

# Inventory Items

Use the **Inventory Items** view to create or modify information about each inventory item. The item ID and it's description are displayed in the two fields at the top of the screen.

To access the **Inventory Items** view:




- A** Select **File > Inventory > Inventory Items** from the **Response Main** window. The **Inventory Items** view (Figure 2-1) appears.
- B** **Tip:** press F5 to clear the screen of a previously viewed item. The screen must be clear before a new item can be created.


**Figure 2-1. Inventory Items View**



Element	Description
<b>ID field</b>	Type a unique code in this field to create a new inventory item. You may also enter the Item ID of an existing item, then press F9 to Find. Use the prompt button to display the "Inventory Items Table List" (Figure 2-2).
<b>Description field</b>	Type a description of the inventory item in this field.
<b>TAB DETAILS</b>	Click each of the Tabs to access the detail it contains. Elements within each tab are described in the following pages.


**Table 2-1. Inventory Items View Descriptions**




First a note about the following icons (buttons): Prompt, , the magnifying glass, Attachment , the paper clip, Keyword search  (icon).

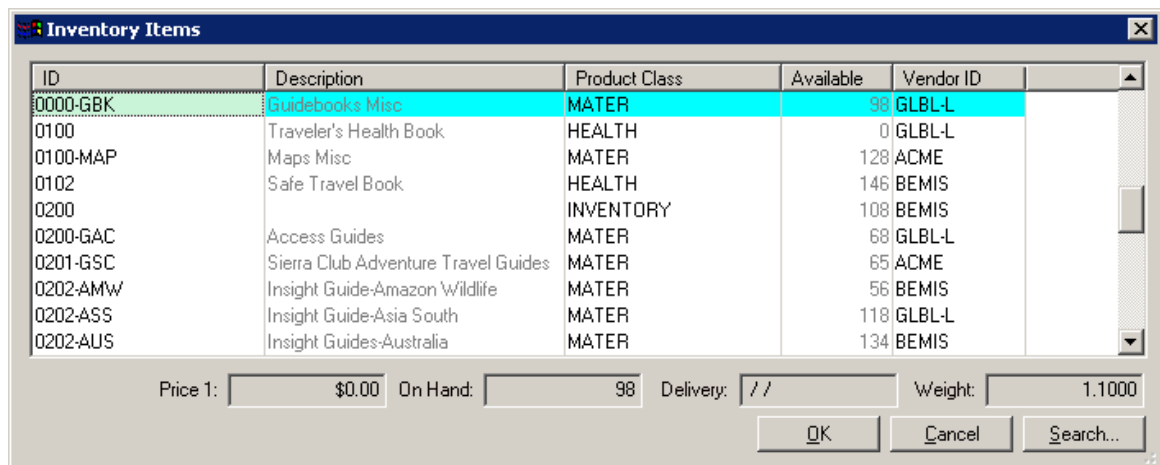
 Prompt button means a lookup (also know as “index”) is available on that field. Press the Prompt button to open a dialog that allows you to scroll thru existing records. If you type the first few characters of the information then press the prompt button you will be taken to that section of the list. If the cursor is in that field, pressing F4 also opens the list, just as if you pressed the prompt icon.

The attachments  mean you can attached objects to individual records in the table. After selecting an existing item, click to display the Attachment for Inventory item dialog. View, add, or delete objects such as documents or graphics, attributes or notes associated with Inventory Items. The paper clip “lights up”  by turning yellow if attachments exist for the item displayed.

The Keyword search icon means you can press CTL + K or the icon  to open a keyword search dialog box.

## Modify Existing Inventory Items

- A** Click  in the **ID** field to access the **Inventory Items** table list (Figure 2-2). If you know the first few characters of the item\_ID, type those in first if desired.

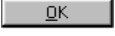


ID	Description	Product Class	Available	Vendor ID
0000-GBK	Guidebooks Misc	MATER	98	GLBL-L
0100	Traveler's Health Book	HEALTH	0	GLBL-L
0100-MAP	Maps Misc	MATER	128	ACME
0102	Safe Travel Book	HEALTH	146	BEMIS
0200		INVENTORY	108	BEMIS
0200-GAC	Access Guides	MATER	68	GLBL-L
0201-GSC	Sierra Club Adventure Travel Guides	MATER	65	ACME
0202-AMW	Insight Guide-Amazon Wildlife	MATER	56	BEMIS
0202-ASS	Insight Guide-Asia South	MATER	118	GLBL-L
0202-AUS	Insight Guides-Australia	MATER	134	BEMIS

Price 1: \$0.00 On Hand: 98 Delivery: // Weight: 1.1000

OK Cancel Search...

**Figure 2-2. Inventory Items Table List**

- B** Select the desired inventory item from the list.
- C** Click . The fields automatically populate with the appropriate information for the item selected. Make the desired changes on any tab and press F2 to save.

## Creating New Inventory Items

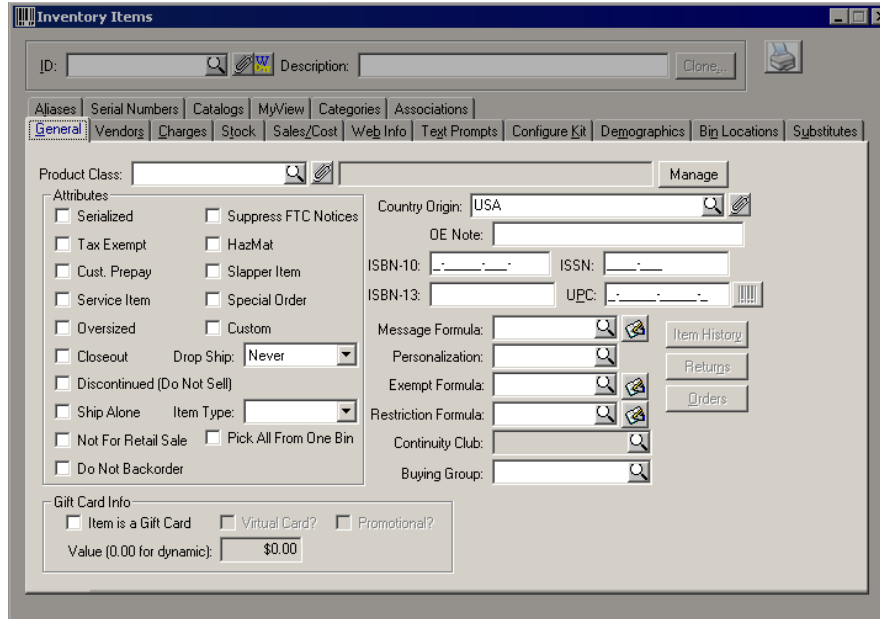
- A** Press F5 to clear the screen. Click in the **ID** field and enter the Item ID you want to assign to the new inventory item.

- ❖ Item ID's are user defined when creating them here. You may want to give careful consideration to your Item ID naming scheme. Each Item ID must be unique. (Tip: there are other ways to automate item setup such as inventory import and item configurator.)
- B** Click in the **Description** field and enter the description of the item ID. Make the description as short as possible, describing the color, style, grade, or whatever information you need to identify the item clearly.
- C** Continue to the following sections for information about the **Inventory Items** tabs:
  - ❖ Inventory Items General Tab on page 2-5
  - ❖ Inventory Items Vendors Tab on page 2-9
  - ❖ Inventory Items Charges Tab on page 2-11
  - ❖ Inventory Items Stock Tab on page 2-13
  - ❖ Inventory Items Sales/Cost Tab on page 2-16
  - ❖ Inventory Items Web Info Tab on page 2-18
  - ❖ Inventory Items Text Prompts Tab on page 2-19
  - ❖ Inventory Items Configure Kit Tab on page 2-21
  - ❖ Inventory Items Demographics Tab on page 2-25
  - ❖ Inventory Items Bin Locations Tab on page 2-26
  - ❖ Inventory Items Substitutes Tab on page 2-28
  - ❖ Inventory Items Aliases Tab on page 2-29
  - ❖ Inventory Items Serial Numbers Tab on page 2-30
  - ❖ Inventory Items Catalogs Tab on page 2-31
  - ❖ Inventory Items MyView Tab on page 2-31
  - ❖ Inventory Items Categories Tab on page 2-32
  - ❖ Inventory Items Associations Tab on page 2-35

## Inventory Items General Tab

Add details on **General** tab for information about each inventory item after creating a new item ID in the previous step:

- A** Activate the **Inventory Items General** tab (Figure 2-3) by clicking the tab.




**Figure 2-3. Inventory Items Dialog Box - General Tab**

Element	Description	
<b>Product Class</b> field	<b>(REQUIRED)</b> Enter an existing product class for the selected inventory item. Use the prompt or F4 to lookup an existing product class	
<b>Manage</b> button	Launches the <b>Product Classes</b> dialog box. For instructions refer to Product Classes on page 2-60.	
<b>Attributes</b> Group	Click the checkboxes or drop arrow selections that are applicable to the item. Dropship should default to "never" and Item Type to blank. Most others are Y/N values you can use in queries, SPE's, Expressions or reports. A Few have special properties listed here:.	
	Tax Exempt	This items price won't be included in sales tax calculations
	Cust. Prepay	Creates a one-pass situation for CC processing. Ask for more details.
	Service Item	These items require NO stock on hand. Example, music downloads or giftwrap. When you sell one allocation is automatic.
	Closeout	Don't allow sales beyond the current available stock levels
	Discontinued:	No more stock is expected
	Not for Retail Sale:	For items that you sell only as a kit components.
	Do not backorder	if checked, won't allow item to be placed on an order when qty available = 0
	Drop Ship	Always (Y), Never (N) or Optional (O). Depending on stock qty available will create a dropship PO. See Purchase Order module for more detail.
	Item Type	Primary, On-The-Fly, Other

Element	Description
	Pick All from one bin Useful if you have things like dye lots where you need to be sure picking from more than one bin isn't indicated on the picking ticket.
<b>Country Origin</b> field	<b>(REQUIRED)</b> Enter an existing country in this field to denote where the inventory item is being shipped from. Use F4 to lookup an existing country. (Tip: a flag option will enable you to set a default country for new items.)
<b>OE Note</b> field	Text entered here will be “pop up” in OE when the item is entered on an order.
<b>ISBN-10</b> field	Enter 10 Character ISBN # if applicable. ISBN numbers typically used for books.
<b>ISSN</b> field	Enter an ISSN # if applicable. Typically used for periodicals.
<b>ISBN-13</b> field	Enter 13 Character ISBN # if applicable. ISBN numbers typically used for books.
<b>UPC</b> field	Enter a UPC code for the item if applicable.
<b>Message Formula</b> field	Optional: choose a formula used to populate the lineitem message
<b>Message Formula</b> prompt	Click to access <b>User Expression</b> table list and select an existing user expression ID.
<b>Message Formula Expression Editor</b> button	Click to access the <b>Expression Editor</b> to view or modify existing expression. For Experienced users ONLY! See more about Expression Editor in the “Technical Reference for Customizing Response”
<b>Personalization</b> field	Select an existing personalization class if applicable to be used by the optional personalization add-on module
<b>Exempt Formula</b> field	Optional: Choose a formula ID from your defined user Expressions
<b>Exempt Formula</b> prompt	Click to access <b>User Expression</b> table list and select an existing user expression ID.
<b>Exempt Formula Expression Editor</b> button	Click to access the <b>Expression Editor</b> to view or modify existing expression. For Experienced users ONLY! See more in the “Technical Reference for Customizing Response”..
<b>Restriction Formula</b> field	Optional: Enter an existing Exempt formula ID from your defined user Expressions
<b>Restriction Formula</b> prompt	Click to access <b>User Expression</b> table list and select an existing user expression ID.
<b>Restriction Formula Expression Editor</b> button	Click to access the <b>Expression Editor</b> to view or modify existing expression. For Experienced users ONLY! See more in the “Technical Reference for Customizing Response”.
<b>Buying Group</b> field	Enter the <b>Buying Group ID</b> if this item is to be sold as a <b>Buying Group</b> item. Buying Groups are covered in <b>Chapter 3 - Customers</b> .
<b>Item History</b> button	Launches the <b>Item History</b> dialog box which displays current and historical information on the item.
<b>Returns</b> button	Click this button to view information about any returns made regarding this inventory item.
<b>Orders</b> button	Click this button to view information about orders that included this inventory item.

Element	Description
<b>Gift Card Info group</b>	Fill out this information to designate this item is a Gift card.
<b>Item is a Gift Card</b> check box	Click checkboxes if the <b>Item is a Gift Card</b> .
<b>Card type</b> check boxes.	Click checkboxes if gift card is <b>Virtual?</b> or <b>Promotional?</b> or both.
<b>Value</b> field	Enter the Value for the gift card. (0.00 if value is dynamic)

Table 2-2. Inventory Items Dialog Box - General Tab Description

- B** In the **Product Class** field enter an existing product class (required) or click  to access the **Product Class Codes** table list (Figure 2-4). If you choose not to use Product classes assign the class named “INVENTORY” to all items.

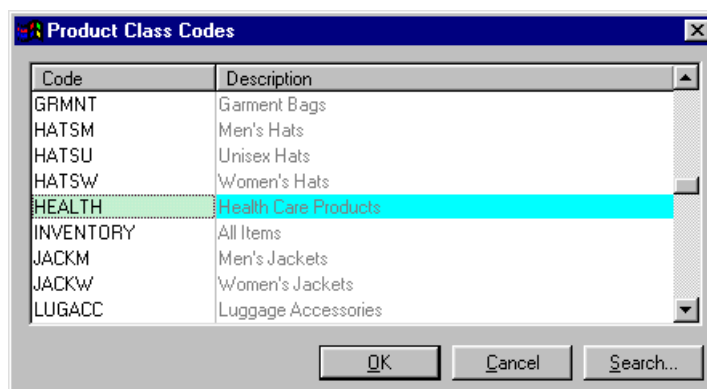




Figure 2-4. Product Class Codes Table List

- C** Select a product class from the list.
- D** Click . The fields populate.
- E** In the **Country Origin** field enter an existing country of origin (required), or click  to access the **Countries** table list (Figure 2-5).

