

ORDER POWER!

Inventory

User Guide
Release 3.3



January 17, 2005

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ORDER POWER!

Version 3.3

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***ORDER POWER!* User Guide**

Inventory Control User Guide Version 3.3

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Inventory Control

Inventory Control or Warehouse Management dynamically tracks all inventory quantities: quantities on hand, quantities on customer order, quantities on pick tickets, quantities committed to customer orders, quantities on vendor purchase orders, total available quantities, quantities available to commit, etc. Therefore, current and projected product availability can be viewed at any given time. Operators can advise customers accordingly and purchasing personnel can make informed buying decisions.

ORDER POWER! supports a multiple company environment. Each company can run independently or the inventory can be shared by two or more companies. General Ledger accounts are defined separately for each company; therefore, inventory effect on the General Ledger accounts will be specific to each company.

Optionally, inventory can be stored in multiple warehouses. Each warehouse can administer different functions; for example, a warehouse may be used to house shippable or damaged merchandise or be used to enforce quality assurance. Items can be stored in multiple warehouses and/or locations within a single warehouse.

Inventory transactions typical of all distributors, such as shipments and purchase order receipts, are supported by **ORDER POWER!** Inventory transactions unique to a company can be defined and supported by **ORDER POWER!** Inventory can be automatically or manually committed and/or allocated. Comprehensive reporting and online display screens assist in the inventory allocation decision making process.

ORDER POWER! builds a history of all inventory transactions which can be maintained online as long as required. This history file contains a diverse base of data essential for management information and analysis. From the inventory database, **ORDER POWER!** can produce an extensive number of online queries as well as standard reports. Some of the available reports include Inventory History, Inventory Movement, Item Schedule Projected, Over Committed Inventory, and Suggested Inventory Transfers.

From the **ORDER POWER! Main Menu**, select **Accounts Receivable** to display **ORDER POWER!'s Inventory Control menus (figures 1 - 3)**.

INV01	--C. S. I. Development 3.3--	7/26/99
JEN	ORDER POWER! Inventory Control	DSP101S1

Select one of the following menus :

Physical Inventory:

1. Capture Current Inventory Position
2. Generate Physical Count Sheets
3. Enter Physical Count
4. Physical Count Edit Listing
5. Generate Physical Recount Sheets
6. Physical vs. Book Report
7. Post Adjustments from Physical Count

Inventory Transaction:

8. Enter Inventory Transactions
9. Inventory Transaction Edit Listing
10. Post Inventory Transactions

More...

Select ion
====>

F1=Help F3=Exit F9=Command Line F12=Cancel
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ORDER POWER! Inventory Control panel 1 (figure 1)

INV01	--C. S. I. Development 3.3--	7/26/99
JEN	ORDER POWER! Inventory Control	DSP101S1

Select one of the following menus :

11. Inventory Value Report
12. Inventory Status Report
13. Inventory Status Inquiry
14. Item Schedule Projected Report
15. Overcommitted Inventory Report
16. Inventory History Report
17. Inventory Movement Report
18. Item Summary Inquiry
19. Suggested Inventory Transfers
20. Free Form Barcode Labels
21. Move Item Preferred Location
22. Generate Style Items
23. Post Style Items

More...

Select ion
====>

F1=Help F3=Exit F9=Command Line F12=Cancel
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ORDER POWER! Inventory Control panel 2 (figure 2)

INV01 JEN	--C. S. I. Development 3.3-- ORDER POWER! Inventory Control	7/26/99 DSP101S1
Select one of the following menus :		
24. Empty Locations Report		
51. AS/400 Operational Assistant		
80. Main Menu		
81. Change Company		
90. Signoff		
		Bottom
Select ion ====>		
F1=Help F3=Exit F9=Command Line F12=Cancel		
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ORDER POWER! Inventory Control panel 3 (figure 3)

Performing a physical inventory

ORDER POWER! also assists in the physical inventory count process by capturing current system counts, producing counts sheets, establishing count cycles uniquely for each item, adjusting inventory counts, and creating reports. We recommend you carry out these steps, in order.

Steps to take a physical inventory of a warehouse		
1. Freeze the inventory data at a certain level		<i>see page 4</i>
2. Print hard copies of the count sheets to be used in the warehouse		<i>see page 8</i>
3. Count the inventory in the warehouse and record it on the physical count sheets		<i>see page</i>
4. Enter the physical count into the system		<i>see page 11</i>
5. Compare the computer vs. physical counts		<i>see page 15</i>
6. Reprint count sheets for only those items with discrepancies		<i>see page 17</i>
7. Double check your original physical count for mistakes		
8. Print a report of the differences in the captured and physical inventory		<i>see page 19</i>
9. Make sure that the information you are about to enter is correct. This is your last chance to change it.		
10. Post the adjustments from the physical count		<i>see page 21</i>

Capture Current Inventory Position

This procedure “captures” or “freezes” the current computer value of the inventory quantity on hand for all items in inventory or a selected group of inventory items prior to taking a physical count of the inventory in the warehouse(s).

Once the inventory *position* has been captured, physical count sheets are generated and you can perform a physical count of the actual items in inventory, and then enter the counts into **ORDER POWER!**. You can then compare the physical count to the captured count and post any differences against the inventory position in **ORDER POWER!**

By freezing the inventory position, normal business activity can continue on virtually uninterrupted (for example, taking orders and releasing orders for Pick Tickets) even while the physical count is performed and adjusting inventory transactions are entered as long as no inventory is removed (or picked) from the warehouse(s). This is referred to as a **two-step count cycle**.

Inventory positions can be recaptured as required. **ORDER POWER!** generates an Inventory Level Capture Exception report for any item / location combination previously captured and currently selected for *recapture*. New entries for the duplicate item / location combinations are not created; however, the duplicate capture combinations are listed on the exception report.

If count sheets have already been printed and then inventory is recaptured, the count sheets must be generated again to maintain data conformity.

The **Capture Inventory Position** function creates a work file of inventory data (for example, item number and current “book” count) as it exists in the **ORDER POWER!** database at the time this procedure is run. Optionally, data from prior runs can be removed from the file or maintained and the new data added to the existing information. Maintaining the prior data might be useful when inventorying one portion of inventory before proceeding to another. For example, items might be selected for one location, then run a second time to capture information for a second location. In this instance, the information pertaining to the second location will be appended to the file already containing information from the first location. Eventually, the file might contain inventory data for the entire warehouse.

1. From the **ORDER POWER! Main Menu**, select: **Inventory Control \ Capture Current Inventory Position** to display the *Capture Inventory Position panel* (figure 4).

--C. S. I. Development 3.3-- Capture Inventory Position				
?Warehouse.....	M/A			
Cycle Code.....	1	1=All	2=Select	3=Blank
GL Class.....	1	1=All	2=Select	3=Blank
Product Group.....	1	1=All	2=Select	3=Blank
Sub Group.....	1	1=All	2=Select	3=Blank
Location.....	1	1=All	2=Select	3=Range 4=Blank
Vendor.....	1	1=All	2=Select	
Item.....	1	1=All	2=Select	
Clear Old Capture Data.....	Y	Y/N		
Use Current Printer Defaults	Y	Y/N		
Submit to Batch.....	N	Y/N		
Save Changes.....	N	Y/N		

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

Capture Inventory Position panel (figure 4)

2. Complete these fields:

Warehouse

Type the three character abbreviation for the physical or logical warehouse to inventory.

Cycle Code

Type a **1**, **2**, or **3** to indicate which **Cycle Code** to inventory. A cycle count is an inventory control technique whereby items are counted on a cyclical schedule throughout the year. A **Cycle Code** is user-defined and can be created for a specific schedule or time frame. For example, **090** might mean “count every 90 days” or **MON** could indicate to “count the inventory every Monday.” Items to be counted on the same cyclical schedule may be assigned the same cycle count code; therefore, items can be selected according to cycle code.



Should you fail to enter any value on a *Selection window* **ORDER POWER!** will automatically change the option from **2=Select** to **1=All**.

- 1=All** selects *all Cycle Codes*
- 2=Select** displays the *Cycle Code Selection* window. Select items with specific **Cycle Codes** to inventory.
- 3=Blank** selects all items which lack **Cycle Codes**

GL Class

Type a **1**, **2**, or **3** to indicate which **GL Class** to inventory.

- 1=All** selects *all GL Class* codes.
- 2=Select** displays the *GL Class Section* window. Select items with specific **GL Class** codes to inventory.
- 3=Blank** selects all items which lack a **GL Class**

Product Group

Type a **1**, **2**, or **3** to indicate which **Product Group** to inventory.

- 1=All** selects *all Product Group* codes.
- 2=Select** displays the *Product Group Section* window. Select a **Product Group** codes to inventory.
- 3=Blank** selects all items which lack a **Product Group**

Sub Group

Type a **1**, **2**, or **3** to indicate which **Sub Group**, or subdivision of a **Product Group** to inventory.

- 1=All** selects *all Sub Group* codes.
- 2=Select** displays the *Sub Group Section* window. Select which **Sub Group** codes to inventory.
- 3=Blank** selects all items which lack a **Sub Group**

Location

Type a **1, 2, 3,** or **4** to indicate which **Location**, area, section, or bin, where an item is stored in the warehouse to inventory.

- 1=All** selects *all* items.
- 2=Select** displays the *Location Section* window. Select which **Location(s)** to inventory.
- 3=Range** displays the *Location Section* window. Specify a “from” and “to” **Location** to inventory.
- 4=Blank** selects all items which lack a designated **Location**

Vendor

Type a **1** or **2** to indicate all items which came certain **Vendor(s)** to inventory.

- 1=All** selects *all* items.
- 2=Select** displays the *Vendor Section* window. Select which **Vendor(s)** to inventory.

Clear Old Capture Data

Type **Y** or **N** to indicate whether to clear inventory information captured during a previous run.

- Y (yes)** initializes the work file and eliminates any existing inventory data
- N (no)** retains the old data and adds additional data to the file for subsequent processing as one large file rather than a number of separate smaller files

Use Current Printer Defaults

Type a **Y** or **N** to indicate whether to change the existing printer defaults for the current report. (See the “Setting Printer Defaults” section on page 71.)

- Y (yes)** accept the existing printer defaults
- N (no)** display the *Printer Defaults panel (figure 52)* to make changes the current printer defaults

Submit to Batch

Type a **Y** or **N** to indicate whether the report should be submitted to a job queue to process behind the scenes in batch mode and immediately free up your terminal or run the report interactively which locks the terminal until the report has completed.

- Y (yes)** indicates that the report will be submitted as a batch job
- N (no)** indicates that the report will be run interactively

Save Changes

Type **Y** or **N** to indicate whether any changes made to the defaults for the current report should be applied to all subsequent printings of *that report*. This eliminates redundant data entry.

- Y (yes)** save changes
- N (no)** use print defaults this time only

3. Press **Enter**. If you have typed **2** (Select) in any of the fields, **ORDER POWER!** displays selection windows similar to *Cycle Code Selection window (figure 5)*.

** CSI 3.3 Development Co 1 **
Capture Inventory Position

?Warehouse.....	MIA		
Cycle Code.....	2	1=All	2=S
GL Class.....	1	1=All	2=S
Product Group.....	1	1=All	2=S
Sub Group.....	1	1=All	2=S
Location.....	1	1=All	2=S
Vendor.....	1	1=All	2=S
Item.....	1	1=All	2=S
Clear Old Capture Data.....	Y	Y/N	
Use Current Printer Defaults	Y	Y/N	
Submit to Batch.....	N	Y/N	
Save Changes.....	N	Y/N	

Cycle Code
Selection

?Cycle
Code Quantity

A/P

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

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

Cycle Code Selection window (figure 5)

The *Cycle Code Selection window* (figure 5) contain two additional fields that are not shown on the *Capture Inventory Position panel* (figure 4).

- To limit the selection of **Item Numbers** within the specified **Cycle Codes**, complete these fields:

?Cycle Code

Type a user-defined **Cycle Code** that defines when the **Item** should be counted.

Quantity

Type an amount or percentage (depending on the next field) of **Item Numbers** in the selected **Cycle Code** to capture. **ORDER POWER!** then limits the quantity of **Item Numbers** to whatever you specify.

A/P

Type a code to indicate whether the value of the corresponding field will be either a total amount or a percentage of the total.

Amount represents a total amount
Percentage represents a percentage of the total

- After completing any selection windows, press **Enter** to capture the Inventory position for the selected **Item Numbers**.

Generate Physical Count Sheets

A *count sheet* is a form that lists **Item Numbers** and their corresponding descriptions, warehouse locations, and stocking units of measure. This form can also list the current quantity on hand, as well as the current cost for the on hand quantity. A space is available on the form to write in the actual physical tally for each item after it has been counted.

To Generate and Print a Physical Count Sheet

1. From the **ORDER POWER! Main Menu**, select: **Inventory Control** \ **Generate Physical Count Sheets** to display the *Generate Physical Count Sheet panel* (figure 6).

--C. S. I. Development 3.3--
Generate Physical Count Sheets

?Warehouse.....	MIA				
List By.....	1	1=Location	2=Item		
Display Current Qty On Hand...	N	Y/N			
Cost to Display.....	1	1=Last	2=Average	3=Replace	4=None
Include Deleted Locations....	N	Y/N			
Use Current Printer Defaults..	N	Y/N			
Save Changes.....	N	Y/N			

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

Generate Physical Count Sheet panel (figure 6)

2. Complete these fields:

Warehouse

Type the three-character abbreviation for the physical or logical warehouse to inventory.

List By

Type **1** or **2** to indicate how the **Count Sheet** should be printed.

1=Location prints the **Count Sheets** in ascending order by **Location**.

2=Item prints the **Count Sheets** in ascending order by **item number**

Display Current Qty On Hand

Type **Y** or **N** to indicate whether an additional column should be included on the printed form which displays the current quantity on hand for each item.

