Eclipse Product Maintenance

Release 8.6.6 (Eterm)

Legal Notices

Activant® Eclipse™ 8.6.6 (Eterm) Online Help System

Publication Date: June 23, 2009

Table Of Contents

Product Maintenance Overview

Use Product Maintenance to create product records for all of your inventory. Product records include all information necessary for purchasing, selling, and maintaining your inventory.

For example:

You can include all information in a product record from the units of measure in which a product can be purchased and sold, to its hazard information, to the branches that stock it.

In addition to creating product records, use Product Maintenance to create the following:

- Product kits, which are multiple components sold together as one unit.

  For example:

  The ABC Kitchen Sink product kit contains all the components making up a kitchen sink – sink, faucet, and hot and cold taps.

- Product families, which are groups of products that are often sold together and which provide you with mix-and-match options during order taking.

  For example:

  A sink can belong to a product family that includes several different styles and colors of sinks, faucets, and tap sets. When a customer orders a sink in the product family, you can offer them one of several colors in the same style, or let them know which types of faucets match that sink.

Finally, use the Inventory Inquiries associated with Product Maintenance to manage your inventory. Inventory Inquiries provide you with information such as product availability, product sales history, and product projections.

See Also:

Creating and Maintaining Product Records Overview

MSDS and Hazardous Information Overview

Product Demand and Procurement Determination Overview

Creating Product Kits Overview

Product Families Overview

Inventory Inquiries Overview

Setup Requirements for Product Maintenance

Following are the control maintenance records and authorization keys used for setting up products, along with additional setup requirements.

Control Maintenance Records

The following control maintenance records affect Product Maintenance:

DLOT General Parameters

- Exclude Detail Lot Items From Available On-Hand Calculation

EMSG (Eclipse Messaging)

- User To Get Tracker When MSDS Is Not Printed For Product

GENRL Sort Parameters

- Product Classification Sort List

INVM Automated Purchasing Parameters

- Days Before Ship Date To Reserve Product
- Enable Automatic Suggested Transfers From Cross Dock Printing Queue
- Message Buyer On Inventory Factor Override In SOE
- Minimum Order Cycle Days For Suggested P/O
- Respect Item Min/Max For Suggested Transfers
- Suggested P/O Trigger For Non-Immediate Orders

INVM Consignments

- Allow Customer Consignment From Multiple Branches
- Allow Transfer Of Vendor Consigned Inventory

INVM Forecast Parameters

- Minimum Lead Samples

INVM General Parameters

- B2B Inventory Control Maintenance
- Buy Line Maintenance Authorization Levels
- Customer/Vendor Display Option For Future And History Ledger
- Display Availability In Inventory Inquiry Product Index
- Enable Immediate Print/Process From Cross Dock Sug Transfer

- Maximum Days Supply
- Reprocure Backordered Tagged Transfer Quantities

INVM Inventory Management Defaults

- Default For Excess Grace In Buy Line Maint
- Default Lead Time Days If Product And Buy Line Have None
- Default Lead Time Factor If Product And Buy Line Have None

MAINT NOTES

- User Defined Product Notes

MAINT PROD

- Default Nonstock Product Template
- Delete Stock Location With Blank Status And Zero Quantity
- Leave Delete Products In The Pricing Index
- Product Maintenance Authorization Levels
- User To Log Automatic Inventory Adjustments Under
- Valid Product Activity Sources
- Valid Product Catalogs
- Valid Product Certification Codes
- Valid Product Commission Groups
- Valid Product Commodity Codes
- Valid Product Select Codes
- Valid Product Sort Codes
- Valid Product Zones

POE Defaults

- Default Br Stock Value When A Product Becomes Active

POE General

- Automatically Calculate Duty Charges For Purchase Orders

SOE Bid Parameters

- Duplicate Bid Days To Check

SOE Branch Parameters

- Additional Brs To Show Availability On Product Primary Index
- Enable Branch Specific Products

SOE Default Parameters

- Default Imaging Profile ID For MSDS

SOE Display Parameters

- Display Products Within A Customer's Product Zones

SOE Duplicate Checking Parameters

- Duplicate Customer P/O Number Check
- Duplicate Order Check
- Duplicate Order History Days To Check
- Duplicate Product Check On Current Order

SOE Filter Parameters

- Exclude All Sales Orders Outside The Plenty Date From Avail Calc

SOE Product Parameters

- Check Other Dynamic Kits For Needed Parts
- Number Of Digits Of Accuracy For Product Weight
- Order To Inventory Factor For SOE

SOE SUBS (Substitutes)

- Add OE Messages For Additional Sale/Substitute Products
- Auto Open Substitute Window For Items W/O Avail In POE
- Auto Open Substitute Window For Items W/O Avail In SOE/TOE
- Auto Open Substitute Window For Items With Type
- Valid Substitute Product Types

TOE (Transfer Order Entry)

- Copy Comments For Hazard Items To Transfers

Authorization Keys

The following authorization keys affect Product Maintenance:

Activity Logs

- PRD.ACTIVITY.CMT.EDIT
- PRD.ACTIVITY.EDIT
- PRD.ACTIVITY.VIEW

Buy Lines

- BUYLINE.MAINT
- BUYLINE.MAINT.LEVEL

COGS

- COGS.VIEW
- COST.VIEW

Customer Maintenance

- CUST.CERTIFY.EDIT

Order Entry

- OE.EDIT.INV.ACCT
- OE.PRODUCT.TYPE.EDIT
- OE.PRODUCT.USE.DELETE
- OE.PRODUCT.USE.REVIEW

Product Maintenance

- DYNAMIC.KIT.EDIT
- MSDS.MAINT
- NONSTOCK
- PRD.SUBS.MAINT
- PRODUCT.MAINT
- PRODUCT.MAINT.LEVEL

Products in Order Entry

- PRODUCT.CERTIFY

Purchase Order Entry

- POE.ALLOWED
- POE.PIL.DAYS.OVRD

Sales Order Entry

- SOE.ALLOWED
- SOE.DUP.ORDER.OK
- SOE.MIN.GP
- SOE.OVRD.NO.PRC.CHANGE
- SOE.PIL.DAYS.OVRD

Valid/Invalid Lines and Types

- INVALID.PRODUCT.LINES
- VALID.BLINES
- VALID.PLINES
- VALID.PRODUCT.LINES

Additional Setup Requirements

The following setup requirements affect Product Maintenance:

Duty Harmonizing Codes

Before assigning a duty harmonizing code to a product, use the Duty Harmonizing Code Maintenance screen to define rates for duty, freight, or other fees for products your company imports and later exports.

G/L Account / Product Sales Type

Before creating new product records, you must set up G/L account product sales types.

Price Lines

Before creating new product records, you must set up price lines.

Sales Budget Group Maintenance

If you are using budget groups with products for the purpose of setting sales goals with your customers, you must set up sales budget groups.

Tax Exception Groups

Before assigning tax exception groups to products, create them in Tax Exception Group Maintenance.

Setup Requirements for Product Status Codes

Following are the authorization keys used with product status codes.

- OE.PRODUCT.USE.DELETE
- OE.PRODUCT.USE.REVIEW

See Also:

Product Status Codes

Product Maintenance Overview

Setup Requirements for Product Families

Following are the control maintenance records and authorization keys used for setting up product families.

Control Maintenance Records

The following control maintenance records affect product families.

Note: You must rebuild the product family cache any time you change the settings of these control maintenance records. Rebuilding the cache is necessary for items to appear in Web Order Entry.

SOE Duplicate Checking Parameters

- Allow Duplicates In Product Families

WOE General

- Display Catalog Products In WOE

Authorization Keys

The following authorization keys affect product families:

Product Maintenance

- PRODUCT.FAMILY.MAINT
- PRODUCT.MAINT

See Also:

Product Families Overview

Product Maintenance Overview

Creating and Maintaining Product Records Overview

Use Product Maintenance to create and maintain records for products. The product record includes all information needed to sell, purchase, and maintain products.

In addition, you can use Product Maintenance to create records for miscellaneous charge placeholders on orders, such as service charges and lot billing items, and nonstock product templates to use when creating nonstock product records. You can also associate product records to create substitute or add-on products or to build product kits.

When you create product records, assign various attributes to the product, such as a unique units of measure for transaction types, UPC numbers, and certification codes for regulated products. Use the main Product Maintenance screen, along with all associated screens accessible by hot keys, to create product records.

See Also:

Creating Product Records

Creating Miscellaneous Charge Product Records

Creating Nonstock Product Templates

Displaying Product Records

Product Codes Overview

MSDS and Hazardous Information Overview

Product Demand and Procurement Determination Overview

Creating Product Kits Overview

Product UPCs Overview

Additional Product Information Overview

Product Maintenance Overview

Creating Product Records

Use Product Maintenance to create records for products. The product record includes all information needed to sell, purchase, and maintain products.

In addition, you can use Product Maintenance to create records for miscellaneous charge placeholders on orders, such service charges and lot billing items.

Edit individual product records through Product Maintenance. Use Mass Load to update multiple product records simultaneously when those records share the parameters needing updated.

To create a product record:

1. From the **Files** menu, select **Product** to display the Product Maintenance screen.
2. In the **Product ID** field, enter **new** to create a new product record.

   The system assigns an internal product ID number which displays to the far right of the **Product ID** field.
3. Complete the following fields, as required:

Field	Description
Description	Product name, along with details that help users differentiate it from similar products. The product description can be up to 99 lines of 35 characters each. You can use any information entered here for product searches. **Important:** We do not recommend using special characters, such as carets (^) or tildes (~) in your product descriptions. Special characters can cause your reports to run incorrectly. For example, the system considers the tilde character a delimiter. Using a tilde in your descriptions eliminates the product from inventory value report calculations. To prevent customers from using the detailed product description on a bid or other printed form for comparison shopping, do the following: 1. Use the **Ades** hot key to display the Alternate Description screen. 2. Assign a generic description to the product. **Note:** This function works only if your printing program is set up to print alternate product descriptions.
Additional Key Words	Additional product information to use for product searches that does not display in the description. When searching for a product, the system looks at data in both the **Description** and **Additional Key Words** fields in the Product Maintenance screen. By including additional key words, you increase the ways by which you can access a product record. For example, use the **Additional Key Words** field to enter the following identifiers for the product: • Common nicknames or abbreviations. • Vendor catalog numbers. • Competitor catalog numbers.

Field	Description
lbs/	Product's weight in pounds. If you assign the product to a buy line with a vendor target based on a weight limit, you must enter the product's weight. After you enter a price line, the system attaches the purchase order unit of measure to the weight, for example, **lbs/ea**. If left blank, the system assigns a value of **0.0000**.
Load/	Product's load factor. If you assign the product to a buy line with a vendor target based on the load factor, enter how much of the item can fit on a truck. After you enter a price line, the system attaches the purchase order unit of measure to the factor, for example, **Load/ea**. If left blank, the system assigns a value of **0.0000**.
GL Acct / Product Type	GL product type code used to group products for sales analysis and reporting purposes. Authorized users can define G/L product types in the G/L Product Types screen. **Note:** When creating a product record for a miscellaneous charge, assign the G/L account instead of a G/L Product Type. **Note:** Some companies do not assign G/L product types to nonstock products. If you are creating a nonstock product, ask your supervisor if this field is required.
Prc Line	Price line to assign to the product. **Note:** The system assigns the product to a sell group with the same identifier as the price line, unless you override it in the Price Group Maintenance screen.
Budget Group	Budget group to assign to the product.
Commodity Code	Standard industry code used to group products in different price lines or buy lines for selection, sorting, and reporting purposes. Authorized users can define these codes using the Valid Product Commodity Codes control maintenance record.
Buy Line	Buy line to assign to the product. Assign secondary buy lines to the product, as needed. Products with a status of **MiscChrg** do not require an associated buy line. If you are creating a nonstock product, you cannot assign a super buy line. **Note:** The system assigns the product to a buy group with the same identifier as the buy line, unless you override it in the Price Group Maintenance screen.
Procure Group	Procurement group to assign to the product.
Status	Current inventory/receiving status of the product. **Stock** is the default value.
Idx Type	Whether the product is indexed in the primary product file or in a secondary catalog. The default value for stock items is **Primary**.

Field	Description
Sort Code	Sort code for the product. When products are re-sequenced in a price line or buy line, the system populates this field with the sort code for the product. Authorized users can define these codes using the Valid Product Sort Codes control maintenance record. **Note**: You can enter a user-defined sort code, but if anyone renumbers the price line or buy line, the system-assigned sort code overrides your entry.

4. In the **UM/Quant/S P T A I** columns, assign the units of measure (UOMs) in which you distribute the product for the associated quantity and transaction. For more information, see Setting Units of Measure for Product Records.
5. Press **Esc** to save your changes and exit the screen.

More Options from the Product Maintenance Screen

The Product Maintenance screen also offers these options:

Hot Key	Function
Log	Displays the Maintenance Log Viewing screen. Use this screen to view the maintenance log for the product record.
MSDS	Displays the Product MSDS / Hazardous Information screen. Use this screen to add MSDS and hazard information to the product record.
Inven	Displays the Primary Inventory Maintenance screen. Use this screen to enter and view the product record's demand information, such as the product's projected inventory level.
Kit	Displays the Product Kit Maintenance screen. Use this screen to create a product kit.
Prices	Displays the Product Price Maintenance screen. Use this screen to maintain pricing, commission groups, and serial number tracking information for the product record.
Tax	Displays the Product Tax Exception Groups screen. Use this screen to assign a tax exception group to the product record.
Del	Delete the product record. At the prompt, enter **Delete**. You cannot delete a product record if the product has an on-hand quantity, open orders, or history. Do not delete any product record created by your installer, such as *AR Conversion Product* or *History Conversion Product*.
Points	Displays the Points Program screen. Use this screen to assign customer points to the product record.
Cert	Displays the Certification Codes screen. Use this screen to assign certification codes to the regulated product record.

<table>
<tr><th>Hot Key</th><th>Function</th></tr>
<tr><td>ADes</td><td>Displays the Alternate Description screen.
Use this screen to enter an alternate description for the product record.
If defined, the system uses a product's alternate description on bids or other printed forms so that customers do not know the product's brand name, and therefore, cannot use the product's brand name to comparison shop..</td></tr>
<tr><td>Copy</td><td>Displays the Copy Item prompt. Use this prompt to copy the information from the current product record to a new product record.
To create a copy of an existing product record:
1. Select a product similar to the new product you are creating.
2. Use the Copy hot key. The system prompts whether you want to copy the item.
3. At the prompt, enter Y. A copy of the product record displays with New Item highlighted in the upper left corner. The new product ID displays to the far right of the Product ID field.
4. Update the information in the required fields to reflect the new product.
5. Press Esc to save your changes and exit the screen.</td></tr>
<tr><td>Loc</td><td>Displays the Product Location Maintenance screen.
Use this screen to edit and view a product record's location information</td></tr>
<tr><td>Remind</td><td>Displays the Order Entry Reminder screen.
Use this screen to attach product reminders to the product record.
Product reminders display on Order Entry screens when the product is added to an order.</td></tr>
<tr><td>Seq</td><td>Re-sequences the product record in either the product's corresponding buy line or price line.</td></tr>
<tr><td>Notes</td><td>Attaches pre-defined notes to a product record.</td></tr>
<tr><td>Subs</td><td>Displays the Product Substitute Maintenance screen.
Use this screen to define substitute and add-on items for the product record.</td></tr>
<tr><td>UPCs</td><td>Displays the UPC Codes Maintenance screen.
Use this screen to assign UPC numbers, special vendor or manufacturer codes, or reference numbers to the product record.</td></tr>
<tr><td>UET</td><td>Displays the UET Parameter Maintenance screen.
Use this screen to assign unquality event tracking parameters.</td></tr>
<tr><td>XRef</td><td>Displays the Product External References Maintenance screen.
Use this screen to define a path to access product information on a vendor web site.</td></tr>
<tr><td>Add'l</td><td>Displays the Additional Data menu.
Use this menu to access additional screens for assigning further information to the product record.</td></tr>
</table>

Hot Key	Function
PDW	Displays the following PDW menu items: • **PDW Data Viewer** The PDW Data View screen displays. • **PDW Batch Update** The Eclipse Product File Batch Update screen displays. • **PDW / Product File Sync** The PDW / Eclipse Product File Sync Utility screen displays. • **PDW / Product File Un-Sync** The PDW Unsync screen displays. • **Product Master Upload to PDW** Displays the PDW Master Upload prompt. Use these menu items to maintain product records through PDW. **Note:** You must have the PDW companion product to use these features.

See Also:

Buy Line Maintenance Overview

Price Line Overview

Pricing Overview

Creating and Maintaining Product Records Overview

Setting Units of Measure for Product Records

A unit of measure is a quantity associated with a standard measurement for inventory control and pricing. Define units of measure for product records.

You can define units of measure in packaging terms such as each, carton, pallet, container, and truckload. For each unit of measure, assign the quantity that makes up the unit, and assign the default unit of measure to use for the product record on transactions.

For example:

Product A is normally sold by carton. The carton unit of measure for Product A is made up of 12 individual items. In Product A's product record, assign the quantity of 12 to the carton unit of measure. Then set the carton unit of measure as the default unit of measure for sales orders.

> **Note:** When entering a product on transactions, the system checks the product record for units of measure. If the units of measure are not set for the product, the system uses the units of measure set for the price line to which the product is assigned.

When defining units of measure for product records, start with the base unit of measure. The base unit of measure is the unit of measure that the system uses to calculate larger units of measure for the product record. It is often the smallest quantity and used as the default on transactions. After defining the base unit of measure, define subsequent units of measure in whole integers of the base.

For example:

If the base unit of measure for a product is 1 each and the product is purchased in cartons of 12, define the carton unit of measure as 1 carton = 12 each. If 12 cartons make up 1 pallet for transfers, define 1 pallet as 144 each. That is, 12 cartons of 12 each.

To set units of measure for a product record:

1. From the **Files** menu, select **Product** to display the Product Maintenance screen.
2. Display a product record.
3. Position the cursor in the first blank row under the **UM** column and enter the two-character unit of measurement to use for the transaction type, for example **ea** (each), **bx** (box), **ct** (carton), or **cs** (case).
   - Define the base unit of measure first. Use the smallest quantity in which the item is handled.
   - Define up to four units of measure based on the base unit of measure. Enter them in ascending order, as each subsequent unit of measure is based on a quantity of the base unit of measure. For example, 1 each, 6 each in a carton, 24 each in a case.

   Note: If a product has history, you can change the description of the unit of measure, but not the quantity. You cannot enter the same unit of measure description twice. If you change an existing product's unit of measure on the Product Maintenance screen, update the units of measure on the Product Price Sheet Maintenance screen also. Failure to do so can cause quantity, pricing, or costing errors.

4. In the **Quant** column, enter the quantity corresponding to each unit of measure.

   Note: You cannot change the quantity for the base unit of measure, regardless of whether a product has history. If you need to change the base unit of measure description and quantity, contact Intuit Eclipse Support for instructions on running a conversion utility that affects product history.

5. For each unit of measure, enter an asterisk (*****) in the corresponding transaction type column that will use it as a default. The transaction types are:

   - **S –** Sales orders.
   - **P –** Purchase orders.
   - **T –** Transfer orders.
   - **A –** Inventory adjustments.
   - **I –** Physical inventory counts and cycle counts.

   For example:

   The product has three units of measure ea, ct, and pa. If you always purchase this item by the carton, enter an asterisk (*****) in the **P** column next to ct unit of measure. When a purchasing agent adds this product to a purchase order with a quantity, the system defaults to the ct unit of measure.