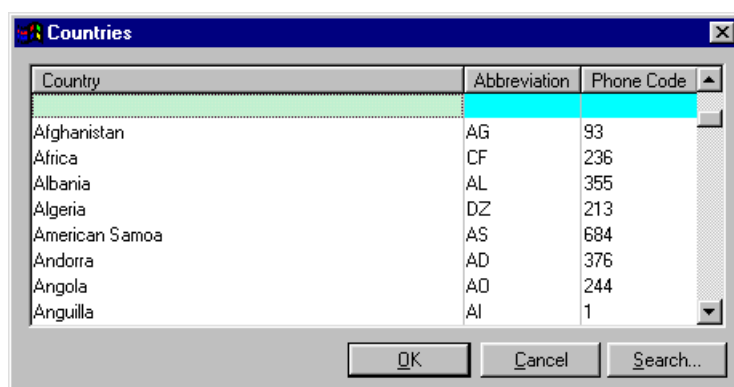
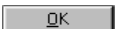


Figure 2-5. Countries Table List

- F** Select a country from the list.
- G** Click . The fields populate.

- H** If the item is a Gift Card, click the checkbox. The remaining fields are enabled.
- I** Check if card is Virtual or Promotional (or both).
- J** Enter the dollar amount of the gift card or leave at 0.00 if dynamic.
- K** Continue to Inventory Items Vendors Tab on page 2-9.

## Inventory Items Vendors Tab

Use the **Vendors** tab to view or update the items preferred vendor as well as all vendors who provide this item including information on preferred vendors and rankings. Multiple vendors per item are allowed. For information on creating new Vendors see chapter 1.

- A** Activate the **Inventory Items Vendors** tab (Figure 2-6) by clicking the tab.

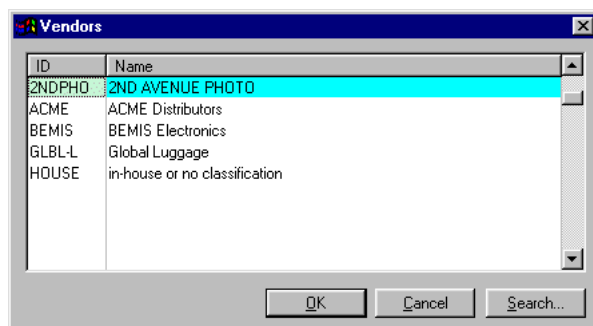
**Figure 2-6. Inventory Items View - Vendors Tab**

Element	Description										
<b>Preferred Vendor</b> field	Enter an existing vendor ID to designate as the preferred vendor for the inventory item. Use the prompt or F4 to lookup an existing vendor.										
<b><u>Vendor ID field and GRID</u></b>	In this grid, add a line for each vendor who are associated with this item. This grid represents the VENDITEM table. In most cases your Preferred Vendor should be included in the grid too.										
	<table border="1"> <thead> <tr> <th>Vendor ID</th><th>Description</th></tr> </thead> <tbody> <tr> <td></td><td>Click in the field to type the Vendor ID. The vendor must already exist in the Vendor Table. Press F4 to access the vendor table list.</td></tr> <tr> <td></td><td><b>Name</b> field Displays the Vendor name associated with the Vendor ID.</td></tr> <tr> <td></td><td><b>Vendor item ID</b> field Use this field to denote the ID the vendor uses to identify this item.</td></tr> <tr> <td></td><td><b>Std. Cost</b> field Enter the item cost charged by this vendor</td></tr> </tbody> </table>	Vendor ID	Description		Click in the field to type the Vendor ID. The vendor must already exist in the Vendor Table. Press F4 to access the vendor table list.		<b>Name</b> field Displays the Vendor name associated with the Vendor ID.		<b>Vendor item ID</b> field Use this field to denote the ID the vendor uses to identify this item.		<b>Std. Cost</b> field Enter the item cost charged by this vendor
Vendor ID	Description										
	Click in the field to type the Vendor ID. The vendor must already exist in the Vendor Table. Press F4 to access the vendor table list.										
	<b>Name</b> field Displays the Vendor name associated with the Vendor ID.										
	<b>Vendor item ID</b> field Use this field to denote the ID the vendor uses to identify this item.										
	<b>Std. Cost</b> field Enter the item cost charged by this vendor										


Element	Description	
	<b>Lead Time</b> field	Enter the number of days lead time the vendor needs to fulfill orders for this item.
	<b>Rank</b> field	Enter your vendor rank for this item.
<b>Vendor Item Description</b> field	The vendor's description of the item as entered in the <b>Vendor / Item Details</b> dialog box.	
<b>Edit Details</b> button	Click to access the <b>Vendor / Item Details</b> dialog box to enter additional information (seen below).	
<b>Vendor Web Address</b> field	The Vendor's web address.	
<b>Web Page Open</b> button	Launches browser and accesses Vendor's web site.	

**Table 2-3. Inventory Items Dialog Box - Vendor Tab Description**

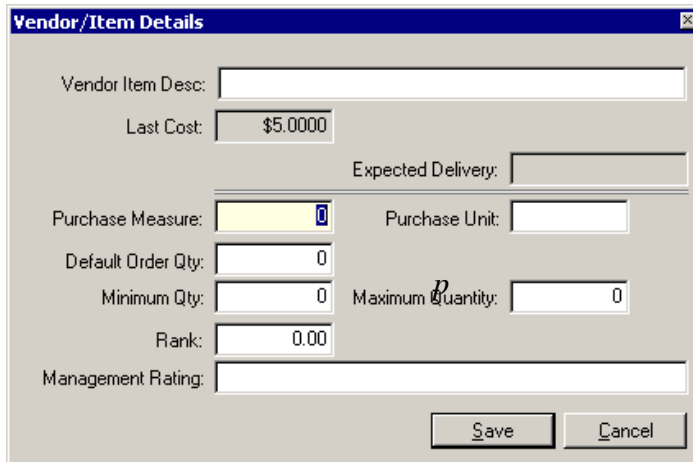
- B** In the GRID below Preferred Vendor, you can assign multiple Vendors to this item. In most cases you should add the Preferred vendor here too! Click in the **Vendor** field and enter the desired vendor ID, or click the column heading “**Vendor ID>>**” to access the **Vendors** table list (Figure 2-4). For more info on setting up vendor IDs, refer to “Entering Vendors” on page 1-1.



**Figure 2-7. Vendors Table List**

- C** Select the desired vendor from the list.
- D** Click . The **Vendor ID** and **Name** fields populate with the vendor information.
- E** Click in the **Vendor Item ID** field and enter the number your vendor uses to denote this item if it is different from your own.
- F** Click **Edit Details** button. The **Vendor / Item Details** dialog box appears.
- G** Enter the vendor's item description in the **Vendor Item Desc.** field.






The dialog box is titled "Vendor/Item Details" and contains the following fields:

- Vendor Item Desc: [Text Field]
- Last Cost: \$5.0000
- Expected Delivery: [Text Field]
- Purchase Measure: [Dropdown Menu]
- Purchase Unit: [Text Field]
- Default Order Qty: 0
- Minimum Qty: 0
- Maximum Quantity: 0
- Rank: 0.00
- Management Rating: [Text Field]

At the bottom right, there are two buttons: "Save" and "Cancel".

**Figure 2-8. Vendor / Item Details Dialog Box**

**H** Enter other available information and click **Save**.

**I** Press <F2>, or click  when finished to save your entry. TIP: CTL + F2 will save without clearing the screen on this view and many others.

## Inventory Items Charges Tab

Use the **Charges** tab to assign prices to your item, to enter the manufacturer's suggested retail price, to enter optional shipping charge for the item, enter optional price formula and to assign quantity price breaks. Prices codes are related to Customer Types, enter a price for each Code (1,2,3 etc) related to a customer type.

**A** Activate the **Inventory Items Charges** tab (Figure 2-9) by clicking the tab. Verify that the inventory item that you want to enter or change information for is selected in the **ID** field.

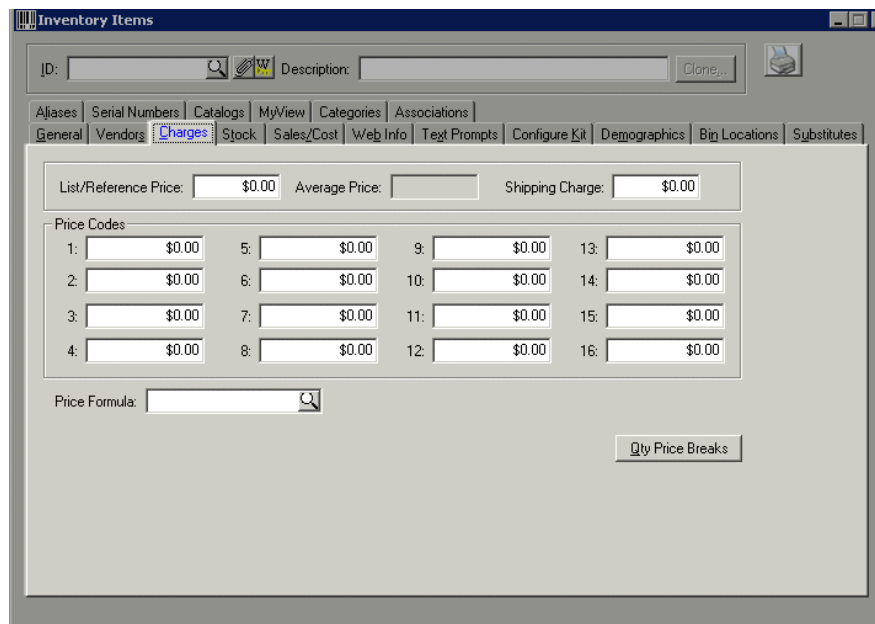


Figure 2-9. Inventory Items View- Charges Tab

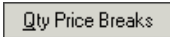
Element	Description
<b>List/Reference Price</b>	Type the manufacturer's suggested retail price for the selected inventory item in this field. Free form entry for reference..
<b>Average Price</b>	Optional: Enter the average price for your item. This is a free form entry field (i.e. not calculated).
<b>Shipping Charge</b>	Enter an optional shipping charge for the selected inventory item.
<b>Price Codes</b>	Each code (1,2,3 etc.) relates to an established customer type (consumer, distributor, etc.). Enter a price for each code you plan to assign to a customer type.
<b>Price Formula</b>	Optional: select a formula (created in Expressions) to drive pricing for the item
<b>Price Formula prompt</b>	Click to access <b>User Expression</b> table list and select an existing expression ID . For Experienced users ONLY! See more in the "Technical Reference for Customizing Response"
<b>Qty Price Breaks button</b>	Activates the Quantity Price Breaks dialog, where you can view or enter information pricing information based on the volume of the item purchase. Up to ten different volume levels each with up to 16 Price codes per level.

Table 2-4. Inventory Items View - Charges Tab Description

- B** Click in the **List/Reference Price** field and enter the manufacturer's suggested retail price (MSRP).
- C** In the **Price Code** fields enter a price for each code you plan to assign to customer types.



This allows you to use different prices for different types of customers. Every customer is assigned a specific customer type code, which in turn has a specific price code. For more information on entering customer types, refer to "Entering Customer Types" on page 3-17.

- D Shipping Charge** field: Enter an optional a shipping charge. This may be used by your company's custom shipping charge formula. For more information on setting up shipping charges, refer to "Shipping Charge Table" on page 1-17.
- E** Click . The **Quantity Price Breaks** dialog box appears. Enter optional quantity price breaks. For more information on entering quantity price breaks, refer to Quantity Price Breaks on page 2-64.

## Inventory Items Stock Tab

The **Stock** tab is used for information regarding stock levels, re-ordering, and physical dimensions of the item. Some numbers here are entered for reference to be used by other functions in Response. For example, re-order numbers can be used by Purchase Order module, Dimensions used in shipping calculations.

- A** Verify the inventory item you want to enter or change information for is selected in the **ID** field then click on the stock tab (figure 2-10).