Y (yes) displays an additional column on the **Count Sheets**

N (no) prints only the base information

Cost to Display

Type **1**, **2**, **3**, or **4** to indicate whether an additional column should be included on the printed form which displays which displays the cost of the current quantity on hand for each item.

1=Last prints the item cost based on the last recorded item cost

2=Average prints the item cost based on the average item cost

3=Replace prints item cost based on the replacement cost

4=None omits the cost column on the report



When the quantity on hand is omitted, the forms are printed 80-characters across. However, when **Quantity On Hand** and **Cost** are included, the resulting form is 132-characters wide.

Include Deleted Locations

Type **Y** or **N** to indicate whether to search all warehouse areas (even deleted locations) and include all items that have positive quantities on the forms.

Y (yes) includes all **Locations**

N (no) includes only currently existing **Locations**

Use Current Printer Defaults

Type a **Y** or **N** to indicate whether to change the existing printer defaults for the current report. (See the “Setting Printer Defaults” section on page 71.)

Y (yes) accept the existing printer defaults

N (no) display the *Printer Defaults panel (figure 52)* to make changes the current printer defaults

Submit to Batch

Type a **Y** or **N** to indicate whether the report should be submitted to a job queue to process behind the scenes in batch mode and immediately free up your terminal or run the report interactively which locks the terminal until the report has completed.

Y (yes) indicates that the report will be submitted as a batch job

N (no) indicates that the report will be run interactively

Save Changes

Type **Y** or **N** to indicate whether any changes made to the defaults for the current report should be applied to all subsequent printings of *that report*. This eliminates redundant data entry.

Y (yes) save changes

N (no) use print defaults this time only

2. Press **Enter** to generate and print count sheets (see page Physical Inventory Count Sheet).

Physical Inventory Count Sheet

User: CSIUSER
 Wsid: DSP108S1
 Prog: IN01002
 Warehouse: MIA Miami Warehouse

** Computer Solutions, Inc. **
 Cost Type: *LAST

Physical Inventory Count Sheet
 Location Item Description U/M Cost

Location	Item	Description	U/M	Cost
	A24	East Side West Side A Story About 2 Boys		
	A25	Hello Dolly		
	A26	South Pacific		
	A27	Oklahoma		
	A28	My Fair Lady	EA	250.0000
	A3	Ghost and Mrs. Muir	EA	25.0000
	A30	Zeke's Secret Fantasy	EA	6.0000
	A5	Disney's Beauty and the Beast	EA	25.0000
	A5634	Pollyanna	EA	6.0000
	A6	101 Dalmations	EA	25.0000
	A7	Jungle Book	EA	25.0000
	A77	Little Mermaid	EA	
	A8	Dumbo	EA	25.0000
	A90	Casper the Friendly Ghost	EA	
	BCAP	Andrea's Cap	EA	1.0000
	BELL	Karen's test Bell	EA	1.0000
	BELL2	1993 X-Mas Bell	EA	12.0000
	BONITEMNS	Bonnie's Item - No Code - 25 - No Stock	EA	19.0000
	BONKIT3	Bonnie 07 Kit to Stock - part/n, stock/y	EA	7.1600
	CEST	Testing, Testing - 1, 2, 3	EA	
	CBST99	Testing, Testing - 5, 6, 7	EA	
	COGS5	Cost of goods sold 5	EA	1.0000
	DARREN	Darren	EA	1.0000
	DDITEM01	description for item DDITEM	EA	.0100
	DDITEM02	st item description for item DDITEM02	EA	2.0000
	DDITEM03	Test item description for item DDITEM03	EA	1.0000

A value of .000 in the entered count quantity column of the report indicates that the operator actually entered a zero or hit the Field Exit key during a previous Physical Count Entry function. Therefore, a zero value (.000) indicates that the operator actually saw and processed the corresponding entry page. **ORDER POWER!** also treats a blank quantity as zero; however, a blank quantity indicates that the operator failed to make any entry for the inventory item

Enter Physical Count

Inventory counts can either be entered via the “update” or “create” process. The entry “update” allows the operator to enter the actual counts for all items that were selected during the *Generate Physical Count Sheet* procedure. For these selected items, only the item quantities can be entered.

The “create” function allows an operator to change the location of an item(s) or to include items not previously captured during the *Generate Physical Count Sheet* procedure. For example, a company might wish to reorganize a location; therefore, inventory could be moved from the “captured” location to a different location and/or warehouse. This would be accomplished by entering a zero quantity at the existing location and “creating” a new entry to specify the item, *new location*, and quantity.

Another reason to “create” a new entry would arise when an item was physically counted at a location; however, there was no corresponding computer record of the item (or receipt of the item) into that location. Therefore, a new entry would be “created” to record the *new item*, location, as well as item quantity.

All necessary adjustments to quantities, locations, and GL accounts will be made when the physical inventory count is posted. See the *Post Physical Count Adjustments panel* (figure 14).

To Update Inventory or Create New Inventory

1. From the *ORDER POWER! Main Menu*, select: **Inventory Control** \ **Enter Physical Count** to display the *Physical Count Entry Selection* (figure 7).

--C. S. I. Development 3.3--
Physical Count Entry Selection

?Warehouse MIA

Warn if Entry Differs from
Book Quantity Y Y/N

Warn only if Percentage of
Difference Exceeds 050 %

Save Changes N Y/N

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

Physical Count Entry Selection (figure 7)

2. Complete these fields:

Warehouse

Type the three character abbreviation for the physical or logical warehouse for which you have taken a physical inventory.

Warn if Entry Differs from Book Quantity

Type **Y** or **N** to indicate whether the entered quantities should be compared to the book quantities.

- Y** (yes) causes **ORDER POWER!** to issue a warning message to the operator when the values differ.
- N** (no) omits the comparison.

Warn only if Percentage of Difference Exceeds

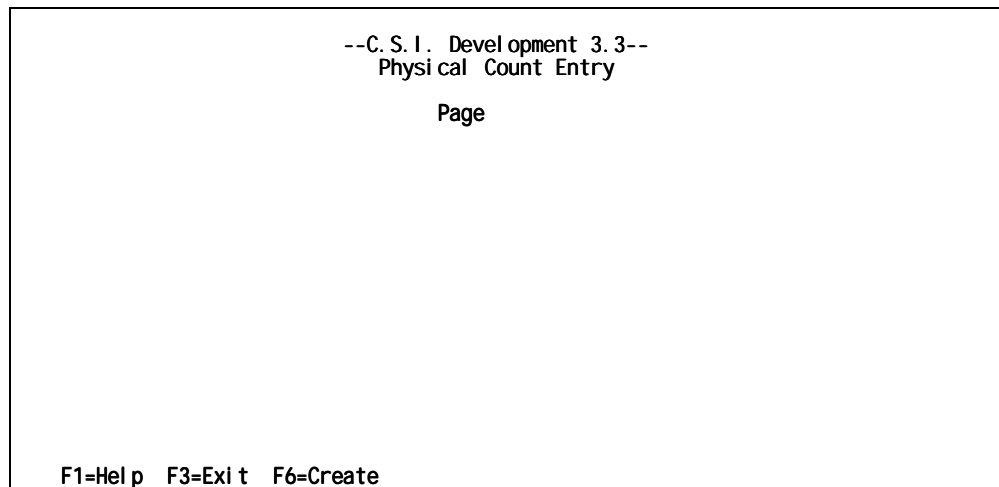
Type a number between 0 and 999 to indicate the acceptable *percentage of difference* (+ or -) between the entered quantities and the book quantities when the additional edits are performed. **ORDER POWER!** converts the percentage into an *acceptable difference* based on the item book count. The warning message is issued when the difference between the book quantity and entered quantity exceeds the *acceptable difference*. This field is irrelevant if the **Warn if Entry Differs from Book Quantity** is set to **N**.

Save Changes

Type **Y** or **N** to indicate whether any changes made to the defaults for the current selection should be retained as the new screen defaults

- Y** (yes) saves the changes to be used again the following time
- N** (no) uses the defaults this time only

3. Press **Enter** to display the *Physical Count Entry panel 1* (figure 8).



Physical Count Entry panel 1 (figure 8)

To Create New Inventory skip to steps 4a – 6a

To Update Inventory Continue

4. Type the page number to be updated. Page numbers must be four numeric digits. For example, “42” must be typed “0042”. Then, press **Enter** to display the *Physical Count Entry panel 2* (figure 9).

--C. S. I. Development 3.3--
Physical Count Entry
Page 0001

Quantity	Location	Item	Description
_____		CEST99	Testing, Testing - 5, 6, 7
_____		CRUST	pizza crust
_____		FFF	Ghost
_____		5699000000000	Gift Certificate
_____		A-KK	The music man
_____		A-22	Ghost
_____		A-33	Little Mermaid
_____		A-87	A19 Item
_____		ABCBASKET	ABC Basket
_____		AC1WHT	SUPER AIR CURLER, WHT
_____		ALARM CLOCK	ROOSTER ALARM CLOCK
_____		APP	Ghost
_____		A1	Mrs. Doubtfire

More...

F1=Help F3=Exit F8=Fwd F12=Cancel

Physical Count Entry panel 2 (figure 9)

5. Type the **Quantity**, the actual tally for the item as recorded on the **Count Sheets** during the physical count process. To update the inventory count press **Enter**.
6. If the **Warn if Entry Differs from Book Quantity** flag is set to **Y** (yes) and the **Physical Count** does not match **ORDER POWER!'s Inventory Count**, press **F5=Accept** to change the current count or type the original amount.

To Create New Inventory

- 4a. Press **F6=Create** to display the *Physical Count Entry panel 3 (figure 10)*.

--C. S. I. Development 3.3--
Physical Count Entry
Page 0000

Quantity	Location	Item	Description
----------	----------	------	-------------

More...

F1=Help F3=Exit F8=Fwd F12=Cancel

Physical Count Entry panel 3 (figure 10)

- 5a. Complete these fields:

Quantity

Type a number between 1 and 999999.999 for number for each item counted during the physical inventory procedure.

Location (required)

Type the warehouse location where each item is stored.

Item

Type the alphanumeric identifier which uniquely defines a unit of inventory.

Description

This field is the description for the item number as defined in the Item Master file.

6a. Press **Enter** to update the inventory count.

7a If the **Warn if Entry Differs from Book Quantity** flag is set to **Y** (yes) and the **Physical Count** does not match **ORDER POWER!'s Inventory Count**, press **F5=Accept** to change the current count or type the original amount. Then press **Enter** to display the *Physical Count Entry panel 1 (figure 8)* where **ORDER POWER!** assigns a page number to the previously entered inventory counts.

Physical Count Edit Listing



A value of .000 in the quantity column of the report indicates that you actually entered a zero.

ORDER POWER! also treats a blank quantity as zero; however, a blank quantity indicates that you failed to make any entry for the inventory item.

The **Physical Count Edit Listing** produces a hard copy report of inventory items and their corresponding physical counts as they were entered into **ORDER POWER!** after the physical count was taken of the inventory in the warehouse.

The report can be compared to the values written on the count sheets and verified for accuracy. This procedure should be performed prior to actually posting the physical count adjustments to the database in order to minimize data entry errors.

1. From the **ORDER POWER! Main Menu**, select: **Inventory Control \ Physical Count Edit Listing** to display the *Generate Physical ReCount Sheets panel (figure 12)*.

```

--C. S. I. Development 3.3--
Physical Count Edit Listing

?Warehouse ..... MIA
List By..... 2          1=Location 2=Item
  Within Page # ..... N          Y/N
Display Current Qty On Hand... N          Y/N
Select Page # ..... 1          1=All 2>Select
Include Deleted Locations.... N          Y/N
Use Current Printer Defaults.. Y          Y/N
Save Changes..... N          Y/N

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

Physical Count Edit Listing panel (figure 11)

2. Complete these fields:

Warehouse

Type the three character abbreviation for the physical or logical warehouse to inventory.

List By

Type **1** or **2** to indicate how the **Count Sheet** should be printed.

- 1**=Location prints the **Count Sheets** in ascending order by **Location**.
- 2**=Item prints the **Count Sheets** in ascending order by **item number**

With in Page #

Type **Y** or **N** to indicate whether the report lines should be sorted sequentially by individual page or by entire report.

- Y** (yes) sorts each entry page individually.
- N** (no) compiles all entries for the report and sorts them as a single group.



When the quantity on hand is omitted, the forms are printed 80-characters across. However, when **Quantity On Hand** and **Cost** are included, the resulting form is 132-characters wide.

Display Current Qty On Hand

Type **Y** or **N** to indicate whether an additional column should be included on the printed form which displays the current quantity on hand for each item.

Y (yes) displays an additional column on the **Count Sheets**

N (no) prints only the base information

Select Page #

Type **1** or **2** to indicate whether to print either the entire physical count work file or specific pages within the file.

1=All prints the entire work file

2=Select displays the *Page Selection* window. Select the desired numeric page numbers

Include Deleted Locations

Type **Y** or **N** to indicate whether to search all warehouse areas (even deleted locations) and include all items that have positive quantities on the forms.

Y (yes) includes all **Locations**

N (no) includes only currently existing **Locations**

Use Current Printer Defaults

Type a **Y** or **N** to indicate whether to change the existing printer defaults for the current report. (See the "Setting Printer Defaults" section on page 71.)

Y (yes) accept the existing printer defaults

N (no) display the *Printer Defaults panel (figure 52)* to make changes the current printer defaults

Save Changes

Type **Y** or **N** to indicate whether any changes made to the defaults for the current report should be applied to all subsequent printings of *that report*. This eliminates redundant data entry.

Y (yes) save changes

N (no) use print defaults this time only

3. Press **Enter** to print the

Generate Physical ReCount Sheets

Once you have **Captured the Current Inventory Position**, or frozen the inventory levels in order to do an inventory count, **Generated Physical Count** sheets, **Entered** the totals you accumulated during the **Physical Count**, and looked at a report of the discrepancies by **Generating Count Edit Listing**, you may want to re-edit or recount. Instead of reprinting all of the **Count Sheets** this screen allows you to only print out the item in which there were discrepancies between the **Inventory Count** and the **Physical Inventory Count**.

1. From the **ORDER POWER! Main Menu**, select: **Inventory Control \ Generate Physical Recount Sheets** to display the *Generate Physical ReCount Sheets panel* (figure 12).

