



## U2009.1 Release Documentation

### Purchasing & Pricing

#### **Menu 5 - Pricing**

**Description: Option to narrow down pricing for product class and category by vendor**

**Menu Path:** Menu 5.15 Pricing Matrix

**Why Use It:** Use Menu 5.15 to narrow down special pricing for product class and product category by vendor. This option is very useful when trying to minimize the pricing and have several vendors assigned to the same product class or category.

**How it works:**

- To setup the pricing by class and vendor enter the following at the PVCTG Menu 5.15 prompt;
  - Setup the pricing normally, but at the PVCTG prompt enter 'C' for class and at the PROD CL: prompt enter the class and the vendor separated by a '**V**':  
**EX: 411V592**
- To setup the pricing by Product Category and Vendor enter the following Menu 5.15 prompts;
  - Setup pricing normally, but at the PVCTG prompt enter 'G' for category and at the PROD CT: prompt enter category and vendor separated by a '**V**': **EX: 411-01V592**

**Description: Setup pricing programs for validation in customer master entry and pricing entry**

**Menu Path:** Menu 5.19 Program Maintenance, Menu 35.3 Pricing Parameter Maintenance, field 11 Program Validation

**Why Use It:** To have the system validate programs as they are being set up for Pricing scenarios. This will ensure that incorrect/invalid programs are not assigned in customer master/5.3 or 5.15.

**How it works:**

- Enter the Program name in Menu 5.19. Then type in the description.
- NOTE: If you are doing this for the first time and have a bunch of programs that you are trying to update the descriptions for – you may enter a job and we can do the upload for you from an Excel Spreadsheet.
- Set the Parameter for Program Validation -To have the system validate programs in 12.2.2.2 Customer Master, screen 2, field 7 : Programs/5.3 and 5.15 you must have the following parameter set to Y. Parameter Menu 35.3.11 : Program Validation
- Once you have the Parameter set to Y you will be able to do a (L) to lookup in Menu 5.15 (Matrix), Menu 5.3 (Fixed Prices), or Customer Master 12.2.2.2, screen 2, field 7 Programs for a listing of valid programs.
- Also view at: [http://dstdocs.sitemax.com/M5\\_19.asp](http://dstdocs.sitemax.com/M5_19.asp)

## Menu 6 - Inventory Evaluation

**Description:** Display historical data for ROP/EOQ/ABC calculations from the EOM reports (run for specific parts/vendor)

**Menu Path:** Menu 6.6 EOM History - ROP/EOQ/ABC

**Why Use It:** This report is useful for finding old ROP's/EOQ and ABC ranking. It's also useful for seeing ROP changes where an entire product line was discontinued and moved to a new vendor.

**How it works:**

- Start with Menu 6.6 EOM History -ROP/EOQ/ABC
- Input warehouse
- Input product number(s) or enter for ALL.
- Select column options (ROP, EOQ, ABC, Season Flag, Lead Time, ALL COLUMNS).
- FT the report and review in EXCEL.
  - **IMPORTANT NOTES: Report will display the warehouse, vendor number, product and current ROP in addition to the columns selected in Column Options.**
    - **EX: ROP1 indicates first month of the calendar year, ROP2 indicates the second month.**
    - **This reports on the months that history has accumulated for. We began collecting the data on most stores in March or April of 2009.**

## Menu 7 - Purchasing

**Description:** Any product descriptions changed during PO entry to print on HTML formatted printed/faxed/emailed PO

**Menu Path:** Menu 7.1 Purchase Order Entry & Edit, description changed in PO Line Detail Entry

**Why Use It:** Sometimes product description changes are needed to be communicated to the vendor. This allows for easy entry and communication.

**How it works:**

- Start with changing your product description on the PO. Pull up the line in Menu 7.1 and then edit the description as needed in line 2 on the PO Entry Line Detail Maintenance screen.
- View the HTML formatted printed/faxed/emailed PO.

**Description:** Add printer number to PO's audit fields from PO to OE rolldowns

**Menu Path:** Menu 7.1 Purchase Order Entry & Edit (rolldown only), Menu 7.1A Rolldown to OE, and Menu 7.23 PO Audit

**Why Use It:** In the continual battle to track paperwork and monitor results, this is another piece of information that helps monitor things. It shows what printer was selected during a PO rolldown and displays it in the audit. Helpful in tracking down where the PO should have printed during the rolldown process.

**How it works:**

PO..... AUDIT.PO.....  
01118292 store support team 13:53:25 25 Aug 2009 - 6 'HP-P  
TO' - **Printer#: 0**

**Description: In BOLD, easy to identify and recognize, mark dropship PO's as such**

**Menu Path:** Menu 7.1 Purchase Order Entry & Edit, header field 5. DRPSHP FLG -flag as 'DS'

**Why Use It:** Easier recognition for the vendors the PO's are sent to that it is a DROPSHIP PO.

**How it works:**

- Start with Menu 7.1 to create a PO.
- In the PO header screen, flag the PO as a 'DS' -DROPSHIP in field 5. DRPSHP FLG. By default, this field will be 'ND'.
- Print, Fax or Email the PO to view the new notification on the PO.