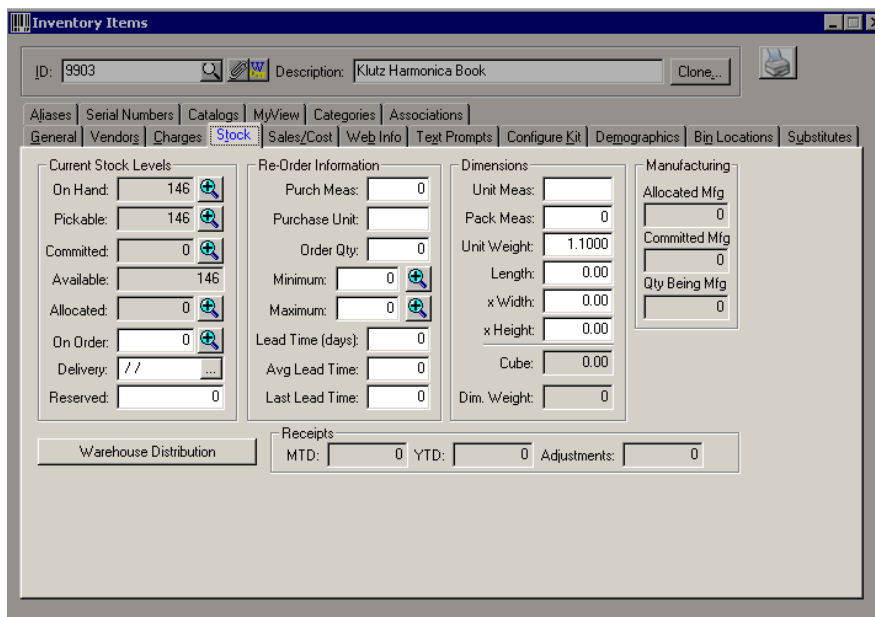



Figure 2-10. Inventory Items View - Stock Tab

Element	Descriptio	
	<b>drill down icon</b>	opens a window with details of the numbe to it's left.
<b>Current Stock Levels Group</b>	<b>Most of the fields in this group diplay a system maintained qty.</b>	


Element	Descriptio	
	<b>On Hand</b> field	This field displays the number of units on hand across all BINS and Warehouses.Drill down for warehouse detail.
	<b>Pickable</b> field	Total number of units located in Pickable BINS (i.e. does not including bins marked non-pickable)
	<b>Committed</b> field	This field displays the number of units committed for delivery. "committed" is the # of items you have unshipped orders for. From WHSINV.committed_qty.
	<b>Available</b> field	Displays the number of units available for new orders (on hand less committed).
	<b>Allocated</b> field	Displays the number of units allocated to existing orders. Drill down for order # detail from WHSINV.allocated
	<b>On Order</b> field	The number of items on existing Purchase Orders not yet received. Free form entry allowed if not using the PO module. Drill down to see PO# detail
	<b>Delivery</b> field	The expected delivery date from the Purchase Order module for items not yet received. Free form entry allowed if not using the PO module.
	<b>Delivery</b> date prompt	Displays a calendar to select applicable date. Typically should not be changed if the PO module populated the date..
	<b>Reserved</b> field	Optional. Enter a reserved qty. Free form entry.
<b>Re-Order Information Group</b>	<b>These optional fields are populated by the user (free form entry) and are for reference by formulas, expressions, SPE's and other modules in Response such as Purchase Order Sugg Order Qty</b>	
	<b>Purch Meas</b> field	The number of individual sellable items in each purchase unit in this field.
	<b>Purch Unit</b> field	The unit of measure in which you purchase this item, e.g. enter 12 if you purchase by the dozen, 144 by the gross, etc.
	<b>Order Qty</b> field	Enter the quantity you typically order from your supplier at one time.
	<b>Minimum</b> field	The minimum number of units you would order at one time for the item. Drill down to see Warehouse specific quantities.
	<b>Maximum</b> field	The maximum number of units you would order at one time for the item. Drill down to see Warehouse specific quantities.
	<b>Lead Time</b> field	The number of days between the time you order an item and the time it arrives in your warehouse in this field.
	<b>Avg. Lead Time</b> field	The average of the lead time amongst all vendors
	<b>Last Lead Time</b> field	The most recent lead time for this item.
<b>Dimensions group</b>	<b>These optional fields are populated by the user and are for reference by formulas, expressions, SPE's and other modules in Response such as shipping charge calculation</b>	
	<b>Unit Measure</b> field	The unit of measure for selling this item in this field.
	<b>Pack Meas</b> field	Enter a numerical value of the units used for storing the item in this field.
	<b>Unit Weight</b> field	The shipping weight (rather than the net weight) of each unit in pounds and ounces in this field.

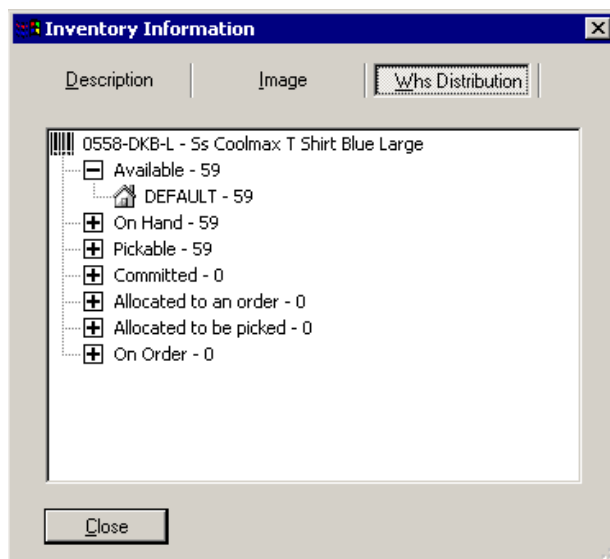
Element	Descriptio	
	<b>Length</b> field	The item's length, expressed in terms of the entry in the <b>Unit Measurement</b> field.
	<b>Width</b> field	The item's width, expressed in terms of the entry in the <b>Unit Measurement</b> field
	<b>Height</b> field	The item's height, expressed in terms of the entry in the <b>Unit Measurement</b> field
	<b>Cube</b> field	The items cubic measurement, expressed in terms of the entries in the <b>Length, Width, and Height</b> fields.
	<b>Dim. Weight</b> field	Calculation of Dim. Weight
<b>Manufacturing group</b>	<b>These fields are populated by work orders from the optional Manufacturing/Finished Goods module.</b>	
	<b>Allocated Mfg.</b> field	Qty allocated to open work orders
	<b>Committee Mfg.</b> field	Qty committed to open work order
	<b>Qty Being Mfg</b> field	Qty being built by open work order
<b>Warehouse Distribution button</b>	Drill down to see warehouse specific data. Currently same as drill down next to On Hand. Similar to  drill down icon.	
<b>Receipts group</b>	<b>MTD</b> field	A read-only field to display the month to date receipts.
	<b>YTD</b> field	A read-only field to display the year to date receipt.
	<b>Adjustments</b> field	A read-only field to display the dollar amount of any adjustments.

**Table 2-5. Inventory Items Dialog Box - Stock Tab Description**



The **On Hand, Committed, Available,** and **Allocated** fields cannot be modified within the **Stock** tab. This information is automatically updated in real-time by **Order Entry, Physical Inventory, Receive/Adjust Inventory,** and **Confirm Orders** programs.

- B** The **On Order and Delivery Date** . The **Purchase Order Module** automatically refreshes this data when you create or modify POs. Can be maintained manually if the PO module is not used. This value displays in order entry when an item is back ordered. Click  to choose a date from the calendar
- C** Click Warehouse Distribution button to access the **Inventory Information** dialog box.



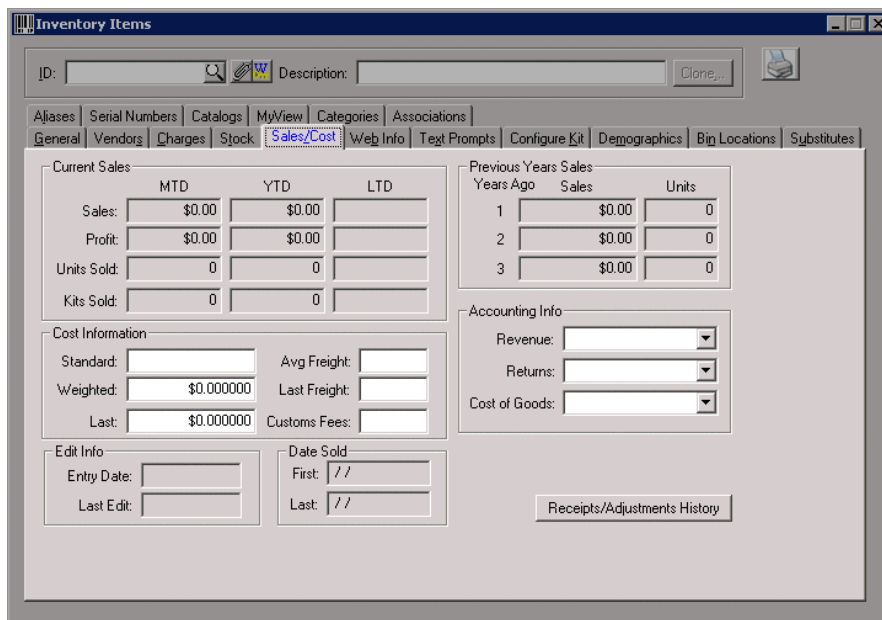
**Figure 2-11. Inventory Information Dialog Box**

- D** Continue to the Inventory Items Sales/Cost Tab on page 2-16.

## Inventory Items Sales/Cost Tab

Use the sales/cost tab to view the current and previous sales for the selected inventory item, and to see or modify the cost of the item. Accounting info group is for feeding external accounting.

- A** Activate the **Inventory Items Sales/Cost** tab (Figure 2-11). Verify that the inventory item that is to be entered or changed is selected in the **ID** field.



**Figure 2-12. Inventory Items View - Sales/Cost Tab**

Element	Description	
<b>Current Sales</b> group.	Accumulated sales by MTD, YTD, LTD (display only)	
<b>MTD, YTD, LTD</b> columns	<b>Sales</b>	The items accumulated sales.
	<b>Profit</b>	The items accumulated profits.
	<b>Units Sold</b>	The items accumulated number of units sold.
	<b>Kits Sold</b>	The items accumulated number of kits sold.
<b>Previous Years Sales</b> group		These fields display the previous year's sales (1-3 yrs)
<b>Cost Information</b> group	<b>Standard</b> field	Enter the standard cost of this time.
	<b>Weighted</b> field	The system calculates a weighted cost of the item when it's purchase cost varies over time.
	<b>Last</b> field	Type the last cost at which you received the item in this field.
	<b>Avg Freight</b> field	Enter the average freight charges for the item.
	<b>Last Freight</b> field	Enter the freight charges the last time the item was ordered.
	<b>Customs Fees</b> field	Enter any import fees associated with this item
<b>Accounting Info</b> group	<b>Revenue</b> account	select existing acct for export to quickbooks
	<b>Returns</b> account	select existing acct for export to quickbooks
	<b>Cost of Goods</b> acct	select existing acct for export to quickbooks
<b>Edit Info</b> group	<b>Entry Date</b> field	date item was created
	<b>Last Edit</b> field	last time the item wasw modified
<b>Date Sold</b> group	<b>First</b> field	date of the first order for the item
	<b>Last</b> field	date of the latest order for the item
<b>Receipts/Adjustments History</b> button	Shows the <b>Inventory Receipts &amp; Adjustments - History.</b> dialog box.	

**Table 2-6. Inventory Items View - Sales/Cost Tab Description**



The **Current Sales** and **Previous Years Sales** groups display read-only information on inventory sales. This information is automatically updated by the system and cannot be modified from this view.

**B** Click in the **Standard** field and type in the standard cost of the item. Used for reference in reports only

**C** Weighted and Last cost are maintained by the system. Access to these fields is controlled by flag options.



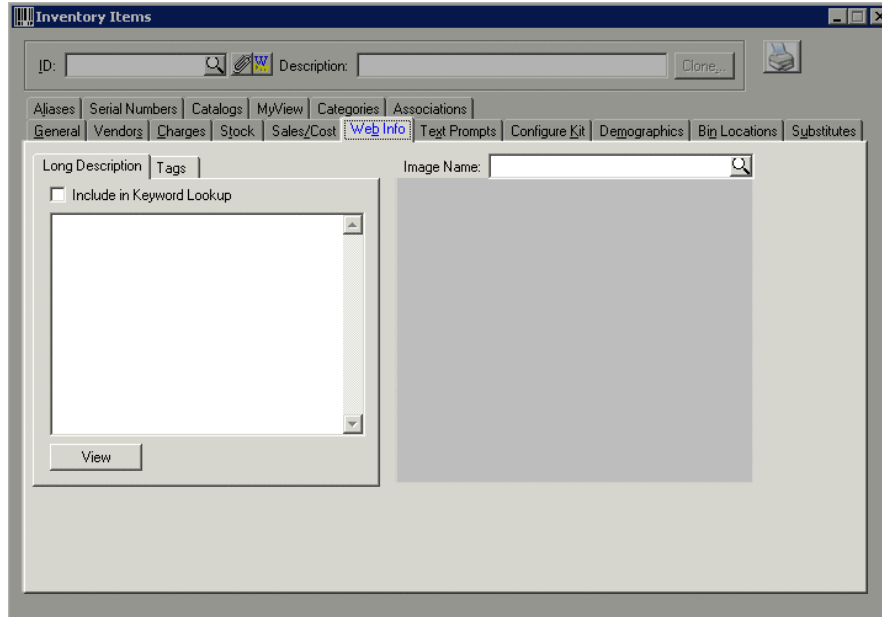
After initial entry of these costs, the Inventory Receipts/Adjustments option or Purchase Order module automatically update Last Cost and Weighted Cost. Weighted Cost, also known as Unit Cost is a calculated a moving, weighted average. If necessary, you may change the costs calculated by the system, however this is not recommended.

- D** Continue to “Inventory Items Web Info tab” for more information about this tab.

## Inventory Items Web Info Tab

Use the **Web Info** tab to add images and descriptions and tags to the selected inventory item that could be viewable in Order Entry.


- A** Activate the **Inventory Items Web Info** tab (Figure 2-13) by clicking the tab. Verify that the inventory item that you want to enter or change information for is selected in the **ID** field.