```

--C. S. I. Development 3.3--
Generate Physical ReCount Sheets

?Warehouse..... MIA
Include if variance exceeds... 2 A A/P
List By..... 1 1=Location 2=Item
Display Current Qty On Hand... Y Y/N
Cost to Display..... 2 1=Last 2=Average 3=Replace 4=None
Include Deleted Locations.... Y Y/N
Pagebreak as original..... Y Y/N
Print original count..... Y Y/N
Use Current Printer Defaults.. N Y/N
Save Changes..... N Y/N

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

Generate Physical ReCount Sheets panel (figure 12)

2. Complete these fields:

Warehouse

Type three character abbreviation for the physical or logical warehouse to inventory.

Include if variance exceeds.

In the first field, type a number to indicate the acceptable amount of difference between the entered quantities and the book quantities when the additional edits are performed.

In the second field, type **A** or **P** to indicate whether that amount is a set number of items or a percentage of total items.

A indicates that the number entered represents a set *amount* of items

P indicates that the number entered represents a *percentage* of the current inventory

List By

Type **1** or **2** to indicate how the **Count Sheet** should be printed.

1=Location prints the **Count Sheets** in ascending order by **Location**.

2=Item prints the **Count Sheets** in ascending order by **item number**

Display Current Qty On Hand

Type **Y** or **N** to indicate whether an additional column should be included on the printed form which displays the current quantity on hand for each item.

Y (yes) displays an additional column on the **Count Sheets**

N (no) prints only the base information



When the quantity on hand is omitted, the forms are printed 80-characters across. However, when **Quantity On Hand** and **Cost** are included, the resulting form is 132-characters wide.

Cost to Display

Type **1**, **2**, **3**, or **4** to indicate whether an additional column should be included on the printed form which displays which displays the cost of the current quantity on hand for each item.

1=Last prints the item cost based on the last recorded item cost

2=Average prints the item cost based on the average item cost

3=Replace prints item cost based on the replacement cost

4=None omits the cost column on the report

Include Deleted Locations

Type **Y** or **N** to indicate whether to search all warehouse areas (even deleted locations) and include all items that have positive quantities on the forms.

Y (yes) includes all **Locations**

N (no) includes only currently existing **Locations**

Pagebreak as original.....

Type **Y** or **N** to indicate how the **ReCount Sheets** should print.

Y (yes) prints the **ReCount Sheets** and uses the same page breaks as the original to make comparison easier and to expedite the physical inventory count.

N (no) prints the **ReCount Sheets** and inserts page breaks as needed

Print original count.....

??????????

Use Current Printer Defaults

Type a **Y** or **N** to indicate whether to change the existing printer defaults for the current report. (See the “Setting Printer Defaults” section on page 71.)

Y (yes) accept the existing printer defaults

N (no) display the *Printer Defaults panel (figure 52)* to make changes the current printer defaults

Save Changes

Type **Y** or **N** to indicate whether any changes made to the defaults for the current report should be applied to all subsequent printings of *that report*. This eliminates redundant data entry.

Y (yes) save changes

N (no) use print defaults this time only

3. Press **Enter** to print the

Physical vs. Book Report

The **Physical versus Book** report lists the discrepancies or variance between the book inventory and the actual physical inventory. The book inventory refers to the quantity on hand “captured” during the **Capture Current Inventory Position** process. See page 4.

Like the **Physical Count Edit Listing**, this report can be used to verify adjustments *prior* to actually posting them to inventory.

1. From the **ORDER POWER! Main Menu**, select: **Inventory Control \ Physical vs. Book Report** to display the *Physical vs. Book Listing panel* (figure 13).

```

--C. S. I. Development 3.3--
Physical vs. Book Listing

?Warehouse ..... M/A
List By..... 1      1=Location 2=Item
  Within Page # ..... N      Y/N
Cost Using ..... 1      1=Average 2=Last 3=Replacement
Select Page # ..... 1      1=All 2=Select
Use Current Printer Defaults.. N      Y/N
Save Changes..... N      Y/N

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

Physical vs. Book Listing panel (figure 13)

2. Complete these fields:

Warehouse

A specific inventory storage area must be selected. This may be either a physical or logical warehouse and must be previously defined to **ORDER POWER!** in the Warehouse Master file. Entries for the warehouse must also exist in the Physical Count Entry work file.

List By

Type **1** or **2** to indicate how the **Count Sheet** should be printed.

- 1**=Location prints the **Count Sheets** in ascending order by **Location**.
- 2**=Item prints the **Count Sheets** in ascending order by **item number**

With in Page

Type **Y** or **N** to indicate whether the report lines should be sorted sequentially by individual page or by entire report.

- Y** (yes) sorts each entry page individually.
- N** (no) compiles all entries for the report and sorts them as a single group.

Cost Using

Type **1**, **2**, or **3** to indicate how to value the inventory. Both the physical and book inventory will be valued based on the same method.



When the quantity on hand is omitted, the forms are printed 80-characters across. However, when **Quantity On Hand** and **Cost** are included, the resulting form is 132-characters wide.

- 1=Last** reports the item cost based on the last recorded item cost
- 2=Average** reports the item cost based on the average item cost
- 3=Replace** reports the item cost based on the replacement cost

Select Page #

Type **1** or **2** to indicate whether which pages to print.

- 1=All** prints comparative data for the entire physical count work file
- 2=Select** displays the *Page Number Selection* widow. Select specific pages to print comparative data for

Use Current Printer Defaults

Type a **Y** or **N** to indicate whether to change the existing printer defaults for the current report. (See the “Setting Printer Defaults” section on page 71.)

- Y** (yes) accept the existing printer defaults
- N** (no) display the *Printer Defaults panel (figure 52)* to make changes the current printer defaults

Save Changes

Type **Y** or **N** to indicate whether any changes made to the defaults for the current report should be applied to all subsequent printings of *that report*. This eliminates redundant data entry.

- Y** (yes) save changes
- N** (no) use print defaults this time only

3. Press **Enter** to print the

Post Adjustments from Physical Count

With this function, the discrepancies between the previously “captured” book count and the actual physical inventory count will be resolved and incorporated into **ORDER POWER!** updating the existing book inventory. Any necessary adjustments will be recorded or posted to the Inventory History file using transaction effect code **001-Physical Inventory Adjustments**.

This function should be executed only after it has been determined that the physical inventory counts in the work file are accurate.

The Physical Inventory Adjustment Journal and the GL Summary for Inventory Transactions report will automatically be produced when **ORDER POWER!** completes the transaction posting procedure.

1. From the **ORDER POWER! Main Menu**, select: **Inventory Control \ Post Adjustments from Physical Count** to display the *Post Physical Count Adjustments panel* (figure 14).

--C. S. I. Development 3.3--
Post Physical Count Adjustments

?Warehouse MA

Save Changes N Y/N

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

Post Physical Count Adjustments panel (figure 14)

2. Complete these fields:

Warehouse

c

Save Changes

Type **Y** or **N** to indicate whether any changes made to the defaults for the current report should be applied to all subsequent printings of *that report*. This eliminates redundant data entry.

Y (yes) save changes

N (no) use print defaults this time only

3. Check one last time to make sure that the adjustments are correct. Press **Enter** to print the

Enter Inventory Transactions

Inventory on hand can be adjusted manually for such transactions as inventory transfers, manual purchase order receipts, and credits to inventory via the Inventory Transaction Entry function.

Inventory Transaction Entry creates a batch of inventory transactions which are posted to the **ORDER POWER!** database at the operator's request. Until the batch is posted, any additions, corrections, and/or deletions can be made.

When a new transaction batch file is created, a blank display screen will be displayed. However, once a batch has been opened (entries have been added), this screen will display one line for each transaction in the batch.

1. From the **ORDER POWER! Main Menu**, select: **Inventory Control** \ **Enter Inventory Transactions** to display the *Inventory Transaction Inquiry panel* (figure 15).

Position To :		--C. S. I. Development 3.3--				Inventory Transaction Inquiry		Show Delete : <u>N</u>
1=Select	2=Change	5=Display						
Line	Code	Date	Item	Whse	Location	Qty	Deleted	
-	1	001	7/26/99	100270	MI A	DEFAULT	1.000	
-	2	001	7/26/99	1003E	ACT	CASH BOX	2.000	

Bottom

F1=Help F3=Exit F6=Create F7=Bkwd F8=Fwd F10=Top

Inventory Transaction Inquiry panel (figure 15)

To display Inventory Transactions

Selecting the display option causes **ORDER POWER!** to present the *Inventory Transaction Display window* (figure 16). The window displays all the information that was recorded for the specific transaction when it was added to the batch file. The display window is protected and cannot be modified.

1. From the **ORDER POWER! Main Menu**, select: **Inventory Control** \ **Enter Inventory Transactions** to display the *Inventory Transaction Inquiry panel* (figure 15).
2. Choose an Inventory Transaction. Press **5=Display** to display the *Inventory Transaction Display window* (figure 16).

```

--C. S. I. Development 3.3--
Position To :      Inventory Transaction Inquiry      Show Delete : N
1=Select  2=Change  5=Display

Line
-   1
-   2

Inventory Transaction Display

Line      1      Delete
Tran Code 001 Physical Inventory Adjustment
Tran Date 7/26/99
Item      100270      Warehouse MIA      Location DEFAULT

Transaction Quantity      1.000      Unit of Measure
Tran Costed Quantity
Transaction Cost
PO or Order Number      Order Line

F1=Help F3=Exit

```

Inventory Transaction Display window (figure 16)

To update an Inventory Transaction

1. From the **ORDER POWER! Main Menu**, select: **Inventory Control** \ **Enter Inventory Transactions** to display the *Inventory Transaction Inquiry panel* (figure 15).
2. Choose an Inventory Transaction. Press **2=Change** to display the *Inventory Transaction Entry panel 2* (figure 18).

-or-

To create an Inventory Transaction

1. From the **ORDER POWER! Main Menu**, select: **Inventory Control** \ **Enter Inventory Transactions** to display the *Inventory Transaction Inquiry panel* (figure 15).
2. Press **F6=Create** and then press **Enter** to display the *Inventory Transaction Entry panel 1* (figure 17).

```

--C. S. I. Development 3.3--
Inventory Transaction Entry

?Transaction Code:
Transaction Date: 7/26/99

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

```

Inventory Transaction Entry panel 1 (figure 17)

2.1 Complete the following fields:

Transaction Code

Type the identifier which indicates what type of transaction is being processed. The following transaction codes are created and maintained automatically by **ORDER POWER!** for internal purposes; therefore, these codes are *not* valid for **Inventory Transaction Entry**:

011 - Cost Change Audit creates an audit trail of changes to the average cost of an item.

016 - Kit Assembly – Component automatically generates each time the **corresponding** transaction code for **Kit Assembly - Kit (parent)** is created (**015**).

018 - Kit Disassembly - Component automatically generates each time the **corresponding** transaction code for **Kit Disassembly. Kit (parent)** is created (**015**).

Transaction Date

Type the date that the transaction occurred and should be recorded to **ORDER POWER!**.

2.1 Press **Enter** to display the *Inventory Transaction Entry panel 2* (figure 18).

```

** CSI 3.3 Development Co 1 **
Inventory Transaction Entry

Transaction Code: 051 ALLY
Transaction Date: 8/02/99

Line: 2
?Item:           ?Warehouse: ___   Delete:
?Location:

Transaction Qty: _____ ?Unit of Measure:
Transaction Costed Qty:
Transaction Cost:

PO # or Order#: _____ Line#:

Info 1
Info 2
Info 3

F1=Help F3=Exit F4=?List F9=Retrieve F12=Cancel F23=User
```

Inventory Transaction Entry panel 2 (figure 18)

3. Complete these fields:

Transaction Code

The transaction code is an identifier which indicates what type of transaction is being processed.

Transaction Date

This date represents the date that the transaction occurred.

Line

Line refers to the number assigned to each entry in the inventory transaction batch.

Delete

Type **Y** or **N** to determine whether to “delete” the inventory transaction entry. Deleted entries will appear in the **Inventory Transaction Inquiry** list when the **Show Delete** indicator is set to **Y** (yes) and deleted entries cannot be posted to the **ORDER POWER!** database. Deleted records can be reactivated anytime before the inventory batch is posted either by changing the field value to **No** or blank.

Y (yes) flags the entry as deleted however it does not physically remove the data from the work file

N (no) leaves the entries as they are

Item (required)

Type the identifier for the actual inventory *object* that is being affected by the transaction. An item can be a manufactured part, a purchased part, a product, or material.

Warehouse

Type the three character abbreviation for the physical or logical warehouse to post the inventory adjustments against.

Location

Type the specific area (section or bin) within the warehouse where the item is housed.

The following fields are displayed depending on the defaults defined in the **Inventory Effect Codes Master** file for each specific transaction code. These additional fields will also print on the **Inventory Transaction Listing** and will appear on the **Inventory Transaction Inquiry Display**.

Transaction Quantity

Type the number of units of the item that are affected by the inventory transaction.

Unit of Measure

Type the unit of measure which refers to the stocking unit of measure to ensure that the proper inventory quantity is affected.

Transaction Costed Quantity

Type the number of units of the item that are costed by the inventory transaction.

Transaction Cost

Type the actual cost for the total quantity of the item affected by the inventory transaction.

PO# or Order#

Type the purchase order or order number that is affected by the inventory transaction.

Line#

Type the specific detail line number on either the purchase order or order (determined by the above entry) that is affected by the transaction.

Comment “n” Description (Info 1/2/3)

Comment “n” Description fields will be displayed when the transaction code has been defined with *any non-blank value* in the Info 1, 2, or 3 fields.

These description lines may consist of one through three user-defined heading lines that define the type of information that may be entered in the corresponding data field. Type the defined information.

4. Press **Enter** to update the current record. To enter another Item Transaction for the same transaction code press **F9=Retrieve** to populate the fields with the data from the previous entry.

Inventory Transaction Edit Listing

The **Inventory Transaction Edit** feature produces the **Inventory Transaction Edit Listing** which displays all the transactions in the inventory batch.

The listing can be reviewed to determine the accuracy of the keyed entries prior to actually posting the transactions to the **ORDER POWER!** database. As this report has no effect on the database, this report can be run as often as required.

Unlike other **ORDER POWER!** reports, the **Inventory Transaction Edit Listing** does not offer the operator any selection options other than those associated with the printer requirements. Therefore, when this report is requested, only the *Printer Defaults panel (figure 52)* will be presented for modifications. See *Printer Defaults panel (figure 52)* on page 71.

Post Inventory Transactions

Once the inventory transaction batch has been verified for accuracy, the batch can be posted to the **ORDER POWER!** database. The posting process will automatically generate two reports: The Inventory Transaction Posting Journal and the GL Summary for Inventory Transactions. Like the **Inventory Transaction Edit Listing**, only the *Printer Defaults panel (figure 52)* is displayed for modifications.

The Posting Journal report duplicates the Inventory Transaction Edit Listing format; however, the Posting Journal lists the final version of the inventory transactions that were actually posted to the database.

The GL Summary for Inventory Transactions is a hard copy listing of the General Ledger journal entries created for the inventory batch and recorded during the Inventory Transaction Posting process.

See *Printer Defaults panel (figure 52)* on page 71.

Inventory Value Report

The **Inventory Value Report** produces a list of items in inventory and their book quantity, then computes the cost for each item. The cost will be based on either the average, last, or replacement value of each item.

- From the **ORDER POWER! Main Menu**, select: **Inventory Control \ Inventory Value Report** to display the *Inventory Value Report panel* (figure 19).