**Menu 11 - Sales Analysis**

**Description: Add customer list price multiplier to selected sales reports**

**Menu Path:** Menu 11.2.8 Comparative Sales by Customer and 11.2.9 Comparative Sales by Salesman

**Why Use It:** The addition of the customer's list price multiplier gives you a quick glance of which LPM pricing structure your customer falls under.

**How it works:**

- **Run M-11.2.8** -Comparative Sales by Customer, the LPM is listed in the upper-left-hand corner of the report.
- **Run M-11.2.9** -Comparative Sales by Salesman, the LPM is listed in report header in the upper-right-hand corner.

**Menu 12 - File Maintenance**

**Description: Add function and features to make it easier to block products from price/cost transmissions updates. Option to go easily from product to product and back, as well as, by vendor or product range.**

**Menu Path:** Menu 12.3.2.9. Corp. Price Update Maintenance and 9A. Corp. Price Update (Range)

**Why Use It:** Often times, more than just a few products need to be blocked from the price updates. The new features added with this upgrade helps get through more products. This addition to Menu 12.3.2.9 allows you do dot "." to move forward, product to product while dot dot ".." moves you back item by item. The addition to Menu 12.3.2.9A provides for a wider-range of blocking by vendor or product range.

**How it works:**

- *Menu 12.3.2.9* -When in Corp. Price Update Maintenance, after putting in the first product, like in stock status, hit a dot "." to move to the next item. Also, use dot dot ".." to move back a product at a time.

- *Menu 12.3.2.9A* -This menu allows you to update a range of products at a time. The eligible ranges are by vendor or product range.
  - **To Update By Vendor** -Access Menu 12.3.2.9A, enter 'V'endor and next prompt -Vendor number, fill in any fields 1 through 23 to block with an 'N', then '0' to accept to update.
  - **To Update By Range** -Access Menu 12.3.2.9A, enter 'R' for range and next prompt -input the beginning product number, and then ending product number, '0' to accept to update the range of products.

**Description: Setup vendor number sequence and add 'NEW' function to create new vendor**

**Menu Path:** Menu 12.4.1.1 Create New Vendors, to create the vendors and Menu 12.1.6 Sequence Control Maintenance, to set the vendor numbering sequence.

**Why Use It:** Previously, vendor numbers were arbitrarily assigned by the operator employing a hit and miss approach if you didn't know what vendor numbers were already being used. This allows you to simply type 'NEW' and let the system assign the next available vendor number.

**How it works:**

Since corporate uses 3 digit vendor numbers, DST recommends using 4 digit vendor numbers when assigning new vendor numbers.

- Start by setting your sequence control Menu 12.1.6, code 001, field 24 to the desired starting vendor number sequence.
- When creating new vendors in Menu 12.4.1.1, enter 'NEW' to grab the next vendor number in sequence. If a vendor number is already taken, this just jumps to the next available one.

**Description: Add field to vendor detail for a warranty URL.\*\*\*Installation available upon Job request\*\*\***

**Menu Path:** Menu 12.4.1.3 Vendor Detail, field 9. WRNTY URL, Menu 1.2 Order Entry, to run the credit, Menu 35.1 Order Entry Parameter Maintenance, screen 3, field 9 set to 'Y'.

**Why Use It:** When processing warranties at the counter, it's much better if all the paperwork can be addressed immediately, before anyone gets out the door. This allows collection of the pertinent warranty info right away.

**How it works:**

*If there is a URL setup in the vendor detail, then when a part is returned using the warranty reason code (006) a browser window will pop up to the URL entered.*

- Start by setting up the vendor warranty URL. Menu 12.4.1.3, field 9. WRNTY URL. Enter the URL: [www.servicebench.com](http://www.servicebench.com) \*\*\*The vendor in product master, Menu 12.3.2.2, field 3.\*\*\*
  - **URL must NOT have any HTTP:// in front of it...just enter as [www.servicebench.com](http://www.servicebench.com)**
- Confirm Menu 35.1, screen 3 field 9. ONLINE Warranty Tag is set to 'Y'.
- Go to order entry Menu 1.2 process the return normally. After inputting reason code 006, the warranty sequence number and the original invoice number, the browse opens to the URL, as input in Menu 12.4.1.3, field 9. WRNTY URL

## Menu 19 - Inquiries

### 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:**
  - 'A' = ALL SEASON ITEM 'S' = SUMMER ITEM 'W' = WINTER ITEM (corp transmission data)
  - 'F' = FORWARD NEXT 2 MONTHS (SOLD LAST YEAR)
  - '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, 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 Menu 12.3.2.2, field 5.**

```
0 0 0 0 0 1
DIRECT 10/02/08 SEAS = S
10 20 0159 AVAIL
137.74 130.85 C161 0
'qty}L'st, 'SUB': AAAAAAAAAAAAAA
```

### Description: Display product HITS in stock status

**Menu Path:** Menu 19.6 Stock Status

**Why Use It:** Easier access to product HITS, previously these could only be seen within Menu 19.7b Inventory Transaction by Product and adding up total invoices in a month or reviewing Menu 6.9 Hits Report or Menu 6.32 ABC Ranking Report.