**Figure 2-13. Inventory Items View -Web Info Tab**

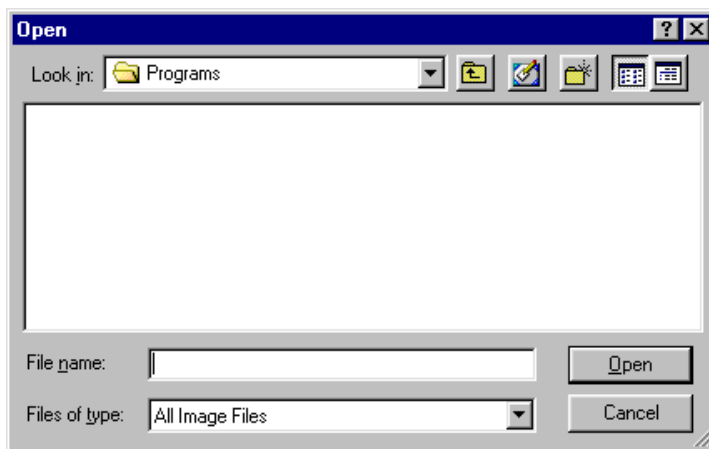
Element	Description	
<b>Image Name</b> field	Enter or view the path and file name for the image. Only one image per item can be defined here..	
<b>Image Name</b> prompt	Accesses the Windows Open dialog box used to locate an image file to associate with the item. The length of the path here is limited 60 character, it must be a path any workstation will recognize..Because tags also store images you could use those instead of this image field	
<b>Image</b> display area	The area where the image is displayed.	
<b>Long Description</b> tab (inside web info tab)	<b>Include in Keyword Lookup</b> checkbox	If checked all text entered here will be included in the key-word search for the item
	<b>Description</b> area	Enter an extended item description. HTML is acceptable..
	<b>View</b> button	Shows a preview of what will be seen in OE. A way to check the translated HTML coding





Element	Description
<b>Tags Tab</b> (inside Web info Tab)	For convenience, visibility to your TAG information is available here in the Web Info tab. For more information on TAGS, see the "Technical Reference for Customizing Response"
<b>Tag Name</b> field	User assigned Tag Name
<b>Tag Value</b> field	user assigned value for this tag. HTML allowed
 <b>Wizard</b> button	The wizard button starts communication with your Commerce V3 Web Site
<b>HTML Preview</b> button	Shows a preview of the tag. A way to check the translated HTML coding

**Table 2-7. Inventory Items View- Web Info Tab Description**

**B** Click  next to **Image Name** field to display the **Open** dialog box (Figure 2-14).



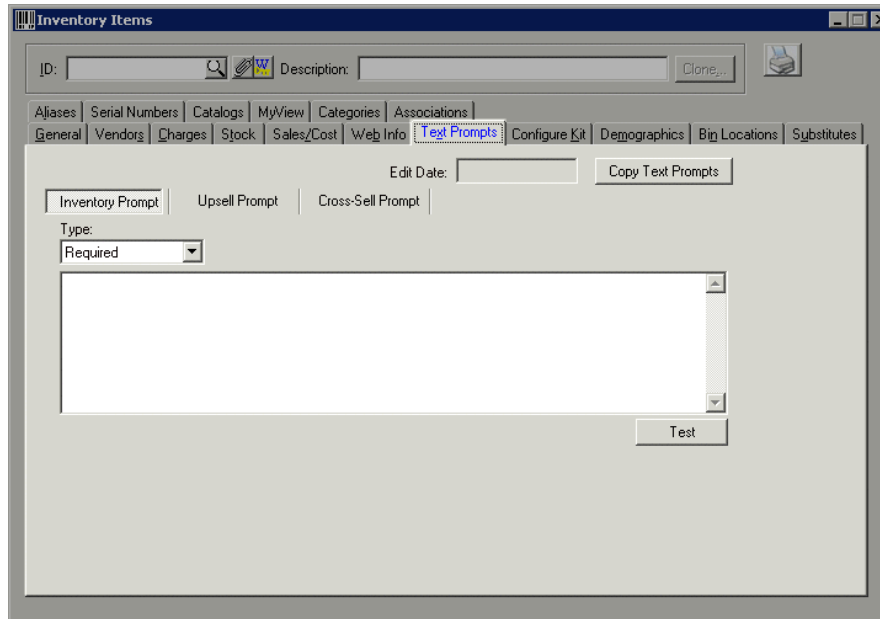
**Figure 2-14. Open Dialog Box**

- C** Select the image file that matches the inventory item, and then click  on the **Open** dialog box. Be aware the path is limited to 60 characters here. The image appears.
- D** Press <F2>, or click  to save the entry after you have entered all information in all of the **Inventory Item** tabs. TIP: CTL + F2 will save without clearing the screen on this view and many others.
- E** Continue to Inventory Items Text Prompts Tab on page 2-19 for more information about this tab.

## Inventory Items Text Prompts Tab

Use the **Text Prompts** tab to provide info to the CSR during Order Entry. Text prompts can contain plain text, graphics along with HTML code. Three types of prompts can be defined: Inventory Prompts, Upsell Prompts and Cross-Sell Prompts. The prompts pop up during order entry to encourage or assist the CSR in describing or providing additional info on the item. For example an Inventory prompt could say "batteries not included" or "not recommended for children under 3 years of age". Cross Sell prompts the CSR to describe additional items that complement the current one. Upsell prompts describes similar items with more or better features. When formatted correctly a html link in the text prompt when clicked will automatically ADD an additional item (cross sell) or change the current item (Upsell). A valuable tool for your CSR's.

- A** Activate the **Inventory Items Text Prompts** tab (Figure 2-15) by clicking the tab. Verify that the inventory item that you want to enter or change information for is selected in the **ID** field.



**Figure 2-15. Inventory Items View - Text Prompts Tab**

Element	Description	
<b>Edit Date</b> field	For reference. Displays a date the prompt was created or changed.	
<b>Copy Text Prompts</b> button	Click to access the Copy Text Prompts dialog box. Enter what information is to be copied and where it will be copied to.	
<b>Inventory Prompt</b> tab	<b>Type</b> drop down menu	Select the prompt type ( <b>Required</b> , <b>Suggested</b> , or <b>Optional</b> ) from the drop menu
	<b>Type</b> text entry field	Enter the text prompt in the provided field. HTML allowed..
<b>Upsell Prompt</b> tab	<b>Type</b> drop menu	Select the prompt type ( <b>Required</b> , <b>Suggested</b> , or <b>Optional</b> ) from the drop menu
	<b>Type</b> text entry field	Enter the text prompt in the provided field HTML allowed.
<b>Cross-Sell Prompt</b> tab	<b>Type</b> drop menu	Select the prompt type ( <b>Required</b> , <b>Suggested</b> , or <b>Optional</b> ) from the drop menu
	<b>Type</b> text entry field	Enter the text prompt in the provided field. HTML allowed.
<b>Test</b> button	Shows a preview of what will be seen in OE. A way to check the translated HTML coding	

**Table 2-8. Inventory Items Dialog Box - Text Prompts Tab Description**

- B** Click the **Type** down arrow and select the desired type of prompt.
- ❖ **Required** - During order entry, the prompt pops up if the item is selected.
  - ❖ **Suggested** - During order entry, the prompt does not pop up, but the operator is advised that he/she should view it (default is YES if Enter Key is pressed).

- ❖ **Optional** - During order entry, the operator is advised that a prompt exists and to press a particular key to view it. (default is NO if Enter key is pressed)
- C** Continue to Inventory Items Configure Kit Tab on page 2-21 for more information about this tab.

## Inventory Items Configure Kit Tab

Use the **KIT** tab if the selected item is comprised of one or more other items to be sold as if it were a single item. Designating “components” in the kit tab renders the item ID containing them a “**Kit Master**” item. This Kit master” item in Response is an inventory sku containing one or more individual inventory skus that could also be sold separately. These could be picked from different bins that are not pre-assembled. Creating kit items requires that you license the optional Kit Module for Response. Kits discussed here we call “warehouse kits”. The Kit type is either “Kit” or “Variable Kit”.

*TIP: If you don't want a component sku sold alone you could mark that component sku as “not for retail sale” in the attributes section on the general tab for the component item.*

Response also has an optional Assembly/Finished goods module for creating kit type of “Finished Goods”. Those are separate from the first two kit types. For detailed information on Kits with type of “Finished Good” (where inventor.kit\_flg = F) please refer to documentation on the Finished Goods module.

- A** Activate the **Inventory Items Configure Kit** tab (Figure 2-9) by clicking the tab. Verify that the inventory item you want to designate at the **Kit Master** is selected in the **ID** field.
- B** The **Static Components** tab is displayed by default (at the bottom of the GRID).
- C** A kit master can have BOTH static components and variable components. Simple kits contain only static components. Static components will always be included in your kit. If the kit will include any or all variable components, you'll add those using the **Variable Components** tab.

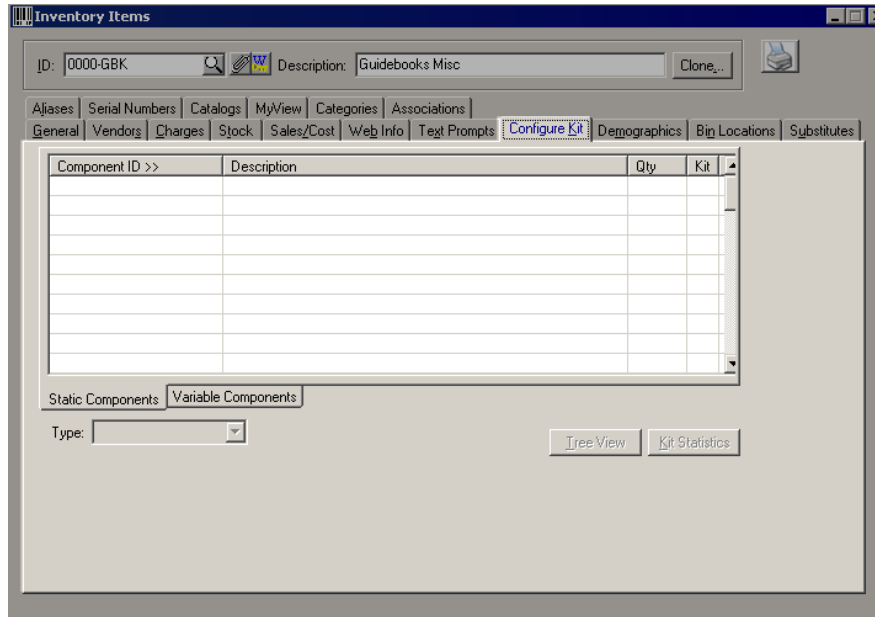


Table 2-9. Inventory Items View - Configure Kit Tab

Element	Description	
Static Components tab	Component ID field	Click <b>Component ID</b> column heading to access the <b>Inventory Items</b> table list. Select existing inventory-items you want to be components of the kit.
	Descriptions field	Auto populates with the component's description from the <b>Inventory Items</b> table.
	Qty field	Enter the quantity of this component included in this kit master item.
	Kit field	If this component is a kit master itself, this will be indicated with a "Y" here. (Kits within kits are allowed)
Variable Components tab	Component Group field	Click <b>Component ID</b> column heading to access the <b>Component Group</b> table list. (see below on managing groups) Select the component group from which selection is allowed in this kit master item. Add as many component groups as needed for the variable kit. One group per line. In OE you can choose one item from each component group.
	Description field	Auto populates with the component's description from the <b>component groups</b> table.
	Qty field	Enter the quantity of this component used for this item.
	Manage Component Groups button	Click to access the <b>Component Groups</b> dialog box and enter component group information.
Type drop menu	Click to select the kit type ( <b>Kit</b> , <b>Finished Good</b> , or <b>Variable Kit</b> ).	
Tree View button	Click to display the Tree <b>View</b> dialog box (Figure 2-17) to review all components, or items, that make up the kit for the selected inventory item ID	

Element	Description
<b>Kit Statistics</b> button	Click to display the Kit <b>Statistics</b> dialog box (Figure 2-18) to view information (weight, price, etc.) for the items in the kit. Click apply to refresh these statistics.

**Table 2-10. Inventory Items Dialog Box - Configure Kit Tab Description**

- D** Click in the **Component ID >>** field and press <F4>. The **Inventory Items** table list (Figure 2-16) appears.

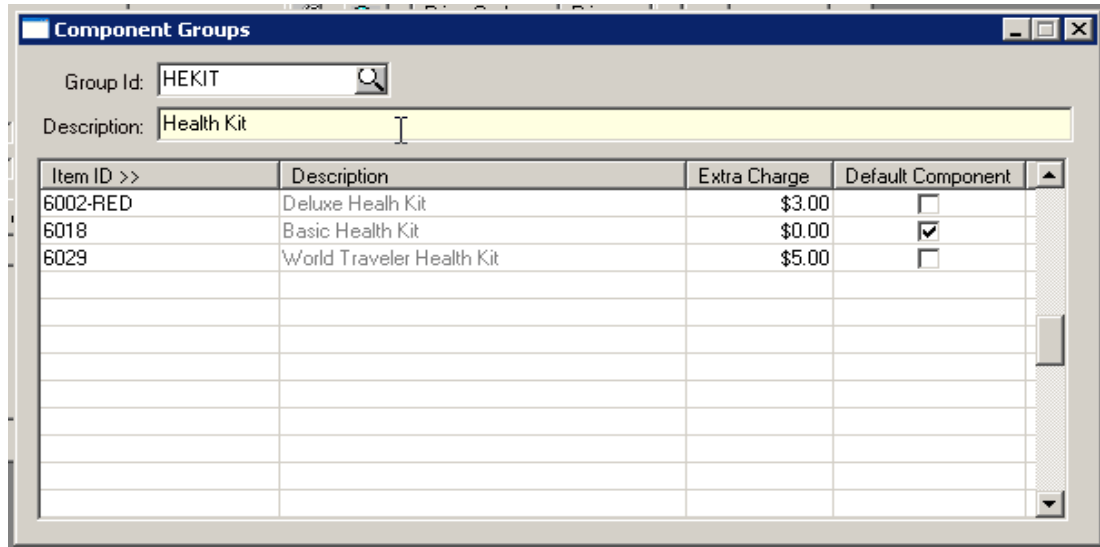
ID	Description	Product Class	Available
0000-GBK	Guidebooks Misc	MATER	98
0100	Traveler's Health Book	HEALTH	-1
0100-MAP	Maps Misc	MATER	128
0102	Safe Travel Book	HEALTH	146
0103	Noooooo	BELTS	0
0200		INVENTORY	108
0200-GAC	Access Guides	MATER	68
0201-GSC	Sierra Club Adventure Travel Guides	MATER	65

Price 1: \$0.00 On Hand: Delivery: // Weight: 0.0000

OK Cancel Search...