```

--C. S. I. Development 3.3--
Inventory Value Report

List By..... 1      1=Item 2=Description 3=G/L Class
                    4=Tax Class 5=Product Group 6=Vendor

Warehouse..... 2      1=All    2=Select 3=Range
Product Group..... 1      1=All    2=Select 3=Range
Product Sub-Group..... 1      1=All    2=Select 3=Range
Calculate Values by..... 1      1=Average 2=Last 3=Replace
Negative Quantities..... 1      1=Include 2=Omit 3=Only
Omit Zero Quantities..... Y      Y/N
Print Items..... Y      Y/N
Print Warehouses..... Y      Y/N
Print Locations..... Y      Y/N
Use Current Printer Defaults.. Y      Y/N
Submit to Batch..... N      Y/N
Save Changes..... N      Y/N

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

Inventory Value Report panel (figure 19)

- Complete these fields:

List By

Type a number **1 - 6** to indicate how the report output should be sorted and in which sequence it should be printed.

- 1=Item** sequences the report by item number
- 2=Description** sequences the report by item description
- 3=G/L Class** sequences the report by GL Class
- 4=Tax Class** sequences the report by tax class
- 5=Product Group** sequences the report by product group
- 6=Vendor** sequences the report by tender number



Entering the same number in both the **To** and **From** fields selects a single thing. Leaving the **From** field blank selects all items between the **To** and the last entry.

Warehouse

Type a **1, 2,** or **3** to indicate which warehouses to include in the report

- 1=All** includes *all* warehouses in the report
- 2=Select** displays the *Warehouse Selection* window. Select the warehouse(s) to include in the report
- 3=Range** displays the *Warehouse Range* window. Type the “to” and “from” Warehouse numbers to indicate the range of warehouses to include in the report

Product Group

Type a **1, 2,** or **3** to indicate which Product Groups to include in the report.

- 1=All** includes *all* items in the report
- 2=Select** displays the *Product Group Selection* window. Select the groups to include in the report

3=Range displays the *Product Group Range* window. Type the “to” and “from” **Product Group** numbers to indicate the range of **Product Groups** to include in the report

Product Sub-Group

Type a **1, 2,** or **3** to indicate which subdivision of the **Product Group** .to include in the report.

1=All includes *all* items in the report

2=Select displays the *Product Sub-Group Selection* window. Select the sub-groups to include in the report

3=Range displays the *Product Group Range* window. Type the “to” and “from” **Product Sub-Group** numbers to indicate the range of **Product Sub-Groups** to include in the report

Calculate Values By

Type **1, 2,** or **3** to indicate how the cost of the current inventory on hand should be valued.

1=Average values the item cost based on the average item cost

2=Last values the item cost based on the last recorded item cost

3=Replace values the item cost based on the replacement cost

Negative Quantities

A negative on hand quantity can result from transactions that decrement inventory below the minimum level. Type a **1, 2,** or **3** to indicate whether **The Inventory Value Report** should display items with negative quantities. The report will designate negative quantities with a “-” sign.

1=Include selects all quantities including negative ones

2=Omit selects only the positive quantities

3=Only prints only the negative quantities

Omit Zero Quantities

Type a **Y** or **N** to indicate whether to include items which are not in stock.

Y (yes) omits items which have zero quantity

N (no) includes items which have zero stock in the report



The item column cannot be excluded from the report when the report is sorted either by item or item description.

Print Items

Type **Y** or **N** to determine whether a column for item number should be included on the report.

Y (yes) includes the column for item number

N (no) omits item numbers from the report

Print Warehouses

Type **Y** or **N** to determine whether a column for warehouses should be included on the report.

Y (yes) prints the warehouse each item is assigned to

N (no) omits warehouses from the report

Print Locations

Type **Y** or **N** to determine whether a column for warehouse location should be included on the report.

Y (yes) prints the warehouse location each item is assigned to

N (no) omits warehouses from the report

Use Current Printer Defaults

Type a **Y** or **N** to indicate whether to change the existing printer defaults for the current report. (See the “Setting Printer Defaults” section on page 71.)

- Y** (yes) accept the existing printer defaults
- N** (no) display the *Printer Defaults panel (figure 52)* to make changes the current printer defaults

Save Changes

Type **Y** or **N** to indicate whether any changes made to the defaults for the current report should be applied to all subsequent printings of *that report*. This eliminates redundant data entry.

- Y** (yes) save changes
- N** (no) use print defaults this time only

3. Press **Enter** to print the

Inventory Status Report

The **Inventory Status Report** totals such as “quantity on hand,” “quantity available,” and “quantity committed” for each item; grand totals are printed for the entire report. To view totals for a single item or for a small group of items online try the Inventory Status Inquiry on page 34.

- From the **ORDER POWER! Main Menu**, select: **Inventory Control \ Inventory Status Report** to display the *Inventory Status Report panel* (figure 20).

--C. S. I. Development 3.3--
Inventory Status Report

List By.....	1	1=Item 2=Description 3=G/L Class 4=Tax Class 5=Product Group 6=Vendor
Warehouse.....	1	1=All 2>Select 3=Range
Product Group.....	1	1=All 2>Select 3=Range
Product Sub-Group.....	1	1=All 2>Select 3=Range
U/M Calculation.....	1	1=Stock 2=Sell 3=Purchase
Print Items.....	Y	Y/N
Print Warehouses.....	Y	Y/N
Use Current Printer Defaults..	Y	Y/N
Submit to Batch.....	N	Y/N
Save Changes.....	N	Y/N

F1=Help F3=Exit F12=Cancel

Inventory Status Report panel (figure 20)

- Complete these fields:

List By

Type a number **1 - 6** to indicate how the report output should be sorted and in which sequence it should be printed.

- 1=Item** sequences the report by item number
- 2=Description** sequences the report by item description
- 3=G/L Class** sequences the report by GL Class
- 4=Tax Class** sequences the report by tax class
- 5=Product Group** sequences the report by product group
- 6=Vendor** sequences the report by tender number



Entering the same number in both the **To** and **From** fields selects a single thing. Leaving the **From** field blank selects all items between the **To** and the last entry.

Warehouse

Type a **1, 2,** or **3** to indicate which warehouses to include in the report

- 1=All** includes *all* warehouses in the report
- 2=Select** displays the *Warehouse Selection* window. Select the warehouse(s) to include in the report
- 3=Range** displays the *Warehouse Range* window. Type the “to” and “from” Warehouse numbers to indicate the range of warehouses to include in the report

Product Group

Type a **1, 2,** or **3** to indicate which Product Groups to include in the report.

- 1=All** includes *all* items in the report

- 2=Select** displays the *Product Group Selection* window. Select the groups to include in the report
- 3=Range** displays the *Product Group Range* window. Type the “to” and “from” **Product Group** numbers to indicate the range of **Product Groups** to include in the report

Product Sub-Group

Type a **1**, **2**, or **3** to indicate which subdivision of the **Product Group** .to include in the report.

- 1=All** includes *all* items in the report
- 2=Select** displays the *Product Sub-Group Selection* window. Select the sub-groups to include in the report
- 3=Range** displays the *Product Group Range* window. Type the “to” and “from” **Product Sub-Group** numbers to indicate the range of **Product Sub-Groups** to include in the report

U/M Calculation

Type **1**, **2**, or **3**, to determine whether how the unit quantities are displayed on the report.

- 1=Stock** represents stocking units of measure
- 2=Sell** represents selling units of measure
- 3=Purchase** represents purchase(ing) units of measure

Print Items

Type **Y** or **N** to determine whether a column for item number should be included on the report.

- Y** (yes) includes the column for item number
- N** (no) omits item numbers from the report

Print Warehouses

Type **Y** or **N** to determine whether a column for warehouses should be included on the report.

- Y** (yes) prints the warehouse each item is assigned to
- N** (no) omits warehouses from the report

Use Current Printer Defaults

Type a **Y** or **N** to indicate whether to change the existing printer defaults for the current report. (See the “Setting Printer Defaults” section on page 71.)

- Y** (yes) accept the existing printer defaults
- N** (no) display the *Printer Defaults panel (figure 52)* to make changes the current printer defaults

Save Changes

Type **Y** or **N** to indicate whether any changes made to the defaults for the current report should be applied to all subsequent printings of *that report*. This eliminates redundant data entry.

- Y** (yes) save changes
- N** (no) use print defaults this time only

3. Press **Enter** to print the

Inventory Status Inquiry

Similar to the **Inventory Status Report**, the **Inventory Status Inquiry** provides totals such as “quantity on hand,” “quantity available”, and “quantity committed” are provided for each item. Unlike the hard copy report, this query is presented in an online format which provides the operator with immediate access to additional item information.

1. From the **ORDER POWER! Main Menu**, select: **Inventory Control \ Inventory Status Inquiry** to display the *Inventory Status Selection panel* (figure 21).

--C. S. I. Development 3.3--
Inventory Status Selection

Select one of the following :

- Item Code
- Description
- ?Item GL Class
- ?Item Tax Class
- Search Words
- ?Product Group
- ?Vendor
- Vendor Reference
- Info field 1

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

Inventory Status Selection panel (figure 21)

2. Press **Enter** to display all items on the *Inventory Status panel* (figure 22), or to narrow your search complete one of these fields (If you complete more then one field **ORDER POWER!** only searches based on the results of the first field.):

Item Code

Type the item code, the alphanumeric identifier assigned to each item. If the item code that you entered does not exist then the listing will begin with the next code in alphabetical order.

Description

Type the description associated with the item number. Like the Item Code if the description does not exist then the next description in alphabetical order will appear



If an **Item GL Class** or **Tax Class** code is entered, only inventory items with the Class code matching the specified code will be selected from the database and included in the inquiry.

Item GL Class

Type the code assigned to the group of items related for General Ledger purposes.

Item Tax Class

Type the code assigned to a group of items related for taxing purposes.

Search Words

Type the predefined words or character groups consisting of a maximum of five characters that may be used to “find” an item or SKU in the database

when the exact item number is unknown. A maximum of three search words may be assigned per item.

When a search word is entered, **ORDER POWER!** will scan the item master file and select only items that have the specified search word(s) assigned to them.

Product Group

Type the code assigned to multiple items in order to relate or *group* the items by the type of product (for example, OFS: Office Supplies).

When a product group code is entered, only inventory items with a group code matching the specified code will be selected from the database and included in the inquiry.

Vendor

Type a vendor number which will force **ORDER POWER!** to select only items provided by a specific supplier (vendor).

Vendor Reference

Type the item number assigned *by the vendor* to an item in inventory.

Inventory Info Field 1/2/3

Type the information as defined in the Company Profile. The Company Profile allows a company to establish three additional information fields that can be used to describe inventory when an item is added or updated in the Item Master file. The field *label* that appears at this point on the panel comes from the description assigned to the first inventory info field in the Company Profile.

3. Press **Enter** to display the *Inventory Status panel* (figure 22).

--C. S. I. Development 3.3--										
Inventory Status										
5=Item	15=Qty	Dis	6=Ext	Desc	7=Prc	10=Kit	11=Cl	12=Spec	14=HI	story
Avail	16=Open	PO	17=Cont	18=Media	Prc	20=Book	Prc	22=Where	used	
Item/Description	U/M	On Hand	On Pick	Cust Order	On PO	Avail	Comm	t		
— AZZ					EA			2.000		2.000-
Dumbo								5000.000		
— A1					EA	12091.000		101653.000		89532.000-
Mrs. Doubtfire						3329.500		1333.000		8643.500
— A10MEB				Phase Out Item	EA					
Mary Ella's Cooking Tips										
— A12								24.000		24.000-
A Few Good Men							5.000	151.000		13.000-
— BARBIE CAR					EA			17.000		
Barbie's 1993 sports car								15.000		
										More...
F1=Help F3=Exit F4=?List F7=Bkwd F8=Fwd F10=Top F12=Cancel F16=Next U/M										

Inventory Status panel (figure 22)

You can perform the following functions on a customer record:

Action	Description
5=Item Display	Display the Item Display window 1 (figure 23)
6=Ext Desc	Display the Extended Description Inquiry window (figure 27)
7=Prc	Display the <i>Item Pricing Inquiry window (figure 28)</i>
10=Kit	Display the <i>Kit Component Inquiry window (figure 29)</i>
11=Cls Prc	Display the <i>Customer Class Pricing Inquiry window (figure 31)</i>
12=Spec Prc	Display the <i>Item Special Price Inquiry panel (figure 32)</i>
14=History	Display the <i>Item Transaction History panel (figure 33)</i>
15=Qty Avail	Display the <i>Item Quantity on Hand panel (figure 34)</i> .
16=Open PO	Display the <i>Purchase Order Item Inquiry panel (figure 35)</i> .
17=Cont Prc	Display the <i>Contract Pricing Inquiry panel (figure 36)</i> .
18=Media	Display the <i>Item Media Price Inquiry panel (figure 37)</i> .
20=Book Prc	Display the <i>Media Book Pricing Inquiry panel (figure 38)</i> .
22=Where used	Display the <i>Component/Parent Inquiry panel (figure 39)</i> .
F16=Next U/M	Change the unit of measure display from the SELL (ing) unit to the PURCHASE (ing), Press F16 =Next U/M to change the display to the STOCK (ing) unit of measure.