   Note: The default unit of measure also displays on product selection screens.

6. Press **Esc** to save changes and exit the screen.

See Also:

Creating Product Records

Setting Product Buy Package Quantity and Divisibility

Units of Measure Guidelines in Pricing

Creating and Maintaining Product Records Overview

Creating Miscellaneous Charge Product Records

Create miscellaneous charge product records to itemize various expenses on transactions. Examples of such expenses include the following:

- Additional or specialized labor charges for products, such as assembly charges.
- Shipping, handling, and expedite charges for products or orders.
- Restocking charges.
- Charges pertaining to orders, such as return check fees or service charges.

To use miscellaneous charge products, do the following:

- Create a product record for the miscellaneous charge in Product Maintenance.
- Assign the actual cost of the charges to the product record in Price Sheet Entry.
- Add the miscellaneous charge product record to a transaction in the same way that you do products.

When the miscellaneous charge product record is added to a transaction, the system includes the miscellaneous charge in the transaction's total.

To create a miscellaneous charge product record:

1. From the **Files** menu, select **Product** to display the Product Maintenance screen.
2. Create a new product record.
3. In the **Description** field, enter the type of miscellaneous charge to create, such as **Assembly Charge**, **Bank Service Charge**, or **Royalties**.
4. In the **Additional Key Words** field, enter **Misc** so that users can search on the word "Misc" to locate the product record.
5. In the **Status** field, press **F10** and select **MiscChrg** to assign the miscellaneous charge status to the product record.

   Note: Products with a status of **MiscChrg** do not require an associated buy line.

6. In the **GL Acct/Product Type** field, press **F10** and assign a general ledger account to which the charge posts.

   Note: Use G/L Account Maintenance to set up an account for miscellaneous charge products. A miscellaneous charge item does not have a related COGS.

7. Press **Esc** to save changes and exit the screen.
8. Assign a charge to the product record in Price Sheet Entry.

Creating Nonstock Product Templates

Create a nonstock product template and assign it to the **Default Nonstock Product Template** control maintenance record to use when creating nonstock product records. The system uses this template when there is not a nonstock template assigned at the buy line level.

> **Note:** When creating a product record from the Product Data Warehouse (PDW) catalog, the system uses the product record templates assigned to the **PDW Product Template** control maintenance record.

When creating a nonstock product template, do the following:

- Supply only the minimum information necessary to save the record.

  Note: The product description and key words do not copy over from the template to other product records.

- Adjust the inventory parameters so the system does not determine stock status automatically based on the number of hits the product receives.

To create a nonstock product template:

1. From the **Files** menu, select **Product** to display the Product Maintenance screen.
2. Create a product record for the nonstock template.
3. Use the **Inven** hot key to display the Primary Inventory Maintenance screen.
4. Use the **Addl** hot key to display the Additional Inventory Parameters screen.
5. Use the **Hierarchy** hot key to select a branch to assign to the template.

   Note: Use the **Find** hot key as necessary to locate a branch that is in the list, but not in the viewable area. Use **Alt-Insert** to add a branch or territory to the list. The new branch or territory inherits the settings of the previous entry. Use **Alt-Delete** to remove a branch or territory from the list.

6. In the **Stock** field, enter **N** to mark the product record as nonstock.
7. Press **Esc** to save changes and return to the Primary Inventory Maintenance screen.
8. Use the **User Controls** hot key to display the User Inventory Controls screen.
9. Use the **Hits/Supply** hot key to display the Hits Control Maintenance screen.
10. In the **Central Warehouse Type** field, enter one of the following central warehouse types if you use a multi-branch network:
    - **Top-Down –** The central warehouse dictates branch replenishment and automatic stock/nonstock determination.
    - **Bottom-Up –** The selling branches dictate branch replenishment and automatic stock/nonstock determination.

11. Use the **Hierarchy** hot key to select a branch to assign to the template for central warehousing.

    Note: Use the **Find** hot key as necessary to locate a branch that is in the list, but not in the viewable area. Use **Alt-Insert** to add a branch or territory to the list. The new branch or territory inherits the settings of the previous entry. Use **Alt-Delete** to remove a branch or territory from the list.

12. In the **Branch Hits** field, enter **999999** so the system does not determine stock and nonstock status automatically.
13. Press **Esc** until you exit Product Maintenance to save the product record.
14. Assign the template to the **Default Nonstock Product Template** control maintenance record.

See Also:

Creating Product Records

Enabling Stock/Nonstock Determination for Products

Entering Control Forecast Parameters

Setting the Non-Stock Product Default for Buy Lines

Creating and Maintaining Product Records Overview

Setting Up Products for the Customer Points Program

Use the Customer Points Program as an incentive for customers to purchase a target dollar amount of selected products.

Set up products for the program by assigning a points-per-dollar multiplier or percentage to the product record. The system multiplies the actual dollars sold of the product – for stock sales and direct shipment sales – by the multiplier or percentage to determine the points the customer earns.

> **Note:** Points program parameters set at the product level override those set at the price line level.

Before assigning points to a price line, set up points programs in the Valid Customer Points Programs control maintenance record.

To set up a product for the Customer Points Program:

1. From the **Files** menu, select **Product** to display the Product Maintenance screen.
2. Display the product record to set up for the Customer Points Program.
3. Use the **Points** hot key to display the Points Program screen.
4. In the **Program** field, do one of the following to assign a points program to the product record:
   - Press **F10** and select an existing points program.
   - Leave the field blank to use the points program that was in existence before the multiple points program functionality was added.
5. In the **Calc Method** field, press **F10** and select one of the following to determine how to calculate points:
   - **Multiplier – Stock** and **Direct** column entries are used as single decimals. For example, .2 = 20 percent.
   - **Percentage – Stock** and **Direct** column entries are used as whole numbers. For example, 50 = 50 dollars.
6. Use the **Hierarchy** hot key to select the branch hierarchy to use for the points program.

   All territories that contain that branch display in the **Branch/Terr** column below the branch, and in territory priority order.

   Note: Use the **Find** hot key as necessary to locate a branch that may be in the list, but not in the viewable area.
7. In the **Stock** column, for each branch, enter the value a customer must reach in stock sales to fulfill the points requirement.

8. In the **Direct** column, for each branch, enter the value a customer must reach in direct shipments to fulfill the points requirement.
9. Press **Esc** to save changes and exit the screen.

See Also:

Creating Points Programs for Products in a Price Line

Branch Hierarchy Details

Creating Product Records

Creating and Maintaining Product Records Overview

Creating Order Entry Reminders for Product Records

You can create reminders that will display for a product when it is entered onto an order.

For example:

For a bathtub product, create the following order entry reminders:

- "Ask if customer needs caulk" for sales orders.
- "Ask if vendor can drop ship to branches" for purchase orders.
- "Inspect immediately upon receipt" for transfer orders.

  Note: These reminders also apply to rental products.

To create an order entry reminder for a product:

1. From the **Files** menu, select **Product** to display the Product Maintenance screen.
2. Display the product record for which to create a reminder.
3. Use the **Remind** hot key to display one of the following:

If...	then the system displays...
order entry reminders already exist for the product,	the Select Reminder to Edit screen. Select one of the following: • **New Reminder** to create a new reminder. • An existing reminder to edit.
order entry reminders do not already exist for the product,	the Order Entry Reminders screen.

4. In the body of the screen, enter or edit a reminder message of up to three lines of 60 characters.
5. Use one of the following hot keys to define the type of order for which the reminder will display:
   - **SOE** – Reminder displays when product is added to a sales order.
   - POE – Reminder displays when product is added to a purchase order.
   - TOE – Reminder displays when product is added to a transfer order.

   The system places an asterisk (*****) next to each hot key used to indicate the type of order for which the reminder will display.
6. Use the **Branch** hot key to assign the message to display for only the indicated branches or territories; otherwise, leave the **Branch** field blank to assign the message to all branches and territories.
7. Press **Esc** to save changes and exit the screen.

Displaying Product Records

The system provides several methods for displaying products in Product Maintenance. Use one of the following methods to locate a product record in the system.

To display a product record in the system:

1. From the **Files** menu, select **Product** to display the Product Maintenance screen.
2. In the **Product** field, enter one of the following:

Entry	Result
A period (**.**), followed by the system-assigned product ID, for example, **.1234**.	The system displays the product record.
A forward slash (/), followed by the product family or price line, for example, **/DELTA**.	The system displays a list of products in that product family or price line. Scroll through the list and select the product. **Note:** If you have access to more than one branch or territory's products, a branch or territory selection list displays. Select the branch or territory in which to view products.
One or more words from the product description.	The system displays the product record. **Note:** If more than one record matches your search criteria, a selection list displays. Scroll through the list and select the product. To narrow the search, enter additional words in the **Product** field.
One or more keywords from the product record's additional keywords.	The system displays the product record. **Note:** If more than one record matches your search criteria, a selection list displays. Scroll through the list and select the product. To narrow the search, enter additional keywords in the **Product** field.

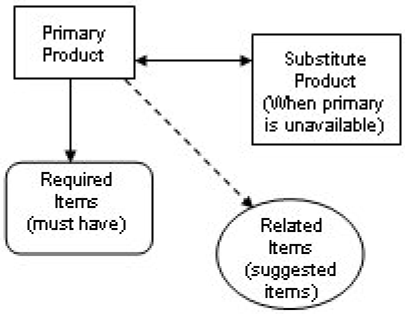
See Also:

Creating Product Records

Creating and Maintaining Product Records Overview

Substitutes, Required, and Related Items Overview

Products can have defined relationships within the system. These relationships help sales personnel and purchasing agents so that they do not have to keep a separate list for items that can be substituted for one another. In addition, the system helps them with items which are associated to other products and either require that they be purchase or are recommended to be purchased with the parent product.



Substitutes

When products in your warehouse are unavailable, you can offer different options to your customer. If the customer wants the specific item you can backorder it. However, many times customers are willing to accept a substitute item and fill their need for an item sooner.

Also, when you order products to replenish your warehouse, you can substitute products so that you have quantity available of similar products for your salespeople to get to customers. Therefore, you can substitute products on purchase orders and transfers, as well as sales orders.

You must indicate in the Product Maintenance product record which items are suitable as substitutes for products. You can assist the salesperson by setting these options, and then the system displays a list of items for the salesperson to select from and place on the order as the salesperson is working with the customer.

For more information, see Substituting Products on Sales Orders, Substituting Products on Purchase Orders, or Substituting Products on Transfers.

Required Products

When you sell and purchase products in and for your warehouse some of those products have additional items that are essential to purchase with the parent product and those products must "tag-along" with the parent product as a required item.

For example, if you sell a specialty light fixture, there may be bulbs that only work in that fixture. Therefore, you must indicate in the Product Maintenance product record which items are required for those products. You can assist the salesperson by specifying required products, and then the system displays a list of items for the salesperson to select from and place on the order.

The Suggested Purchase Order Queue picks up all required and related items when stock levels reach the order point.

For more information, see Selling Required Items on Sales Orders, Purchasing Required Items, or Transferring Required Items.

Related Items

When you sell products in your warehouse, some of those products have additional items that are "nice to have" to purchase at the same time or to assist customers in using or installing the product, and these items can be purchased with the primary product.

For example, if you sell a lamp, you can suggest having several different lengths of extension cords available, depending on where the customer may be installing that item. Therefore, you can indicate in the Product Maintenance product record which items are related to the parent products. You can assist the salesperson by setting these options, and then the system displays a list of items for the salesperson to select from and place on the order.

The Suggested Purchase Order Queue picks up all required and related items when stock levels reach the order point.

For more information, see Adding Related Items to Sales Orders, Adding Related Items to Purchase Orders, or Adding Related Items to Transfers.

Setup Requirements for Substitutions

The following control maintenance records and authorization keys should be addressed for Sales Order Entry, Purchase Order Entry, and Transfers.

Control Maintenance Records

- Valid Product Relationship Types
- Related Products Display Mode
- Auto Open Related Items Window For Items W/O Avail In POE

Authorization Keys

The normal authorization keys as described in Sales Order Entry setup topics apply for using the substitution functionality and depend on what role you normally are responsible for filling. Talk to your manager if you think you need to check your authorization key permission levels.

Setup Requirements for Required and Related Items

The following control maintenance records and authorization keys should be addressed for Sales Order Entry, Purchase Order Entry, and Transfers.

Control Maintenance Records

- Valid Product Relationship Types
- Related Products Display Mode
- Auto Open Related Items Window For Items W/O Avail In POE

Authorization Keys

The normal authorization keys as described in Sales Order Entry setup topics apply for using the required and related item functionality and depend on what role you normally are responsible for filling. Talk to your manager if you think you need to check your authorization key permission levels.

Setting Up Substitute Product Relationships

When products in your warehouse are unavailable, you have different options when ordering or purchasing to replenish that product. You must indicate in the Product Maintenance product record which items are suitable as substitutes for products. You can assist the salesperson by setting these options, and then the system displays a list of items for the salesperson to select from and place on the order.

For example, you have a 40-gallon State water heater that you can use as a substitute for a 40-gallon AO Smith water heater, or you can use the 40-gallon AO Smith water heater as a substitute for the 40-gallon State water heater. You must indicate this reciprocal relationship in both product records.

You can also enter notes for the products. For example, you can indicate that a color may be slightly darker than the original product's color. Enter any details that the customer should be notified about before ordering the substitute item.

Use the **Related Products Display Mode** control maintenance record to indicate how you want the substitute product information to display in order entry: automatically display substitutes for review, display a reminder message indicating that a product has substitutes, or do not display anything.

After setting up a substitute item for a product the **Subs** hot key highlights on the product file and on any order when you use the primary product. This highlight indicates that the product has substitutes defined in the system.

To setup a product as a substitute for another product:

1. Display the primary product for which you want to define a substitute product if the first is unavailable.
2. Use the **Subs** hot key and select **Substitute Items** to display the Substitute Maintenance screen.

   The **Desc** field displays the parent's Product Description from the Product Maintenance screen.
3. In the **Substitute Product Description** field, enter the product which you would like sales personnel to use in the event that the parent product is not available.
4. In the **Allowed @ Br/Tr** field, indicate which branches in your company that you want to permit this substitution. You can enter more than one branch separated by commas. For example, enter 1,2,3, NE to assign branches one, two and three and also the NE territory.
5. In the **Notes** field, enter any information to describe the substitution. These notes display on the order with the product description.

   Note: To enter more than 30 characters, use the **Edit Notes** hot key to display the note in a separate screen. Anything past the 30 character mark must be viewed and edited using the **Edit Notes** hot key.

6. Repeat steps 3-5 to enter more substitute product options.
7. Press **Esc** to save your changes to the product file.

   The **Subs** hot key stays highlighted to indicate that this product has substitute items available.

Substituting Products on Sales Orders

When products in your warehouse are unavailable, you can offer different options to your customer. If the customer wants the specific item you can backorder it. However, many times customers are willing to accept a substitute item and fill their need for an item sooner.

For example, you have a 40-gallon State water heater that you can use as a substitute for a 40-gallon AO Smith water heater, or you can use the 40-gallon AO Smith water heater as a substitute for the 40-gallon State water heater. You must indicate this reciprocal relationship in both product records.

Note: If you delete a parent product from the sales order, the system also deletes any required items for the product from the order.

To substitute a product on a sales order:

1. Display the order which requires a product substitution.
2. In the **Qty/Unit** field and **Product Description** field, enter the product information for the parent product you want to add to the order.
3. Do one the following:
   - If a product reminder message displays indicating that the product has substitute items, then press **Enter** close the reminder message. Then, use the **Subs** hot key to display the Substitute Items screen.
   - If no message displays, but the **Subs** hot key highlights to indicate that the product has substitute items, then use the **Subs** hot key to display the Substitute Items screen.
   - If an item already listed on the order has become unavailable and you want to substitute that product, then place the cursor on the parent product's line and use the **Subs** hot key. Select **Substitute Items** to display the Substitute Items screen.
4. On the Substitute Items screen, select the substitute which the customer would like to use to replace the product which is unavailable.
5. Use the **Substitute Item** hot key to add the item to the order. The system adds the same quantity of the substitute item on the order as was requested of the parent product.
6. If prompted, indicate if you want to keep the original description on the order or use the one from the substitute product.
   - **Yes –** The system uses the description from the parent product even though it is substituting a different product for it. This is the default.
   - **No –** The system uses the description from the substitute product and adds a note that reads "* Sub for <original product>" beneath the description.

   If the item already on the order has related or required items on the order, you must delete the parent product and start the substitution process again.

   Note: Use the **Prompt For Original Description On Substitutes** control maintenance record to make this selection automatic.

7. Use the **Inquiry** hot key to investigate product history or product file details, if needed.
8. Use the **Notes** hot key to check for details from the product file, as needed.
9. Press **Esc** to exit this screen.

   If there are related or required items on this order, then the Related Products screen displays.
10. Add related or required items, as needed, and press **Esc** to exit the screen.
11. Save your changes and exit the order.

Substituting Products on Purchase Orders

When you need to replenish products in your warehouse, sometimes the product is not readily available from the vendor. You can substitute products in your warehouse with a similar item. Also, if you are procuring directly for a customer, you can substitute an item and fill the need for the order more quickly.

For example, you have a 40-gallon State water heater that you can use as a substitute for a 40-gallon AO Smith water heater, or you can use the 40-gallon AO Smith water heater as a substitute for the 40-gallon State water heater. You must indicate this reciprocal relationship in both product records.

To substitute products on a purchase order:

1. Display the order which requires a product substitution.
2. In the **Qty/Unit** field and **Product Description** field, enter the product information for the parent product you want to add to the order.
3. Do one the following:
   - If a product reminder message displays indicating that the product has substitute items, then press **Enter** close the reminder message. Then, use the **subs** hot key to display the Substitute Items screen.
   - If no message displays, but the **Subs** hot key highlights to indicate that the product has substitute items, then use the **Subs** hot key and to display the Substitute Items screen.
   - If an item already listed on the order has become unavailable and you want to substitute that product, then place the cursor on the primary item's line and use the **Subs** hot key. Select **Substitute Items** to display the Substitute Items screen.
4. On the Substitute Items screen, select the substitute which you or the customer would like to use to replace the product which is unavailable.
5. Use the **Substitute Item** hot key to add the item to the order.
6. If prompted, indicate if you want to keep the original description on the order or use the one from the substitute product.
   - **Yes –** The system uses the description from the parent product even though it is substituting a different product for it. This is the default.
   - **No –** The system uses the description from the substitute product and adds a note that reads "* Sub for <original product>" beneath the description.

   If the item already on the order has related or required items on the order, you must delete the parent product and start the substitution process again.

   Note: Use the **Prompt For Original Description On Substitutes** control maintenance record to make this selection automatic.

7. Use the **Inquiry** hot key to investigate product history or product file details, if needed.
8. Use the **Notes** hot key to check for details from the product file, as needed
9. Press **Esc** to exit this screen.

   If there are related or required items on this order, then the Related Products screen displays.
10. Add related or required items, as needed, and press **Esc** to exit the screen.
11. Complete and exit the order.

Substituting Products on Transfers

When products in your warehouse need to be replenished, sometimes the product is not readily available. If you are procuring directly for a customer, you can substitute an item and fill the need for the order more quickly and at times you can find those items in another branch of your warehouse.

For example, you have a 40-gallon State water heater that you can use as a substitute for a 40-gallon AO Smith water heater, or you can use the 40-gallon AO Smith water heater as a substitute for the 40-gallon State water heater. You must indicate this reciprocal relationship in both product records.