**Figure 2-16. Inventory Items Table List**

- E** Select the desired inventory items (one per line).
- F** Click . The fields populate.
- G** Press <Tab> to land in the **Qty** field.
- H** Enter the quantity for that item. Press <Tab> to go to the next line. Enter other inventory items if desired. The component's description auto-populates in the description field.
- I** In the Variable Kits tab you create Component Groups first via the Manage Groups button. Then add the appropriate GROUPS as components on the Variable Kits Tab. The customer selects ONE of the choices from each group on the variable kits tab.



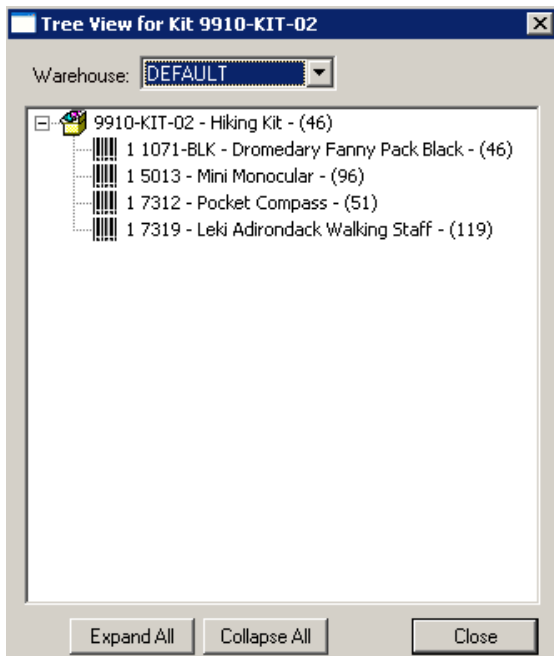
**Component Groups**

Group Id:

Description:

Item ID >>	Description	Extra Charge	Default Component
6002-RED	Deluxe Health Kit	\$3.00	<input type="checkbox"/>
6018	Basic Health Kit	\$0.00	<input checked="" type="checkbox"/>
6029	World Traveler Health Kit	\$5.00	<input type="checkbox"/>

- J** From the **Type** drop menu select the kit type (this object is gray until at least one kit component line has been added)
- ❖ Kit - choose this if the item will have only static components as described previously
  - ❖ Finished Good - (ONLY if you're using the Finished Goods add-on module!)
  - ❖ **Variable Kit** - choose this if the item will have any variable components as described previously
- K** Click  to display the **Tree View** dialog box (Figure 2-17) to review all the components, or items, that make up the kit for the select inventory item ID\*)



**Tree View for Kit 9910-KIT-02**



Warehouse:

- 9910-KIT-02 - Hiking Kit - (46)
  - 1 1071-BLK - Dromedary Fanny Pack Black - (46)
  - 1 5013 - Mini Monocular - (96)
  - 1 7312 - Pocket Compass - (51)
  - 1 7319 - Leki Adirondack Walking Staff - (119)

**Figure 2-17. Tree View Dialog Box**

- L** Click **Kit Statistics** to display the **Kit Statistics** dialog box (Figure 2-18) to view information (weight, price, etc.) for the items in the kit. Click **apply** to calculate kit statistics for allocation. Kit statistic are routinely calculated “on the fly” as the Response program needs them. Pressing **apply** below is not necessary for that to happen.

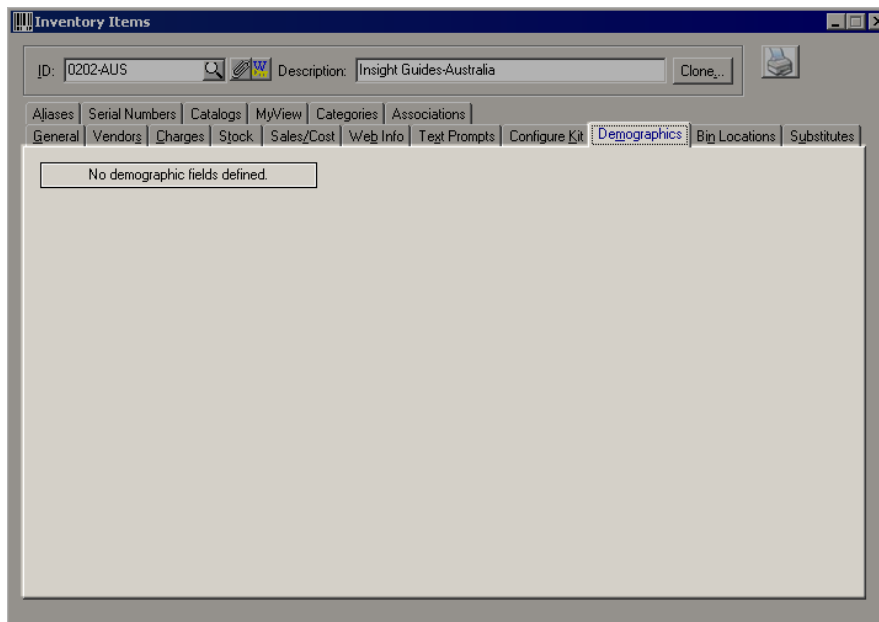
**Figure 2-18. Kit Statistics Dialog Box**

- M** Press <F2> or click  to save the Inventory record after you have entered all the components in the kit. TIP: CTL + F2 will save without clearing the screen on this view and many others.
- N** Click  when ready to exit the **Inventory Items** dialog box.

## Inventory Items Demographics Tab

The Inventory Items Demographics tab displays **User Defined Fields** that have been established for customers. If no **User Defined Fields** have been established, the tab appears as shown in (Figure 2-19).

For information on adding **User Defined Fields**, refer to **Technical Reference for Customizing Response**.



Inventory Items

ID: 0202-AUS Description: Insight Guides-Australia Clone...

Aliases | Serial Numbers | Catalogs | MyView | Categories | Associations

General | Vendors | Charges | Stock | Sales/Cost | Web Info | Text Prompts | Configure Kit | **Demographics** | Bin Locations | Substitutes

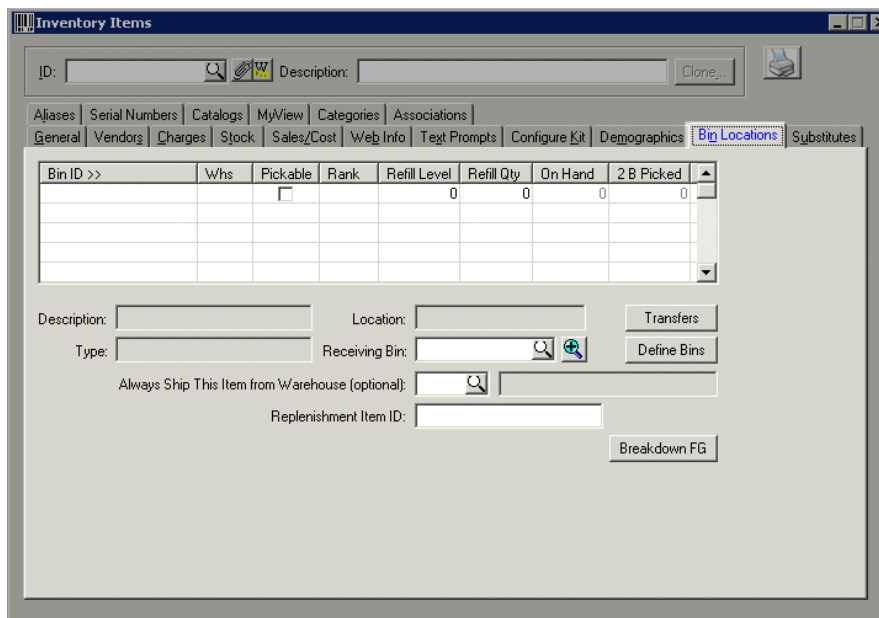
No demographic fields defined.

Figure 2-19. Inventory Items View - Demographics Tab

## Inventory Items Bin Locations Tab

Use the **Bin Locations** tab create or modify BINS associated with the item. Each item can be stocked in multiple BINS so those bins are identified here. Once a line is added in the BIN ID Grid, the BIN\_ID cannot be changed, you must delete the line and add a new one with the desired BIN ID

- A** Activate the **Bin Locations** tab (Figure 2-20) by clicking the tab. Verify that the inventory item that you want to manage BIN Locations for is selected in the **ID** field.



Inventory Items

ID: Description: Clone...

Aliases | Serial Numbers | Catalogs | MyView | Categories | Associations

General | Vendors | Charges | Stock | Sales/Cost | Web Info | Text Prompts | Configure Kit | Demographics | **Bin Locations** | Substitutes

Bin ID >>	Whs	Pickable	Rank	Refill Level	Refill Qty	On Hand	2 B Picked
		<input type="checkbox"/>		0	0	0	0

Description: Location: Transfers


Type: Receiving Bin: Define Bins

Always Ship This Item from Warehouse (optional):

Replenishment Item ID: Breakdown FG

Figure 2-20. Inventory Items View - Bin Locations Tab



Element	Description	
<b><u>BIN ID Grid</u></b>	In this grid, a line exists for each BIN Location associated with this item. This grid represents the INVBIN table which is the cross reference to allow multiple Bins per single item	
	<b>Bin ID field</b>	Displays a BIN ID associated with the item. When the cursor is on a blank line, F4 to opens the list so you can choose a new bin. Existing lines can be modified or deleted. Delete a line only allowed when on hand and 2b picked qty are zero
	<b>Whs field</b>	The warehouse number where this bin is located will populate
	<b>Pickable field</b>	Check if this is a pickable BIN
	<b>Rank</b>	assign an optional rank. Bins with lower ranking will be picked from first
	<b>Refill Level field</b>	assign an optional refill level for the item qty in this BIN
	<b>Refill Qty field</b>	assign an optional refill qty for the item qty in this BIN
	<b>On Hand field</b>	displays current qty on hand.
	<b>2 B Picked field</b>	displays the qty on orders currently in Printed status (W or Q)
<b>Description field</b>	populates from the BIN record	
<b>Location field</b>	populates from the BIN record	
<b>Transfers button</b>	Opens the Inventory BIN Transfer view. See the the <b>Warehouse Setup section in this chapter</b> for detail on Inventory Transfers function	
<b>Type field</b>	populates from the BIN record	
<b>Receiving Bin field</b>	Select a default BIN for inventory receiving to suggest	
	<b>drill down icon</b>	opens a window with details of the number on it's left
<b>Define Bins button</b>	Opens the BIN Location Maintenance view. See the the <b>Warehouse Setup section in this chapter</b> for detail on defining Inventory Bin Locations.	
<b>Always Ship This Item from Warehouse (optional) field</b>	0 here means no warehouse is selected. Select a warehouse if applicable.	
<b>Replenishment Item ID field</b>	inventor.master_stock_id. Enter an item id used to restock or replenish qty for this item. See example below. When transferring stock, the replenishment item IDs bin location(s) are also available for assignment/transfer	
<b>Breakdown FG button</b>	If this item is the result of Finished goods manufacturing, you can break the item back down into it's component parts, and the parts then exist in this bin location. See more information in Finished Goods module.	

**Table 2-11. Inventory Items View - Bin Locations Tab Field Descriptions**

- B** A Replenishment Item ID example: A single item\_ID that may represent many others. A screw or clip or spring that fits in many can opener models. A special memory card that works in several camera models. The same memory card may have a special Item\_id for each camera model and a bin close to each of those various camera models. But the replenishment item ID points to a larger bin elsewhere that could be used to restock the smaller

separate bins. When transferring stock, the replenishment item IDs bin location(s) are also available for assignment/transfe

- C** If this item is the result of Finished goods manufacturing, you can break the item back down into it's component parts, and the parts would then exist in this bin location. See more information in Finished Goods module documentation.

## Inventory Items Substitutes Tab

Use the **Substitutes** tab to define appropriate substitutes for any item. Whenever the master item is out of stock, order entry displays a list of items the customer may agree to substitute for the back ordered item.

- A** Activate the **Inventory Items Substitute** tab by clicking the tab. Verify that the inventory item that you want to enter or change information for is selected in the **ID** field.

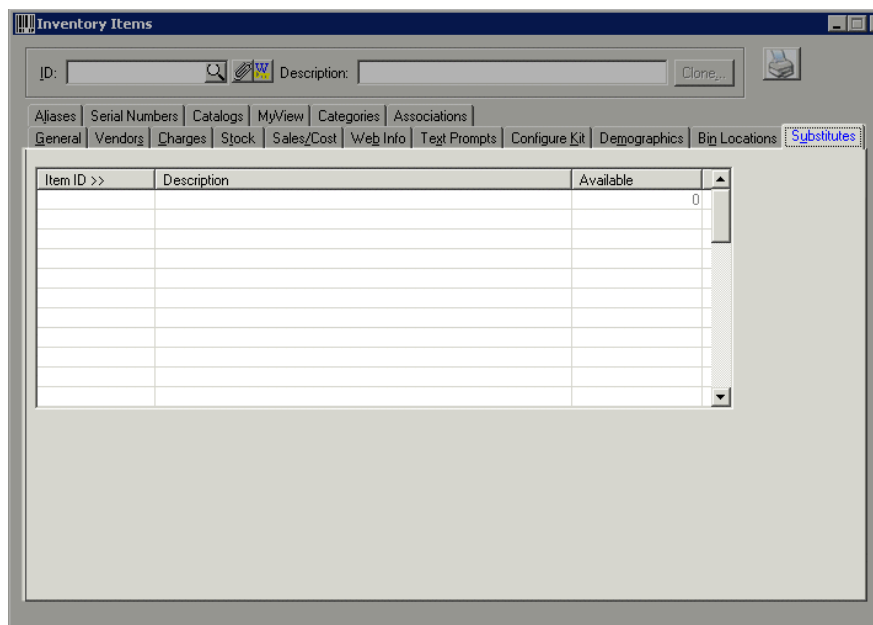

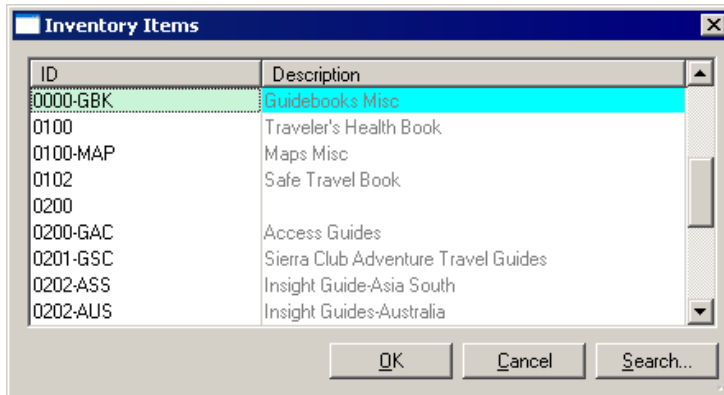


Figure 2-21. Inventory Items Dialog Box - Substitute Tab



Element	Description
<b>Item ID</b> field	Click to access the Inventory Items table list and select the substitute item.
<b>Description</b> field	The substitute items description in the inventory table.
<b>Available</b> field	displays the current qty for the substitute item.

