISCONTINUED ITEMS (Y/N) :n

DO YOU ONLY WANT TO SEE THOSE ITEMS THAT HAVE BEEN PURCHASED? (Y/<CR>) :
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PURCHASING AND PRICING

Menu 8 - Inventory Control

Description: Add columns to inventory analysis report.

Menu Path: M-8.9.34 Inventory by Vend/Prod Class(FT)

Why Use it: We have added two new fields, product description 2 and vendor description to the Inventory by Vend/Prod Class report M-8.9.14. With the additional fields, this report can be easily utilized for product line comparison.

How to use it: Proceed to M-8.9.34 to run an FT only version of this report.

1. ENTER WAREHOUSE (3N) –Enter warehouse for analysis
2. SORT OPTION –Enter your sort option
 - a. 1) By Vendor –prompts for vendor
 - b. 2) By Product class –prompts for product class
3. Open FT.TXT in excel (see sample report below)

INVENTORY BY VENDOR

ENTER WAREHOUSE (3N), OR 'END' TO END :001

SORT OPTION: 1) BY VENDOR
 2) BY PRODUCT CLASS

ENTER 1 OR 2 :_

Sample report from M-8.9.34 Inventory by Vend/Prod Class(FT)

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	VEND.NO.	PRODUCT	WLOC.	ITEM.DESC.....	DESCRIPTION 2.....	MFR.NO.....	COST	EA.PRICE.	DIR.COST.	ON	EXT.COST	VEND	ROP	QTY SOLD.
2										HAND		ON ORD		12 MONTHS
3														
4	1	Q51-558		ORM5458SUB S58-975		ORM5458SUB	29.96	89.88	29.963				0	
5	1	S58-007		97 MOTOR			97	73.15	148.53	96.099	0		0	0
6	1	S58-016		14 MOTOR			14	17.04	37.43	22.382	0		0	0
7	1	S58-018		27 MOTOR			27	19.16	42.08	25.163	0		0	1
8	1	S58-020		48 MOTOR			48	45.74	92.88	60.09	0		0	0
9	1	S58-021		32 MOTOR			32	18.1	39.77	23.783	1	18	0	1
10	1	S58-023		33 MOTOR			33	18.1	39.77	23.783	0		0	0
11	1	S58-024		44 MOTOR			44	34.53	75.85	45.361	1	35	0	0
12	1	S58-025		50 MOTOR			50	49.8	101.12	65.426	0		0	1
13	1	S58-029		18 MOTOR			18	18.76	41.2	24.638	0		0	1
14	1	S58-049		19 MOTOR			19	18.76	41.2	24.638	0		0	0
15	1	S58-122		28 MOTOR			28	21.59	47.43	28.366	0		0	1
16	1	S58-123		29 MOTOR			29	21.59	47.43	28.366	0		0	1
17	1	S58-126		46 MOTOR			46	45.62	100.21	59.925	0		0	0
18	1	S58-128		85 MOTOR			85	52.14	105.88	68.505	0		0	0
19	1	S58-174		42 MOTOR			42	31.17	68.46	40.943	0		0	1
20	1	S58-175		309 MOTOR			309	56.46	124.04	74.181	0		0	0
21	1	S58-176		359 MOTOR			359	24.71	54.29	32.466	0		0	0
22	1	S58-267		1314A 6PK SPACER D97V,		1314A	1.77	3.23	1.772	0			0	0
23	1	S58-268		1315A 6PK SPACER		1315A	1.00	2.33	1.000	0			0	0

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Menu 12 – File Maintenance

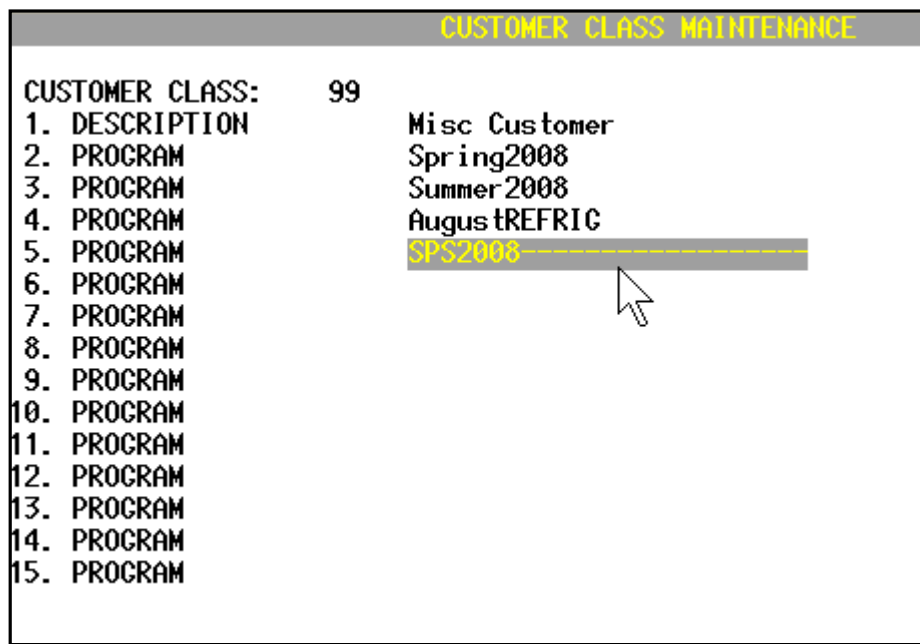
Description: Assign contract to all customers within a specific customer class

