U2009.1 Release Documentation

Counter & Sales

Menu 1 - Order Entry & Invoicing

Description: Addition of reasons codes when cancelling a quote

***This job is still in BETA testing, it will be available for installation the end of October**

Menu Path: Menu 1.2 Order Entry to cancel the quote and Menu 12.15 OE Cancel Reason Code Maintenance to maintain the reason codes.
Why Use It: Similar to when cancelling an order, you want to know why quotes are cancelled as well.
How it works:
- In the Order Entry Total screen for a quote, when selecting 'CAN' to cancel the quote the Reasons for CANCEL dialog displays requiring you to select from the list of reason codes (as setup in M-12.15). By recording a reason for cancelling, this now enables reporting and tracking for quotes.

Description: Add product description to the order entry 'SER' option

Menu Path: Menu 1.2 Order Entry, 'SER'
Why Use It: Helpful information to display on the serial number entry screen.
How it works:
- Pull up an existing finalized release number in Menu 1.2 and when prompted "This Order has been Finalized. 'UNF'inalize, 'SER'ial# or <Enter>" put in SER and the screen to input the serial#'s now displays the product and descriptions, whereas previously, it only displayed the product number.

Description: Add option for operator to select a reason when unfinalizing a ticket with the reason being sent with the event notification

Menu Path: Menu 1.2 Order Entry, UNF, and Menu 35.19.10 Unfinalized Invoice to setup the Event Notification, Menu 12.1.19 Unfinalize Reason Code Maintenance to setup the UNFinalize reason code
Why Use It: Helps provide more detail as to the scenarios when it's needed to unfinalize an order.
How it works:
- Start by setting up the unfinalize reason codes in Menu 12.1.19. ***This needs to be done before using this feature!***

- Go back and make sure you have created reason code(s) in Menu 12.1.19.
- Next, make sure the event notification is setup in Menu 35.19.10.
- After those are setup, go and UNFinalize a ticket, you will get prompted to select from a list of UNFinalize reason codes.
- This reason will be placed on the event notification.

Description: Option to print/fax/email quotes excluding the sales tax amount

***This job is still in BETA testing, it will be available for installation the end of October**

Menu Path: Menu 1.2 Order Entry, Menu 1.34 Email Quote thru Linux Server
Why Use It: Often times, the competition produces quotes without sales tax, making our quotes seem higher if only glancing at the totals. This levels the playing field of the viewable document.
How it works:
- Start by creating or accessing a quote.
- In Menu 1.2, when the quote is filed away, there is a new prompt; Exclude Tax Amount (Y/<CR>)? Answer Y to exclude the tax amount from the document.

Description: Add display of special descriptions in stock status and order entry

Menu Path: Menu 19.6 Stock Status and Menu 1.2 Order Entry
Why Use It: Additional display of more useful/helpful product information.
How it works:
- ***This could potentially conflict with custom coding. This will be a "by request only" upgrade job***
- Will display product description 2 or Corp special invoice description in stock status.
  STOCK STATUS INQUIRY
  ```
  ITEM NO.       HAZ U/M ITEM DESCRIPTION      DISC  P/C
   s88-558           EA 1645 48FR 1/6HP COND FAN  N 406-08
                  S  **Super SPECIAL DESC**
  REGULAR PRC   CORE CHG    AVERAGE COST   BRANCH COST
  ```

Menu 11 - Sales Analysis

Description: Add vendor lookup to vendor selection prompt

Menu Path: Menu 11.4.40 Vendor Sales - Detail by Product
Why Use It: Gives the opportunity to lookup a vendor that when you aren't quite sure of the vendor number when running the report.
How it works:
- Run report Menu 11.4.40 Vendor Sales - Detail by Product and when prompted for "Enter Vendor#, <CR> for ALL or 'L'ookup, enter 'L' to go to the vendor lookup. Locate your vendor, select and continue on with the report.

Menu 12 - File Maintenance

Description: The Sequence control label in Menu 12.1.6, field 19. has been changed from 'Standing Order' to 'QUOTES'

Menu Path: Menu 12.1.6 Sequence Control Maintenance
Why Use It: This changes the sequence control screen field label to something more familiar.
How it works:
  • Menu 12.1.6 field 19 has been changed from "STANDING ORDER NO" to "QUOTES (PRO.FORMA)"

Description: Addition to audit files (status-log) recording -addition of S3 menu product changes

Menu Path: Handheld S3 menu and Menu 12.7 File Maintenance Report and EOD.XREF 01-118
Why Use It: There is inherent benefit to having data changes whether from the main menu or from the S3 handheld menu hit the audit files for reporting and verification. In this upgrade any warehouse location changes made in S3 Option 9 – W/C Locations will be audited in Menu 12.7.
How it works:
  • There is nothing to setup with this one, just monitor the reports via EOD with 01-118 or Menu 12.7 File Maintenance Report to view the changes.