To substitute products through a transfer:

1. Display the order which requires a product substitution.
2. In the **Qty/Unit** field and **Product Description** field, enter the product information for the parent product you want to add to the order.
3. Do one the following:
   - If a product reminder message displays indicating that the product has substitute items, then press **Enter** to close the reminder message. Then use the **Subs** hot key to display the Substitute Items screen.
   - If no message displays, but the **Subs** hot key highlights to indicate that the product has substitute items, then use the **Subs** hot key to display the Substitute Items screen.
   - If an item already listed on the order has become unavailable and you want to substitute that product, then place the cursor on the parent product's line and use the **Subs** hot key. Select **Substitute Items** to display the Substitute Items screen.
4. On the Substitute Items screen, select the substitute which the customer would like to use to replace the product which is unavailable.
5. Use the **Substitute Item** hot key to add the item to the order.
6. If prompted, indicate if you want to keep the original description on the order or use the one from the substitute product.
   - **Yes –** The system uses the description from the parent product even though it is substituting a different product for it. This is the default.
   - **No –** The system uses the description from the substitute product and adds a note that reads "* Sub for <original product>" beneath the description.

   If the item already on the order has related or required items on the order, you must delete the parent product and start the substitution process again.

   Note: Use the **Prompt For Original Description On Substitutes** control maintenance record to make this selection automatic.

7. Use the **Inquiry** hot key to investigate product history or product file details, if needed.

8. Use the **Notes** hot key to check for details from the product file, as needed.
9. Press **Esc** to exit this screen.

   If there are related or required items on this order, then the Related Products screen displays.
10. Add related or required items, as needed, and press **Esc** to exit the screen.
11. Complete and exit the order.

Setting Up Required Product Relationships

When you sell products in your warehouse some of those products have additional items that are essential to purchase with the parent product and they must "tag along" with the parent product as a required item. These tag-along items must be purchased with the parent product.

For example, if you sell a specialty lamp which requires specific bulb types. Therefore, you must indicate in the Product Maintenance product record which items are required for those products. You can assist the salesperson by setting these options ahead of time. Then the system displays a list of items for the salesperson to review, add required items, or select from and place related items on the order.

> **Note:** The Suggested Purchase Order Queue picks up all required and related items when stock levels reach the order point.

To set up a product as a required item for another product:

1. Display the primary product for which you want to define a required product.
2. Use the **Subs** hot key and select **Related Items** to display the Related Items Maintenance screen.

   The **Desc** field displays the parent's Product Description from the Product Maintenance screen.
3. In the **Description** field, enter the product which sales personnel must add when selling the primary product.
4. In the **Br/Tr** field, indicate which branches in your company this required item is valid to add to orders. Type **All** if the items can be sold at any of your branches.
5. In the **Quantity** field, list the minimum amount that the customer must order.
6. In the **Reqd** field, type Y to show that this item is required.
7. In the **Split Ship** field, indicate if the required item can ship separately from the primary product. If a split shipment is allowed, then the item can be shipped after the parent product, but not *before* the parent product. For most required items, this field is set to No because the items need to ship together.

   For example, if the required item is a lamp, the shade could ship separately because it is not necessary for the item to work. However, the specialized bulbs would need to ship with the lamp.
8. In the **Type** field, enter the type of item you are entering.

   Note: These types are set in the **Valid Product Relationship Types** control maintenance record.
9. Press **Esc** to save your changes and return to the product record.
10. Press **Esc** to save your changes in the product record and exit the screen.

Setting Up Related Item Product Relationships

When you sell products in your warehouse some of those product have additional items that are "nice to have" to help them work and they can be purchased with the primary product.

For example, if you sell a lamp, you can suggest having several different lengths of extension cords available, depending on where the customer maybe installing that item. Therefore, you can indicate in the Product Maintenance product record which items are related to the primary products. You can assist the salesperson by setting up related items, and then the system displays a list of items for the salesperson to select from and place on the order.

> **Note:** The Suggested Purchase Order Queue picks up all required and related items when stock levels reach the order point.

To set up a product as a required item for another product:

1. Display the primary product for which you want to define a required product.
2. Use the **Subs** hot key and select **Related Items** to display the Related Items Maintenance screen.

   The **Desc** field displays the parent's Product Description from the Product Maintenance screen.
3. In the **Description** field, enter the product which the sales personnel could add when selling the primary product.
4. In the **Br/Tr** field, indicate which branches in your company this item is valid to add to orders. Type **All** if the items can be sold at any of your branches.
5. In the **Quantity** field, list the recommended amount that the customer should order.
6. In the **Reqd** field, type **N** to show that this item is not required.
7. In the **Split Ship** field, indicate if the required item can be shipped separately from the primary product. If split shipments are allowed, then the item can be shipped after the primary product, but not *before* it. For most related items, this field would be set to Yes because the items do not *need* to be shipped at the same time.
8. In the **Type** field, enter the type of item you are entering.

   Note: These types are set in the **Valid Product Relationship Types** control maintenance record.
9. Press **Esc** to save your changes and return to the product record.

Selling Required Items on Sales Orders

When you sell products in your warehouse some of those products have additional items that are essential to purchase with the parent product. These tag-along products have recommended order quantities set up. Use the recommended quantities to add the correct number to the sales order.

For example, if you sell a specialty light fixture, there may be bulbs that only work in that fixture. Therefore, you must indicate in the Product Maintenance product record which items are required for those products. You can assist the salesperson by specifying required products, and then the system displays a list of items for the salesperson to select from and place on the order.

The required item types are set in the **Valid Product Relationship Types** control maintenance record.

> **Note:** If you delete a parent product from the sales order, the system also deletes any required items for the product from the order.

To sell a required product on a sales order:

1. Display the order which requires an additional product sale.
2. In the **Qty/Unit** field and **Product Description** field, enter the product information for the parent product you need to add to the order.
3. Do one of the following:
   - If a product reminder message displays indicating that the product has related items, press enter to close the reminder message. Then, use the **Subs** hot key to display the Related Items screen.
   - If no message displays, but the **Subs** hot key highlights to indicate that the product has substitute items, then use the **Subs** hot key to display the Related Items screen. If the parent product has substitutes, the system displays the Substitute Items screen first.
   - If you want the related items to display on the order, then place the cursor on the parent product line, and use the **Subs** hot key to display the Related Items screen. If the parent product has substitutes, the system displays the Substitute items screen first.
4. If there are substitute items, the Substitute Items screen displays first. Decide on substitute items, then press **Esc** to display the Related Products screen.

   Note: You can also access the Related Products screen by using the **Subs** hot key and selecting **Related Items**. The **Subs** hot key highlights if there related substitute or related products assigned to the parent product.

5. On the Related Products screen, select the item which the customer must add to the order. The system populates **Ord Qty** field with what is recommended. This field can only be increased in quantity and cannot be de-selected.

   Note: Set the recommended quantity in Product Maintenance.

6. Use the **Add Recommended** hot key to add all recommended items to the order.
7. Use the **Inquiry** hot key to investigate product history or product file details, if needed.
8. Press **Esc** to save your changes and exit this screen.

Purchasing Required Items

When you buy products to replenish your warehouse on-hand stock, it is useful for the purchasing agent to know whether or not the product has related items. Since required items may be purchased from a different vendor than the parent product, required items are not enforced for purchase orders.

The required item types are set in the **Valid Product Relationship Types** control maintenance record.

> **Note:** If you delete a parent product from the purchase order, the system *does not* delete any required items for the product from the purchase order. You must delete them separately. The required item can be deleted from the order without deleting the parent product.

> **Important:** The purchase order entry program does not refer to the **Related Products Display Mode** control maintenance record.

To purchase a required product on a purchase order:

1. Display the order which requires an additional product sale.
2. In the **Qty/Unit** field and **Product Description** field, enter the product information for the parent product you need to add to the order.

   Note: The **Subs** hot key highlights if there are related substitute or related items assigned to the parent product.

3. At the product reminder message indicating that the parent product has additional sale items, press **Enter** to display the Related Products screen.

   Note: Use the **Auto open Related Items Window For Items W/O Avail In POE** control maintenance record to indicate if the Product Relationships screen displays. If set to yes, then the screen displays if related items are assigned to the parent product. If set to no, you must use the **Alt-B** hot key to display the screen.

4. If there are substitute items, the Substitute Items screen displays first. Decide on substitute items, then press **Esc** to display the Related Products screen.

   Note: You can also access the Related Products screen by using the **Subs** hot key and selecting **Related Items**.

5. On the Related Products screen, review and select the items which you want add to the order.
6. Change the **Order Qty** field to the quantity you want to add to the order. By default, this field is set to zero (0).

   Note: Set the recommended quantity in Product Maintenance.

7. Use the **Add Recommended** hot key to add all related items to the order with their recommended quantities.
8. Use the **Inquiry** hot key to investigate product history or product file details, if needed.
9. Press **Esc** to add your items to the purchase order and exit this screen.

Transferring Required Items

When you transfer products in your warehouse to fulfill either a sales order or a purchase order some of those products have additional items that are essential to purchase with the parent product.

For example, if you transfer a lamp which requires specific bulb types. Each lamp requires six bulbs. These bulbs are sold when the lamp sells. On an order that lists five lamps, the system's minimum quantity is 30. The system prompts the purchasing agent to add them to the order in this quantity.

The required item types are set in the **Valid Product Relationship Types** control maintenance record.

> **Note:** If you delete a parent product from the transfer, the system *does not* delete any required items for the product from the transfer. You must delete them separately. The required item can also be deleted from the order without deleting the parent item.

Use the Related Items Display Mode control maintenance record to indicate how to display the Product Relationships window. For transfers, the Auto-Fill function is treated as a Review option.

To transfer a required product:

1. Display the order which requires an additional product sale.
2. In the **Qty/Unit** field and **Product Description** field, enter the product information for the original or primary product you need to add to the order.
3. Do one of the following:
   - If a product reminder message displays indicating that the parent product has related items, press **Enter** to close the reminder message, then use the **Subs** hot key to display the related Items screen.
   - If no message displays, but the **Subs** hot key highlights to indicate that the product substitute items, then use the **Subs** hot key to display the Related Items screen. If the parent product has substitutes, the system may display the Substitute Items screen first.
   - If you want to view the related items on the order, then place the cursor on the parent product and use the **Subs** hot key to display the related Items screen. If the primary product has substitutes, the system may display the Substitute Items screen first.
4. If there are substitute items, the Substitute Items screen displays first. Decide on substitute items, then press **Esc** to display the Related Products screen.

   Note: You can also access the Related Products screen by using the **Subs** hot key and selecting **Related Items**. The **Subs** hot key highlights if there are related substitute or related products assigned to the primary product.

5. On the Related Products screen, review and select the items which you want add to the order.
6. Change the **Order Qty** field to the quantity you want to add to the order. By default, this field is set to zero (0).

   Note: Set the recommended quantity in Product Maintenance.

7. Use the **Add Recommended** hot key to add all related items to the order with their recommended quantities.
8. Use the **Inquiry** hot key to investigate product history or product file details, if needed.
9. Press **Esc** to add your items to the transfer order and exit this screen.

Adding Related Items to Sales Orders

Related items are non-required products which are recommended or suggested for sale with the parent product entered on the order. These items are not necessary for the parent product to work, but are recommended based on how the parent product functions.

The related item types are set in the **Valid Product Relationship Types** control maintenance record.

To sell a related product on a sales order:

1. Display the order.
2. In the **Qty/Unit** field and **Product Description** field, enter the product information for the parent product you want to add to the order.
3. Do one of the following:
   - If a product reminder message displays indicating that the parent product has related items, press **Enter** to close the reminder message, then use the **Subs** hot key to display the related Items screen.
   - If no message displays, but the **Subs** hot key highlights to indicate that the product substitute items, then use the **Subs** hot key to display the Related Items screen. If the parent product has substitutes, the system may display the Substitute Items screen first.
   - If you want to view the related items on the order, then place the cursor on the parent product and use the **Subs** hot key to display the related Items screen. If the primary product has substitutes, the system may display the Substitute Items screen first.
4. If there are substitute items, the Substitute Items screen displays first. Decide on substitute items, then press **Esc** to display the Related Products screen.

   Note: You can also access the Related Products screen by using the **Subs** hot key and selecting **Related Items**. The **Subs** hot key highlights if there related substitute or related products assigned to the parent product.

5. On the Related Products screen, select the item the customer wants to add to the order. The **Ord Qty** field is set at zero (0) and there is a suggested quantity in the **Rec'd Qty** field.

   Note: The suggested quantity is set in Product Maintenance.

6. Do one of the following:
   - For each specific item the customer wants, change the quantity to the quantity and press **Esc** to add the items to the order.
   - Use the **Add Recommended** hot key to add all the related items to the order with the recommended quantities.

- Change the quantity to the amount the customer wants and press **Esc** to add that amount to the order.

6. Use the **Inquiry** hot key to investigate product history or product file details, if needed.
7. Press **Esc** to add the related items to the order and exit this screen.

Adding Related Items to Purchase Orders

Related items are non-required products which are recommended or suggested for purchase with the parent product entered on the order. These items are not necessary for the parent product to work, but are recommended based on how the parent product functions. When you replenish the parent product, you should check the stock levels on the recommended items as well and replenish as needed.

The related item types are set in the **Valid Product Relationship Types** control maintenance record.

Use the **Auto open Related Items Window For Items W/O Avail In POE** control maintenance record to indicate if the Product Relationships screen displays. If set to yes, then the screen displays if related items are assigned to the parent product.

> **Note:** The Suggested Purchase Order Queue picks up all required and related items when stock levels reach the order point.

To add a related item to a purchase order:

1. Display the order.
2. In the **Qty/Unit** field and **Product Description** field, enter the product information for the original or primary product you want to add to the order.
3. At the product reminder message indicating that the product has additional sale items, press **Enter** to display the Related Products screen.

   Note: Use the **Auto open Related Items Window For Items W/O Avail In POE** control maintenance record to indicate if the Product Relationships screen displays. If set to yes, then the screen displays if related items are assigned to the parent product. If set to no, you must use the **Alt-B** hot key to display the screen.

4. If there are substitute items, the Substitute Items screen displays first. Decide on substitute items, then press **Esc** to display the Related Products screen.

   Note: You can also access the Related Products screen by using the **Subs** hot key and selecting **Related Items**. The **Subs** hot key highlights if there are related substitute or related products assigned to the parent product.

5. On the Related Products screen, review and select the items which you want add to the order.
6. Change the **Order Qty** field to the quantity you want to add to the order. By default, this field is set to zero (0).

   Note: Set the recommended quantity in Product Maintenance.

7. Do one of the following:
   - For each item the customer wants, change the quantity and press **Esc** to add the items to the order.
   - Use the **Add Recommended** hot key to add all related items to the order with their recommended quantities.
8. Use the **Inquiry** hot key to investigate product history or product file details, if needed.
9. Press **Esc** to add the related items to the purchase order and exit this screen.

Adding Related Items to Transfers

Related items are non-required products which are recommended or suggested for sale with the parent product entered on the order. These items are not necessary for the parent product to work, but are recommended based on how the parent product functions. You can add these items to the transfer as needed.

The related item types are set in the **Valid Product Relationship Types** control maintenance record.

To add a related item to the transfer:

1. Display the order.
2. In the **Qty/Unit** field and **Product Description** field, enter the product information for the original or parent product you want to add to the order.
3. Do one of the following:
   - If a product reminder message displays indicating that the product has related items, press **Enter** to close the reminder message, then use the **Subs** hot key to display the related Items screen.
   - If no message displays, but the **Subs** hot key highlights to indicate that the product substitute items, then use the **Subs** hot key to display the Related Items screen. If the parent product has substitutes, the system may display the Substitute Items screen first.
   - If you want to view the related items on the order, then place the cursor on the parent product and use the **Subs** hot key to display the related Items screen. If the primary product has substitutes, the system may display the Substitute Items screen first.
4. If there are substitute items, the Substitute Items screen displays first. Decide on substitute items, then press **Esc** to display the Related Products screen.

   Note: You can also access the Related Products screen by using the **Subs** hot key and selecting **Related Items**. The **Subs** hot key highlights if there are related substitute or related products assigned to the parent product.

5. On the Related Products screen, select the item which the customer wants to add to the order. The **Ord Qty** field is set at zero (0) and there is a recommended quantity in the **Rec'd Qty** field.
6. Do one of the following:
   - Change the quantity to the amount the customer wants and press **Esc** to add that amount to the order.
   - Use the **Add Recommended** hot key to add all related items to the order with their recommended quantities.

7. Use the **Inquiry** hot key to investigate product history or product file details, if needed.
8. Press **Esc** to add the related items to the transfer and exit this screen.

Model Configurator Overview

Use the Model Configurator to set up products that have components with several options from which customers choose.

For example, a distributor sells custom-built doors. You create a main product for the door called Custom Steel Door 1. Then, you select various components for the door which can be customized, such as door panels, hinges, locksets, and glass. After identifying the components, set up pre-defined lists for each one from which the customer can select their preference.

This system function must be set up in the Solar application. Please refer to the Solar online documentation for more information.

Product Codes Overview

The system uses the following types of product codes to categorize products:

- Product Location Quantity Type Codes – Identifies the type of material stored in a location or the type of transaction to which the product is tagged.
- Product Location Status Codes – Identifies the type of location in which a product resides and prioritizes the order in which product locations are picked.
- Product Status Codes – Categorizes products for inventory control and cataloging.

For more information about the product codes used in the system, review the following topics:

- Product Location Quantity Type Codes
- Product Location Status Codes
- Product Status Codes

See Also:

Creating Product Records

Changing Product Locations

Product Maintenance Overview

Product Location Quantity Type Codes

Product location quantity type codes identify either the type of material stored in a location or the type of transaction to which the product is tagged. Use product location quantity type codes to help you categorize your inventory as follows.

Location Quantity Types

Location quantity types distinguish how a product is being used in your inventory, for example, as regular, sellable stock, or as a display product. When you receive products or place them in warehouse locations, assign them a location quantity type in Product Location Maintenance.

Use the following codes to assign products a location quantity type:

Location Quantity Type Code	Description
S – Stock	Sellable product available for shipment.
L – Display	Sellable product reserved for display, but available for shipment if requested.
F – Defective	Non-sellable product, which needs to be returned to vendor or discarded.
O – Over Shipment	Non-sellable product, which needs to be reviewed for return to vendor.
R – Review	Possible sellable product, which needs to be examined for return to stock or return to vendor. When tagged to a sales order with a negative quantity, the item is a customer return item.
T – Tagged	Product that is reserved for an order. This type is assigned by the system. The system does not update tagged items for inventory counts.
C – Consignment	Product from a consignment transfer or consignment shipment. This type is assigned by the system. The system does not update consignment items for inventory counts.

Transaction Quantity Types

Transaction quantity types are assigned by the system and display in the **Type** column of the Inventory History Ledger screen and the Customer Inventory History Ledger screen. These transaction quantity types help distinguish between the type of transaction to which a product is tagged, rather than the type of product.

Value in Type Column	Description
BCsnTr	Customer consignment transfer from a branch.

Value in Type Column	Description
Br#	Procurement from a branch. For example: **Br2** indicates that the product is being procured from Branch 2.
CCsnBi	Customer consignment billing.
CCsnTr	Customer consignment transfer.
Direct	Shipment direct from the vendor to the customer.
Except	Transaction marked as exceptional.
LotShp	Shipment of lot billing items.
Procur	Procurement from a vendor.
Rental	Rental transaction and item.
VCnsgn	Vendor consignment transfer.

See Also:

Product Location Status Codes

Product Status Codes

Product Codes Overview

Product Location Status Codes

Use product location status codes to define the type of location in which a product resides and to prioritize the order in which product locations are picked.