To display Item Details

1. From the **ORDER POWER! Main Menu**, select: **Inventory Control \ Inventory Status Inquiry** to display the *Inventory Status Selection panel (figure 21)*.
2. Follow the directions for that panel and press **Enter**. Then, choose an item and press **5=Item Display** to display the *Item Display window 1 (figure 23)*.

Item		AZZ		Item Display			
Description		Dumbo					
Search Words		MOVIE STK					
Start Date		End Date		H	Creation Date		
2/03/01	bl						
Primary Vendor		1	Style				
		Kreidman					
Stock	Y	Stock U/M	EA	1.000	EA		
Salable	Y	Sales U/M	EA	1.000	EA		
Manufactured	N	Purchase U/M	M	1000.000	M		
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	Invoice	N		
Assortment Item	N	Allow Partial Ship		N	Cost to Kit		
Continuity Item	N	Serial/Lot/Gift Certificate	S/L/G				
Gift Certificate:	Face Value	Fixed	Y/N				
Superseding Item							
Check Qty Available if Superseding	N						

3. Press **Enter** to display the *Item Display window 2 (figure 24)*.

```

GL Class          Tax Class          002
Price Group  SIS
Product Group          Product Sub-Group
Pick Ticket  MEB          Hold Code
Auto F10 in OE      in PO
Buyer          Cycle Count          A
Auto Prc Brk N          Lead Time

Preferred:
Pick Location          Replenishment
Orders:
Put Away Locn

```

Item Display window 2 (figure 24)

4. Press **Enter** to display the *Item Display window 3*(figure 25).

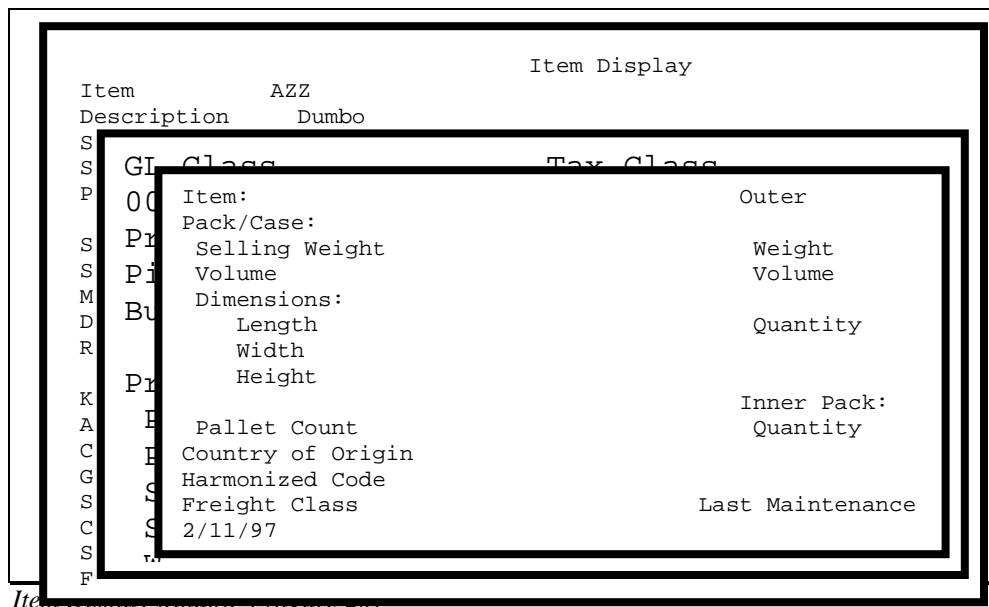
```

Item Display
Item          BARRIE GAB
D GL Class          Tax Class          Price Group
S Pr Personalization Code          Required
S Pi Seasonality Cd
P Bu Subs. Group
S Pr Up-sell Group
S Pi Up-sell Mesg.
M Pu Cross-sell Grp.
D Sh Default Shipping Inst.
R S Zero Price          A A/E/W
W Shipping/Handling Calculation Method          Chart Id
K Av Mandatory
A Re Roys Inf 1          1.....
C Mi N
G Co Roys Inf 2          2.....
S N
C F
S

```

Item

5. Press **Enter** to display the *Item Display window 4* (figure 26).



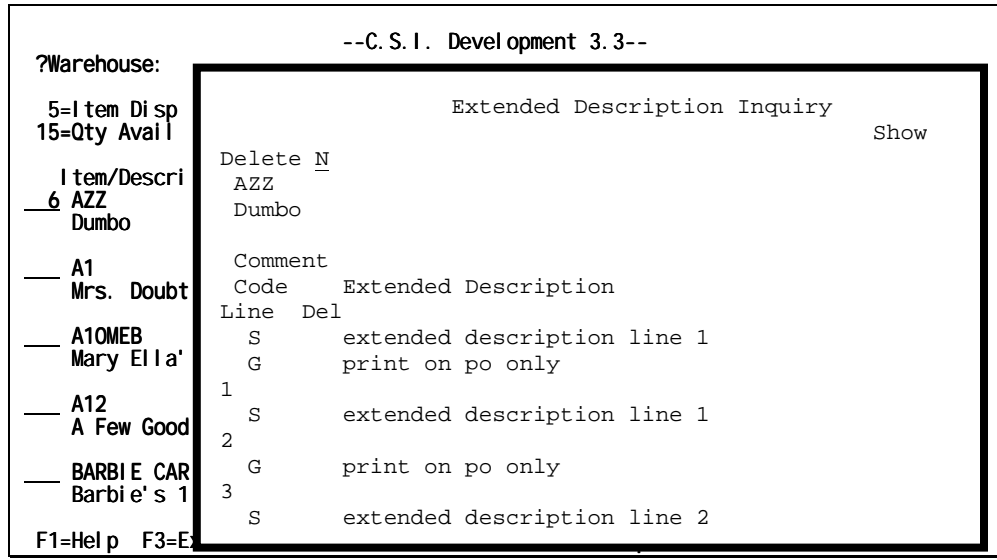
Item Display window (figure 26)

6. Press **Enter** to return to the *Inventory Status panel* (figure 22).

To display and Item's Extended Description

The item number and description for the selected item are displayed. These fields cannot be modified from this screen.

1. From the **ORDER POWER! Main Menu**, select: **Inventory Control \ Inventory Status Inquiry** to display the *Inventory Status Selection panel* (figure 21).
2. Follow the directions for that panel and press **Enter**. Then, choose an item and press **6=Ext Desc** to display the *Extended Description Inquiry window* (figure 27).



Extended Description Inquiry window (figure 27)

To Display Item Pricing

1. From the **ORDER POWER! Main Menu**, select: **Inventory Control \ Inventory Status Inquiry** to display the *Inventory Status Selection panel (figure 21)*.
2. Follow the directions for that panel and press **Enter**. Then, choose an item and press **7=Prc** to display the *Item Pricing Inquiry window (figure 28)*.

```

--C. S. I. Development 3.3--
?Warehouse:
5=Item Disp
15=Qty Avail

Item/Descri
7 AZZ
  Dumbo

  A1
  Mrs. Doubt

  A10MEB
  Mary Ella'

  A12
  A Few Good

  BARBIE CAR
  Barbie's 1

F1=Help F3=Exit
  
```

--C. S. I. Development 3.3--				
AZZ		Item Pricing Inquiry		
Dumbo				U/M
EA				
Pstn:				
2=Change 5=Display 6=Ship Via Shipping/Handling				
	Quantity	Unit Price	Allow Disc 1	Allow
Disc 2				
—	1.000	143.0000	Y	Y
—	5.000		Y	N
—	21.110		Y	N
Bottom				

Item Pricing Inquiry window (figure 28)

To Display Kit or Assortment Information

1. From the **ORDER POWER! Main Menu**, select: **Inventory Control \ Inventory Status Inquiry** to display the *Inventory Status Selection panel (figure 21)*.
2. Follow the directions for that panel and press **Enter**. Then, choose an item which must be either a kit or an assortment and press **10=Kit**. If the item is a kit then **ORDER POWER!** displays the *Kit Component Inquiry window (figure 29)*. If the item is an assortment then **ORDER POWER!** display the *Assortment Item Header Update panel (figure 30)*.

```

--C. S. I. Development 3.3--
FDIN
Delete : N
Gift Basket
Pstn:
2=Change 5=Display 6=Ext Desc 8=Qty Avail

Component      Description
Quantity Del
— A1           Cheese
4.000
— A10          Wheat Crackers
4.000
— A11          Whole Grain Ckackers
8.000
— A16          Wine
1.000
— A5           Napkins
4 000
  
```

Kit Component Inquiry window (figure 29)

3. Press **Enter** to return to the *Inventory Status panel* (figure 22).

```

--C. S. I. Development 3.3--
Assortment Item Header Update

Assortment Item KRIASST
Kreuger Industrial asst item

Allow More Than One
to be Ordered at a Time Y

6=Group Items

Opt Group Description Order Qty Required Required to Order Sales Adj Percentage
- 1 COLORS 1.00 Y 100.00
- 2 SEATS N
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- 10

F1=Help F3=Exit F12=Cancel F21=Print Delete

```

Assortment Item Header Update panel (figure 30)

To create an assortment item

Complete these fields:

Allow More Than One to be Ordered at a Time

Type **Y** or **N** to indicate whether a customer is permitted to order multiple quantities of the same assortment item.

Y (yes) allows a customer to order more than one

N (no) does not allow the customer to order more than one

Description

Type a description for the group that identifies the type (relationship) of the component items assigned to each group.

Order Qty Required

Type the total number of units from that group that must be selected during Order Entry. Multiples of the same item can be ordered if the total quantity required is met, and not exceeded.

Required to Order

Type **Y** or **N** to indicate if there is an item which must be ordered.

Y (yes) requires that an item be selected for the assortment.

N (no) allows all items to be optional

Sales Adjustment Percentage

Type the Sales adjustment percentage. This field works similarly to kit processing, but the percentage applies to the group as a whole, not the individual component items. Sales adjustment percentage is used to prorate the assortment charges for the parent item to each group within the assortment. The proportion applies to the item price, shipping and handling, discount, taxes, and miscellaneous charges. The combined sales adjustment percentage must total 100% for all groups.

3. Press **Enter** to update the information and return to the *Inventory Status panel* (figure 22).

To Display Customer Class Pricing

1. From the *ORDER POWER! Main Menu*, select: **Inventory Control \ Inventory Status Inquiry** to display the *Inventory Status Selection panel* (figure 21).
2. Follow the directions for that panel and press **Enter**. Then, choose an item and press **11=Cls Prc** to display the *Customer Class Pricing Inquiry window* (figure 31).

```

--C. S. I. Development 3.3--
FDIN1      Customer Class Pricing Inquiry
Gift Basket                               Show
Delete : N
Pstn:                                         Show
Expire : N
2=Change  5=Display  6=Ship Via Shipping/Handling
                               Allow  Allow
__Class   Quantities   Unit Price  Disc 1  Disc 2
Del  Exp
__  CSI    10.000      10.0000   N      N
__  DIS    100.000     10.0000   Y      Y
__  EMP    25.000      8.0000    N      N
__  MEM    50.000      10.0000   Y      Y
F1                                             Next U/M

```

Customer Class Pricing Inquiry window (figure 31)

To Display Item Special Pricing

1. From the *ORDER POWER! Main Menu*, select: **Inventory Control \ Inventory Status Inquiry** to display the *Inventory Status Selection panel* (figure 21).
2. Follow the directions for that panel and press **Enter**. Then, choose an item and press **12=Spec Prc** to display the *Item Special Price Inquiry panel* (figure 32).

```

--C. S. I. Development 3.3--
?Warehouse:
5=Item Disp
15=Qty Avail
Item/Description
7 AZZ
Dumbo
A1
Mrs. Doubt
A10MEB
Mary Ella'
A12
A Few Good
BARBIE CAR
Barbie's 1
F1=Help F3=End

AZZ      Item Special Price Inquiry
Dumbo                               U/M
EA
Pstn:
2=Change  5=Display  6=Ship Via Shipping/Handling
Quantity   Unit Price   Allow Disc 1   Allow
Disc 2
--- 25.000   12.0000       Y               Y
--- 50.000   10.0000       Y               Y
F1=Help F3=End

```

Item Special Price Inquiry panel (figure 32)

To Display Item Special Pricing

1. From the **ORDER POWER! Main Menu**, select: **Inventory Control \ Inventory Status Inquiry** to display the *Inventory Status Selection panel (figure 21)*.
2. Follow the directions for that panel and press **Enter**. Then, choose an item and press **14=History** to display the *Item Transaction History panel (figure 33)*.