Table 2-12. Inventory Items Dialog Box - Substitute Items Tab Description

- B** Type the desired substitute item in the **Item ID** >> field, or click  to access the **Inventory Items** table list (Figure 2-22).



**Figure 2-22. Inventory Items Table List**

- C** Select a substitute item **ID** from the list.
- D** Click . The **Description** field displays a description of the item, and the **Available** field displays how many of the substituted items are available.
- E** Press <F2> or click  to save the record after you have entered all the components in the kit.
- F** Continue to Inventory Items Aliases Tab on page 2-29 for more information about this tab.

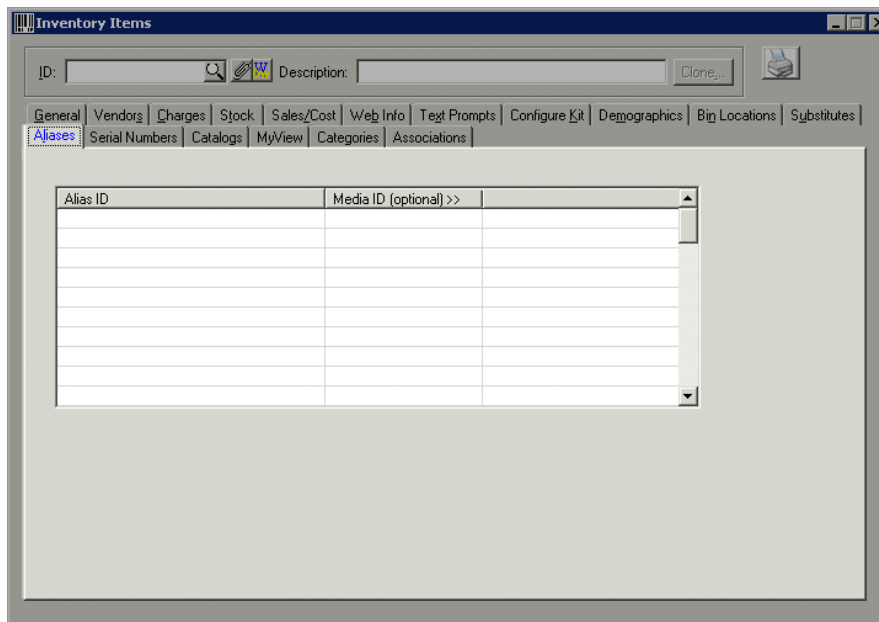
## Inventory Items Aliases Tab

Use the **Aliases** tab to assign Alias IDs for the item. An Alias ID could be assigned if for example you had an Item ID misprint in your catalog. An alias ID entered at Order Entry (OE) is automatically switched to the correct Item ID. An Alias could also set the lineitem media automatically for you and if the order media = none, it will set the order media too. An Alias can also assign the multi-pay code for the optional installment billing module (not shown below).

- A** Activate the **Aliases** tab by clicking the tab. Verify that the inventory item that you want to enter or change information for is selected in the **ID** field.

Element	Description	
<b>Alias ID Grid</b>	The Grid represents records in the ITMALIAS table	
	<b>Alias ID</b>	Click in the field below the <b>Alias ID</b> column heading and enter the Alias ID
	<b>Media ID</b>	Enter an optional media ID


**Table 2-13. Inventory Items View - Aliases Tab Field Descriptions**



The screenshot shows the 'Inventory Items' window with the 'Aliases' tab selected. At the top, there are fields for 'ID:' and 'Description:', each with a search icon and a 'Clone...' button. Below these are several tabs: General, Vendors, Charges, Stock, Sales/Cost, Web Info, Text Prompts, Configure Kit, Demographics, Bin Locations, Substitutes, Aliases (selected), Serial Numbers, Catalogs, MyView, Categories, and Associations. The main area contains a table with three columns: 'Alias ID', 'Media ID (optional) >>', and an empty third column. The table has multiple rows, with the first row being highlighted.

Alias ID	Media ID (optional) >>	

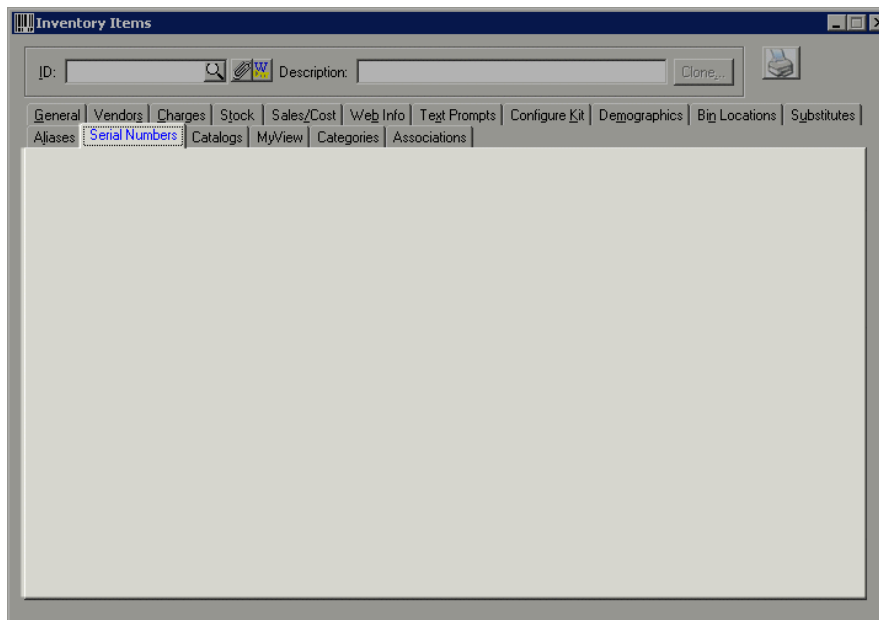
Figure 2-23. Inventory Items View - Aliases Tab

**B** Press <F2> or click  to save the inventory item record.

## Inventory Items Serial Numbers Tab

The **Serial Numbers** tab is a feature under construction (as of build 5058)

**A** Activate the **Inventory Items Serial Numbers** tab by clicking the tab. Verify that the inventory item that you want to enter or change information for is selected in the **ID** field.



The screenshot shows the 'Inventory Items' window with the 'Serial Numbers' tab selected. The layout is identical to the previous screenshot, but the 'Serial Numbers' tab is now active, and the main area is empty.

Figure 2-24. Inventory Items View - Serial Numbers Tab

## Inventory Items Catalogs Tab

Use the **Catalogs** tab to view a list of catalogs the item appears in. For more information on creating your Catalogs in Response see the documentation for **Media > Catalogs > Catalog Definitions**.

- A** Activate the **Inventory Items Catalogs** tab by clicking the tab. Verify that the inventory item that you want to enter or change information for is selected in the **ID** field.

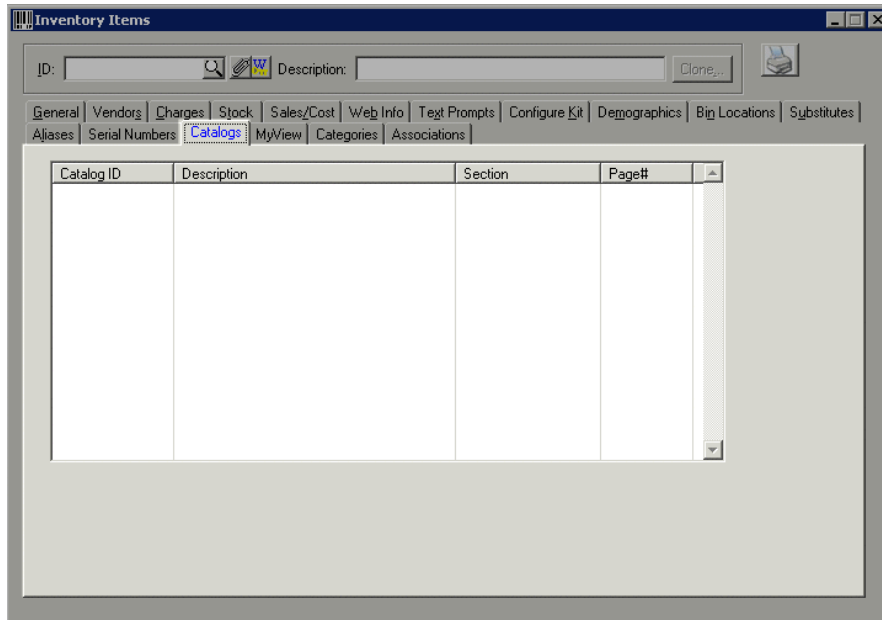


Figure 2-25. Inventory Items View - Catalogs Tab

Element	Description	
<b>CATALOG ID GRID</b>	The grid represents records from CATPAGE, CATHEAD, CATSECT tables that are related to this item	
	<b>Catalog ID</b> field	Displays the catalog ID the user created.
	<b>Description</b> field	Displays the catalog description.
	<b>Section</b> field	Displays the section of the catalog the item is in.
	<b>Page #</b> field	Displays the page # of the catalog the item is in.

Table 2-14. Inventory items View - Catalogs Tab Field Descriptions

## Inventory Items MyView Tab

The **MyView** tab is a way for users to define in one place, information they need to consistently see "at a glance".

To view or add information to the **Inventory Items MyView** tab, refer to **MyView Tab** section in the Introduction:

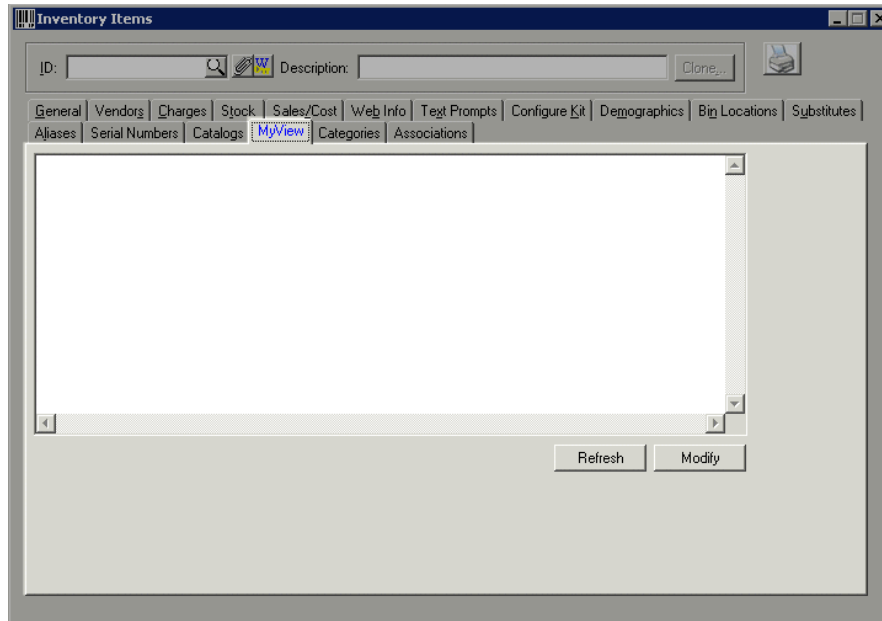


Figure 2-26. Inventory Items View - MyView Tab

## Inventory Items Categories Tab

Use the **Categories** tab to view, add or remove category assignments for the current item. Categories are similar to product class but you can assign unlimited number of categories to a single item. For example you have a child's book you want to associate to the category "Books" but also to the category called "toys" and a category called "Education - children". See more information on using Categories in the "Technical Reference for Customizing Response"

- A** Activate the **Inventory Items Categories** tab by clicking the tab. Verify that the inventory item that you want to enter or change information for is selected in the **ID** field.