> **Note:** For information about pick allocation logic, see Automated RF Pick Allocation Logic.

Assign the following product location statuses to locations in Product Location Maintenance.

Product Location Status Code	Description
P-Primary	Most efficient permanent location for storing and picking product. This type of location remains in the system even when the quantity reaches zero.
S-Secondary	Another permanent location used for overstock quantities of product. Use this location when the primary location is filled. This type of location remains in the system even when the quantity reaches zero.
R-Remnant	Location used for storing left-over product. For example, you might store the remaining lengths of pipe or wire and sell them "as is." This type of location remains in the system even when the quantity reaches zero.
F-Floating	Temporary location for product when the amounts at the primary or secondary locations are at maximum capacity. This type of location is deleted from the system when the quantity reaches zero. Floating locations are used for temporary non-stock locations as well.
N-Null	Code indicating that a status has not been established for the location. This type of location is deleted from the system when the quantity reaches zero unless the Delete Stock Location With Blank Status And Zero Quantity control maintenance record is set to **N** for the branch.
***I*-In Process**	Code indicating that product is currently not in a location because it is either begin put away or picked. Once the product is available in a location, the system updates its location status code.

See Also:

Product Location Quantity Type Codes

Product Status Codes

Product Codes Overview

Product Status Codes

Categorize products for inventory control and cataloging with the following product status codes. Product status codes are system defined, but you assign them to products from Product Maintenance.

Product Status Code	Description
Stock	Item regularly kept in inventory.
NonStock	Item not regularly kept in inventory but available for special order.
MiscChrg	Charge for a service, such as assembly. **Note:** Product records with this status are not physical items, and they do not require an associated buy line.
Delete	Item scheduled to be removed from inventory when the current on-hand quantity reaches zero, such as products the vendor deems to be obsolete. Items with a **Delete** status ignore the Exclude All Sales Orders Outside The Plenty Date From Avail Calc control maintenance record. You must have the OE.PRODUCT.USE.DELETE authorization key to sell products with a status of **Delete**. Products with a status of **Delete** do not appear on a suggested purchase order.
Review	Item under review to be assigned a new product status. Assign new items to be added to your inventory the **Review** status until all product maintenance on the item is complete and the item is ready to be sold. Assign products that you are considering removing from your inventory the **Review** status. You must have the OE.PRODUCT.USE.REVIEW authorization key to sell products with a status of **Review**. Products with a status of **Review** do not appear on a suggested purchase order.
Comment	Description of a product or service designed to display in Order Entry. **Note:** Product records with this status are not physical items. Use this status for utility items, such as freight charges, that your purchasing or sales department can use. For example: • Create a product record called ACME VENDOR FREIGHT CHARGE, assign it the **Comment** status, and enter the ACME Vendor's freight charges in the **Additional Key Words** field. • If a sales person needs to recall the ACME Vendor freight charge amount when entering a purchase order, he or she can search for this product record, display it on the order while completing the transaction, and remove it before sending the transaction.

Product Status Code	Description
Purge	Item scheduled to be removed from the Product File when the Purge Products program is run. Product records with the **Purge** status must meet all of the following criteria: • Have zero on-hand quantities. • Have no history. • Not exist on any open transactions. During the process of editing the Product File, to remove discontinued products, we recommend the following flow: • Assign the product record the **Review** status and review the product. • Assign the product record the **Delete** status to mark it for deletion. • Assign the product record the **Purge** status and run the Purge Product program to permanently delete the record from the system.
LotItem	Item used as a Lot Item Billing product record.

See Also:

Product Location Quantity Type Codes

Product Location Status Codes

Product Codes Overview

MSDS and Hazardous Information Overview

As required by *OSHA Standard (29-CFR) Hazard Communication 1910.1200*, you are required to provide customers with Material Safety Data Sheets (MSDS). In addition, the U.S. Department of Transportation (DOT) requires that all hazardous products be identified as such on shipping containers and documents.

Use Product Maintenance to identify all hazardous products and to attach MSDS by doing the following:

- Create MSDS records for products by attaching the sheet to a product record and assigning the MSDS an internal sheet ID for tracking and maintenance. In addition, add comments to MSDS records, such as the web site from which it was obtained, and maintain its information as needed.

  Note: You must have the Document Imaging companion product to attach a MSDS to product records.

- Add hazardous information to products. The system prints hazardous information on the Hazardous Materials Shipping document any time hazardous materials are added to shipping tickets, transfers, purchase orders printed with a manifest, or return purchase orders.
- Assign certification codes to regulated products, such as dangerous chemical compounds or compressed gases that require special handling. Use the Product Certification program to identify both the products needing to be regulated and the customers who are allowed to purchase such regulated products.

After you have added hazardous information and attached MSDS to product records, provide your customers with the appropriate information and track the information that you have provided so you know when to send customers updated information.

See Also:

Attaching MSDS to Product Records

Adding MSDS and Hazardous Information to Product Records

Adding Comments for MSDS

Maintaining MSDS Records

Assigning Certification Codes to Products

Providing MSDS to Customers

Maintaining MSDS for Customers Overview

Attaching MSDS to Product Records

Attach Material Safety Data Sheets (MSDS) to product records in order to easily access the MSDS for the product.

For example:

When you need to deliver a MSDS with an ordered product, you can print the MSDS directly from the product record.

When a product record has an MSDS attached, the **MSDS** hot key highlights on the Product Maintenance screen and ***i*** displays in the upper right corner of the Product Maintenance screen.

> **Note:** You must have the Document Imaging companion product to attach a MSDS to product records.

When you attach a MSDS to a product record, you must do the following:

1. Locate the MSDS file.
2. Attach the file to the product using the Attachment Indexing program.
3. Assign the file an internal sheet ID for tracking and maintenance.

To locate a MSDS file to attach to a product record:

1. From the **Files** menu, select **Product** to display the Product Maintenance screen.
2. In the **Product ID** field, select the product requiring the MSDS.

   Note: Use the **Additional Key Words** field to add identifying information about the MSDS to aid in future searches. For example, include the title of the MSDS.

3. Click **Attachments** on the Eterm window menu bar to display the Select File dialog box.
4. Navigate to the folder containing your collection of MSDS files.
5. Select an MSDS file and then click **Open** to display the Attachment Indexing screen.

   Use this screen to attach the MSDS file to the product record.

To attach a MSDS file to a product record:

1. Display the Attachment Indexing screen.
2. In the **Doc Profile** field, enter **MSDS**.

   If the system prompts you to replace the current description of the attachment with the default description for MSDS attachments, enter one of the following:

   - **Y** – Replace the current description with the default description.
   - **N** – Do not replace the current description with the default description.

3. In the **Description** field, enter the name of the MSDS as needed.
4. In the **View Auth Key** field, enter **MSDS.MAINT**.
5. In the **Product** field, enter the name of the product to which you are attaching the MSDS.

   Use the **Multi** hot key to select multiple product records when an MSDS applies to more than one product.
6. Use one of the following hot keys to attach the MSDS:
   - **Index –** Indexes the file, copies it to a central repository, and deletes the source file from the original location. Use this hot key when you do not want a copy of the source file to reside in its original location.
   - **Index W/O Delete –** Indexes the file, copies it to a central repository, and leaves the source file in its original location.

   After attaching the MSDS, the system returns you to the Product Maintenance screen.
7. Press **Esc** to save changes and exit the screen.
8. Re-display the product record to view the attached MSDS.

To assign an internal sheet ID to a MSDS:

1. From the **Files** menu, select **Product** to display the Product Maintenance screen.
2. Display the product requiring the MSDS.
3. Use the **MSDS** hot key to display the Product MSDS / Hazardous Information screen.

   Note: If you updated your system from an earlier release, you might find information already populated on this screen.
4. In the **Sheet ID** field, enter **New** to assign the next available internal sheet ID to the MSDS.

   The system displays the MSDS Sheet Maintenance screen.
5. In the **MSDS Sheet#** field, enter a user-defined ID to help you locate the MSDS.

   We recommend using one of the following user-defined IDs:
   - If you maintain a manual filing system, use the MSDS Sheet # from your alphanumeric filing system.
   - If you use the name of the MSDS, use the first few letters or words.

   This value displays in the line comment on any orders to which the product is added as a reminder to send the correct MSDS for the product.
6. In the **Description** field, enter the name of the MSDS.
7. In the **WWW Address** field, enter the web site from which you obtained the MSDS.

   Note: For more information about how this field works with the **Xrefs** hot key, see Setting Up Product or Price Line External References.

8. In the **Effective Date** field, enter the date that the MSDS was prepared or revised.

   The system uses this date for tracking which customers must be sent updated sheets.

9. Press **Esc** to save changes and exit the screen.

See Also:

Adding MSDS and Hazardous Information to Product Records

Adding Comments for MSDS

Providing MSDS to Customers

Maintaining MSDS Records

MSDS and Hazardous Information Overview

Adding MSDS and Hazardous Information to Product Records

The U.S. Department of Transportation (DOT) requires that all hazardous products be identified as such on shipping containers and documents. This information helps emergency response personnel to identify and deal with potential chemical hazards in the event of an accident or disaster.

Note: All hazardous products have related Material Safety Data Sheets (MSDS).

Add MSDS and hazardous information to product records from Product Maintenance. The system prints this information on the Hazardous Materials Shipping document any time hazardous materials are added to shipping tickets, transfers, purchase orders printed with a manifest, or return purchase orders. The Hazardous Materials Shipping document lists the following:

- Quantity of the hazardous material.
- Hazard code
- Item description.
- Total weight for each item.
- Emergency response number.

To add MSDS and hazardous information to a product record:

1. From the **Files** menu, select **Product** to display the Product Maintenance screen.
2. Display the product to which to add MSDS and hazardous information.
3. Use the **MSDS** hot key to display the Product MSDS / Hazardous Information screen.

   Note: If you updated your system from an earlier release, you might find information already populated on this screen.

4. In the **Sheet ID** field, enter the internal sheet ID assigned to the MSDS.

   The system populates the **MSDS Sheet#** and **MSDS Desc** fields with the user-defined MSDS sheet ID and description.

5. Complete the following fields with the product's hazardous information, as needed:

Field	Description
Hazard Class	U.S. DOT hazard classification for the item. This designation is either numeric or alphanumeric. **Note:** Other countries can have different classifications.

Field	Description
Hazard Class Desc	Description associated with the hazard class or the item's shipping name. Use the **Expanded Haz Desc** hot key to enter a description that takes multiple lines. If you have the Copy Comments For Hazard Items To Transfers control maintenance record set to **Y**, the system prints the description entered here on transfer orders.
Hazard Code	Hazard code used to cross-reference the product with the **HM** column on the Hazardous Materials Shipping document. Use one of the following codes: • **X** – Hazardous material. • **RQ** – Reportable quantity. Some material is not DOT regulated unless it is sold in quantity. The RQ designation is used for these non-hazardous products, regardless of the quantity sold. • **Blank** – Leave the field blank to indicate that the description applies to a product that is neither hazardous nor handled in a reportable quantity.
ID Number	U.S. DOT identification number, also known as the UN or UN/NA number. This number is included on the shipping label.
Pack Group	Packing list group to which the product is assigned.

6. Press **Esc** to save changes and exit the screen.

More Options on the Product MSDS / Hazardous Information Screen

The Product MSDS / Hazardous Information screen also offers these options:

Hot Key	Function
MSDS Maintenance	Displays the MSDS Sheet Maintenance screen. Use this screen to assign or edit an internal sheet ID for the attached MSDS.
Comments	Displays the MSDS Sheet Comments screen. Use this screen to add or edit comments for the attached MSDS.
Delete	Displays a prompt to remove the MSDS from the product record. Enter **Y** to delete the MSDS. **Note:** You cannot delete a MSDS with open items in the MSDS Exception Queue.

See Also:

Attaching MSDS to Product Records

Providing MSDS to Customers

MSDS and Hazardous Information Overview

Adding Comments for MSDS

Add comments for Material Safety Data Sheets (MSDS) attached to product records when you must clarify information on or about the MSDS.

For example:

If you obtain MSDS updates from multiple web sites, include the alternate web site addresses as a comment.

You can enter comments on either the Product MSDS / Hazardous Information screen or the MSDS Sheet Maintenance screen.

When a comment is attached for an MSDS, the **Comments** hot key highlights on the Product MSDS / Hazardous Information and MSDS Maintenance screens. In addition, a notation appears in the upper right corner of the MSDS Sheet Maintenance screen, indicating that comments are on file.

To add a comment for MSDS using the Product MSDS / Hazardous Information screen:

1. From the **Files** menu, select **Product** to display the Product Maintenance screen.
2. Display the product for which to add a MSDS comment.
3. Use the **MSDS** hot key to display the MSDS / Hazardous Information screen.
4. Use the **MSDS Comments** hot key to display the MSDS Comments screen.
5. Enter the comment.
6. Press **Esc** to save changes and exit the screen.

To add a comment for MSDS using the MSDS Sheet Maintenance screen:

1. From the **Files** > **Material Safety Data Sheets** menu, select **MSDS Sheet Maintenance** to display the MSDS Sheet Maintenance screen.
2. In the **Sheet ID** field, enter the internal sheet ID for the MSDS, or part of the sheet description.
3. Use the **Comments** hot key to display the MSDS Comments screen.
4. Enter the comment.
5. Press **Esc** to save changes and exit the screen.

See Also:

Adding MSDS and Hazardous Information to Product Records

Attaching MSDS to Product Records

MSDS and Hazardous Information Overview

Maintaining MSDS Records

After you have attached a MSDS, you might find that you periodically need to make changes to it.

For example:

The web site from which you obtained it has changed. Access the MSDS record and update the web site address.

Maintain MSDS records directly from the product record to which the MSDS is attached.

To maintain a MSDS record:

1. From the **Files** menu, select **Product** to display the Product Maintenance screen.
2. Display the product for which to add a MSDS comment.
3. Use the **MSDS** hot key to display the MSDS / Hazardous Information screen.
4. In the **Sheet ID** field, enter the MSDS record to edit.
5. Use the **MSDS Maintenance** hot key to display the MSDS Sheet Maintenance screen.
6. Edit any of the following fields:

Field	Description
MSDS Sheet#	MSDS number assigned by the manufacturer. This value displays in a line comment on any order to which the product is added as a reminder to include the MSDS with the product.
Description	Name of the MSDS product.
WWW Address	Web site from which you obtained the MSDS. **Note:** For more information on how this field works with the **Xrefs** hot key, see Setting Up Product or Price Line External References.
Effective Date	Last date the MSDS was prepared or revised. The system uses this date to track when to send customers updated sheets.

7. Press **Esc** to save changes and exit the screen.

More Options for the MSDS Maintenance Window

The MSDS Maintenance window also offers these options:

Hot Key	Function
Comments	Displays the MSDS Sheet Comments screen. Use this screen to add or edit comments for the attached MSDS.
Delete	Displays a prompt to remove the MSDS record from the product record. Enter **Y** to delete the MSDS record.
Products	Displays a list of products assigned to the MSDS record.

Assigning Certification Codes to Products

The Product Certification program provides a means of controlling the sale of regulated products, such as dangerous chemical compounds or compressed gases that require special handling. When a customer orders a regulated product, the system requires a customer certification number to prevent regulated products from being sold to unauthorized customers.

To use the Product Certification program, identify both the products needing to be regulated and the customers who are allowed to purchase such regulated products.

- Assign certification codes to regulated products from Product Maintenance.
- Identify customers who are allowed to purchase regulated products from Customer Maintenance.

  Note: Before you can assign certification codes to products, you must define the codes in the Valid Product Certification Codes control maintenance record.

To assign a certification code to a product:

1. From the **Files** menu, select **Product** to display the Product Maintenance screen.
2. Display the product that requires a certification code.
3. Use the **Cert** hot key to display the Certification Codes screen.
4. Press **F10** and select each code that applies to the product.
5. Press **Esc** to save changes and exit the screen.

See Also:

Identifying Customers Who Can Buy Regulated Products

MSDS and Hazardous Information Overview

Providing MSDS to Customers

As required by *OSHA Standard (29-CFR) Hazard Communication 1910.1200*, you are required to provide customers with Material Safety Data Sheets (MSDS) when the following occur:

- A customer buys a product with an MSDS for the first time.
- A MSDS changes for a product previously purchased by the customer.

To help you follow these guidelines, the system does the following:

- When you add a product with a MSDS to an order, the system inserts a line comment on the invoiced order stating that the product requires an MSDS. On subsequent orders for the same product to the same customer, or on orders of other products associated with a previously sent MSDS, the line item comment does not display. The system assumes that the customer already has the MSDS in question.
- If you attach a revised MSDS to a product that the customer has previously ordered, the system inserts the line comment when the customer next purchases the product. This line comment helps ensure that the customer receives the updated MSDS.

The inserted comments serve to remind you to include the MSDS with the product *when you invoice the order*. Upon invoicing, the system appends a comment to the product description indicating which MSDS is required.

The system uses the invoice date to ensure that the most current MSDS is sent to the customer for the following reasons:

- It is possible for an MSDS to be revised between the time the order is placed and the order is invoiced. This process ensures that the customer receives the most current information available.
- Your company policy might dictate sending the MSDS under separate cover instead of including it with the product shipment. Sending MSDS separate from the order helps ensures that the MSDS arrives at the customer's office instead of a job site.

Provide the MSDS to the customer by doing one of the following:

- If you maintain a manual filing system for your MSDSs, retrieve a copy of the MSDS and send it to the customer.
- If you use the Document Imaging companion product to maintain your MSDS, print the MSDS and send it to the customer.

  Note: The User To Get Tracker When MSDS Is Not Printed For Product control maintenance record determines the user to be messaged when an MSDS is not printed for a product.

To provide an MSDS to a customer using the Document Imaging companion product:

1. From the **Orders** menu, select **Sales Order Entry** to display the Sales Order Entry screen.
2. Display the sales order for which to print an MSDS.
3. Position the cursor on the product requiring the MSDS.
4. Use the **Inq** hot key and then use the **Product Maint** hot key to display the Product Maintenance screen.
5. Press **Shift-F8** to display a list of files attached to the product.
6. Select the MSDS attachment to open the Attachment Viewer screen.
7. Click the printer icon to send the MSDS to the default printer.
8. Send the MSDS to your customer.

See Also:

Adding MSDS and Hazardous Information to Product Records

Attaching MSDS to Product Records

MSDS and Hazardous Information Overview

Maintaining MSDS for Customers Overview

Use the Material Safety Data Sheets (MSDS) application to track which MSDS have been sent to a customer.

For example:

1. On January 15th, on Sales Order 1 shipping on January 20th, a customer orders Product A, which requires MSDS #1.
2. On January 18th, on Sales Order 2 shipping on January 21st, the customer orders Product B, which also requires MSDS #1. Because you need to send an MSDS only when a customer first purchases a product requiring that MSDS, the system does not require sending an MSDS with Product B.
3. On January 20th, the customer cancels Sales Order 1 before it ships.
4. On January 21st, Sales Order 2 ships without an MSDS for Product B.

Use the MSDS application to track this sequence of events so you know the customer requires MSDS #1 to be shipped for Product B.

Use the following MSDS applications to maintain MSDS for customers:

- MSDS Exception Queue – Both determine which MSDS need to be sent to customers and record when MSDS have been sent to customers. Before you can use the queue, you must build it or schedule it to build at regular intervals.
- MSDS Sheets Sent Report – Create a list of the MSDS that were sent to customers.

