

ORDER POWER!

Continuities

User Guide

Release 4.0.2



**Computer
Solutions,
Inc.**

Since 1978

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ORDER POWER! Continuities

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Continuity Items

Continuity orders refer to an order for a finite series of **Items**; the series has a defined first shipment, final shipment, and interim shipments. Frequently, different **Items** are released with each shipment. Continuity orders continue until the entire order is complete or canceled by the customer.

The sequence in which the component items are shipped depends on how you set up the continuity parent **Item** in the Item Master File:

- The starting item in the series can be defined as the first item in the continuity component sequence (“start first”)
- or -
- The component item currently being shipped to all customers who ordered the same continuity item (“start current”). In this case, no matter which component item was shipped first, all customers ordering the same continuity parent item will receive the same components.

For example, a customer may place an order for a series of home repair books, CN1200, containing six volumes. Volume One of the set is sent in the first shipment, Volume Two, in the next shipment, etc. In this example, the items are shipped in item entry sequence. Another example of a continuity item would be a "Fruit of the Month" Club that ships a different type of fruit to the customer each month. This type of continuity would be set up in current item sequence as fruit is generally seasonal. Therefore, all customers receiving shipments in January will receive pears, oranges in February, strawberries in March, regardless of when they ordered the **Continuity**.

Setting Up a Continuity Item (parent)

In **ORDER POWER!**, a **Continuity Item** is defined as parent Item, to which you add various component **Items**. Please refer to the “ORDER POWER! Item Maintenance Users Guide” if you are not already familiar with the basic **Item Maintenance** processes.

1. Begin creation of the **Continuity Parent Item** as you would any **Item** in **ORDER POWER!**.

```

OP! 4.0 DEVELOPMENT * CO# 001
Item Update

Item          CN1200
Description   Home Repairman Book Series
Search Words
Start Date    _____ End Date _____      Creation Date 2/13/00
?Primary Vendor _____ ?Style _____
Stock N ?Stock UOM EA *S 1.000 EA
Salable Y ?Sales UOM EA *S 1.000 EA
              ?Purchase UOM EA *S 1.000 EA
Manufactured N Drop Ship N
Phase Out N Phase Out Date _____
Royalty Item N ?Royalty Vendor _____ Royalty .00 A/P
Kit Parent Item N List Components on Documents N On Invoice N
Assortment Item N Allow Partial Ship Y Cost to Kit _____
Continuity Item Y Serial/Lot/Gift Certificate S/L/G
Gift Certificate: Face Value _____ Fixed N Y/N
?Superseding Item _____
Check Superseding Available N
?Supersede Comment Code _____ Delete _
F1=Help F3=Exit F4=?List F6=Ext Desc F9=Retrieve F12=Cancel
F14=Hist F15=Qty Avail F16=Open POS F22=Audit F23=User F24=More

```

Item Update panel 1 (figure 1)

2. On *Continuity Item Header Update panel (figure 2)*, you must complete these fields as follows:

Stock
Type N(o).

Continuity Item
Type Y(es).

Allow Partial Ship
Type Y(es).

3. Complete all other item fields and pricing as necessary, then press **Enter** to display *Continuity Item Header Update panel (figure 2)*.

```

OP! 4.0 DEVELOPMENT * CO# 001
Continuity Item Header Update

Continuity Item  CN1200
                  Home Repairman Book Series

Starting Item in Series  C      (F-First, C-Current)

Allow Order Types:      (Y/N)
Type 1..... Y
Type 2..... Y
Type 3..... Y

Allow More Than One
to be Ordered at a Time  Y

Delete _
F1=Help F3=Exit F10=Components F12=Cancel F20=Renumbr F21=Print

```

Continuity Item Header Update panel (figure 2)

2. Complete these fields:

Starting Item in Series

Type a code to indicate how you want to set up the shipment sequence of the component items.

F(irst) Shipments begin with the first item listed in the **Continuity Component Item Entry Sequence**. (Read about the **Sequence Number** field on page 5.) This type of continuity will always ship out in the same sequence to all customers, no matter when, during the year, the **Item** was ordered. For example, in the Home Repair Projects Book Series, all customers will receive the same six books beginning with Roof Repair & Maintenance and ending with Landscaping & Gardening.

C(urrent) Shipments begin with the item currently being shipped to all customers who have ordered this continuity item. This type of continuity does not ship out in the same sequence to all customers, however, every customer will have received the same items by the time the continuity has completed all shipments.