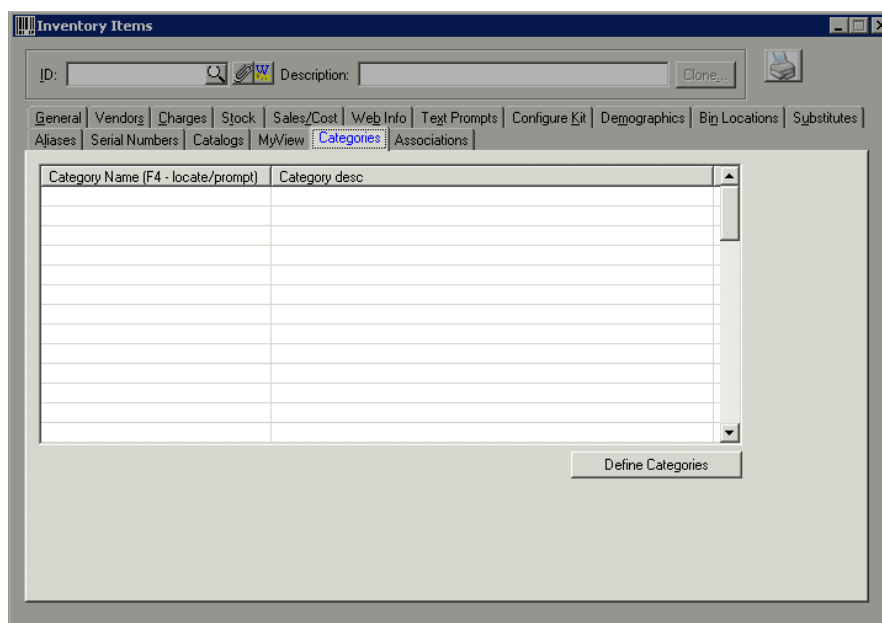



Figure 2-27. Inventory Items View - Categories Tab

Element	Description				
<b>Category GRID:</b>	A list of categories (if any) associated with this item.				
	<table> <tr> <td><b>Category Name</b> field</td><td>Enter category name, press F4, or click <b>Category Name</b> column heading to access the <b>Categories</b> dialog box to select from existing categories.</td></tr> <tr> <td><b>Category Description</b> field</td><td>The description auto-populates the entry in the categories table when a selection is made.</td></tr> </table>	<b>Category Name</b> field	Enter category name, press F4, or click <b>Category Name</b> column heading to access the <b>Categories</b> dialog box to select from existing categories.	<b>Category Description</b> field	The description auto-populates the entry in the categories table when a selection is made.
<b>Category Name</b> field	Enter category name, press F4, or click <b>Category Name</b> column heading to access the <b>Categories</b> dialog box to select from existing categories.				
<b>Category Description</b> field	The description auto-populates the entry in the categories table when a selection is made.				
<b>Define Categories</b> button	Click to access the <b>Categories</b> dialog box which is used to create or modify inventory categories.				

**Table 2-15. Inventory items View - Categories Tab Field Descriptions**

- B** To add a category for the item, click in the first available field and press **F4**. The **Categories** dialog box appears.(You can also click the column heading).
- C** Locate the applicable category in the category tree and click **OK**. The **Category Name** and **Description** fields populate with the selected information.
- D** Press <**F2**> or click  to save the record after you have entered the category information.

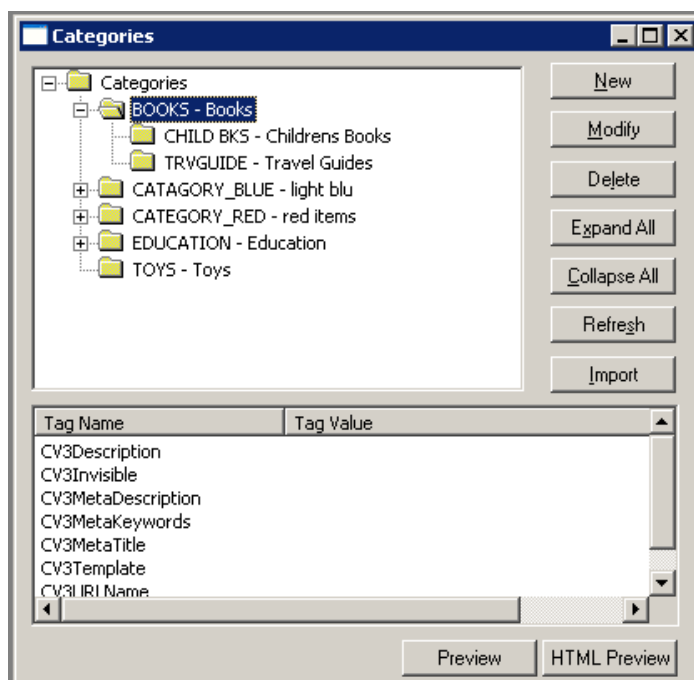
//gwen: 9/2 Steve, somewhere around here i've messed up what's being written in the page footer :( can you help?

Also I've noted my cross references that say see figure x-xx may be not point to the right picture number, like it's shifted by +1 or -1. Any idea what starts that? More importantly how can i find those imbedded xref to check them? is there something to locate them?

Define Categories

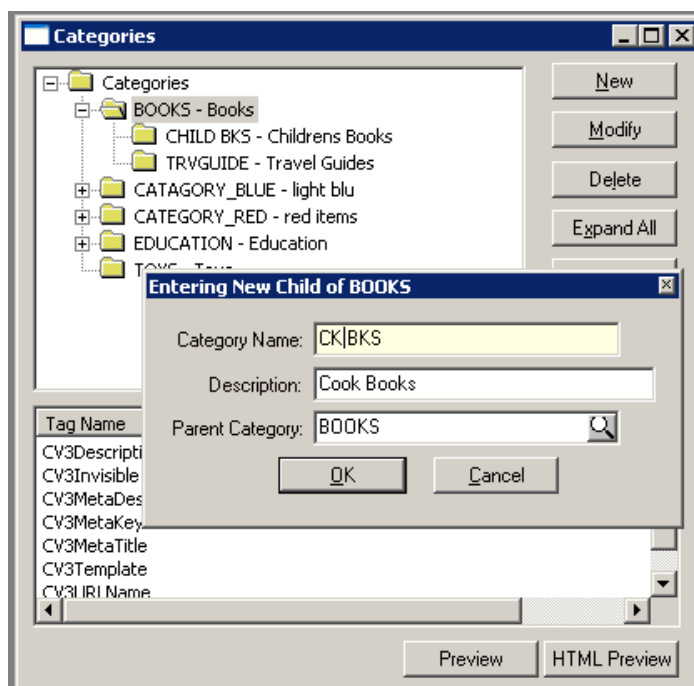
Opens the create & modify Catagories dialog. Highlight an existing category name and press New to create a new catagory below it.

Tag Values are displayed here for convenience.



**Figure 2-28. Categories Dialog Box**

- E** NEW button opens a blank dialog box where you can add a new Category. The parent will be populated for you if a category was highlighted when you pressed NEW. If you want the new category to be at the highest level, highlight the top “Categories” object. If modifying a category the parent cannot be changed, the category must be deleted and added under the parent.



**Figure 2-29. Add NEW category dialog box**



- F** Click in the **Category Name** field and enter a unique name
- G** Press <Tab> and enter a description of the Category.
- H** Click  and the category is added to the category hierarchy. Repeat these steps to add categories at any level within the tree.
- I** Import button opens the dialog that allows you to import category data via standard Response ascii data import functionality.

## Inventory Items Associations Tab

Use the **Associations** tab to view other items than are associated with the current selected item. Associate items that compliment each other or go well together. Usually Best described as an Amazon-like relationship where “customers who purchased this item also tend to purchase these other items”. **This feature is under construction.**

- A** Activate the **Inventory Items Association** tab by clicking the tab. Verify that the inventory item that you want to enter or change information for is selected in the **ID** field.

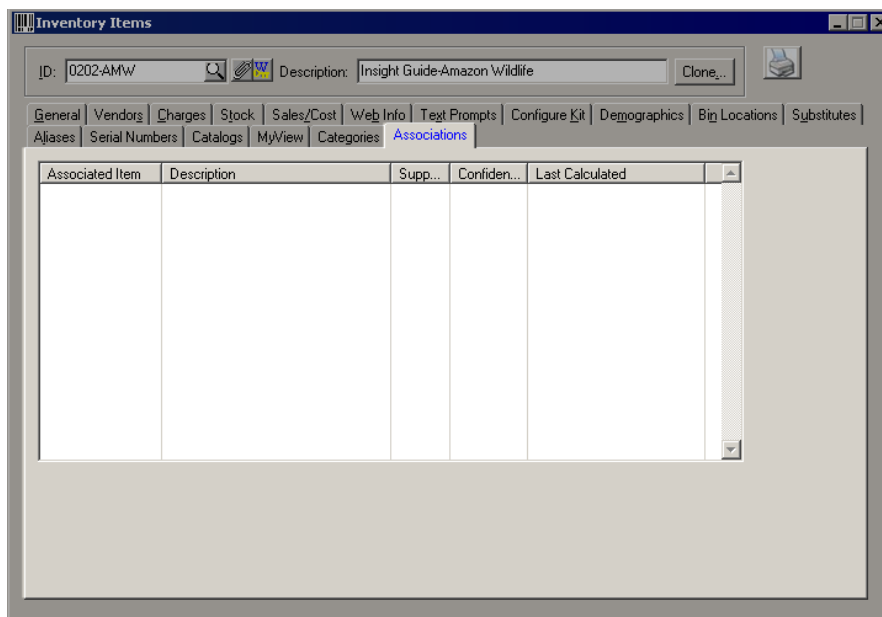


Figure 2-30. Inventory Items View - Associations Tab

Element	Description	
Item Associations GRID	This grid shows items that are associated with the current item.	
	<b>Associated Item</b> field	The item id as it exists in the inventory table.
	<b>Description</b> field	The item description as it exists in the inventory table.
	<b>Support</b> field	no info
	<b>Confidence</b> field	
	<b>Last Calculated</b> field	

Table 2-16. Inventory Items View - Associations Field Descriptions

## Warehouse Setup

Your Response system by default uses a single warehouse designated as Warehouse #1. More than a single warehouse is an optional feature. Defining your warehouse(s) is done from the Warehouse Setup Menu under Inventory. Use the **Warehouse** view to create or modify information about your warehouse.

To access the **Warehouse Setup**:

- A** Select **File > Inventory > Warehouse Setup** from the **Response Main** window. Multiple options appear on the next menu for Warehouse, Zones, Bin Locations, Bin Types and more. Each option is explained next.

### Warehouses

Choose Warehouse from the Warehouse Setup Menu. The Warehouse view appears.

- A** Tip: press F5 to clear the screen of a previously viewed warehouse. The screen must be clear before a new warehouse can be create

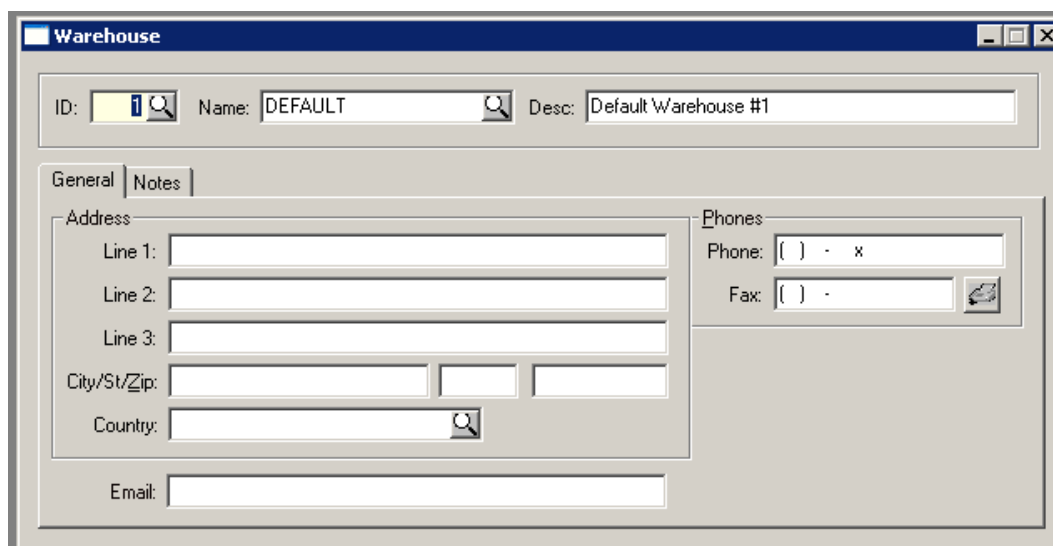


Figure 2-31. Warehouse view

Element	Description
<b>Warehouse ID</b>	The default Warehouse ID is #1, named <b>Default</b> . Use the Prompt button next to ID or Name to open a list of existing warehouses
General Tab	Enter the information for All fields
Notes Tab	Enter any freeform information about this Warehouse

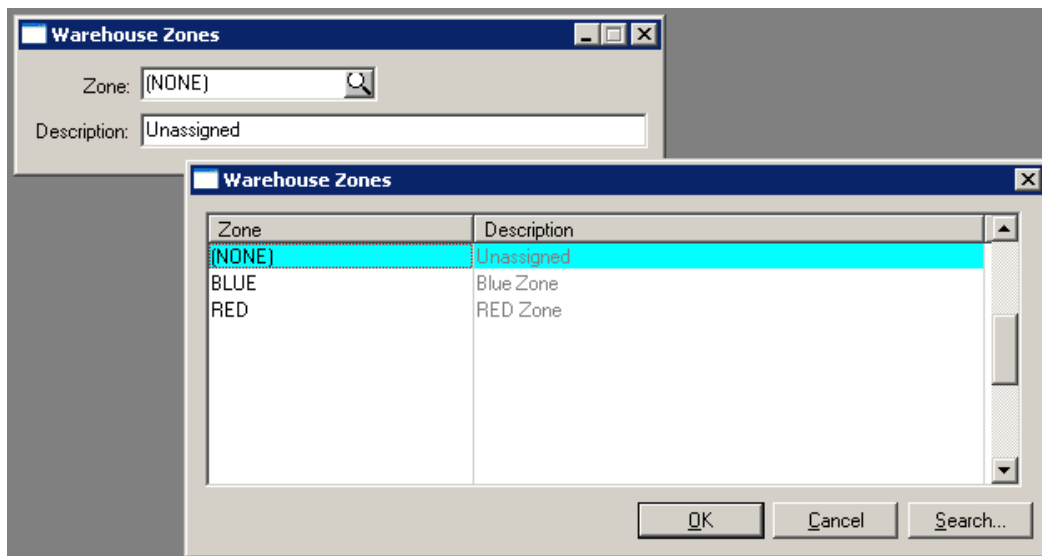
Table 2-17. Warehouse ID View, Field descriptions table

### (warehouse) Zones

Choose Zones from the Warehouse Setup Menu. The Warehouse view appears.