See Also:

MSDS and Hazardous Information Overview

Building the MSDS Review Queue

Using the MSDS Exception Queue

Running the MSDS Sheets Sent Report

Building the MSDS Review Queue

Before using the MSDS Review Queue to view both the discrepancies in sending MSDS to customers and a list of the customers who require new MSDS, build the queue or schedule it to build at regular intervals.

To build the MSDS Review Queue:

1. From the **Files** > **Material Safety Data Sheets** menu, select **MSDS Build Review Queue** to display the Build MSDS Review Queue screen.
2. In the **Branch** field, select the branch or territory for which to build the queue.
3. In the **Start Date** field, enter the first date in a range of dates for which to select transactions.
4. In the **End Date** field, enter the last date in a range of dates for which to select transactions.
5. Do one of the following:

To...	Use this hot key...
build the queue now	**Begin** The system notifies you when the file is generated.
schedule the build to run on a specific date or time	**Schedule** The Phantom Scheduler screen displays.

6. Press **F12** to exit the screen.
7. When the file is generated, view the information in the MSDS Exception Queue.

See Also:

Using the MSDS Exception Queue

Running the MSDS Sheets Sent Report

Maintaining MSDS for Customers Overview

Using the MSDS Exception Queue

Use the MSDS Exception Queue to do the following:

- Determine which Material Safety Data Sheets (MSDS) need to be sent to customers.
- Record when MSDS are sent to customers.

Remember to build the MSDS Exception Queue before using it. For a list of the MSDS that have been sent to customers, use the MSDS Sheets Sent Report.

To use the MSDS Exception Queue:

1. From the **Files** > **Material Safety Data Sheets** menu, select **MSDS Exception Queue** to display the MSDS Exception Queue screen.
2. In the **Branch** field, enter the branch or territory to query. Type **All** to select all branches and territories.
3. In the **Customer** field, enter the customer to query. Leave the field blank to query all customers.
4. In the **Sheet ID** field, enter the sheet ID of the MSDS to query. Leave the field blank to query all MSDS.
5. In the **Sort** field, press **F10** and select how to sort the queue:
   - **Customer by Sheet** – Sort the queue by customer name and then by sheet ID.
   - **Sheet by Customer** – Sort the queue by sheet ID and then by customer name.

   If you must resort the queue after displaying, use the **Sort** hot key to reposition the cursor in the **Sort** field.
6. The MSDS Exception Queue displays the following information:

Field	Description
Shipto Customer	Customer to receive the MSDS.
S	Indicates the order is either: • **I** – Invoiced. • **C** – Canceled.
Invoice#	Transaction number and generation of the order.
Product	Product requiring the MSDS. When a product has an attached image, the ***i*** icon displays in the upper right corner of the MSDS Exception Queue.
Sheet ID	Sheet ID of the MSDS.

7. In the **Sent** field, enter the date you send the MSDS to the customer for each transaction in the queue.

   This date remains until you close the transaction out of the queue.

8. Press **Esc** to save changes and exit the screen.

More Options from the MSDS Exception Queue

The MSDS Exception Queue also offers these options:

Hot key	Function
View	Display the transaction on which the cursor is positioned.
Print Report	Print the contents of the queue. At the **Select Print Option** prompt, select one of the following: • **Print** hot key – Send the report to the printer. • **Hold** hot key – Send the report to your Hold File.
Select	Narrow which transactions display in the queue. To narrow the transactions that display in the MSDS Exception Queue: 1. In the **Start Date** field, enter the beginning of a date range for transactions. Leave blank to select all dates. 2. In the **End Date** field, enter the ending of a date range for transactions. Leave blank to select all dates. 3. In the **Customer** field, enter the customer for whom to display transactions. Leave blank to select all customers. 4. In the **Sheet ID** field, enter the MSDS sheet ID for which to display transactions. Leave blank to select all MSDS. 5. In the **Status** field, enter the status for which to display transactions. 6. Press **Esc** to limit the display according to your selections.
Close	Close the selection transaction from the queue.
All	Close either all items or all selected items from the queue. **Note:** If you do not select a portion of the MSDS Exception Queue prior to using the **All** hot key, the system prompts whether to close all items in the queue.
MSDS Maint	Display the MSDS for the transaction.

See Also:

Building the MSDS Review Queue

Running the MSDS Sheets Sent Report

Maintaining MSDS for Customers Overview

Running the MSDS Sheets Sent Report

Use the MSDS Sheets Sent Report to generate a list of all Material Safety Data Sheets (MSDS) information sent to customers. This report enables you to both confirm the completeness of your customers' MSDS collection and demonstrate your compliance with OSHA standards for providing MSDS to customers.

For a description of the report, see What the Report Shows at the end of the topic.

To run the MSDS Sheets Sent Report:

1. From the **File** > **Material Safety Data Sheets** menu, select **MSDS Sheets Sent Report** to display the MSDS Sheets Sent Report screen.
2. In the **Br/Tr/All** field, enter the shipping branch or territory for which to run the report. Enter **All** to run the report for all branches and territories.
3. In the **Customer** field, enter the customer for whom to run the report. Leave the field blank to select all customers.

   Use the **Customer** hot key to run the report for multiple customers.
4. In the **Start Date** field, enter the first date in a range of dates for which to review MSDS sent to customers.
5. In the **End Date** field, enter the last date in a range of dates for which to review MSDS sent to customers.
6. Set options, if needed, and generate the report.

What the Report Shows

The MSDS Sheets Sent Report shows the following information:

Field/Column	Description
Shipping Branch(es)	Shipping branches for which the report was run.
Ship-To Customer(s)	Customers for whom the report was run.
Ship-To Customer	Customer to whom the MSDS was sent.
Invoice	Invoice for which the MSDS was sent.
MSDS Sheet#	Sheet number for the MSDS.
Eff Date	Date the MSDS information is effective.
MSDS Description	Description for the MSDS.
Sent Date	Date the MSDS was sent to the customer.
Product Description	Product to which the MSDS is attached.

See Also:

Maintaining MSDS for Customers Overview

Product Demand and Procurement Determination Overview

Use Primary Inventory Maintenance to manage product demand and procurement determination. From the utility, you can do the following:

- View demand and procurement information for each branch's warehousing scheme, such as central purchasing or central distribution.
- Enable stock/nonstock determination for your products. When this utility is enabled, the system determines a product's stock status using the number of hits the product has received.
- Set product buy package quantity and divisibility. These two settings determine how products can be procured.

See Also:

Viewing Product Demand and Procurement Information

Enabling Stock/Nonstock Determination for Products

Setting Product Buy Package Quantity and Divisibility

Product Maintenance Overview

Viewing Product Demand and Procurement Information

Use the Primary Inventory Maintenance screen to view product demand and procurement information for each branch in which the product exists. The system displays the demand and procurement information for each branch's warehousing scheme, such as central purchasing or central distribution.

The system continually updates the product's projected inventory level and order/transfer point in real time. The system updates the remaining information on the screen each time you run the Update Product Demand Forecast program for the product.

For stock products, the Primary Inventory Maintenance screen displays a summary of the product's current demand information. For nonstock products, the system does *not* calculate the order point, line point, Economic Order Quantity (EOQ), and monthly demand.

To view a product's demand information:

1. From the **Files** menu, select **Product** to display the Product Maintenance screen.
2. Display the product record for which to view demand information.
3. Use the **Inven** hot key to display the Primary Inventory Maintenance screen.
4. Review the following information for the displayed product record:

Column	Description
Brch	Branch to which the demand information applies. Branch's with the following letter suffixes indicate the warehousing scheme used for replenishing that product. These lines display calculated information for all branches combined under the defined warehouse scheme. • **P** – Central purchasing branch that purchases for other branches. • **W** –Central distribution branch that warehouses for other branches. • **C** – Central warehousing branch that both purchases and warehouses for other branches.
Stk	Product's stock status: • (**Y**) – Pre-defined stock item. • (**N**) – Pre-defined nonstock item. • (**-**) – System calculates the item's stock or nonstock status based on the number of hits the product receives in a branch warehouse network.
Buy Pkg (unit of measure)	Buy package quantity integral in which the product is purchased or transferred. For example: If set to 6, stock is purchased or transferred in quantities of 6, 12, 18, 24, and so forth.

Column	Description
Div	Whether the product's buy package quantity integral can be divided when one of the following occurs: • Vendor purchases the product. • Warehousing branch transfers the product.

5. Review the following demand information for the displayed product record:

   Note: The following columns display different information depending on whether the branch is a parent or child branch.

Column	Parent Branch Description	Chile Branch Description
PIL	Projected inventory level.	Projected inventory level.
OP/XP	Order point.	Transfer point and surplus point.
Low Sale (unit of measure)	Lowest quantity sold in the branch within the forecast period.	Lowest quantity sold in the branch within the forecast period.
EOQ	Economic Order Quantity (EOQ), based on the combined demand of the multi-branch network. When the low sale quantity exceeds the calculated EOQ, the system uses the low sale quantity in place of the EOQ in associated calculations. If this is the case, the field displays with an asterisk (*****) to indicate the exception.	EOQ for the product in the branch.
Monthly Demand	Monthly demand for the product in the branch.	Monthly demand for the product in the branch.
Monthly Hits	Monthly hits for the product in the branch.	Monthly hits for the product in the branch.
Leadtime XF Cyc	Lead time for a purchasing branch.	Transfer cycle days for a selling branch.
Safety LT Day	Number of lead time safety days for the item in the branch.	Number of lead time safety days for the item in the branch.

6. Press **Esc** to exit the screen.

More Options on the Primary Inventory Maintenance Screen

The Primary Inventory Maintenance screen also offers these options:

Hot Key	Function
Audit	Displays the Demand Calculation Audit screen. Use this screen to view product demand calculation information.
Order Points	Displays the Product Order Points/Line Points screen. Use this screen to do one of the following: • View product order point and line point calculation information. • Change the safety factor and projected gross margin for an individual branch.
Forecast Params	Displays the Forecast Parameters Maintenance screen. Use this screen to set the parameters used to forecast product demand.
User Controls	Displays the Product User Controls Parameters screen. Use this screen to enter specialized product-level user inventory control parameters.
Inv Inq	Display the Inventory Inquiry screen. Use this screen to view inventory details for the product in all branches.
EDI	Displays the EDI/VMI screen. Use this screen to flag the product as vendor-managed inventory for EDI.
Addl	Displays the Additional Inventory Parameters screen. Use this screen to do the following: • Set up the product's stock or nonstock determination. • Determine the product's buy package and divisibility overrides.

See Also:

Enabling Stock/Nonstock Determination for Products

Setting Product Buy Package Quantity and Divisibility

Product Demand and Procurement Determination Overview

Updating Product Demand Overview

Forecasting Overview

Enabling Stock/Nonstock Determination for Products

Enable the system to determine whether a product is a stock or nonstock item in Additional Inventory Parameters. If enabled, the system determines a product's stock status using the number of hits the product has received as follows:

- The system first compares the product's hits to the number set in the Minimum Hits control maintenance record.
- If the product has less hits than the value set in the Minimum Hits control maintenance record, the product is considered a nonstock item.
- If the product has the same or more hits than the value set in the Minimum Hits control maintenance record, the system then compares the product's hits to the value set for the product's assigned branch in Hits Control Maintenance.
- If the product has less hits than the value set for the branch, the product is considered a nonstock item. Otherwise, it is considered a stock item.

Note: Use the Default Br Stock Value When A Product Becomes Active control maintenance record to set a product's stock or nonstock determination status when it is activated in a branch.

Note: The following procedure is a manual process for a single product. Use the Mass Load program to enter inventory parameters to groups of products.

To enable stock/nonstock determination for a product:

1. From the **Files** menu, select **Product** to display the Product Maintenance screen.
2. Display the product record for which to set up stock/nonstock determination.
3. In the **Status** field, verify that the product has one of the following values set:
   - **Stock** – A stock-keeping item.
   - **Nonstock** – An item not kept in inventory, but available for order from a vendor's catalog.
4. Use the **Inven** hot key to display the Primary Inventory Maintenance screen.
5. Use the **Addl** hot key to display the Additional Inventory Parameters screen.
6. Use the **Hierarchy** hot key to select the branch to assign to the product record.

   Note: Use the **Find** hot key as necessary to locate a branch that is in the list, but not in the viewable area. Use **Alt-Insert** to add a branch or territory to the list. The new branch or territory inherits the settings of the previous entry. Use **Alt-Delete** to remove a branch or territory from the list.

7. In the **Stock** field, set up for stock or nonstock determination by entering one of the following:

Option	Description
Y	Sets the item as a stock item.
N	Sets the item as a nonstock item.
-	Sets the system to determine whether the item is considered a stock or nonstock item based on hits.

Note: If you override the default stock or nonstock setting in the Default Br Stock Value When A Product Becomes Active control maintenance record, the system displays an asterisk (*****) after the value in the **Stock** field.

8. Press **Esc** to save changes and exit the screen.

See Also:

Stock/Nonstock Determination and Branch Replenishment

Entering Hits Control Maintenance Parameters

Viewing Product Demand and Procurement Information

Setting Product Buy Package Quantity and Divisibility

Product Demand and Procurement Determination Overview

Setting Product Buy Package Quantity and Divisibility

You can procure stock, whether by purchasing or by intra-branch transfer, in different quantities. Sometimes stock is limited to being procured in a fixed buy package quantity, for example, a six-pack is a buy package quantity. Other times, although an item is procured in a buy package quantity, the vendor or branch manager allows you to divide the buy package into different quantities. For example, a product is sold by case, with 4 boxes making up 1 case; however, the vendor will break the case quantity into 4 boxes and sell you the individual boxes.

Buy package quantity indicates the integral in which you can procure the item. For example, if set to 6, you can purchase or transfer the item in quantities of 6, 12, 18, and so forth. The system populates the unit of measure for the buy package quantity, using the unit of measure defined for purchasing.

Divisibility indicates whether the buy package can be divided and the item procured in a quantity other than the buy package quantity. You can assign one of the following divisibility settings to a product's buy package quantity:

- Allow the buy package quantity to be divided.
- Do not allow the buy package quantity to be divided.
- Allow the buy package quantity to be divided, but require the branch to take the remaining amount into stock.

  For example:

  The buy package quantity is 50 and a user attempts to sell only 10 on the order. The system orders the buy package quantity of 50, tags 10 for the order, and brings the remaining 40 into stock.

  Note: With this setting, if the order causes the product's projected inventory level (PIL) to exceed the maximum days' supply, a user must have the SOE.PIL.DAYS.OVRD authorization key to procure the partial amount for the order and bring the remainder of the buy package quantity in as regular stock. If the user is not authorized, the system changes the sales order quantity to reflect the full buy package quantity, forcing the customer on the sales order to buy the full package quantity.

The combination of the buy package quantity and divisibility produces different results for automated purchasing and transfers, depending on whether the vendor will divide the package quantity and whether a child branch expects a full or divided package quantity.

Note: The following procedure is a manual process for a single product. Use the Mass Load program to enter inventory parameters to groups of products.

To set the buy package quantity and divisibility for a product:

1. From the **Files** menu, select **Product** to display the Product Maintenance screen.
2. Display the product record for which to set the buy package quantity and divisibility.

3. Use the **Inven** hot key to display the Primary Inventory Maintenance screen.
4. Use the **Addl** hot key to display the Additional Inventory Parameters screen.
5. Use the **Hierarchy** hot key to select the branch to assign to the product.

   Note: Use the **Find** hot key, as necessary, to locate a branch that is in the list but not in the viewable area. Use **Alt-Insert** to add a branch or territory to the list. The new branch or territory inherits the settings of the previous entry. Use **Alt-Delete** to remove a branch or territory from the list.

6. Enable stock/nonstock determination for the product, if needed.
7. In the **Buy Pkg** field, enter the quantity integral in which the product is purchased or transferred.
8. In the **Div** field, enter one of the following:
   - **Y –** The product can be sold or transferred in a quantity other than the buy package quantity.
   - **N –** The product can only be sold or transferred in the buy package quantity.
   - **O –** One of the following:
     - For normal purchasing, **O** functions the same as **N**.
     - For procurements, **O** allows a branch to sell or transfer the product in a quantity other than the buy package quantity, but the branch must procure the remaining amount.
9. Set the percentage of parent order point to protect, if needed.
10. Press **Esc** to save changes and exit the screen.

See Also:

Enabling Stock/Nonstock Determination for Products

Viewing Product Demand and Procurement Information

Product Demand and Procurement Determination Overview

How Eclipse Uses Package Quantities in Line Buy Calculations

Creating Product Kits Overview

Product kits are comprised of multiple components sold together as one unit.

For example:

The ABC Kitchen Sink product kit contains all the components making up a kitchen sink – sink, faucet, and hot and cold taps.

When you create product kits, define each component that makes up a product kit, along with product kit settings, such as whether a product kit can be sold without a component.

You must also define whether product kits are standard or dynamic. The system calculates sell price, cost, and cost of goods sold (COGS) differently for the two types of product kits. It also procures components and adds product kits to orders based on the product kit type.

In addition, define which calculation method to apply to a product kit for determining sell price, cost, and COGS.

Use Product Kit Maintenance to create your product kits.

See Also:

Creating Product Kits

Standard Kits Versus Dynamic Kits

Calculation Methods for Product Kits

Product Kits Overview

Product Maintenance Overview

Creating Product Kits

Product kits are comprised of multiple components sold together as one unit. For example, the ABC Kitchen Sink product kit contains all the components making up a kitchen sink – sink, faucet, and hot and cold taps.

Use Product Kit Maintenance to create product kits. When creating product kits, define the following:

- Whether the product kit is a standard kit or dynamic kit.
- Calculation methods to use in selling the product kit.
- Kit components of which the product kit is comprised.
- Kit component settings, such as whether the product kit can be sold without the component.

To create a product kit:

1. From the **Files** menu, select **Product** to display the Product Maintenance screen.
2. Create or open the product record to use in creating a product kit.

   Note: If you open an existing product record, it must already be defined as a product kit in order to access the Product Kit Maintenance screen. In addition, the product record cannot exist on any open orders or bids, and its on-hand quantities must be set to zero before you can edit the record's product kit settings.

3. Use the **Kit** hot key to display the Product Kit Maintenance screen.

   The system populates the **Desc** field with the product name.

4. In the **Dynamic Kit** field, enter **Y** to indicate that the product kit is dynamic; otherwise, enter **N** to set the product kit as a standard product kit.

   Important: Once you define a product kit as dynamic, you cannot change it back into a standard kit.

5. To set price and calculation methods for the product kit, populate the following fields:

Field	Description
Calc Sell Method	Calculation method to use in determining the selling price of the product kit. Press **F10** and select a calculation sell method to assign to the product kit. The system populates this field with **Use Kit Product Price**.
Calc Cost Method	Calculation method to use in determining the cost of the product kit. Press **F10** and select a calculation cost method to assign to the product kit. The system populates this field with **Use Kit Product Price**.

Field	Description
Calc COGS Method	Calculation method to use in determining the cost of goods sold (COGS) for the product kit. Press **F10** and select a calculation COGS method to assign to the product kit. The system populates this field with **Use Kit Product Price**. **Note:** Use the **Cost Calc Basis** hot key to change the **Calc Cost Method** field name to **Calc COGS Method**.
Prorate Price	Whether to prorate the price for the product kit when components are backordered. Enter one of the following: • **Y –** The system prorates the product kit price when kit components are backorderd. When prorating, the system distributes the price across all generations that include kit components. The system calculates the prorated price using the list price for each kit component. If the system cannot find a list price, it uses zero. You can then ship key components of a partial kit and bill for those components on the current generation. Backorder unavailable non-key components, and bill for those components on the order generations with which they are shipped. • **N –** The system does not prorate the product kit price when kit components are backorderd. Instead, the system charges for the entire kit on the current order generation. All backordered kit components on subsequent order generations use a zero price override. You can then ship key components of a partial kit and bill for the entire kit. Backorder unavailable non-key components for later shipment at no charge.