--C. S. I. Development 3.3--
Inventory Status

?Warehouse: _____

A1		Item Transaction History			From:
OLDEST					To:
Mrs. Doubtfire					
NEWEST					
Pstn to Date:	1.000	?Filter by Whse:	STOCK U/M: EA	/	
5=Display		?Filter by Code:			
Transaction		Prior			
Whse	Location	Code	QOH	Quantity	
Date					
MIA	BINA1	003 Adjustments	37.000	1000.000	
12/02/97					
MIA	BINA1	020 Return-to-Vend	1034.000	6.000-	
12/24/97					

Item Transaction History panel (figure 33)

To Display Item Quantity Available

1. From the **ORDER POWER! Main Menu**, select: **Inventory Control \ Inventory Status Inquiry** to display the *Inventory Status Selection panel (figure 21)*.
2. Follow the directions for that panel and press **Enter**. Then, choose an item and press **15=Qty Avail** to display the *Item Quantity on Hand panel (figure 34)*.

--C. S. I. Development 3.3--

?Warehou

5=Item	AZZ	Item Quantity Availability			
15=Qty A	Dumbo				SELL
	Pstn:				U/M: EA /
	1.000				
Item/D	6=Qty on Hand				
15 AZZ	Whse	On Hand	Cust Order	Cust Drop	Available
Dumbo	On PO				
			Committed		Avail Commit
A1	PO Drop				
Mrs.	On Pick				
A10ME	Net				
Mary	_ FTL				
A12					
A Few	_ MIA	2032	362	4	1674
BARBI	138				
Barbi			298		1734
F1=Help F	4				

Item Quantity on Hand panel (figure 34)

To Display Purchase Order Items

1. From the **ORDER POWER! Main Menu**, select: **Inventory Control \ Inventory Status Inquiry** to display the *Inventory Status Selection panel (figure 21)*.

- Follow the directions for that panel and press **Enter**. Then, choose an item and press **16=Open PO** to display the *Purchase Order Item Inquiry* panel (figure 35).

--C. S. I. Development 3.3--

?	AZZ	Purchase Order Item Inquiry					Recvd	Not
1	Costed: <u>N</u>							
	Dumbo							Active
	POs Only							
<u>1</u>	On Order	138.000						
	PO					Req	Sched	
	PO #	Whs	Order Qty	Rec Qty	Ordered	Ship	Ship	
	Status							
	40164	MIA	100.000		3/23/98	2/15/01		
	2/15/01	Active						
	41370	MIA	1.000		6/23/99	4/22/99		
	4/22/99	Active						
	41370	MIA	1.000		6/23/99	4/22/99		
	4/22/99	Active						
	41370	MIA	1.000		6/23/99	4/22/99		
	4/22/99	Active						

F1=Help F3=EXIT F4=?LIST F7=BKWD F8=FWD F10=TOP F12=CANCEL F16=Next 0/M

Purchase Order Item Inquiry panel (figure 35)

To Display Contract Pricing

- From the **ORDER POWER! Main Menu**, select: **Inventory Control \ Inventory Status Inquiry** to display the *Inventory Status Selection* panel (figure 21).
- Follow the directions for that panel and press **Enter**. Then, choose an item and press **17=Cont Prc** to display the *Contract Pricing Inquiry* panel (figure 36).

--C. S. I. Development 3.3--

?	AZZ	Contract Pricing Inquiry				
1	u					
	Dumbo					
	Expire : N					
	Pstn:					
	2=Change	5=Display	6=Ship Via	Shipping/Handling		Show
				Allow	Allow	
	Start/End					
	Customer	Quantity	Unit Price	Disc 1	Disc 2	
	Dates					
	-	307	5.000	15.0000	Y	Y
	-	9748	1.000	10.0000	Y	Y
	-	10013	15.000	15.0000	N	N

F1=Help F3=EXIT F4=?LIST F7=BKWD F8=FWD F10=TOP F12=CANCEL F16=Next 0/M

Contract Pricing Inquiry panel (figure 36)

To Display Item Media Price

- From the **ORDER POWER! Main Menu**, select: **Inventory Control \ Inventory Status Inquiry** to display the *Inventory Status Selection* panel (figure 21).
- Follow the directions for that panel and press **Enter**. Then, choose an item and press **18=Media Prc** to display the *Item Media Price Inquiry* panel (figure 37).

```

--C. S. I. Development 3.3--
?Wareho
5=Ite
15=Qty
Item
18 AZZ
Dum
A1
Mrs
A10
Mar
A12
A F
BAR
Bar
F1=Hel p

```

Media	Class	Quantity	Unit Price	Allow Disc 1	Allow Disc
2	Del Exp				
-	MONTHLY	50.000	28.0000	Y	Y
-	SPRING	50.000	25.0000	Y	Y
-	WWW199701	50.000	30.0000	Y	Y

Item Media Price Inquiry panel (figure 37)

To Display Media Book Price

Book Item pricing assigns special prices to **Item(s)** being promoted in specific media. **ORDER POWER!** applies this pricing when the **Media Code** is used in **Order Entry**.

1. From the **ORDER POWER! Main Menu**, select: **Inventory Control \ Inventory Status Inquiry** to display the *Inventory Status Selection panel (figure 21)*.
2. Follow the directions for that panel and press **Enter**. Then, choose an item and press **20=Book Prc** to display the *Media Book Pricing Inquiry panel (figure 38)*.

```

--C. S. I. Development 3.3--
?Wa
5=
15=
I
18
A1
Mrs
A10
Mar
A12
A F
BAR
Bar
F1=Hel p

```

Media Book	Class	Quantity	Unit Price	Allow Disc 1	Allow Disc
2	Del Exp				
-	MARVSBOOK	50.000	42.0000	Y	Y
-	SEPT98C	50.000	40.0000	Y	Y

Media Book Pricing Inquiry panel (figure 38)

To Display Item Quantity Available

1. From the **ORDER POWER! Main Menu**, select: **Inventory Control \ Inventory Status Inquiry** to display the *Inventory Status Selection panel (figure 21)*.
2. Follow the directions for that panel and press **Enter**. Then, choose an item and press **22=Where Used** to display the *Component/Parent Inquiry panel (figure 39)*.

--C. S. I. Development 3.3--

?Wareho	DS_KITSTK	Component/Parent Inquiry	Show
5=Ite	Delete: N		
15=Qty	Kit to Stock Item		
Item	5=Display		
— AZZ	K D		
Dum			
— A1	A e		
Mrs	Parent	Description	
	C l		
22 A10	— DS_KITSTK2	Kit to Stock kit's as components	
Mar	K —		
— A12	— DS_KITSTK3	Kit to Stock kit's as components	
A F	K —		
— BAR	— DS_KITSTK4	Kit to Stock kit's as components	
Bar	K —		
F1=Hel p			

Component/Parent Inquiry panel (figure 39)

Item Schedule Projected Report

The **Item Schedule Projected Report** produces a list of all unshipped items that are scheduled for shipment during a specific time frame. This report can be used to create a backorder listing or to list future item requirements (items that must be purchased).

1. From the **ORDER POWER! Main Menu**, select: **Inventory Control \ Item Schedule Projected Report** to display the *Item Scheduled Projected Report panel* (figure 40).

--C. S. I. Development 3.3--		
Item Schedule Projected Report		
From Date.....		
To Date.....	<u>7/29/99</u>	
Print in Detail or Summary...	<u>1</u>	1=Detail 2=Summary
Show Kit to Ship Components...	<u>Y</u>	Y/N
Use Current Printer Defaults..	<u>Y</u>	Y/N
Submit to Batch.....	<u>N</u>	Y/N
Save Changes.....	<u>N</u>	Y/N
F1=Help F3=Exit F12=Cancel		

Item Scheduled Projected Report panel (figure 40)

2. Complete these fields.

From/To Date

Type a range of dates to specify which items to select for the report.

Print in Detail or Summary

Type the code to determine which print form.

1=Detail prints a detailed report, which lists a detailed report line for each item and scheduled date

2=Summary prints a report in summarized format, which prints one line of report information for each date; all outstanding orders/items for a single date are grouped together and an aggregate total is compiled

Show Kit to Ship Components

The report will optionally print all kit components; however, these component quantities will not be included in the report total quantity. Type **Y** or **N** to indicate whether to print all of the kit components.

Y (yes) prints a line for the kit parent item as well as all kit components

N (no) prints a report line for the composite kit parent item

Use Current Printer Defaults

Type **Y** or **N** to indicate whether to change the existing printer defaults for the current report. (See the "Setting Printer Defaults" section on page 71.)

- Y** (yes) accept the existing printer defaults
- N** (no) display the *Printer Defaults panel (figure 52)* to make changes the current printer defaults

Save Changes

Type **Y** or **N** to indicate whether any changes made to the defaults for the current report should be applied to all subsequent printings of *that report*. This eliminates redundant data entry.

- Y** (yes) save changes
- N** (no) use print defaults this time only

3. Press **Enter** to print the

Overcommitted Inventory Report

The Overcommitted Inventory report produces a list of all items that have been committed to orders for a quantity in excess of the “on hand” or item stock quantity (for example, the “quantity committed” exceeds the “quantity on hand”).

- From the **ORDER POWER! Main Menu**, select: **Inventory Control \ Overcommitted Inventory Report** to display the *Overcommitted Inventory Report panel* (figure 41).

** CSI 3.3 Development Co 1 **			
Overcommitted Inventory Report			
List By.....	1	1=Item	2=Description
Warehouse.....	1	1=All	2=Select
U/M Calculation.....	1	1=Stock	2=Sell 3=Purchase
Use Current Printer Defaults..	Y	Y/N	
Submit to Batch.....	N	Y/N	
Save Changes.....	N	Y/N	
F1=Help F3=Exit F12=Cancel			

Overcommitted Inventory Report panel (figure 41)

- Complete these fields.

List By

Type **1** or **2** to indicate how the report output should be sorted and in which sequence it should be printed.

- 1**=Item sequences the report by item number
- 2**=Description sequences the report by item description

Warehouse

Type a **1** or **2** to indicate which warehouses to include in the report

- 1**=All includes *all* warehouses in the report
- 2**=Select displays the *Warehouse Selection* window. Select the warehouse(s) to include in the report

U/M Calculation

Type **1**, **2**, or **3**, to determine whether how the unit quantities are displayed on the report.

- 1**=Stock represents stocking units of measure
- 2**=Sell represents selling units of measure
- 3**=Purchase represents purchase(ing) units of measure

Use Current Printer Defaults

Type **Y** or **N** to indicate whether to change the existing printer defaults for the current report. (See the “Setting Printer Defaults” section on page 71.)

- Y** (yes) accept the existing printer defaults

N (no) display the *Printer Defaults panel (figure 52)* to make changes the current printer defaults

Save Changes

Type **Y** or **N** to indicate whether any changes made to the defaults for the current report should be applied to all subsequent printings of *that report*. This eliminates redundant data entry.

Y (yes) save changes

N (no) use print defaults this time only

3. Press **Enter** to print the

Inventory History Report

The **Inventory History Report** provides a recap of the stock activity (or change in stock) for each item during a specific time period. The number of units received can be readily compared to the number of units issued and/or adjusted for each item.