Menu 16 - End-of-Day

Description: Quote productivity analysis report

Menu Path: Menu 2.30 Quote Status Report and Menu 16.5 EOD.XREF Maintenance (01-198 Customer Quotes Status Report)
Why Use It: Similar to the counter productivity report that covers orders, this report tracks the productivity of the quotes.   Have they expired, still pending, converted to order, etc...
How it works:
  • Run the report from Menu 2.30 on demand.
  • Setup the EOD.XREF item for the report to be part of the EOD. Menu 16.5, EOD.XREF 01-198.

Menu 19 – Inquiries

Description: Create a Quote or an Order from CPR –Customer Price Review

DISCLAIMER: DSPro staff continues to recommend providing customers with pricing and building quotes/orders from M-1.2 Order Entry. As of 10/09/09 this upgrade request will not be available until further evaluation can be done.

Menu Path: Menu 19.6 Stock Status, CPR
Why Use It: The CPR menu option has always been a good option to get a customer's pricing, but you would still have to take the info over to Menu 1.2 Order Entry and re-enter it. Now, a quote or an order can be built directly from CPR.
How it works:
- Start in Menu 19.6 by entering a product.
- Type in 'CPR' for the Customer Price Review screen, and input the customer#.
- When done checking their prices, simply hit <ENTER> or <END> and a new prompt will come up: "Convert Customer Pricing? 'Q'uote, 'O'rder or <ENTER>):"
  - Selecting 'Q' will start the process of building a quote and selecting "O" starts the process of creating an order.
    - ***The ORDER created is a live pick ticket. Quantities will remain in backorder or in pick until this pick ticket is addressed (finalized or cancelled).***
  - It will assigned a number from the quote/order sequence, prompt for operator code and take you right into Menu 1.2 Order Entry to maintain your quote/order and print or file away as needed.

Description: Enhancement to a current feature from Stock Status SUBSTITUTE Item listing to select from the list and view its info in Stock Status

Menu Path: Menu 19.6 Stock Status and use the 'SUB option
Why Use It: This is a step/keystroke saver where it's easier to directly view a product's substitute items and consequently view the specific stock status info of those subs.
How it works:
- Start by accessing stock status Menu 19.6 and inputting a product that contains SUBS.
- Enter 'SUB' to view a listing of substitute items.
- Select item from the list to view it within stock status.

Description: Add the product season code to stock status

Menu Path: Menu 19.6 Stock Status to view, M-12.3.2.2 Product Master, field 5. A/S/W Code
Why Use It: When checking the validity of the ROP for a product, the first place to go is stock status. The season code is an important field to consider.
How it works:
Access stock status, put in the product and view the season code from product master (Menu 12.3.2.2, field 5).   The code subtly displays in the lower-right-hand corner of the stock status screen.
- ***The season code below the EA is from Menu-12.3.2.2, field 5.A/S/W CODE with one of the following possible entries:***

- o *'A' = ALL SEASON ITEM 'S' = SUMMER ITEM 'W' = WINTER ITEM*
  (corp transmission data)
- o *'F' = FORWARD NEXT 2 MONTHS (SOLD LAST YEAR)*
- o *'B' = BACKWARDS LAST 6 MONTHS*

- • *The SEAS code that is in the lower right is the calculated seasonal code, based on the parameters in Menu-27.24 Forecast Totals by Vendor, fields 7 thru 9.*
- • *If the item does not have enough history to calculate an ROP or seasonal code, it will default to the code above from 12.3.2.2, field 5.*

```
   0   0   0   0   0   1
 DIRECT 10/02/08        SEAS = S
    10      20 O159   AVAIL
 137.74   130.85 C161       0
'{qty}L'st, 'SUB': AAAAAAAAAAAAAA
```

Menu 35 – Parameters

Description: Event notification for newly created quotes

Menu Path: Event Setup in Menu 35.19.11 Quote Notification, Menu 1.2 to create the quote.
Why Use It: Instant notification when a quote is created allows you to immediately fix or append quotes before it is too late.
How it works:
- • Start by setting up the salesman email addresses in Menu 35.19.11 Quote Notification. (The salesman on the account in Menu 12.2.2.3 Customer Detail, field 1)
  - o There is also an **ALL** option. This option is available by putting in the company#, then in field 1. SALESMAN put in 'ALL' and then in field 11. Type in the email of who should get them ALL.
- • Create a quote in Menu 1.2 to email the event notification.
- • Review the Event Notification Email.