6. In the **Print Components** field, enter **Y** to print each kit component on tickets and invoices; otherwise, enter **N**.
7. Assign components to the product kit by populating the following columns for each kit component:

Column	Description
Quantity	Amount of the component needed to create the kit. Kit components can have different units of measure than the product kit. When allocating locations for kit components, the system uses the component's unit of measure and not the kit's.

Column	Description
Spoil %	Over-packing percentage to apply to the shipping quantity of kit components. Over-packing small items when they are enclosed in bulk for a manufacturing application compensates for unavoidable waste when the kit arrives at the customer's site. Extra components are added to the kit when the spoil percentage multiplied by the component quantity multiplied by the ship quantity of the kit results in a whole number (**spoil %** x **component quantity** x **ship quantity** = **whole number**). For example: If the spoil percentage is .02% for a quantity of 10 of component A, and 40 kits are ordered (.002 x 10 x 40 = .8), no extras of component A are added. However, if 120 kits are ordered (.002 x 10 x 120 = 2.4), two extras of component A are added.
Component Description	Product to include as a component in the kit. You can select products from product families or price lines. **Note:** You need the OE.PRODUCT.USE.REVIEW authorization key assigned to add a component with a product status of **Review**.
Key	Whether the component is a key kit component, meaning that it must be available to ship with the current order generation and cannot be backordered when selling partial kits. Enter **Y** to indicate that the component is a key kit component; otherwise, enter **N**. The default setting is **Y**.

8. Review the following information for each component:

   Note: Use the **View** hot key to change the displayed column.

Field	Description
Avail	Amount of the component that is currently available on-hand. Use the **View** hot key and select **Availability** to display this column.
Dflt List	Default list price of the component. Use the **View** hot key and select **Dflt List** to display this column.
Cost	Commission cost of the component. Use the **View** hot key and select **Cost** to display this column. You need to be assigned the COST.VIEW authorization key to view this cost.
COGS	COGS (cost of goods sold) cost of the component. Use the **View** hot key and select **COGS** to display this column. You need the COGS.VIEW authorization key assigned to view this cost.

9. Press **Esc** to save changes and exit the screen.

More Options from the Product Kit Maintenance Screen

The Product Kit Maintenance screen also offers these options:

Hot Key	Function
Inquiries	Displays the Inquiries menu. Use this menu to access further information about the selected component.
Comment	Displays the Comments dialog box. Use this dialog box to add comments to a selected kit component. The comments will display below the component. **Note:** You can enter only one comment per component.
Stock Br	Places the cursor in the **Br#** field. Use this field to enter the stock branch for which to view the component availability, price, and costs by branch.

See Also:

Standard Kits Versus Dynamic Kits

Calculation Methods for Product Kits

Creating Product Records

Product Kits Overview

Purchasing Product Kits

Creating Product Kits Overview

Standard Kits Versus Dynamic Kits

When you set up a product kit, you must define whether it is a standard or dynamic kit. Review the following differences between the two types of kits before determining whether to define a kit as standard or dynamic.

Important: After you define a product kit as dynamic, you cannot change it back into a standard kit.

Calculation Methods

The system calculates Sell, Cost, and Cost of Goods Sold (COGS) for standard and dynamic kits as follows:

Standard Kits	Dynamic Kits
The system uses one of the following methods: • Use Kit Product Price. • Sum Component Price, Less Kit Discount. • Sum Discounted Component Prices.	The system uses the Use Kit Product Price method.

Kit Procurement

Procure standard and dynamic kits as follows:

Standard Kits	Dynamic Kits
You assemble kits from individual components in your inventory. Standard kits are not pre-packaged, nor do vendors offer standard kits to you for purchase.	You can either purchase kits pre-packaged from vendors or you can assemble kits from individual components in your inventory.

Sales Order Entry Features

When adding standard or dynamic kits to sales orders, the following rules apply:

Standard Kits	Dynamic Kits
Standard kits do not have individual on-hand component quantities on sales orders, and so you cannot separate standard kits into their individual components on a sales order. You must add a standard kit as one item on a sales order. The system determines kit availability using the lowest available quantity for a kit component. You can only sell a standard kit when you have the necessary components in stock. For example: The Kitchen Sink Standard Kit is comprised of a sink, a faucet, and a stem set. You have 3 sinks, 2 faucets, and 3 stem sets in stock. You can sell only 2 of the Kitchen Sink Standard Kit.	Dynamic kits do have individual on-hand component quantities on sales orders, and so you can separate dynamic kits into individual components on a sales order to create additional kits on the fly. For example: The Lock Set Dynamic Kit is comprised of two knobs and dead bolt assembly hardware. You sell these items as individual products. If you have 4 brass lock sets, 4 chrome lock sets, and 4 additional pairs of brass knobs, you can create 8 brass lock sets by using the dead bolt assembly hardware from the chrome lock sets, and then substituting the brass knobs for the chrome. **Note:** When a pre-packaged dynamic kit moves in or out of inventory, the system updates inventory history for the dynamic kit. When you build a dynamic kit from component parts, the system updates inventory history for the components. **Note:** The Check Other Dynamic Kits For Needed Parts determines whether the system considers dynamics kits in other branches as a source from which to acquire kit components. **Note**: The DYNAMIC.KIT.EDIT authorization key limits whether users can alter dynamic kits.

See Also:

Creating Product Kits

Calculation Methods for Product Kits

Purchasing Product Kits

Selling Dynamic Kits

Dynamic Kit Sales Examples

Creating Product Kits Overview

Calculation Methods for Product Kits

When creating product kits, select one of the following methods for calculating the Sell, Cost, and Cost of Goods Sold (COGS) for product kits:

Note: The system always uses the available matrix cell or the system default matrix cell for kit pricing or pricing of individual components.

Use Kit Product Price

The system first uses the product kit's list price to determine pricing. It then subtracts any kit pass-along discount from the list price to reach the final kit price.

Note: This option is the default, and it is the only option available for dynamic kits.

Sum Comp Price, Less Kit Disc

The system ignores the product kit's list price and instead totals the prices of the individual components to determine pricing. It then subtracts any kit pass-along discount from the components' total to determine the final kit price.

Sum Discounted Comp Prices

The system ignores the product kit's list price and instead subtracts any kit pass-along discount from each component to determine pricing. It then totals the resulting prices of the components to determine the final kit price.

See Also:

Creating Product Kits

Purchasing Product Kits

Product Kits Overview

Sell Matrix Overview

Standard Kits Versus Dynamic Kits

Creating Product Kits Overview

Product UPCs Overview

A Universal Product Code (UPC) is a twelve digit number that identifies an individual consumer product. The twelve digits represent the following:

- Digit 1 – Item type.
- Digits 2-6 – Manufacturer code.
- Digits 7-11 – Product code assigned by the manufacturer.
- Digit 12 – Check for error detection.

In addition, UPCs are often printed with a bar code representing the number in a scannable format.

The system uses UPCs to synchronize items in your product file with your vendor's products. Use the following utilities to assign and manage UPCs for your inventory:

- UPC Codes Maintenance – Use to assign and maintain UPCs for your inventory.
- Price Updating ID Maintenance – Use to assign user-defined UPCs for products managed through the Electronic Data Interchange (EDI) and Product Data Warehouse (PDW) companion products.

See Also:

Assigning UPCs to Products

Assigning User-Defined UPCs to Products

Product Maintenance Overview

Assigning UPCs to Products

Use UPC Codes Maintenance to assign a primary Universal Product Code (UPC) to a product record. In addition, you can do the following:

- Assign secondary UPCs to the product record.
- Edit existing UPCs assigned to the product record.
- Change which UPC is the primary and which UPCs are secondary for the product record. Make this change when you choose to have a different vendor supply a generic product but want to retain the previous vendor's UPC.

Important: If your business maintains separate product records and you need to assign a UPC code to the same product at different branches, contact Eclipse Support. Support will activate the Enable Branch Specific UPCs control maintenance record at your site so that you can assign a UPC code to the same product at different branches.

To assign UPCs to a product:

1. From the **Files** menu, select **Product** to display the Product Maintenance screen.
2. Display the product record to which to assign UPCs.
3. Use the **UPCs** hot key to display the UPC Codes Maintenance screen.

   The system populates the product description in the **Desc** field.
4. In the **Primary UPC** field, enter the product's primary UPC. UPCs must be numeric.

   Note: The system warns you if you enter a UPC that is already assigned to another product. You must enter a unique UPC to continue.
5. In the **Secondary UPCs** field, enter additional UPCs associated with the product.
6. Press **Esc** to save changes and exit the screen.

More Options from the UPC Codes Maintenance Screen

The UPC Codes Maintenance screen also offers these options:

Hot Key	Function
UD Maint	Displays the Price Updating ID Maint screen. Use this screen to assign user-defined UPCs to products.
Secondary	Sets the primary UPC to be a secondary UPC. The code in the **Primary UPC** field moves under the **Secondary UPCs** field. You can now enter a new primary UPC.

Hot Key	Function
Set Primary	Sets a defined secondary code as the primary UPC. Select the secondary code and use the hot key. The system places the secondary code in the **Primary UPC** field, and moves the primary code to the **Secondary UPCs** field.

Assigning User-Defined UPCs to Products

Use Price Updating ID Maintenance to assign up to ten additional user-defined Universal Product Codes (UPCs) to use with the Electronic Data Interchange (EDI) and Product Data Warehouse (PDW) companion products. These additional UPCs help link your product IDs to your vendors' product IDs when using EDI or PDW.

To assign user-defined UPCs to a product:

1. From the **Files** menu, select **Product** to display the Product Maintenance screen.
2. Display the product record for which to assign user-defined UPCs.
3. Use the **UPCs** hot key to display the UPC Codes Maintenance screen.
4. Use the **UD Maint** hot key to display the Price Updating ID Maint screen.

   The system populates the **Desc** field with the product description.
5. In the **Catalog #** field, enter the product's assigned catalog number for use with EDI and PDW.
6. In each **User Defined #** field, enter a user-defined UPC as needed.
7. Press **Esc** to save changes and exit screen.

See Also:

Assigning UPCs to Products

Product UPCs Overview

Additional Product Information Overview

When creating product records, you can define an assortment of additional information for the record. For example, you can define vendor product catalog information for the product, identify the branches that are authorized to sell the product, and assign a work order template to the product.

Use the Additional Data menu accessed directly from Product Maintenance to define the following information for a product record:

Additional Data	Function
Misc Product Info	Enter optional product-level defaults or overrides, such as: • Whether the product is a direct shipment item. • Duty harmonizing code and the country of manufacture. • Laminate cut product dimensions. • Original tire tread depth.
Classify	Enter user-defined data for the product.
Product Catalog Maint	Define vendor product catalog information for the product.
Work Order Processing Maint	Assign a work order template to the product.
Minimum GP%	Set a minimum gross profit percentage for product stock sales and direct shipment orders.
Branch Access	Define the branches that are authorized to sell the product.
Secondary Buy Lines	Assign the product to multiple buy lines to purchase it from vendors offering the product in generic brands or as commodity type items.
Product Zones	Restrict product selection by assigning the product to product zones.
Product Wizard Maint	Select the product wizard interface to use for adding a product to an order.
Gift Card Maint	Set up a miscellaneous charge product as a gift card or gift certificate.

See Also:

Entering Miscellaneous Product Information

Entering User-Defined Data for Products

Defining Vendor Catalog Locations for Products

Setting Minimum Gross Profit Percentages for Products

Defining Accessible Branches for Products

Assigning Secondary Buy Lines to Products

Assigning Products to Product Zones

Entering Miscellaneous Product Information

Use the Miscellaneous Product Information utility to enter optional product-level defaults or overrides, such as the following:

- Whether the product is a direct shipment item.
- Duty harmonizing code and the country of manufacture.
- Laminate cut product dimensions.
- Original tire tread depth.

To define miscellaneous product information:

1. From the **Files** menu, select **Product** to display the Product Maintenance screen.
2. Display the product record for which to define miscellaneous information.
3. Use the **Add'l** hot key and then the **Misc Product Info** hot key to display the Miscellaneous Product Information screen.
4. Populate the following fields, as necessary.

Field	Description
Prepaid FET (Y/N)	Whether the vendor requires pre-payment of federal excise tax for the product. Enter **Y** to require pre-payment for the product; otherwise enter **N**.
Original Tread Depth	For tires, the original tread depth for warranty purposes.
Direct Ship Item (Y/N)	Whether the product is a direct shipment item. Enter **Y** to define the product as a direct shipment item; otherwise enter **N**. When direct shipment items are added to orders, the system prompts whether the item can be shipped directly from the vendor. If you enter **Y** in this field, define the product's direct shipment vendor in the **Default Dir Vendor** field.
Default Dir Vendor	Direct shipment vendor for the product. **Note:** You can change a direct shipment vendor on an order if necessary.
Duty Harmonizing Code	Duty harmonizing code assigned to the product to determine the basis for levying tariffs. Press **F10** and select from a list of codes set in Duty Harmonizing Code Maintenance.
Country of Manufacture	Country in which an imported product was manufactured. **Note:** The duty harmonizing code is automatically updated for the product when the Product Duty Information Update process is run. Those changes are recorded in the Product Maintenance change log. Also, if the **Automatically Calculate Duty Charges For Purchase Orders** control maintenance record is set to **Y**, the system calculates the duty and freight amounts for the product when it is added to a purchase order.

Field	Description
ERoute Time to Deliver	This field is reserved for future development of the ERoute companion product.
ERoute Special Volume	This field is reserved for future development of the ERoute companion product.
Order to Inventory Factor For SOE	Percentage of the product that you want to maintain on hand. If an order writer attempts to sell more than this quantity on a transaction, the system displays a warning. For example: If you set this field to 50% for the product and you have 10 of the product on hand, the system displays a warning if the order writer attempts to sell 6 or more of the product. If the order writer overrides the system warning and if the **Message Buyer On Inventory Factor Override In SOE** control maintenance record is set to **Y**, the system notifies the purchasing agent that the order writer performed the override. **Note:** The entry in this field overrides the **Order To Inventory Factor For SOE** control maintenance record.
Disable Duplicate Order Check (Y/N)	Whether to disable the Sales Order Entry duplicate order check parameters for the product as set up in the **Duplicate Product Check On Current Order** control maintenance record. Enter **Y** to override the parameters; otherwise enter **N**.
Secondary Serial#	Secondary serial number for the product. Enter the serial number.
Inv Account Override	Inventory account to use for the product's G/L postings. Press **F10** and select from a list of G/L inventory override accounts. **Note:** Inventory account overrides assigned at the order level take precedence over those set at the product level. Product level overrides take precedence over those at the price line level.
Exclude Detail Lot from Avail if On Hold (Y/N)	Whether to exclude a detail lot item from the sales order availability calculation when the item is on hold. Enter one of the following: • **Y** – If the detail lot item is on hold, then the system excludes the item from the availability calculation. • **N** – The system does not check the detail lot item's on hold status when calculating the available quality. If the product is available, the user still cannot commit quantity if the detail lot item is on hold. **Note:** Settings at the product level override settings in the **Exclude Detail Lot Items From Available On-Hand Calculation** control record *for this item only*. If the field is left blank, the system uses the settings in the control maintenance record.

Field	Description
Exclude Detail Lot from Avail if Inspect Level/Qual Rank Not Met (Y/N)	Whether to exclude a detail lot item from the sales order availability calculation when one of the following occurs: • The item's inspection level does not meet the customer's acceptable quality check inspection level. • The item's quality rank does not meet the customer's acceptable quality rank. Enter **Y** to exclude the detail lot item from the calculation; otherwise enter **N**. **Note:** Settings at the product level override settings in the **Exclude Detail Lot Items From Available On-Hand Calculation** control record *for this item only*. If the field is left blank, the system uses the settings in the control maintenance record.

The view-only **TPCx Rationalized** field indicates that the product is available to your Trading Partner Connect trading partners. The **TPCx Dead Stock** field indicates that the product is posted to the Trading Partner Connect web site as dead stock. For information about Trading Partner Connect, see Trading Partner Connect Integration for Eclipse.

5. Press **Esc** to save changes and exit the screen.

See Also:

Additional Product Information Overview

Original Tire Tread Depth Overview

Entering User-Defined Data for Products

Enter user-defined data for a product record to further classify the product.

For example:

You separate all of your plumbing inventory into three departments – plumbing 1 for bathroom plumbing, plumbing 2 for kitchen plumbing, and plumbing 3 for laundry facility plumbing. Assign one of your user-defined plumbing departments to all of your plumbing product records.

Before you can assign user-defined data to products, you must set up the user-defined dictionary items for product records in the Product Classification Sort List control maintenance record.

To enter user-defined data for a product:

1. From the **Files** menu, select **Product** to display the Product Maintenance screen.
2. Display the product record for which to enter user-defined data.
3. Use the **Add'l** hot key and then the **Classify** hot key to display the User Defined Data screen.

   The system populates the following:

Field	Description
File Name	Product records file name.
Desc ID	Product record description.
Prompts	User-defined data set up in the Product Classification Sort List control maintenance record.
Category	Sales Force Automation (SFA) category assigned to each prompt. **Note:** This feature requires the use of the SFA companion product.

4. In the **Input** field, enter the requested information for each prompt. If the field is validated, press **F10** for a list of possible entries.
5. Press **Esc** to save changes and exit the screen.

More Options from the User Defined Data Screen

The User Defined Data screen also offers these options:

Hot key	Function
Log	Displays the Maintenance Log Viewing screen. Use this screen to view changes made to the user-defined data file.
Sort	Displays the Sort By menu. Use this menu to change the displayed order of the prompts. Select one of the following sort by options: • **Default** – Sorts by the order defined in the Product Classification Sort List control maintenance record. • **By Attribute** – Sorts by the attribute number assigned in Dictionary Maintenance. • **By Category by Prompt** – Sorts alphabetically by category and then alphabetically by prompt within each category. • **By Category by Attribute** – Sorts alphabetically by category and then ascending order by attribute number. • **By Prompt** – Sorts alphabetically by prompt name.
Category	Displays the Category Selection screen. Use this screen to enter multiple SFA Categories for a prompt. **Note:** This feature requires the use of the SFA companion product.

See Also:

Creating User-Defined Files

Additional Product Information Overview

Defining Vendor Catalog Locations for Products

To more easily access product information in vendor catalogs, define the page and column location where the product is located in the vendor catalog. This notation is also helpful when product catalogs provide illustrations of the product and are available for customers to browse.

Note: Use the Valid Product Catalogs control maintenance record to define the vendor catalogs available for reference.

To define a vendor catalog location for a product:

1. From the **Files** menu, select **Product** to display the Product Maintenance screen.
2. Display the product record for which to define vendor catalog information.
3. Use the **Add'l** hot key and then the **Product Catalog Maint** hot key to display the Product Catalog Maintenance screen.
4. Complete the following columns:

Column	Description
Catalog	Vendor catalog in which the product appears. Press **F10** and select a vendor catalog.
Page #	Page number on which the product appears. Enter the page number.
Column	Column number in which the product appears. Enter a column number, as required.

5. Repeat step 4 if the product appears more than once within a vendor catalog or in different vendor catalogs.
6. Press **Esc** to save changes and exit the screen.