1. From the **ORDER POWER! Main Menu**, select: **Inventory Control \ Inventory History Report** to display the *Inventory History Report panel* (figure 42).

```

--C. S. I. Development 3.3--
Inventory History Report

From Date.....
To Date..... 7/29/99
List By..... 1      1=Item 2=Description
Warehouse..... 1      1=All  2=Select
U/M Calculation..... 1      1=Stock 2=Sell      3=Purchase
Items Without Activity..... 1      1=Include 2=Omit    3=Only
Use Current Printer Defaults.. Y      Y/N
Submit to Batch..... N      Y/N
Save Changes..... N      Y/N

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

Inventory History Report panel (figure 42)

2. Complete these fields.

From/To Date

Type a range of dates to specify which items to select for the report.

List By

Type **1** or **2** to indicate how the report output should be sorted and in which sequence it should be printed.

- 1**=Item sequences the report by item number
- 2**=Description sequences the report by item description

Warehouse

Type a **1** or **2** to indicate which warehouses to include in the report

- 1**=All includes *all* warehouses in the report
- 2**=Select displays the *Warehouse Selection* window. Select the warehouse(s) to include in the report

U/M Calculation

Type **1**, **2**, or **3**, to determine whether how the unit quantities are displayed on the report.

- 1**=Stock represents stocking units of measure
- 2**=Sell represents selling units of measure
- 3**=Purchase represents purchase(ing) units of measure

Items Without Activity

Type **1**, **2**, or **3** to indicate whether items that lack activity within the designated timeframe should be included.

- 1**=Include generates a report which includes inactive items
- 2**=Omit generates a report which excludes inactive items
- 3**=Only generates a report containing only those items who have become inactive

Use Current Printer Defaults

Type a **Y** or **N** to indicate whether to change the existing printer defaults for the current report. (See the "Setting Printer Defaults" section on page 71.)

- Y** (yes) accept the existing printer defaults
- N** (no) display the *Printer Defaults panel (figure 52)* to make changes the current printer defaults

Save Changes

Type **Y** or **N** to indicate whether any changes made to the defaults for the current report should be applied to all subsequent printings of *that report*. This eliminates redundant data entry.

- Y** (yes) save changes
- N** (no) use print defaults this time only

3. Press **Enter** to print the

Inventory Movement Report

The **Inventory Movement Report** lists all inventory transactions (inventory effect codes) posted against an item through a specific time period.

A report cumulative column will be displayed on the report. This field is a running transaction quantity total of all transactions against an item during the reporting period (the total inventory “movement” of an item).

This report can be useful as an audit tool to evaluate how the inventory was affected or adjusted by various **ORDER POWER!** functions. For example, by selecting only inventory effect code “002” (Issue - Shipment), a report could be produced to show all shipments of an item within a certain time frame.

1. From the **ORDER POWER! Main Menu**, select: **Inventory Control \ Inventory Movement Report** to display the *Inventory Movement Report panel* (figure 43).

--C. S. I. Development 3.3--			
Inventory Movement Report			
From Date.....			
To Date.....	<u>7/29/99</u>		
Inventory Effect Code.....	<u>1</u>	1=All	2=Select
Item.....	<u>1</u>	1=All	2=Select
Use Current Printer Defaults..	<u>Y</u>	Y/N	
Submit to Batch.....	<u>N</u>	Y/N	
Save Changes.....	<u>N</u>	Y/N	
F1=Help F3=Exit F12=Cancel			

Inventory Movement Report panel (figure 43)

2. Complete these fields.

From/To Date

Type a range of dates to specify which items to select for the report.

Inventory Effect Code

Type **1** or **2** to indicate which codes to include.

1=All selects all codes

2=Select displays the *Inventory Effect Code Selection* window. Choose which code(s) to include in the report.

Use Current Printer Defaults

Type **Y** or **N** to indicate whether to change the existing printer defaults for the current report. (See the “Setting Printer Defaults” section on page 71.)

Y (yes) accept the existing printer defaults

N (no) display the *Printer Defaults panel* (figure 52) to make changes the current printer defaults

3. Press **Enter** to print the

Item Summary from Customer Orders Inquiry

This inquiry provides a summary of item/order activity by month over a three-year period. A visual comparison can be made of the number of items ordered as compared to the number of items returned.

The period begins with the current system year and lists twelve months of activity beginning with January. Totals for each month of the *preceding* two years will also be accumulated and displayed.

- From the **ORDER POWER! Main Menu**, select: **Inventory Control \ Item Summary Inquiry** to display the *Item Summary Inquiry panel* (figure 44).

--C. S. I. Development 3.3--									
Item Summary Inquiry									
?Item: ASSORTO		Assortment 0							
Primary Vendor:		56 AOL							
Buyer: Greg Hopkins								Sell U/M.....: EACH	
----- 1999 -----		----- 1998 -----		----- 1997 -----		Non-Stockable Drop Ship			
Ordered		Returned		Ordered		Returned		Creation Date: 8/25/98	
JAN									
FEB	4								
MAR	1							Repl. Cost.....:	
APR	1								
MAY	67							Qty on Order...:	368
JUN	172							Qty on Hand...:	
JUL	52							Qty on PO.....:	227
AUG									
SEP									
OCT									
NOV				113	15				
DEC				13					
TOTAL	297			126	15			Refresh Date:	7/22/99
AVG	42			25					
F1=Help F3=Exit F4=?List F5=Item F6=Ext Desc F7=Prev F8=Next F24=More keys									

Item Summary Inquiry panel (figure 44)

- Type an **Item Code** and then press **Enter** to display the **Item Summary**.

Suggested Inventory Transfers

The Suggested Inventory Report analyzes inventory replenishment requirements and lists potential stock redistribution or reallocation. Replenishment refers to the process of incrementing the inventory quantity on hand at a particular location until the maximum stock level defined for the location has been achieved. For example, if there are currently 50 units of an item on hand and the location allows a maximum stock level of 5000 units, then 4950 units would be required to completely replenish the item.

This report is useful for companies that maintain a certain amount of inventory in one location to fulfill pick tickets (“picking” location) but use a separate location or locations to store excess inventory (“bulk” location). Therefore, this report could determine which “picking” locations are running low and which corresponding “bulk” locations would be potential suppliers. It is strongly suggested that warehouse locations are set up with a location type in the master file especially for locations that will be maintained as “picking” and “bulk” locations.

This report selects items with quantity deficits and then searches for (and displays) alternate locations from which to restock the item. The report will display the item, “from” location and current inventory quantity as well as the location, inventory quantity, and the minimum and maximum stock levels for the “to” location. Multiple “from” locations could be selected for a single location. The Suggested Inventory Transfers Report is sequenced by “from” location.

An additional column, Suggested Transfer Quantity, will be displayed to indicate how many units could be distributed from the issuing location to replenish the destination location. When the “from” location lacks sufficient quantity to completely replenish the “to” location, the entire quantity on hand will be suggested. Otherwise, **ORDER POWER!** will suggest only enough of the “from” quantity to replenish the item. When multiple “from” locations are selected, the total of each suggested transfer quantity will equal the number of units required to replenish the “to” location.

1. From the **ORDER POWER! Main Menu**, select: **Inventory Control** \ Suggested **Inventory Transfers** to display the *Suggested Inventory Transfers panel (figure 45)*.

--C. S. I. Development 3.3-- Suggested Inventory Transfers			
?From Warehouse	<u>FTL</u>		
Location Type	<u>BLK</u>		
?To Warehouse	<u>FTL</u>		
Location Type	<u>PIK</u>		
Select Items Below	<u>2</u>	1=Minimum	2=Maximum
Use Current Printer Defaults . . .	<u>N</u>	Y/N	
Submit to Batch	<u>N</u>	Y/N	
Save Changes	<u>Y</u>	Y/N	
F1=Help F3=Exit F4=?List F12=Cancel			

Suggested Inventory Transfers panel (figure 45)

2. Complete these fields.



You are only required to complete one of the **Location** fields. However, at least one of the **From** or **To Location** fields **MUST** be filled.

From Warehouse

Type the three character abbreviation for the physical or logical warehouse from which the inventory could be taken from in order to restock the primary location.

Location Type

Type the three character abbreviation for the type of location from which inventory could be taken in order to restock the **To Location**. This may also be referred to as the “bulk” location.

To Warehouse

Type the three character abbreviation for the physical or logical primary warehouse from which the items requiring replenishment will be selected.

Location Type

Type the three character abbreviation for the type of location with inventory requiring replenishment. This may also be referred to as the “picking” location.

Select Items Below

Type 1 or 2 to indicate how to determine which items require replenishment.

1=Minimum????????????????

The operator decides whether to search for items whose current inventory quantity on hand falls below either the minimum stock level or maximum stock level as defined for each item in the Item Quantities on Hand file.

Use Current Printer Defaults

Type a code to indicate whether to change the existing printer defaults for the current report. (See the “Setting Printer Defaults” section on page 71.)

- Y** (yes) accept the existing printer defaults
- N** (no) display the *Printer Defaults panel (figure 52)* to make changes the current printer defaults

Submit to Batch

Type **Y** or **N** to indicate whether the report should be submitted to a job queue to process behind the scenes in batch mode and immediately free up your terminal or run the report interactively which locks the terminal until the report has completed.

- Y** (yes) indicates that the report will be submitted as a batch job
- N** (no) indicates that the report will be run interactively

Save Changes

Type **Y** or **N** to indicate whether any changes made to the defaults for the current report should be applied to all subsequent printings of *that report*. This eliminates redundant data entry.

- Y** (yes) save changes
- N** (no) use print defaults this time only

3. Press **Enter** to print the

Free Form Barcode Labels

A barcode is a printed image consisting of a series of encoded lines of varying thicknesses and contrasts which represents numbers, letters, special characters, and some codes. The barcode image provides information about the item or **ORDER POWER!** function to which it is assigned. For example, a barcode can indicate the name, description, storage location, quantity, and/or price of an item. A barcode can also identify and initiate automated functions; for example, scanning an “F03” barcode label could trigger the **ORDER POWER!** “F3=Exit” function key.

A barcode can be printed or stamped on labels, parts, invoices, or other media and can be scanned electronically to speed the timely and accurate input of data into a computer system.

This function will produce free formatted barcode labels to assist with the enhanced automation of Inventory or Warehouse Control and Positive Ship Confirmation.

Before you begin note: A barcode capable printer or IPDS (Intelligent Printer Data Stream) is required.

1. From the **ORDER POWER! Main Menu**, select: **Inventory Control \ Free Form Barcode Labels** to display the *Printer Defaults panel* (figure 52) on page 71. Follow the directions for that panel and then press **Enter** to display the *Barcode Label Selection panel* (figure 46).

```

--C. S. I. Development 3.3--
Barcode Label Selection

Characters.....
Length.....
Description.....
Number of Labels to Print.....
Enter Number of Labels for Keys Below.....

___ F01          ___ F09          ___ F17          ___ Cursor Right
___ F02          ___ F10         ___ F18          ___ Cursor Left
___ F03          ___ F11         ___ F19          ___ Cursor Up
___ F04          ___ F12         ___ F20          ___ Cursor Down
___ F05          ___ F13         ___ F21          ___ TAB
___ F06          ___ F14         ___ F22          ___ BackTAB
___ F07          ___ F15         ___ F23          ___ ENTER
___ F08          ___ F16         ___ F24          ___ FIELD EXIT
                                     Bottom

F1=Help F3=Exit

```

Barcode Label Selection panel (figure 46)

2. Complete these fields.

Characters

Type the actual characters (alphabetic characters, numerics, special characters, and/or codes) that will be automatically converted to the encoded barcode image. A maximum of 15 characters is permitted.

Length

Indicate to the print program how long the generated label should be; the size is specified in characters. The maximum length permitted is 15 characters.

?????????Note: When the length is set to 15, the scanner will automatically TAB to the next field position. When any other length is specified, the operator must manually scan a TAB or field mark prior to scanning the next item.

Description

Type an explanation of the type of information encoded on the label (for example, Item Number, Warehouse Location, or Cursor Right). It will print below the printed barcode image on the label.

Number of Labels to Print

Type the number of specific item labels to print during the current print process. **ORDER POWER!** will print four labels across the page before continuing on the next line of labels. A maximum of 999 labels can be printed during a single processing run.

Enter Number of Labels for Keys Below

In front of each function key you would like printed, type the number of labels you would like. These bar coded function labels are required for use with the **Positive Ship Confirmation** process.

Barcoding allows the warehouse personnel to scan the required ship confirmation information (for example, item numbers and picker/packer initials) and then *to scan the appropriate function key label to trigger the **ORDER POWER!** ship confirmation process (Positive Ship Confirmation)*. This automation creates a hands-free environment replacing manual data entry and ensuring greater data accuracy.

3. Press **Enter** to print the labels. **Note:** The **Barcode Images** will *not* appear on your screen.

Move Item Preferred Location

This function allows the operator to assign a new preferred warehouse location to an item. This transfer occurs within the same warehouse. At the completion of this function, a Move Item Preferred Location Listing and an Inventory Transactions Journal Report are printed.

To post the changes to the ORDER POWER! database, this function must be terminated with by pressing **F15=Post/Exit**. Otherwise, the inventory transfers are not carried out.

1. From the **ORDER POWER! Main Menu**, select: **Inventory Control \ Move Item Preferred Location** to display the *Printer Defaults panel* (figure 52) on page 71. Follow the directions for that panel and then press **Enter** to display the *Move Item Preferred Location panel 1* (figure 47).

--C. S. I. Development 3.3--
Move Item Preferred Location

?Item.....
?Warehouse.....

F1=Help F3=Exit/Cancel Transfers F4=?List
F12=Cancel F15=Exit/Post

Move Item Preferred Location panel 1 (figure 47)

2. Complete these fields.

Item

Type the item or product whose physical inventory storage location is to be changed.

Warehouse

Type the existing warehouse for the specified item. **ORDER POWER!** displays an error message the specified item does not exist in the warehouse.

ORDER POWER! determines whether the item whose location is being changed is currently on any orders awaiting ship confirmation. Should the item appear on an active order, a **ORDER POWER!** displays a window to alert you. You can confirm the change request and continues processing or cancel the transfer request completely.

3. Press **Enter** to display the *Move Item Preferred Location panel 2* (figure 48).

```

--C. S. I. Development 3.3--
Move Item Preferred Location

Item..... 0022
Warehouse..... MIA
Current Preferred Location.... 000100
?Requested Preferred Location...

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

```

Move Item Preferred Location panel 2 (figure 48)

4. Complete the following field:

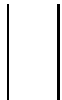
Current Preferred Location

This is the specific area within the warehouse where the item is currently housed (for example, section or bin). This field is informational and cannot be modified.

Requested Preferred Location

Type the new area within the warehouse where the item will be stored following a successful transfer (for example, section or bin).

5. Press **F15=Post/Exit** to post the transfer.



Style Items

ORDER POWER! automatically generates **Item Numbers** by combining **Core Items** with **Styles** that you created under the **Work With Files Menu**.. For help creating **Styles** and **Core Items** see the *Styles User Guide*.

Entering **Style Items** into inventory is a two step process:

1. Generate Style Item Numbers
2. Post the Style Items to the inventory

To Generate Style Item Numbers

1. From the **ORDER POWER! Main Menu**, select: **Inventory Control \ Generate Style Items** to display the *Generate Style Items panel (figure 49)*.

--C. S. I. Development 3.3--			
Generate Style Items			
Style	2	1=All	2=Select
Clear Old Data	Y	Y/N	
Submit to Batch	N	Y/N	
Save Changes	N	Y/N	
F1=Help F3=Exit F12=Cancel			

Generate Style Items panel (figure 49)

2. Complete these fields.

Style

Type **1** or **2** to indicate which styles **ORDER POWER!** should generate **Item Numbers** for.

1=All selects all previously created styles

2=Select display the Style Selection Inquiry window for you to choose which individual styles **ORDER POWER!** should create **Item Numbers** for.

Clear Old Data

Type **Y** or **N** to indicate whether to clear any **Style Items** from the *Style Item Batch Inquiry panel (figure 50)*.

Y (yes) clears all **Style Items** that you have previously created but not yet posted.

N (no) does not clear any items.

Submit to Batch

Type a code to indicate whether the report should be submitted to a job queue to process behind the scenes in batch mode and immediately free up

your terminal or run the report interactively which locks the terminal until the report has completed.

- Y (yes) indicates that the report will be submitted as a batch job
- N (no) indicates that the report will be run interactively

Save Changes

Type Y or N to indicate whether any changes made to the defaults for the current report should be applied to all subsequent printings of *that report*. This eliminates redundant data entry.

- Y (yes) save changes
- N (no) use print defaults this time only

3. Press **Enter** to print the _____ and return to the **ORDER POWER! Main Menu**.

To Post Style Items to the Inventory

1. From the **ORDER POWER! Main Menu**, select: **Inventory Control \ Post Style Items** to display the *Style Item Batch Inquiry panel (figure 50)*.

Pstn : _____		** CSI 3.3 Development Co 1 **		Show Delete : <u>N</u>	
2=Change 5=Display		Style Item Batch Inquiry			
Style	Item	Description	ERROR Del		
- SHOES	SHOESBLU8	Shoes Blue Size 8			
- SHOES	SHOESBLU9	Shoes Blue Size 9			
- SHOES	SHOESYEL8	Shoes Yellow Size 8			
- SHOES	SHOESYEL9	Shoes Yellow Size 9			
Bottom					
F1=Help F3=Exit/No Post F6=Create F7=Bkwd F8=Fwd F10=Top F12=Cancel F18=Bot					
F15=Exit/Post F21=Print					

Style Item Batch Inquiry panel (figure 50)

2. Check to be sure that all of the items listed are the items that you intended to create. Now is the time to add, change, or delete any records. When you have verified that all of the records are correct, press **F15=Exit/Post** to post the **Style Items**. This creates the **Style Items** in the **Item Master File**, using the **Core Item** as a template.

Empty Locations Report

1. From the **ORDER POWER! Main Menu**, select: **Inventory Control \ Empty Locations Report** to display the *Empty Warehouse Location Selection panel* (figure 51).