*What hits will do for you is;*

- HITS and sales are used to determine sales classification, ranking (A/B) and ROP levels.
- Helpful in developing your NOOSE lists.

**How it works:**

- Start by accessing stock status (Menu 19.6) and inputting a product.
- With the product information displayed, use the 'HT' option to display the product HITS. **Hits are defined as how many times a product is placed on different orders, not the actual quantity of all those orders.**

**Description: Enhancement to a current feature from stock status SUBSTITUTE Item listing to select from 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 option to input and display detailed release inquiry from Inventory Transaction By Customer**

**Menu Path:** Menu 19.7A. Inventory Transaction By Customer, Menu 19.5 Detailed Invoice/Release Inquiry

**Why Use It:** Makes it easier to review history and then drill down to a specific release on the history.

**How it works:**

- Start by accessing Menu 19.7A.
- Enter the customer number.
- Enter the Part# (or ALL)
- At the following prompt, put in the 11 digit release# and view it in Menu 19.5
  - REL#(11N), <ENTER>-NEXT PAGE P-PREVIOUS OR END: #####

## **Menu 27 - PO Forecasting**

**Description: Add option to PO Forecast conversion to quickly jump into and edit the converted PO**

**Menu Path:** Menu 27.6 Convert Forecast to Purchase Order, for the new prompt, Menu 7.1 Purchase Order Entry & Edit when editing.

**Why Use It:** This helps streamline the process from forecast to PO. Instead of having to record the PO#, leave the current menu you are in, remember the PO#, go into another menu to edit, -->this is all done through a single process.

**How it works:**

- After you have maintained your forecast and are converting it in Menu 27.6, there is a prompt:
  - YOUR CONVERSION IS DONE! 'F'AX OR 'E'DIT LAST PO CONVERTED, OR <ENTER> TO CONTINUE
- When selecting 'E'dit to edit the last PO converted, you head directly into Menu 7.1 to edit as needed.
- You can even rolldown from here (Menu 7.1) in the PO total screen, options 7. HOLD, PRINT & ROLLDOWN
  - 8. HOLD, NO PRINT & ROLLDOWN when the forecast vendor being rolled down in Menu 27.6 is an 'SO' vendor.

## Menu 35 - Parameters

**Description:** Display current quantity on-hand when entering pre-counts

**Menu Path:** Menu 35.11 Inventory Parameters, field 18 to set parameter and Menu 9.1 to enter pre-counts and view on-hand.

**Why Use It:** On items that you know this is the only place it's stocked, you have the knowledge to correct the situation at this point before it goes to the variance report.

**How it works:**

- To display quantity on-hand in Menu 9.1, start by setting the parameter in Menu 35.11, field 18. Display QOH on Pre-Counts Screen Menu 9.1 to 'Y'
- View QOH column in Menu 9.1 See sample below;

PHYSICAL INVENTORY PRE-COUNT ENTRY				
WHSE: 001	Johnstone Supply #226			
PART NBR	DESCRIPTION	PRECOUNT	QOH	PRECOUNT TOTAL
=====				
S88-573	1495 MOTOR MOUNT	10	1	0

**Description:** Eliminate redundant/unnecessary price override notifications from the price override event

**Menu Path:** Menu 35.19.4 Price Override

**Why Use It:** Price overrides that come as a result of Menu 5.15 Matrix pricing and Corp flyer are ALL excluded from the price override event notification. Also, customers beginning with SO (store transfers) are excluded from this event notification.

**How it works:**

- **Menu 35.19.4. Price Override** - Enter the company number that the event will take place. Each company (company 01, 02, etc.) will need to be set up separately.
  - **Note: Price overrides that come as a result of Menu 5.15 Matrix pricing and Corp flyer are ALL excluded from the price override event notification. Also, customers beginning with SO (store transfers) are excluded from this event notification.**
- **Fields 1 - 9 Email Address** - Enter each email address to receive an immediate notification when a price override takes place in Order Entry.
- **Gross Profit %** - allows you to enter a minimum GP%. If the GP% is higher than the amount in line 10 than no event notification will take place.
- **Bypass QTY Pricing** - if 'Y' is entered you will not receive a price override notification as long as the price of the product that was overwritten was found in one of the quantity buckets. Enter 'N' if you want to receive notification. Blank defaults to No.
- **Only New Orders** - If 'Y' is entered you will only receive a price override notification on new invoices/pick packs. You will not receive multiple notifications for every time the price is changed - if it is more than once.