An example of a current item sequence shipping would be a “Fruit of the Month” Club that ships a different type of fruit to the customer depending on the month. Therefore, all customers receiving shipments might get pears in January, oranges in February, strawberries in March, etc. Therefore the initial continuity order shipment would differ from customer to customer depending on when the order placed.

Allow Order Types

Type **Y**(es) or **N**(o) to indicate which type of **Tender** can be used to pay for the continuity order. For example, you may wish to require a **Type 1 Tender** in order to receive full payment at order time rather than a **Type 2 Tender** which charges for each **Item** as it ships.

Allow More Than One to be Ordered at a Time

This field defines whether the customer is permitted to order multiple quantities of the same continuity item. This is used to separate multiple continuity programs during the shipping process.

3. Press **F10** (Components) to display *Continuity Item Detail Inquiry window* (figure 3).

OP! 4.0 DEVELOPMENT * CO# 001

CN1200	Continuity Item Detail Inquiry	Show Del: <u>N</u>
Pstn : ___		
2=Change 5=Display		
Seq	Item	Description
-	010 1201	Roof Repair & Maintenance
-	020 1202	Carpeting & Tiling
-	030 1203	Home Electrician
-	040 1204	Car Repair
-	050 1205	Room Additions
-	060 1206	Landscaping & Gardening
-		Del
F1=Help F3=Exit F6=Create/Change F7=Bkwd F8=Fwd F10=Top		Bottom
F12=Cancel F18=Bottom F20=Renumbr F21=Print		

Continuity Item Detail Inquiry window (figure 3)

Setting up the Continuity Components

These actions are available, in addition to the standard **ORDER POWER!** functions:

Action	Description
2=Change	Display <i>Continuity Group Item Update panel for F-type Continuities (figure 5)</i> or <i>Continuity Group Item Update panel for C-type Continuities (figure 6)</i> to work with a Continuity Component
5=Display	Display the either the <i>Continuity Item Component Display window</i> similar to <i>Continuity Group Item Update panel for F-type Continuities (figure 5)</i> or <i>Continuity Group Item Update panel for C-type Continuities (figure 6)</i> to view the Continuity Component setup.
F11=Fold	Toggle to display or hide the quantity to ship and ship date requirements defined for each Continuity Component
F20=Renumbr	Reassign Sequence Numbers , incremented by ten
F6=Create	Display the <i>Continuity Group Item Prompt panel (figure 4)</i> to create a new Continuity Component

To create a new Continuity Component

1. On the *Continuity Item Detail Inquiry window (figure 3)*, press **F6** (Create) to display the *Continuity Group Item Prompt panel (figure 4)*.

OP! 4.0 DEVELOPMENT * CO# 001 Continuity Group Item Prompt
Continuity # CN1200 Home Repairman Book Series
Sequence Number _____
F1=Help F3=Exit F12=Cancel

Continuity Group Item Prompt panel (figure 4)

1a. Complete this field:

Sequence Number

Type a Sequence number for **ORDER POWER!** to use to position the **Item** within list for display purposes and to arrange the components for shipment when shipping by item entry or "start first" sequence. The sequence number can be used to insert a new item between two existing items, or to move an existing item to a different position on the list.

1b. Press **Enter**.

- If you set up the **Starting Item in Series** as **F**(irst) on the *Continuity Item Header Update panel (figure 2)*, **ORDER POWER!** displays the *Continuity Group Item Update panel for F-type Continuities (figure 5)*.
- If you set up the **Starting Item in Series** as **C**(urrent) on the *Continuity Item Header Update panel (figure 2)*, **ORDER POWER!** displays the *Continuity Group Item Update panel for C-type Continuities (figure 6)*.

To change Continuity Components

1. On the *Continuity Item Detail Inquiry window (figure 3)*, type **2** (Change), beside the **Continuity Component** you want to work with, then press **Enter**.
 - If you set up the **Starting Item in Series** as **F**(irst) on the *Continuity Item Header Update panel (figure 2)*, **ORDER POWER!** displays the *Continuity Group Item Update panel for F-type Continuities (figure 5)*.
 - If you set up the **Starting Item in Series** as **C**(urrent) on the *Continuity Item Header Update panel (figure 2)*, **ORDER POWER!** displays the *Continuity Group Item Update panel for C-type Continuities (figure 6)*.

The **Shipment Intervals** portion of the Continuity Group Item Update panel differs depending on whether the continuity parent item is set up to ship by item entry sequence ("Start First") or by current item sequence ("Start Current"). The remaining fields have the same requirements on both panels.