See Also:

Additional Product Information Overview

Setting Minimum Gross Profit Percentages for Products

You can set a minimum gross profit percentage (GP%) at the order, product, price line, and user levels. These settings follow the below hierarchy:

- Order – A GP% set at the order level overrides the settings at all other levels.
- Product – A GP% set at the product level overrides the settings at the price line and user levels.
- Price Line – A GP% set at the price line level overrides the settings at the user level.
- **User –** A GP% set at the user level applies to any order entered by that user.

During order entry, when you make a change that affects the GP% for a product, the system compares the new GP% to the specified minimums, in the order stated above. If the new GP% falls below one of these minimums, one of two things will happen:

- If you do not have the SOE.MIN.GP authorization key, the system prompts for authorization from someone who has the authorization key to accept the change.
- If you have the SOE.MIN.GP authorization key, the system warns that you are going below the minimum GP%. Authorize the change.

Define a minimum gross profit percentage for products from Product Maintenance.

To set a minimum GP% for a product:

1. From the **Files** menu, select **Product** to display the Product Maintenance screen.
2. Display the product record for which to set a minimum GP%.
3. Use the **Add'l** hot key and then the **Minimum GP%** hot key to display the Product Minimum GP% screen.
4. Use the **Hierarchy** hot key to select the branch hierarchy to use for the product.

   All territories that contain that branch display in the **Br/Tr** column below the branch, and in territory priority order.

   Note: Use the **Find** hot key as necessary to locate a branch that may be in the list, but not in the viewable area.

5. Enter the following information for each branch or territory:

Column	Description
Order Stock GP%	Minimum gross profit percentage to use for stock sales of this product during order entry.
Order Direct GP%	Minimum gross profit percentage to use for direct shipment sales of this product during order entry.

Column	Description
Report Stock GP%	Minimum gross profit percentage as it should display for stock sales of this product on the Detailed Invoiced GP% report.
Report Direct GP%	Minimum gross profit percentage as it should display for direct shipment sales of this product on the Detailed Invoiced GP% report.

6. Press **Esc** to save changes and exit the screen.

See Also:

Additional Product Information Overview

Defining Accessible Branches for Products

Use the Accessible Branches utility from Product Maintenance to define whether a product can be sold at a branch.

Remember the following before defining accessible branches for a product:

- The system default permits all branches to sell all products.
- Settings in Accessible Branches from Price Line Maintenance override the system default.
- Settings in Accessible Branches from Product Maintenance override the system and price line defaults.

To define accessible branches for a product:

1. From the **Files** menu, select **Product** to display the Product Maintenance screen.
2. Display the product record for which to define accessible branches.
3. Use the **Add'l** hot key and then the **Branch Access** hot key to display the Accessible Branches screen.
4. In the **Branches** field, position the cursor at the end of the list and enter the branch or territory that can sell the product.
5. Repeat step 4 for all branches or territories that can sell the product.
6. Press **Esc** to save changes and exit the screen.

See Also:

Additional Product Information Overview

Assigning Secondary Buy Lines to Products

Assign secondary buy lines to a product to purchase it from vendors offering the product in generic brands or as commodity type items. By purchasing a product in this way, you can contribute towards meeting each of the associated vendor's targets.

To assign secondary buy lines to a product:

1. From the **Files** menu, select **Product** to display the Product Maintenance screen.
2. Display the product to which to assign secondary buy lines.
3. Use the **Add'l** hot key and then the **Secondary Buy Lines** hot key to display the Secondary Buy Lines screen.
4. In the **Buy Line** column, enter the secondary buy line to assign to the product.
5. In the **Buy Pkg** field, enter the buy package quantity integral in which the product is purchased within the buy line.

   For example:

   If set to 6, the product is purchased in quantities of 6, 12, 18, 24, and so forth.
6. In the **Div** field, enter **Y** to permit the product to be purchased in an amount less than the vendor's buy package quantity; otherwise enter **N**.
7. Repeat steps 4-6 for each secondary buy line to assign to the product.

   Note: To re-sequence one of the buy lines, use the **Sequence** hot key.
8. Press **Esc** to save changes and exit the screen.

See Also:

Buy Line Maintenance

Additional Product Information Overview

Setting Product Buy Package Quantity and Divisibility

Assigning Products to Product Zones

Use product zones to restrict customer purchases to a selection of products. Customers with product zones are limited to buying only those products or only from price lines assigned to their zones. All products are available to customers for whom no product zones are assigned.

For example:

If you have branches in Florida and Texas that stock the same products, you can restrict Florida customers to purchasing products at your Florida branch only. This saves money on shipping.

Before using product zones do the following:

1. Define product zones using the Valid Product Zones control maintenance record. Otherwise, all products are available for customer sales.
2. Set the Display Products Within A Customer's Product Zones control maintenance record to determine whether all products display in Sales Order Entry.
3. Assign the PRD.ZONE authorization key to users who need to view products outside the customer's assigned product zones.
4. Assign product zones to customers.
5. Assign product zones to price lines.
6. Assign product zones to products, if necessary.

Product zone assignments at the product level override assignments at the price line level.

To assign a product to product zones:

1. From the **Files** menu, select **Product** to display the Product Maintenance screen.
2. Display the product to assign to product zones.
3. Use the **Add'l** hot key and then the **Product Zones** hot key to display the Product Zones screen.
4. In the **Zones** field, press **F10** and select the zone in which to permit or restrict access to the product.
5. In the **Include/Exclude** field, press **F10** and select one of the following:
   - **Include** - Permits access to the product from the selected product zone.
   - **Exclude** - Restricts access to the product from the selected product zone.
6. Repeat steps 4-5 for each zone to assign to the product.
7. Press **Esc** to save changes and exit the screen.

See Also:

Assigning Product Zones to Price Lines

Original Tire Tread Depth Overview

Use the Original Tire Tread Depth utility to both define original tire tread depth and create percent of wear tables for warranty and return purposes.

Original tire tread depth is the thickness of a tire's tread before it is used. Tire tread depth is defined in integrals of 1/32 of an inch. When customer's return tires, you can compare the tire's original tread depth with its remaining tread depth to begin in determining the tire's return value.

Percent of wear tables consist of refund percentages assigned to a tire's original tread depth and the remaining tire tread depth. After comparing the tire's original and remaining tread depth, the system applies the percent of wear table to determine the return value for the tire.

For example:

You create a percent of wear table with the original tread depth being 3/32 and the following values:

Remaining Depth	Percent of Wear
3/32	100%
1/16	50 %
1/32	0 %

- If a customer returns a tire with the original tread depth of 3/32, then the system refunds them 100% of the tire's sell price.
- If the customer returns a tire with a tread depth of 1/16, the system refunds them only 50% of the tire's sell price.
- If the customer returns a tire with a tread depth of 1/32, the system refunds them 0% of the tire's sell price.

  Note: The Original Tire Tread Depth utility works with Return Goods Verification.

See Also:

Defining Original Tire Tread Depth for Products

Creating Percent of Wear Tables for Original Tread Depths

Additional Product Information Overview

Defining Original Tire Tread Depth for Products

For tire product records, define the original tread depth for warranty and return purposes. When customers return tires, the system uses the original tread depth and a percent of wear table to determine the return value for the tire.

> **Note:** The Original Tire Tread Depth utility works with Return Goods Verification.

Define original tread depth in integrals of 1/32 of an inch. For each 1/32 of an inch of the original tread depth, enter a whole number.

For example:

1 = 1/32, 2 = 1/16, and 3 = 3/32.

Or you can use decimals to define original tread depth, which also relate to each 1/32 of an inch.

For example:

0.5 = 1/64, or half of 1/32.

To define the original tire tread depth for a tire product record:

1. From the **Files** menu, select **Product** to display the Product Maintenance screen.
2. Display the tire product record for which to define original tread depth.
3. Use the **Add'l** hot key and then the **Misc Product Info** hot key to display the Miscellaneous Product Information screen.
4. In the **Original Tread Depth** field, enter a value for each 1/32 of inch of the original tread depth.
5. Press **Esc** to save changes and exit the screen.

See Also:

Creating Percent of Wear Tables for Original Tread Depths

Entering Miscellaneous Product Information

Original Tire Tread Depth Overview

Creating Percent of Wear Tables for Original Tread Depths

For original tread depths, define percent of wear tables to calculate return values.

Percent of wear tables consist of refund percentages for remaining tire tread depth. The system uses this percentage and remaining tire tread depth to calculate a refund amount.

For example:

You create a percent of wear table with the original tread depth being 3 and the following values:

Remaining Depth	Percent of Wear
3.0	100%
2.5	50 %
2.0	0 %

- If a customer returns a tire with the original tread depth of 3, then the system refunds them 100% of the tire's sell price.
- If the customer returns a tire with a tread depth of 2.5, the system refunds them only 50% of the tire's sell price.
- If the customer returns a tire with a tread depth of 2.0, the system refunds them 0% of the tire's sell price.

  Note: The Original Tire Tread Depth program works with Return Goods Verification.

To create a percent of wear table:

1. From the **Files** > **Product Additional** menu, select **Percent Of Wear Maintenance** to display the Percent of Wear screen.
2. In the **Original Depth** field, enter the original tread depth for which to define a percent of wear table
   - If a percent of wear table does not exist for the original tread depth, the system creates a table populating the **Remaining** column with tread depths starting at the original tread depth and working down to 2.0, in 0.5 increments.
   - If a percent of wear table exists for that original tread depth, the system displays it.
3. In the **Percent** column, enter a refund percentage for each remaining tread depth.
4. Press **Esc** to save the table.
5. Press **Esc** to exit the screen.

Product Families Overview

Product families are groups of products that are often sold together. They are meant to provide you with mix-and-match options during order taking.

For example:

A sink can belong to a product family that includes several different styles and colors of sinks, faucets, and tap sets. When a customer orders a sink in the product family, you can offer them one of several colors in the same style, or let them know which types of faucets match that sink.

Product families can be entered onto orders in both Sales Order Entry and Web Order Entry. Before using product families with these applications, do the following:

- Create product families.
- Build or rebuild the Product Family Cache.

  Note: A product family differs from a product kit in that a product kit is a group of products, also sold individually, which when assembled together creates another product.

See Also:

Creating Product Families

Rebuilding the Product Family Cache

Setup Requirements for Product Families

Product Maintenance Overview

Creating Product Families

Use Product Family Maintenance to create, copy, delete, and maintain product families.

When you create a product family, you can build it out of the following components:

- Individual products.
- Existing product families.
- All products in a price line.
- All products within a category.

In addition, you can determine whether a product family can be used with the Web Order Entry companion product.

> **Note:** The Allow Duplicates In Product Families control maintenance record determines whether you can enter duplicate components in a product family. Entering duplicate components facilitates in ordering items grouped together in different configuration blocks.

> **Note:** You must be assigned level 2 of the PRODUCT.FAMILY.MAINT authorization key to add or edit product families. If you are assigned level 1 of the authorization key, you can only view product families.

To create a product family:

1. From the **Files** > **Product Additional** menu, select **Product Family Maintenance** to display the Product Family Maintenance screen.
2. In the **Branch/Territory** field, enter the branch or territory in which to create a product family, or enter **All** to create a product family for all branches and territories.

   Enter **All** for one of the following reasons:

   - A branch does not have specific products defined for that family. Branch-specific product families are independent of the default family, not a subset of it.
   - You want the product family to be used with Web Order Entry.

   Note: You can edit or view product families only for branches or territories to which you have been assigned access.

3. In the **Product Family ID** field, enter **New** to create a product family.
4. At the prompt, enter an ID to assign to the product family.

   Note: When entering a new product family ID, the system does not allow you to use an ID already assigned to a price line. This restriction prevents conflicts when accessing price lines or product families in Sales Order Entry. In addition, do not use the ampersand (**&**) character in product family IDs.

5. In the **Description** field, enter a short description of the product family.

6. In the **Display in WOE** field, enter **Y** to use this product family in Web Order Entry; otherwise enter **N**.

   Note: The Display Catalog Products In WOE control maintenance record determines whether nonstock items display in Web Order Entry, regardless if they are included in a product family.

7. In the **Product Description** column, enter any of the following components to build the product family:

Component	Action
Individual product	Enter the product. • In the **Quantity** column, enter the quantity of the product to add when the product family is added to an order. • In the **UOM** column, the system enters the product's default unit of measure defined for sales transactions.
All products in another product family	Enter an ampersand (**&**) followed by the product family ID, for example, **&zoepumps**. • Leave the **Quantity** column blank. This applies to individual products only. • In the **UOM** column, the system enters the each (ea) unit of measure.
All products in a price line	Enter the word **line** followed by a tilde (~) followed by the price line ID, for example, **line~zoe**. • Leave the **Quantity** column blank. This applies to individual products only. • In the **UOM** column, the system enters the each (ea) unit of measure.
All products containing a selected word or phrase in the product description	Enter an exclamation mark (**!**) followed by the word or phrase, for example, **!brass hex bushing**. • Leave the **Quantity** column blank. This applies to individual products only. • In the **UOM** column, the system enters the each (ea) unit of measure.

   Note: Use **Alt-Delete** to delete the selected line item from the product family. Use **Alt-Insert** to insert a blank line above the cursor position and enter a new line item.

8. Press **Esc** to save the product family and exit the screen.

   Note: You must rebuild the product family index whenever you create new product families.

More Options from the Product Family Maintenance Screen

The Product Family Maintenance screen also offers these options:

Hot Key	Function
Del	Deletes the current product family record. At the confirmation, enter **Delete**.
Copy	Copies a selected product family to a new branch, territory, or product family record. To copy the current record: 1. Use the **Copy** hot key to display the Copy screen. 2. In the **From family** field, verify that you the correct product family to copy is displayed. The system enters the current product family ID. 3. In the **From branch/territory** field, verify that the correct branch or territory from which to copy is displayed. The system enters the current product family's assigned branch or territory. 4. In the **To family** field, enter the product family to which to copy the information as needed. 5. In the **To branch/territory** field, enter the branch or territory to which to copy the information as needed. 6. Press **Esc** to copy the product family.
Prod Maint	Displays the product record for the selected product. The Product Maintenance screen displays in view-only mode. **Note:** This hot key is active only if you have the PRODUCT.MAINT authorization key and the cursor is positioned on an individual product.
Expnd	Displays the products assigned to a selected price line. The Products from <price line> Selection screen displays. Add or remove products from the list, as needed.
Log	Displays changes made to the product family. The Maintenance Log Viewing screen displays.
Note	Attaches a note to the product family. In the Edit Note dialog box, enter a note and press **Esc**.
Cmt	Attaches a comment to an individual product in the product family. In the Product Comments dialog box, enter a comment for the selected product and press **Esc**. When the product family is added to an order, this comment displays for the product.

See Also:

Product Families Overview

Rebuilding the Product Family Cache

Web Commerce Overview

Rebuilding the Product Family Cache

Items contained in product families and product categories for use with Web Order Entry are organized in a product family cache. Whenever you create new product families or add product families to product categories, you must rebuild this cache to recalculate the number of products in a subcategory. Rebuilding the cache ensures that product families and product categories display properly on the main shopping cart page of Web Order Entry.

To rebuild the product family cache:

1. From the **File > Product Additional** menu, select **Product Family Rebuild Cache** to display the Rebuild prompt.
2. At the prompt, enter **Continue** to rebuild the index.

   The system displays a message when the index is rebuilt.

See Also:

Creating Product Families

Product Families Overview

Web Commerce Overview

Inventory Inquiries Overview

Use different inventory inquiry utilities throughout the system to view product information, such as product availability, sales history, and demand. Inventory inquiry utilities are available from system screens using hot keys or from Inquiry menus.

Use the following inventory inquiries to access additional product information:

- Inventory Inquiries – Review product availability and inventory information.
- Inventory History Ledger – Review product transactions.
- Customer Inventory History Ledger – Review customer purchasing history.
- Future Ledger – View inventory forecasts.
- Product Sales History – Compare a product's transaction history at one branch.
- Product and Quantity Selection – Review all products in a product family, price line, or buy line.

See Also:

Product Maintenance Overview

Using Inventory Inquiry

Use Inventory Inquiry to review product availability and inventory information, such as product rank, demand, and sales figures, in all branches and territories. This information is useful in procuring products because you can review the branches that have available inventory.

Inventory Inquiry displays product information based on the following branch or territory hierarchy:

1. Inventory inquiry territory set for you on the Accessible Branches screen.
2. Your home territory.
3. Branches set for your home branch on the Inventory Inquiry Brs screen.
4. Your home branch.

If you are assigned an inventory inquiry territory or a home territory, the system also displays product information for all stocking branches within the territory.

You can also access additional inquiries and product information from Inventory Inquiry.

To use Inventory Inquiry:

1. From the **Orders > Inquiries** menu, select **Inventory Inquiry** to display the Inventory Inquiry screen.

   Note: When accessing Inventory Inquiry from other screens, the system uses the product and branch information from those screens.

2. In the **Desc** field, enter the product for which to review inventory information.
3. Review the following information to determine where inventory is available.

Field	Display
Desc	Product description.
Status	Product status, such as stock or nonstock.
Pkg Qty	Buy package quantity for the currently selected branch. As you scroll up or down in the list of branches (**Wh#**), the buy package quantity changes to reflect the current branch.
Weight	Product weight in pounds.
Buy Line	Buy line to which the product is assigned.
Load	Load factor for the product. Use the load factor to determine the amount of the product required to fill a shipment vehicle.
Prc Line	Price line to which the product is assigned.
Wh#	Warehouse / branch to which the displayed product information applies.
Avail	Amount of the product that is uncommitted in each location.

Field	Display
In PO	Quantity of the product scheduled for purchase from vendors. **Note:** Kit components are counted, but the items making up the components are not counted.
In Xfer	Quantity of the product being transferred from other branches.
In Proc	Quantity of the product in the process of being picked or received.
In Work	Quantity of the product scheduled for value-added processing.
Rnk	Product rank that identifies how often the product is purchased, in terms of number of hits, gross profit, or demand over a 12-month period, when compared to other products.
Demand	Frequency at which the product is typically purchased.
30Day Sls	Number of times you purchased the product in the last 30 days.
365 Sls	Number of times you purchased the product in the last 365 days.
UM	Product's primary unit of measure for sales.

4. When you have finished reviewing the information, press **Esc** to exit the screen.

More Options from the Inventory Inquiry Screen

The Inventory Inquiry screen also offers these options:

Hot key	Function
Fut Ledger	Displays the Future Ledger for the product and branch. Use this screen to view inventory forecasts for the product.
Hist Led	Displays the Inventory History Ledger for the product and branch. Use this screen to view the transaction history for the product.
Inven	Displays the Primary Inventory Maintenance screen for the product and branch. Use this screen to review demand information for the product.
Pricing	Displays the Product Pricing screen for the product and branch. Use this screen to review the pricing rules for the product by customer class.
Kit	Displays the Product Kit Maintenance screen. Use this screen to review the kit for which this product is a component if any.
Sales Hist	Displays the Product Sales History screen for the product and branch. Use this screen to review product sales.
Locas	Displays the Product Location Maintenance screen for the product and branch. Use this screen to review warehouse locations for the product.
Subs	Displays a substitute products and their associated statistics if available. Select a substitute to do an inquiry on the substitute product.
Log	Displays the Product Activity Log Viewing screen for the product and branch. Use this screen to view changes made to the product's maintenance record.