Menu Path: Menu 12.2.8

Why Use it: Often times there is a need to assign a pricing program(s) to all accounts of a certain customer class. In the past, each customer within that class would need to be touched with the program(s) entered into their customer master. Now, just identify which customer class needs which programs and maintain it once within the customer class maintenance.

How to use it: Setup your pricing programs and then apply those to the affected customer classes.

1. Setup your programs in Menu 5.3 or Menu 5.15.
2. Access customer class maintenance Menu 12.2.8 and enter the class to maintain.
 - To get a listing of customer classes use Menu 12.2.28
3. Select lines 2 through 15 and put in the program name(s) assigned to the specific customer class.
4. Pricing is available immediately in Order Entry



The screenshot shows a terminal-style interface titled "CUSTOMER CLASS MAINTENANCE". It displays the following information:

CUSTOMER CLASS:	99
1. DESCRIPTION	Misc Customer
2. PROGRAM	Spring2008
3. PROGRAM	Summer2008
4. PROGRAM	AugustREFRIC
5. PROGRAM	SPS2008
6. PROGRAM	
7. PROGRAM	
8. PROGRAM	
9. PROGRAM	
10. PROGRAM	
11. PROGRAM	
12. PROGRAM	
13. PROGRAM	
14. PROGRAM	
15. PROGRAM	

A mouse cursor is pointing at the "SPS2008" program name in line 5, which is highlighted with a horizontal line.

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Menu 27 - PO Forecasting Menu

Description: Print laser formatted PO when rolling down Forecast to PO

Menu Path: Menu 27.6

Why Use it: Use for consistency in PO printed format and saves a step in having to reprint PO to a laser format when converting forecast.

How to use it: If the parameter is set in Menu 35.5 to print Laser formatted PO's this will automatically start printing after the forecast conversion is complete.

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Menu 34 - Bar Coding Menu

Description: Print bar code labels for a quote.

Menu Path: Menu 34.38

Why Use it: Integration of quote system with providing Johnstone Labels for customer shelves.

How to use it: Once a quote is created in Menu 1.2 Order Entry you can go to Menu 34.38 to print labels for this quote.

1. *ENTER OPTION:* -Access Menu 34.38 and select option 2. PRINT ALL PRODUCTS FOR A SPECIFIC QUOTE.
2. *ENTER QUOTE NUMBER (8N):* -Enter a valid quote number (8N)
3. *PRINT ONLY ONE LABEL PER PRODUCT (Y/<CR>)* -If you answer 'Y' to this prompt, a SINGLE label will print for each line item, regardless of actual quantity on the quote. If you hit ENTER here it will print a label out for each item's quantity on the quote. EX: If quoting a quantity of 50 of an item, there will be 50 labels.
4. *Sort by L-ine number P-art number (L/P) ?*
 - o L -prints the labels out in line number order (Line 1, Line 2, etc)
 - o P -prints the labels out in part# order alphabetically.
5. Collect labels from your designated label printer and distribute as needed.

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BARCODE LABEL PRINTER  
  
BARCODE LABEL PRINT OPTIONS:  
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1. ENTER SPECIFIC PRODUCT NUMBERS
2. PRINT ALL PRODUCTS FOR SPECIFIC QUOTE
3. PRINT ALL PRODUCTS FOR A VENDOR
4. PRINT ALL PRODUCTS FOR A LOCATION

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ENTER OPTION: ?2  
ENTER QUOTE NUMBER (8N): ?01000148  
PRINT ONLY ONE LABEL PER PRODUCT (Y/<CR>) ?Y  
Sort by L-ine number P-art number (L/P) ?P
```