```

--C. S. I. Development 3.3--
Empty Warehouse Location Selection

?Warehouse . . . . .

Use Current Printer Defaults . . .   Y       Y/N
Submit to Batch . . . . .           N       Y/N
Save Changes . . . . .               N       Y/N

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

```

Empty Warehouse Location Selection panel (figure 51)

2. Complete these fields.

Warehouse

Type the three character abbreviation for the physical or logical warehouse to check for the report.

Use Current Printer Defaults

Type **Y** or **N** to indicate whether to change the existing printer defaults for the current report. (See the “Setting Printer Defaults” section on page 71.)

Y (yes) accept the existing printer defaults

N (no) display the *Printer Defaults panel* (figure 52) to make changes the current printer defaults

Submit to Batch

Type a **Y** or **N** to indicate whether the report should be submitted to a job queue to process behind the scenes in batch mode and immediately free up your terminal or run the report interactively which locks the terminal until the report has completed.

Y (yes) indicates that the report will be submitted as a batch job

N (no) indicates that the report will be run interactively

Save Changes

Type **Y** or **N** to indicate whether any changes made to the defaults for the current report should be applied to all subsequent printings of *that report*. This eliminates redundant data entry.

Y (yes) save changes

N (no) use print defaults this time only

3. Press **Enter** to print the

Appendix A: Cycle Count Code Maintenance

Cycle count is an inventory control technique that counts inventory items throughout the year, on a cyclical schedule. Items are assigned a cycle count code that defines when the item (SKU) should be counted.

The inventory item counting procedure is not performed automatically. The operator must initiate the process from the Capture Inventory Position off the Inventory menu. Optionally, inventory items can be counted (captured) based on selected cycle codes.

From the Capture Inventory Position Selection screen, the Cycle Code Selection pop-up window is displayed when the cycle code **select** option (2=Select) is requested. The operator enters the desired cycle codes. All entries are validated against the Cycle Count Code Master File.

Cycle Code

A cycle code is user-defined and can be created for a specific schedule or time frame. For example, **090** might mean count every 90 days or **MON** could indicate to count the inventory every Monday. Items to be counted on the same cyclical schedule may be assigned the same cycle count code; therefore, items can be selected according to cycle code.

Cycle codes are validated against the Cycle Count Code Master File.

The operator can view a list of available cycle count codes from which a specific code can be selected. The List request (F4=?List) transfers control to the Cycle Count Code Inquiry screen. *Refer to the Cycle Count Code Inquiry section on the following pages.*

Quantity

Quantity refers to either a *precise number* of items or a *percentage* of items having the designated cycle code(s). The A/P indicator determines how the quantity is interpreted.

The quantity must be a numeric value in the format **999999.999**. The value must range between .000 and 999999.999. Decimal digits are not required; whole integers can be specified.

A/P

This flag indicates whether the value in the *quantity* field is a flat number of items (**A**) or a percentage of the total number of selected items (**P**).

For example, if 150 items have a cycle code of **JAN** and a request is issued to select 60% (**P**) of all items with cycle code **JAN**, then **ORDER POWER!** will capture the first 90 items with the **JAN** cycle code. However, if a request was issued to select 60 (**A**) items with cycle code **JAN**, then **ORDER POWER!** will capture the first 60 items with the **JAN** cycle code.

Cycle Count Code Inquiry

The Cycle Count Code Inquiry allows the operator to view, add, modify, and/or delete cycle count codes. A hard copy report can be printed listing all available cycle count codes. Optionally, the report can include deleted codes.

Pstn :	_____	Cycle Count Code Inquiry	Show Delete: <u>N</u>
--------	-------	--------------------------	-----------------------

1=Select	2=Change					
Cycle		Counts	Manual			
Count	Description	Per YR	Assign Only	Del		
- 030	count every 30 days			N		
- 060	count every 60 days					
- 090	count every 90 days					
- APR	count in April			N		
- JAN	count at the beginning of YR in Jan					
- MON	count every Monday					
					More...	
F1=Help	F3=Exit	F6=Crt	F7=Bkwd	F8=Fwd	F10=Top	F12=Cancel F21=Prt

Pstn (Position)

Cycle count codes are stored in ascending order in the master file. Placing a value in this field indicates where in the cycle count code file the display should begin.

When the value does not exist, the list will begin with the next sequential entry. For example, the master file contains codes **090**, **APR**, **JAN**, and **MON**. When the operator attempts to position at code **APR**, the query lists APR, JAN, and MON. However, when the operator attempts to position at code **AUG**, the query lists only JAN and MON since a code for August does not exist.

A blank in this field displays the *entire* table of cycle count codes beginning with the first file entry and ending with the last entry in the master file.

Show Delete

This indicates whether deleted cycle count codes should be included in the list. The default is **No**, do not display deleted entries.

Action Code

In this field the operator indicates what action, if any, should be performed on the corresponding cycle count code.

Valid values are **1** (to select the entry) and **2** (to change the entry information). *Refer to*

the section on *Cycle Count Code Update*.

Cycle Count

This field displays a cycle count code from the master file. *Deleted* cycle count codes are retained in the file and can be displayed and/or modified as required.

Description

This is the description assigned to each cycle count code in the master file.

Counts Per YR

Counts per year indicates how many times during the course of a calendar year can a particular cycle code be counted. This value is optional. When entered, the value must be a number between zero and 999. However, a zero value is treated as if nothing was entered.

ORDER POWER! converts the *counts per year* into a number of days between counts. This value is used to compare the current *system date* to the *last count date* and validate whether the cycle count code can be selected for processing. The *last count date* is tracked internally. For example, a code defined for **12** *counts per year* is converted to one count allowed every 30 days (based on a standard 30 day month). Therefore, if a previous capture based on cycle codes was last performed on January 15, an additional capture for the same cycle code would not be permitted until February 15.

Manual Assign Only

The *manual assignment only* field is currently used for custom programs that can assign the cycle codes to items (SKUs) based on specific parameters such as sales, average cost, etc.

Del(ete)

This field indicates whether the cycle count code has been deleted during the change option. Deleted entries will not appear in the list when the *show delete* indicator is set to No.

Cycle Count Code Prompt

The prompt panel is displayed when defining a new cycle count code (F6=Crt).

Cycle Count Code Prompt

Cycle Count
090

F1=Help F3=Exit F12=Cancel

Cycle Code

A cycle code is user-defined and can be created for a specific schedule or time frame. For example, **090** might mean count every 90 days or **MON** could indicate to count the inventory every Monday. Items to be counted on the same cyclical schedule may be assigned the same cycle count code; therefore, items can be selected according to cycle code.

Cycle code is required and must be a one to three-character alphanumeric identifier.

Cycle Count Code Update

The update function allows the operator to define the field values for a new cycle count code or change the values defined for an existing cycle code.

Optionally, an existing cycle code can be deleted from the master file. Deleting the record does not physically remove the entry from the file; however, a deleted code cannot be selected for processing. Deleted records can be modified and reinstated for subsequent processing.

```

                                Cycle Count Code Update

                                Cycle Count
                                090

Description count every 90 days

Counts Per Year

Manual Assignment Only N

                                Delete

F1=Help  F3=Exit  F12=Cancel
Record '090      ' not in file, assume addition to file.
```

Cycle Code

A *cycle count* is a one to three-character alphanumeric code that identifies a specific schedule or time frame for counting inventory items. For example, **090** might mean count every 90 days or **MON** could indicate to count the inventory every Monday. Items to be counted on the same cyclical schedule may be assigned the same cycle count code; therefore, items can be selected according to cycle code.

Description

The *description* usually provides a detailed definition of the specific schedule or time frame for counting inventory items. The *description* is free-formatted and unedited.

Counts Per YR

Counts per year indicates how many times during the course of a calendar year can a particular cycle code be counted. This value is optional. When entered, the value must

be a number between zero and 999. However, a zero value is treated as if nothing was entered.

This value is used to compare the current *system date* to the *last count date* and validate whether the cycle count code can be selected for processing. For example, a code defined for **12 counts per year** is converted to one count allowed every 30 days (based on a standard 30 day month). Therefore, if a previous capture based on cycle codes was last performed on January 15, an additional capture for the same cycle code would not be permitted until February 15.

Manual Assign Only

The *manual assignment only* field is currently used for custom programs that can assign the cycle codes to items (SKUs) based on specific parameters such as sales, average cost, etc. Valid entries are **Y** or **N**.

Delete

Placing a **Y**(es) or **D**(elete) causes **ORDER POWER!** to make the cycle code inactive. Deleted entries cannot be selected for processing and will only appear in the inquiry list when the *show delete* indicator is set to **Yes**.

Deleted records can be modified and reactivated for subsequent processing by placing a **No**.

Cycle Count Code Listing

A hard copy report can be printed listing all cycle count codes maintained in the Cycle Count Code Master File. *Refer to the sample report on the following pages.*

A delete confirmation window is displayed when the report is requested. The pop-up window allows the operator to indicate whether deleted cycle count codes should be included or excluded from the report. Optionally, a report of deleted records only can be printed.

Deleted Records	<u>1</u>	1=Include
		2=Omit
		3=Only
F1=Help F3=Exit F12=Cancel		

Wsid: PR01048P
Date: xx/xx/xx
Prog: PR01048 Cycle Count Code Listing
Time: xx:xx:xx

Manual

Cycle Count	Description	Counts Per Year	Assign
Only Deleted			
030	count every 30 days		N
060	count every 60 days		
090	count every 90 days		
APR	count in April		N
JAN	count at the beginning of YR in Jan		
MON	count every Monday		

Total Records 6
Active Records 6
Deleted Records

Setting Printer Defaults

The *Printer Defaults panel (figure 52)* allows you to preset the values that determine how and where a report should be printed (for example, which printer device should be used, the number of copies to be produced, the required forms type, etc). This panel is usually displayed to the user after each report request. You can change the default values at the time you run any report.

```

Printer Defaults (GNO0023M)

Type choices, press Enter.

List Name . . . . . > 'AR Maintenance Proof'
Number of Copies . . . . . > 1_____ 1-255
Submit to Batch . . . . . > *NO_____ *YES, *NO
Printer to Use . . . . . > *JOB_____ Name, *JOB, *SYSVAL
Output Queue . . . . . > *JOB_____ F4 - Possible Output Queues
Library . . . . . > *LIBL_____ Name, *LIBL
Align Forms . . . . . > *NO_____ *YES, *NO
Forms Type . . . . . > *STD_____ Character value, *STD
Hold Spool File . . . . . > *NO_____ *YES, *NO
Save Spool File . . . . . > *NO_____ *YES, *NO
Print Text at Bottom of Page . . . > *JOB
Apply Changes Permanently . . . . > *NO_____ *YES, *NO

F3=Exit F4=Field F5=Refresh F12=Cancel F13=How to use this display Bottom
F24=More keys
  
```

Printer Defaults panel (figure 52)

Complete these fields, or press **Enter** to accept the displayed values:

Number of Copies

Type a number (from 1 to 255) to indicate the number of copies of the report to be produced.

Submit to Batch

Indicate whether the report should be submitted to a job queue to process behind the scenes in batch mode and immediately free up your terminal or run the report interactively which locks the terminal until the report has completed.

- *YES indicates that the report will be submitted as a batch job
- *NO indicates that the report will be run interactively

Printer to Use

Indicate which printer device the report should be printed on.

- Name** a user-supplied printer identifier
- *JOB defaults to the user's printer
- *SYSVAL defaults to the printer identifier in the system valve QPRTDEV

Output Queue

Indicate the name of a spool file where the report output can be stored temporarily until it is printed.

- Name* a user-supplied output queue identifier
- *JOB defaults to the user's output queue

Library

Indicate the name of the library where the output queue resides. This is an optional field.

Name a user-supplied library identifier
***LIBL** defaults to the library list

Align Forms

Indicate whether special forms are to be realigned before printing can begin.

***YES** the forms should be realigned. This will cause a message to display on your screen requesting that the forms be aligned.
***NO** realignment is not required prior to printing

Forms Type

Indicate whether the report/output should print on a special type of form.

***STD** regular forms are used
Character valuea user-supplied name representing which type of form the output should be printed on. This will cause a message to display on your screen requesting that the forms be changed.

Hold Spool File

Indicates whether the report output should be held on a spool file until released by the user.

***YES** hold the output spool file
***NO** automatically release the output spool file

Save Spool File

Indicate whether the spool file should be retained the completion of printing the report.

***YES** save the spool file
***NO** release the spool file

Print Text at Bottom of Page

Indicate text to be printed at the bottom of each page of the report

***JOB** defaults to the text defined for the user

Apply Changes Permanently

***YES** any default modifications become the new default values for the current report
NO** ***ORDER POWER! will not apply any changes made during the current report run to any subsequent reports

NOTE: Defaults can be changed any time as required.