Hot key	Function
Xref	Displays the Product External References screen if the product is cross-referenced to an external catalog or Internet address, such as an online catalog. Use this screen to cross-reference the product with a catalog or other external reference.
Net Avail	Displays the Network Avail screen when the selected branch is either a central purchasing branch (C) or central warehousing branch (W). Use this screen to view the total item availability in a multiple warehouse scheme, where the central purchasing branch (C) or central warehousing branch (W) branch is the controlling branch. **Note:** Central purchasing and central warehousing schemes are set up for product groups using Procurement Group Maintenance.
Terr	Displays a prompt to select a stocking branch or territory from the user's authorized branches. Enter **All** to select all stocking branches. Use this function to view product inventory information for a different branch or territory. If you select a branch for which you do not have full access, the **Pricing**, **Fut Ledger**, and **Hist Led** hot key are disabled.
Find Br	Displays a prompt to search for a branch ID in a list of branches or territories. At the prompt, enter the branch or territory ID and press **Esc** to return to the Inventory Inquiry screen. The cursor moves to the requested branch.

See Also:

Inventory Inquiries Overview

Using the Inventory History Ledger

Use the Inventory History Ledger to review the following transactions for a product in and out of inventory at the specified branch:

- Sales – Displays all sales orders for the product.
- Purchases – Displays all purchase orders (P/Os) for the product.
- Transfers – Displays all transfers for the product.
- Adjustments – Displays all inventory adjustments for the product.
- Work Orders – Displays all work orders for the product.

  Note: If a product is tied to a work order, the Ledger only displays the work order and not the sales order to which the work order is tagged.

- Open Serial – Displays all serialized transactions for the product.
- Rentals – Displays all rental transactions for the product.

In addition, use this screen to view a product's activity and see how various transactions affect product availability. If necessary, make adjustments to other transactions, making more of the product available for sales.

Note: The INV.SLS.LIMIT.DETAIL authorization key limits your viewing of the sales order history to accounts to which you have been assigned.

To use the Inventory History Ledger:

1. From the **Orders > Inquiries** menu, select **Inventory History Ledger** screen.

   Note: When accessing the Inventory History Ledger from other screens, the system uses the product information from those screens.

2. In the **Desc** field, enter the product for which to review activity.
3. Limit the information displayed in the following fields, as needed:

Field	Description
As of Date	Date as of which to view transactions for the selected product. Either arrow up to the field or use the **Date** hot key to change the value in this field. Leave the field blank to include all transactions through the current date.
Br	Branch for which to view transactions for the selected product. Either arrow up to the field or use the **Br** hot key to change the value in this field. If you access this screen from the menu, the system displays the information for your home branch.

Field	Description
Status	Transaction type to display. Use the **Show** hot key and select one of the following statuses to which to limit the display: • **All** – Displays all transactions for the product. • **Sales** – Displays all sales orders for the product. • **Purchases** – Displays all P/Os for the product. • **Transfers** – Displays all transfers for the product. • **Adjustments** – Displays all inventory adjustments for the product. • **Work Orders** – Displays all work orders for the product. • **Open Serial** – Displays all serialized transactions for the product • **Rentals** – Displays all rental transactions for the product.
Entity	Customer, vendor, branch, or territory for which to display transactions. Arrow up to this field to enter a value.

4. Review the following product availability information for the product at the selected branch:

Field	Description
On Hand	Total amount on hand both in stock and tagged to orders.
Commtd	Total amount committed to sales or transfer orders both in stock and tagged to orders.
In P/O	Total amount being purchased both in stock and tagged to orders.
In Xfer	Total amount being transferred from other branches both in stock and tagged to orders.
In Proc	Total amount being picked or received both in stock and tagged to orders.
In Work	Total amount scheduled for work order processing both in stock and tagged to orders.

5. Review the following inventory history information for the product:

Note: Use the **Chng View** hot key to change the screen view. You must be assigned the TO.PRICE.VIEW authorization key to view any price, cost, or COGS fields.

Column	Description
Reference	Transaction number.
PostDate	Transaction's posting date.
Type	Product location quantity type for the item on the transaction. If you have the OE.PRODUCT.TYPE.EDIT authorization key, you can change a transaction from **Stock** to **Except** to indicate that it is an exceptional sale and should be excluded from the demand forecast calculation. Otherwise, the value in this column is view only.

Column	Description
In	Incoming quantity of product on that transaction. **Note:** When **In** and **Out** quantities display in the same column, in quantities are positive.
Out	Outgoing quantity of product on that transaction. **Note:** When **In** and **Out** quantities display in the same column, out quantities are negative.
On Hand	Quantity of the product on hand. When multiple units of measure are defined in Product Maintenance, both the Inventory History Ledger screen and report use the unit of measure set for inventory counts (**I**).
Customer / Vendor	Customer or vendor associated with the transaction, or other information that defines the transaction, such as **Xfer** for transfers or **** Location Adju** for location adjustments.
Unit Prc/	Unit price for the default unit of measure defined for inventory. This column displays the same overrides that display in Sales Order Entry, as follows: • + – Unit price determined by a matrix cell tied to a contract customer. • ! – Unit price determined by a customer-specific matrix cell or a system override. • * – The original price on the sales order for the item was determined by a matrix cell tied to a contract customer, customer-specific matrix cell, or system override, but was then subject to a manual override on the sales order.
Unit COGS	Unit cost of goods sold (COGS) for the default unit of measure defined for inventory. This column displays the same overrides that display in Sales Order Entry, as follows: • + – COGS cost determined by a matrix cell tied to a contract customer. • ! – COGS cost determined by a customer-specific matrix cell or a system override. **Note:** If the original COGS on the sales order for the item was determined by a matrix cell tied to a contract customer, customer-specific matrix cell, or system override, but was then subject to a manual override on the sales order, an asterisk (*****) displays.
GP%	Gross profit percentage calculated for the item.

Column	Description
Unit Cost	Unit cost for the default unit of measure defined for inventory. This column displays the same overrides that display in Sales Order Entry, as follows: • **+** – Unit cost determined by a matrix cell tied to a contract customer. • **!** – Unit cost determined by a customer-specific matrix cell or a system override. **Note:** If the original unit cost on the sales order for the item was determined by a matrix cell tied to a contract customer, customer-specific matrix cell, or system override, but was then subject to a manual override on the sales order, an asterisk (*) displays.
Location	Product stocking location. You cannot update the location for a direct order.
Serial Ct	Number of units assigned a serial number for the transaction.
Customer PO	Customer's purchase order number.
Country Manufactured	Country where the item was manufactured.
Lead Time	Adjusted lead time for the item.

6. Press **Esc** to exit the screen.

More Options from the Inventory History Ledger Screen

The Inventory History Ledger screen also offers these options:

Hot key	Function
View	Displays the selected transaction in view-only mode.
Locations	Displays the Product Location Maintenance screen for the product. Use this screen to view multiple product stocking locations.
Future Ldgr	Displays the Future Ledger screen for the product. Use this screen to view projected product availability.
Inven Inq	Displays the Inventory Inquiry screen for the product. Use this screen to view product availability and inventory information.
Print	Displays the Inventory History Ledger Printing screen. Use this screen to print the Inventory History Ledger to a printer or to your Hold file. You can define the branch, date range, and customer for which to print a report. **Note:** To print the ledger for all customers, leave the **Customer** field on the Inventory History Ledger Printing screen blank.
Sales Hist	Displays the Product Sales History screen for the product. Use this screen to compare transaction quantities or dollar amounts.
Log	Displays the Product Activity Log Viewing screen for the product. Use this screen to view product activity.

Hot key	Function
Xref	Displays any cross-reference links for the product to related information on Web sites. Select the link to open it in your default Web browser.
Ser# Entry	Displays the Serial Number Entry screen for the product. Use this screen to view or edit serial numbers.
P/O Srch	Displays the Customer P/O prompt. Use this prompt to display only those transactions entered against a specific customer P/O. Enter the customer P/O and press **Esc** to display the specific transactions.
Edit Loc	Displays the Edit Location screen. Use this screen to edit the location type and location for the selected transaction. • In the **Typ** field, edit the location type. • In the **Location** field, edit the location. • Press **Esc** to save changes and exit the dialog box.
Lot Desc	Displays the Search Material Detail For screen. Use this screen to search for lot billing items.
CostQ	Displays the Branch Costs Inquiry screen. Use this screen to view branch cost updates and related cost and quantity data for the product within a branch.

See Also:

Inventory Inquiries Overview

Using the Customer Inventory History Ledger

Use the Customer Inventory History Ledger to list every product that a customer purchased as of a given date for one or more branches.

In addition, use the ledger to look for and manage *exceptional* sales. These are the unusual sales, such as when a customer buys 100 of a product for a special job instead of their normal order of 12. Exclude such sales from the product demand calculations used for inventory forecasting by changing the order type to Except in the ledger.

To use the Customer Inventory History Ledger:

1. From the **Orders > Inquiries** menu, select **Customer Inventory History Ledger**.

   Note: When accessing the Customer Inventory History Ledger from other screens, the system uses the customer information from those screens.

2. In the **Customer** field, enter the customer for whom to view activity.
3. In the **Br** field, enter the branch in which to view customer activity, or enter **All** to view activity in all branches.
4. In the **As Of Date** field, enter the date up to which to view customer activity.
5. Review the following information:

Column	Description
Reference	Transaction number.
Ship Date	Date the product shipped.
Type	Stock location type. If needed, change the type from **Stock** to **Except**. **Note:** You can only edit this field if the type is **Stock** or **Except**.
Qty	Quantity purchased.
Br	Branch from which the customer requested the product.
Product Description	Description of the product purchased.

6. Press **Esc** to exit the screen.

More Options from the Customer Inventory History Ledger Screen

The Customer Inventory History Ledger screen also offers these options:

Hot key	Function
View	Displays the selected transaction in view-only mode.
Edit	Displays the selected transaction for editing.
Future Ledger	Displays the Future Ledger screen for the selected product. Use this screen to view product availability projections for a selected product.

Hot key	Function
Inv Inq	Displays the Inventory Inquiry screen for the selected product. Use this screen to view actual availability and other inventory information for a selected product.
Cust Inv Hist (Alt-C)	Displays the Inventory History Ledger for the selected product *and* this customer. Use this screen to view the inventory history of a selected product and customer.
Inv Hist (Alt-H)	Displays the Inventory History Ledger for the selected product. Use this screen to view the inventory history of a selected product.
Xref	Displays any cross-reference links for the product to related information on Web sites. Select a link to open it in your default Web browser.
Select	Displays the Select Pattern prompt. Use this prompt to limit the number of transactions that display.

See Also:

Inventory Inquiries Overview

Using the Future Ledger

Use the Future Ledger to view the inventory forecasts for a product within a selected branch.

The ledger lists all the branch's transactions affecting the product's availability and calculates inventory projections based on the ship dates and status of existing orders. It forecasts open and future purchase orders by considering normal order cycle and lead time for the product line, as well as the last time a line buy was made.

Use the ledger's inventory forecasts to decide how to commit inventory. From the ledger, you can drill down into orders to change order status, procure inventory for the order, or make stock available for another order.

For example:

If you need product to fill an immediate order, you can take the product from other future orders that you viewed in the ledger.

To use the Future Ledger:

1. Position your cursor on the product for which to view inventory status and use the **Future Ledger** hot key from one of the following to display the Future Ledger screen:
   - A product screen.
   - An inquiry menu.

   The system populates the **Product Description** and **Branch #** fields with the information displayed on the screen from which the Future Ledger was accessed.
2. Review the following product availability information for the product at the selected branch:

Field	Description
On Hand	Total amount on hand both in stock and tagged to orders.
Commtd	Total amount committed to sales or transfer orders both in stock and tagged to orders.
In P/O	Total amount being purchased both in stock and tagged to orders.
In Xfer	Total amount being transferred from other branches both in stock and tagged to orders.
In Work	Total amount scheduled for work order processing both in stock and tagged to orders.

3. Review additional stock commitments for the product at the selected branch:

Field	Description
Inpr	Total amount being picked or received
NCmt	Total amount committed on transactions in a multi-branch network if the displayed branch is a parent-branch.

Field	Description
Revw	Total amount that has been or is going to be returned as defective or over-shipments, that has been separated for review, and that is included in a direct shipment.
Bid	Total amount included on bids.

4. Review the ledger listing:

Column	Displays
Order #	Transactions on which the product exists. Use the **Up Arrow**, **Down Arrow** or **Enter** key to select a transaction to examine. Use the **View Ord** hot key to view the transaction.
S	Transaction's order status.
Date	Date of the transaction.
Type	Product location quantity type code for the product on the transaction.
In	Amount of the item coming into the branch on the transaction.
Out	Amount of the item leaving the branch on the transaction.
Avail	Amount available for the product once the transaction occurs. Use the **Chng View** hot key to toggle between this column and the **Customer P/O** column.
Customer P/O	Customer P/O number assigned to the transaction. Use the **Chng View** hot key to toggle between this column and the **Avail** column.
Customer/Vendor	Customer or vendor associated with the transaction.

5. Press **Esc** to exit the screen.

More Options from the Future Ledger Screen

The Future Ledger screen also offers these options:

Hot key	Function
Show Only	Displays the Sales Types list. Use this list to select the type of transactions to review. Within each transaction type, you can select a stock type subgroup to review. For example: Selecting **Sales** enables you to limit your view further to **Directs** or **Over Shipments**.
Loc	Displays the Product Location Maintenance screen. Use this screen to view the product's stocking locations.
Chng Br	Repositions the cursor in the **Branch #** field so you can select another branch for inquiry.
Inv Inq	Displays the Inventory Inquiry screen. Use this screen to review product availability and other inventory information.

Hot key	Function
Hist Ldgr	Displays the Inventory History Ledger screen. Use this screen to view the transaction history for the product.
Log	Displays the Product Activity Log Viewing screen for the product. Use this screen to view product activity.

See Also:

Committing Inventory to Sales Orders

Inventory Inquiries Overview

Using Product Sales History

Use Product Sales History to compare a product's transaction history at one branch. The utility displays a month-to-month comparison for two consecutive years of the product's transactions.

You can view a product's history for sales orders, purchase orders, transfers, work orders, or rentals depending on the location from which you access the utility and the information you select to view.

There are two types of Product Sales History utilities within the system:

- Detail Product Sales History – Compares both the quantities and dollar amounts associated with a product's transactions.
- Summary Product Sales History – Compares the quantities associated with the product's transactions.

To use the detailed Product Sales History screen:

1. Position your cursor on a product and use a version of the **Sales History** hot key located on a parent screen to display the detailed Product Sales History screen.

   Note: The screen name changes based on the information being reviewed.

   The system populates the following fields with the selected product's information from the parent screen:

Field	Description
Br#	Branch for which you are viewing the product's history.
Desc	Product for which you are viewing history.
UM	Unit of measure for which you are viewing the product's history. The unit of measure that displays matches the selected transaction. For example: Selecting **Sales Quantities** displays the default unit of measure for sales orders.

2. Use the **Mode** hot key to select one of the following types of transaction quantities or dollar amounts to view.

Mode	Description
Sales Quantities	Product's sales quantity history. **Note:** The Include All Location Types In Product Sales History control maintenance record determines whether all product location types display.
Purchase Quantities	Product's purchase quantity history.
Transfer Quantities	Product's transfer quantity history.

Mode	Description
Work Order Quantities	Product's work order quantity history.
Rental Quantities	Product's rental quantity history.
Sales Dollars	Product's sales dollar history. The system also displays gross profit percent. **Note:** The Include All Location Types In Product Sales History control maintenance record determines whether all product location types display.
Purchase Dollars	Product's purchase dollar history. **Note:** You must have the COST.VIEW and COGS.VIEW authorization keys to access the **Purchase Dollars** option.
Transfer Dollars	Product's transfer dollar history. **Note:** You must have the COST.VIEW and COGS.VIEW authorization keys to access the **Transfer Dollars** option.
Work Order Dollars	Product's work order dollar history.
Rental Dollars	Product's rental dollar history.

3. Review the following information:

Column/Field	Description
Month	Each month of the year for the comparisons.
Year 1	First year's quantity or dollar amount being compared.
GP% 1	For dollar comparison's, first year's gross profit percentages being compared.
Year 2	Second year's quantity or dollar amount being compared.
GP% 2	For dollar comparison's, second year's gross profit percentages being compared.
Diff%	Percentage difference between the two years.
YTD	Year to date totals for each column.

Note: Use the **< Change Year >** hot keys to display to the previous or next year, respectively.

4. Press **Esc** to exit screen.

To use the summary Product Sales History screen:

1. Position your cursor on a product and use a version of the **Sales History** hot key located on a parent screen to display the summary Product Sales History screen.

   Note: You can use the **Sales Hist On** hot key to display the screen for each product as you scroll through the list.

The system populates the following fields with the selected product's information from the parent screen:

Field	Description
Br#	Branch for which you are viewing the product's history.
Desc	Product for which you are viewing history.

2. Review the following information:

Column/Field	Description
Months	Each month of the previous and current year for the comparisons.
LY	Previous year's quantities.
TY	Current year's quantities.
Last Purch Date	Most recent date product was purchased.
Last Purch Qty	Most recent amount in which the product was purchased.
UM	Unit of measure in which the product was last purchased.

3. Press **Esc** to exit the screen.

See Also:

Inventory Inquiries Overview

Using Product and Quantity Selection

Use Product and Quantity Selection to review all the products in a product family, price line, or buy line. In addition, use the utility to do the following:

- Review product quantity available at a branch if the utility was accessed from a screen with a branch already defined.
- Review product quantity committed to a purchase order (P/O) if the utility was accessed from a screen associated with a P/O.
- Select amounts of products to place onto P/Os or other screens from which the utility was accessed.

Access Product and Quantity Selection from Purchase Order Entry or from other product maintenance screens, such as Product Kit Maintenance, when you enter a product family, price line, or buy line. You cannot access the utility from a menu.

To use Product and Quantity Selection:

1. Display the parent screen from which to access the Product and Quantity Selection utility.
2. Do one of the following to display the Product and Quantity Selection screen for a product family, price line, or buy line:

To display the screen for a...	In the Product Description field, enter...
product family or price line	one of the following: • / to list all product families and price lines available. Select the product family or price line. • / followed by the product family or price line.
buy line	one of the following: • // to list all available buy lines. Select the buy line. • // followed by the buy line ID.

3. Review the following information on the screen:

Column	Description
Product Description	Each product within the product family, price line, or buy line.
Avail Qty	Quantity available for the product at the branch displayed on the parent screen from which this screen was accessed. **Note:** When the parent screen does not have a branch displayed, the available quantity is not displayed.
On P/O	Amount of product already committed on the P/O from which this screen was accessed. **Note:** When the parent screen is not tied to a P/O, the committed quantity is not displayed.

4. In the **Order Qty** field, enter the amount of the product to select and place on the parent screen.

   For items you do not want to select, leave the **Order Qty** field blank.

5. Press **Esc** to copy the selected products and quantities to the parent screen.

More Options from the Product and Quantity Selection Screen

The Product and Quantity Selection screen also offers these options:

Hot Key	Description
Sales Hist	Displays the summary Product Sales History screen for the selected product. Use this screen to compare a product's transaction history at one branch. **Note:** When accessing this screen from a screen where the branch is not identified, the Product Sales History screen does not display data.
Sales Hist : Off (On)	Toggles between displaying the summary Product Sales History screen for each product as you scroll through the list, or not displaying the screen.
History Ledger	Displays the Inventory History Ledger screen for the selected product. Use this screen to review the following transactions for a product in and out of inventory at the specified branch
Future Ledger	Displays the Future Ledger screen for the selected product. Use this screen to view the inventory forecasts for a product within a selected branch.
Inv Inq	Displays the Inventory Inquiry screen for the selected product. Use this screen to review product availability and inventory information.

See Also:

Inventory Inquiries Overview

Index