OP! 4.0 DEVELOPMENT * CO# 001
Continuity Group Item Update

Continuity # CN1200
Home Repairman Book Series

Sequence Number
010

?Component Item to Ship 1201
Roof Repair & Maintenance

Override Description _____
Selling Quantity 1.000
Sales Adjustment Percentage 16.00

Shipment Intervals:
Fixed Month/Day for Shipment 4 / 15 (Month/Day)

Order Dates for this Item to ship first:
Earliest Date 1 / 1 (Month/Day)
Latest Date 1 / 31 (Month/Day)

Delete _

F1=Help F3=Exit F4=?List F12=Cancel

Continuity Group Item Update panel for F-type Continuities (figure 5)

OP! 4.0 DEVELOPMENT * CO# 001
Continuity Group Item Update

Continuity # PetAMonth
Continuity

Sequence Number
013

?Component Item to Ship 1202
Carpeting & Tiling

Override Description _____
Selling Quantity 1.000
Sales Adjustment Percentage 16.00

Shipment Intervals:
Days From Prior Shipment 30
OR Months from Prior Shipment on Fixed Day of the Month
OR Fixed Month/Day for Shipment / (Month/Day)

Delete _

F1=Help F3=Exit F4=?List F12=Cancel

Continuity Group Item Update panel for C-type Continuities (figure 6)

2. Complete these fields:

Component Item to Ship

Type a user-defined code for an existing **ORDER POWER!** item that you want to use as a component of this **Continuity Item**.

Override Description

Type a new description that you want to assign to this **Item** to replace the Item's master description on the *Review Continuity Item panel (figure 7)* during **Order Entry**. Otherwise, the master description appears during **Order Entry**.

Selling Qty

Type a number that indicates the quantity of units of this **Component Item** to be shipped.

Sales Adjustment Percentage

Type the percentage of the sale that corresponds to this **Component Item**. **ORDER POWER!** uses this to calculate invoicing when a component of the **Continuity Item** is shipped.

The proration applies to the item price, shipping and handling, discount, taxes, and miscellaneous charges. The combined sales adjustment percentage must total 100% for all components.

For example, in the Home Repair Projects Book Series, sales adjustment percentages are assigned as follows: Roof Repair & Maintenance and Carpeting & Tiling are both set to 16%, while the remaining four books are each set to 17%. If the continuity parent item (CN1200) has a shipping charge of \$10.00, the shipping charges for each book would be prorated as follows:

Component Item	Sales Adj %	Prorated Charge
Roof Repair & Maintenance	16%	1.60
Carpeting & Tiling	16%	1.60
Home Electrician	17%	1.70
Car Repair	17%	1.70
Room Additions	17%	1.70
Landscaping & Gardening	17%	1.70
		10.00

3a. For F-type **Continuity Items**, complete ONE of the following **Shipment Intervals**:

Days From Prior Shipment

Type the number of days must elapse before the next installment component is sent. A zero in this field defines the component for immediate shipment. Usually, the initial item for shipment in a “Start First” continuity is set up with a zero in this field. All subsequent items can be set up in a variety of ways (such as days from prior shipment, months from prior shipment, or fixed month/day for shipment). You can also enter zero to “load up” several **Items** to ship immediately.

Months from Prior Shipment / on Fixed Day of the Month

These two fields define the shipment interval between the previous shipment and the shipment of the current component in number of months. For example, if the next book in the series was to ship out 2 months from the previous book, on the 15th of the month, the shipment interval fields would be entered as follows:

Shipment Intervals: Days From Prior Shipment _____ OR Months from Prior Shipment <u> 2 </u> on Fixed Day of the Month <u> 15 </u> OR Fixed Month/Day for Shipment <u> </u> / <u> </u> (Month/Day)

Fixed Month/Day for Shipment

Type a specific date (month and day) the **Component Item** should ship to the customer.

3b. For C-type **Continuity Items**, complete following **Shipment Intervals**:

Fixed Month/Day for Shipment

Type a specific date (month and day) the **Component Item** should ship to the customer.

Order Dates for this Item to ship first: Earliest/Latest Date

Type a range of order dates that will cause a **Component Item** to ship first.

For example, the selection date ranges for each book (component) in the Home Repair Projects Book Series, CN1200, are defined in the following table. If the continuity item was ordered on March 15, 2002, the first item to ship would be item 1203, Home Electrician. The remaining items would ship according to sequence number: 1204, 1205, 1206, 1201, and 1202. Note, when the last item in the sequence, 1206, the system wraps around to the beginning of the list to ship the remaining items.

ITEM and Description	Seq #	Date Range for this Item to ship first	
		Earliest Date	Latest Date
1201 Roof Repair & Maintenance	10	10/20	12/19
1202 Carpeting & Tiling	20	12/20	2/19
1203 Home Electrician	30	2/20	4/19
1204 Car Repair	40	4/20	6/19
1205 Room Additions	50	6/20	8/19
1206 Landscaping & Gardening	60	8/20	10/19

To display Continuity Components

1. On the *Continuity Item Detail Inquiry window (figure 3)*, type **5** (Display) beside the **Continuity Component** you want to see, then press **Enter** to display either the *Continuity Item Component Display window* similar to *Continuity Group Item Update panel for F-type Continuities (figure 5)* or *Continuity Group Item Update panel for C-type Continuities (figure 6)*.

To Renumber Sequence numbers

Press **F20** (Renumber) to reassign **Sequence Numbers**, incremented by ten. This allows additional component items to be added to the list and inserted between existing items. See the following example of resequencing.

Old Seq#	Item
010	1201 Roof Repair & Maintenance
020	1202 Carpeting & Tiling
030	1203 Home Electrician
040	1204 Car Repair
021	1205 Room Additions
060	1206 Landscaping & Gardening

Before resequencing

New Seq#	Item
010	1201 Roof Repair & Maintenance
020	1202 Carpeting & Tiling
030	1205 Room Additions
040	1203 Home Electrician
050	1204 Car Repair
060	1206 Landscaping & Gardening

After resequencing

To complete the Continuity Item setup

When **ORDER POWER!** displays the *Item Quantities Prompt panel*, be sure to create a warehouse record for the **Continuity Parent Item** so that it can be sold from the warehouse.

To complete the **Continuity Item** definition, all of the **Component Items** must be set up using the panels described above. When setting up a “start current” continuity, you must enter the date ranges for the **Component Items** in ascending chronological order from starting to ending component sequence number.

Continuity Item Selection in Order Entry

Once you have defined the **Continuity Item**, the continuity can be ordered during Order Entry. After entering the continuity parent item number and quantity, you can review the items to ship as part of the continuity on the *Order Entry Item Selection* panel by pressing **F23** (Review) to display *Review Continuity Item* panel (figure 7).

```

OP! 4.0 DEVELOPMENT * CO# 001
Order #      118099      Order Entry Item Selection      Limit
Customer #   9473                               Used      38.50
CSI'S FAVORITE CUSTOMER                          Mdse

----- Selected Items -----
2=Change 4=Delete 5=Pricing 6=Extended Description 7=Line Item Notes
8=View Personalization 9=Line Additional Information 10=Kit
Quantity  Item      Description      Price  U/M
-----  -
1.000  CN1200    Home Repairman Book Series      EA
1.000  1203      Home Electrician                EA
1.000  1204      Car Repair                      EA
1.000  1205      Room Additions                  EA
1.000  1206      Landscaping & Gardening         EA
1.000  1201      Roof Repair & Maintenance       EA
1.000  1202      Carpeting & Tiling              EA
-----
Bottom
----- Select Item -----
?Item / Search words      Quantity      ?Price      N/C ?Ship To ?Via ?Whs Shp.Date
N                9473 UPS    MIA  3/15/02
F1=Help  F3=Exit  F7=Bkwd  F8=Fwd  F12=Cancel  F13=Header  F14=Cust Notes
F15=Orders  F16=Cust Info  F17=AR    F18=Header Notes
F20=Totals  F21=Fold    F22=Delete  F23=Entry
  
```

Review Continuity Item panel (figure 7)

Once the continuity is in the order, the selected components cannot be changed. Only parent level information can be modified, such as the price, quantities, or the ship to customer number.

To view shipping dates for individual components

On the *Review Continuity Item* panel (figure 7), type **9** (Line Additional Information) to display *Item Select Additional Information* window (figure 8).

```

OP! 4.0 DEVELOPMENT * CO# 001
Order #      118582      Order Entry Item Selection      Limit
Customer #   9473                               Used      38.50

-- Item Select Additional Information

Ship to      9473 CSI'S FAVORITE CUSTOMER      Contact
Ship Via     UPS
Item Description  Car Repair
Shipping Inst
Req Ship Date  4/15/02
Qty Committed
Drop Ship     N Y/N      Personalized  N Y/N
Pick Ticket Code  GCP
Override Cost
Commission Bonus  33.0000    Unit Weight
Commission %     12.0000
Coordinate Line #  2      - Reason Codes --
Return Code
ack.no         REASONDTL1
Cat/SubCat     REASONDTL2
Frnt Class     REASONDTL3

F1=Help  F3=Exit  F12=Cancel
  
```

Item Select Additional Information window (figure 8)