- A** Tip: press F5 to clear the screen of a previously viewed zone. The screen must be clear

before a new zone can be create



**Figure 2-32. Warehouse Zones view and the list of existing warehouses opened by the prompt icon**

Element	Description	
<b>Warehouse Zone</b>	The default Warehouse Zone is a special system value of (NONE). Use the Prompt button next to Zone to open a list of existing Zone records	
Zone	Enter a zone name or use the prompt button to open the list. Add new Zones as needed by your company.	
Description	Enter a description of your zone	



**Table 2-18. Warehouse Zones**


## Bin Locations



The Bin Locations view is used to create and define the BINS in your warehouse.

- A** Tip: press F5 to clear the screen of a previously viewed zone. The screen must be clear before a new zone can be created.



Refresher Info about the following icons): Prompt  & Attachment 

 Prompt button means a lookup (also know as “index”) is available on that field. Press the Prompt button to open a dialog that allows you to scroll thru existing records. If you type the first few characters of the information then press the prompt button you will be taken to that section of the list. If the cursor is in that field, pressing F4 also opens the list.

The attachments  mean you can attached objects to individual records in the table. The paper clip “lights up”  by turning yellow if attachments exist for the item displayed.

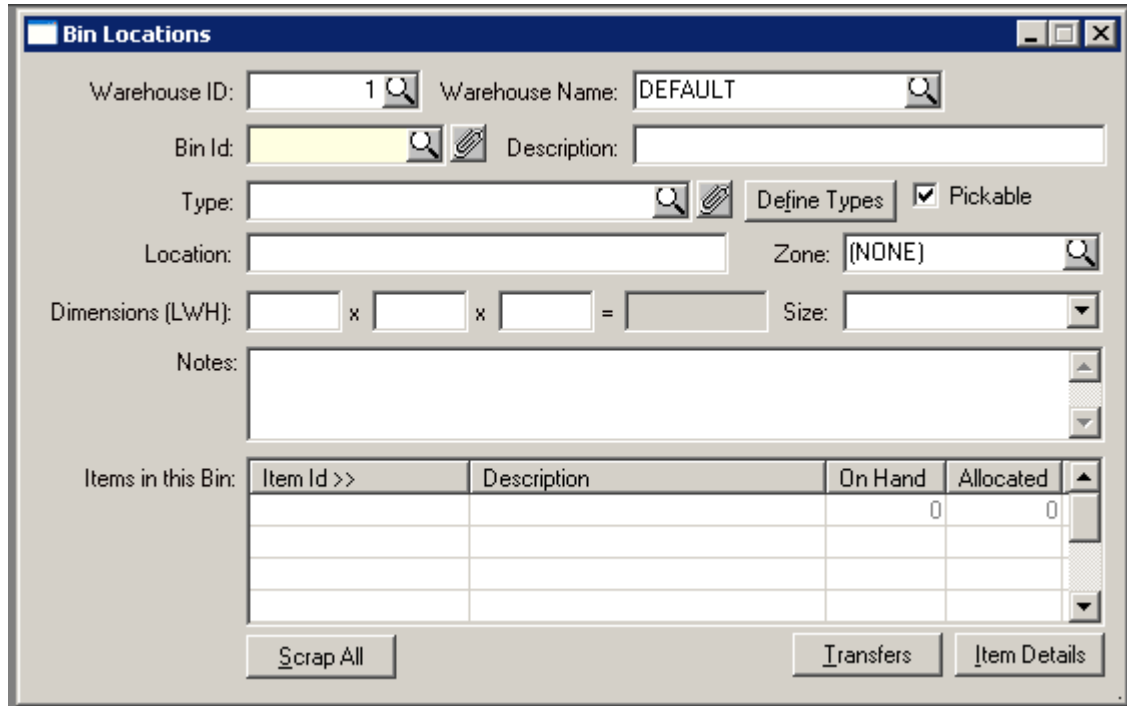


Figure 2-33. Bin Locations view

Element	Description								
<b>Warehouse ID</b>	Choose a warehouse ID for a NEW BIN or displays the ID for an existing BIN.								
<b>Warehouse Name</b>	This field displays the warehouse name.								
<b>BIN ID field</b>	Enter your BIN ID								
<b>BIN Description</b>	Enter your Bin Description								
<b>Type</b>	Choose a BIN TYPE (required)								
<b>Define Types Button</b>	Opens the Dialog to create Bin Types								
<b>Pickable Check box</b>	Check if warehouse staff should pick from this bin. <b>If blank</b> Response will not consider qty in this bin for allocation								
<b>Location</b>	Type in a free form description of the location of this Bin								
<b>Zone</b>	Choose a zone. If you don't have zones choose the default zone of (NONE)								
<b>Dimensions</b>	Optional: enter the dimensions of the BIN								
<b>Size</b>	Optional: choose a size from the drop down list								
<b>Notes</b>	Enter any free form notes about this Bin								
<b>Items in this Bin GRID</b>	Displays information from the <b>INVBIN</b> table to show you which items exist in this BIN and their qty's..								
	<table> <tr> <td>Item ID</td><td>The Item ID</td></tr> <tr> <td>Description</td><td>Item Description</td></tr> <tr> <td>On Hand</td><td>the On Hand Qty for this BIN</td></tr> <tr> <td>Allocated</td><td>Qty allocated</td></tr> </table>	Item ID	The Item ID	Description	Item Description	On Hand	the On Hand Qty for this BIN	Allocated	Qty allocated
Item ID	The Item ID								
Description	Item Description								
On Hand	the On Hand Qty for this BIN								
Allocated	Qty allocated								
<b>Scrap All Button</b>	Scrap All function is only available when Type = Scrap and BIN is NOT pickable								
<b>Transfers Button</b>	Opens the Inventory Transfers View where you can move inventory from Bin to Bin. Transfers is also available from the Warehouse setup menu and described later in this chapter.								

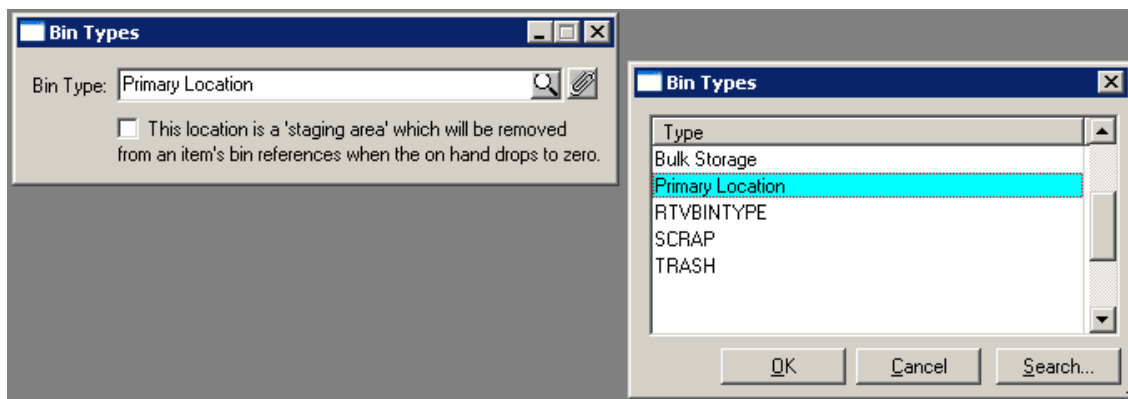
Element	Description
Item Detail Button	Opens a view only window where you can see details of the item highlighted in the grid.

**Table 2-19. Inventory Items Bin Location Field Descriptions Dialog Box.**

- A** The scrap All button button presents a warning before deleting the items from the bin.

## Bin Types

Bin type is required for every BIN you create. Create by clicking on the “Define Types” button. Because you have to assign a bin type when you create a new bin, at least one bin type must exist before creating BINS. Bin type examples: Primary Pick Location; Return to Vendor; Reserve #1; Reserve #2; Point of Sale; Bargain Bin; Storage Only; Refrigerated Storage; Fast Pick; Cross Dock; Etc.



**Figure 2-34. Inventory Bin Types Setup and Lookup**

Element	Description	
<b>BIN Type</b>	Enter a New Bin Type or use the Prompt Icon to open the list of existing Bin Types	
<b>Staging Area</b> check box	If you check this box then the INVBIN record will be removed from items when qty becomes zero. Useful when you have temporary Receiving Bins and you don't want to see those in the Bin List if no qty is there.	

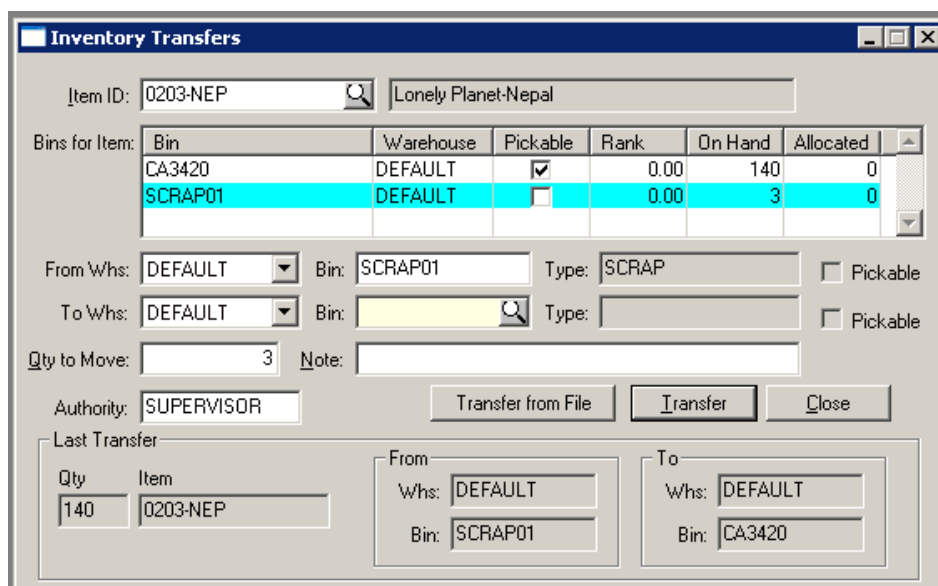
**Table 2-20. Bin Tyoe Field Descriptions**

Tip: press F5 to clear the screen of a previously viewed Bin Type. The screen must be clear before a new Bin Type can be created.

## Inventory Transfers

**File Menu > Inventory > Warehouse Setup > Inventory Transfers.**

Use Inventory Transfers to move inventory from one BIN to another. This utility will transer between Warehouses if more than one exist. Qty's already allocated for picking (meang qtys on Printed Picking Tickets) cannot be transferred.



**Inventory Transfers**

Item ID: 0203-NEP Item Name: Lonely Planet-Nepal

Bins for Item:	Bin	Warehouse	Pickable	Rank	On Hand	Allocated
	CA3420	DEFAULT	<input checked="" type="checkbox"/>	0.00	140	0
	SCRAP01	DEFAULT	<input type="checkbox"/>	0.00	3	0

From Whs: DEFAULT Bin: SCRAP01 Type: SCRAP ☐ Pickable

To Whs: DEFAULT Bin:  Type:  ☐ Pickable

Qty to Move: 3 Note:

Authority: SUPERVISOR

Last Transfer

Qty	Item	From Whs	From Bin	To Whs	To Bin
140	0203-NEP	DEFAULT	SCRAP01	DEFAULT	CA3420

Figure 2-35. Inventory Transfers View

Element	Description
<b>ITEM ID</b>	Choose an ITEM ID for the <b>Transfer</b> . Use the prompt button to open the Inventory Items Table List.
<b>ITEM Name</b>	This field displays the Item name.
<b>BINS For Item GRID</b>	The Grid Displays bins where the items exist and the columns contain information you need to make decisions on the transfer.
<b>From Whs</b>	Select a warehouse from the drop down list
<b>From Bin</b>	Type in the Bin ID. It must be one of the Bins visible in the Bins for Item Grid
<b>To Whs</b>	Select a warehouse from the drop down list
<b>To Bin</b>	Enter the Bin to receive the transfer or choose a Bin by using the prompt button. Tip, be sure the Bin you type exists.
<b>Qty to Move</b>	Enter the Qty you wish to transfer.
<b>Note</b>	Enter any freeform notes you need to make about this transfer
<b>Authority</b>	Enter a valid Response User ID
<b>Transfer From File Button</b>	Provides information on how you can create an inventory Transfer for multiple items using a .csv file format
<b>Transfer Button</b>	Performs the Transfer
<b>Close</b>	Closes the Inventory Transfer View
<b>Last Transfer Section</b>	Display only. Shows detail on the last Transfer completed. Item Id, from bin & to bin..

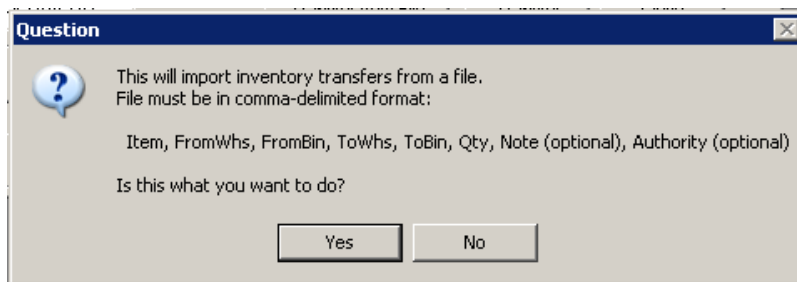
**Table 2-21. Inventory Transfer Dialog Box.**



Transfer from File presents the information in (Figure 2-36) to help you create a file for multiple inventory transfers. Pressing YES opens a Windows dialog where you can choose the file you have created.

Your import file should contain the warehouse NAME for both the FROM and TO warehouses, not the numeric ID. (WHS.WHS\_NAME) So your import file should look like this if you had a warehouse name of “ATLANTA”


76220,ATLANTA,U4B1A014,ATLANTA,10-0135-0401,QTY

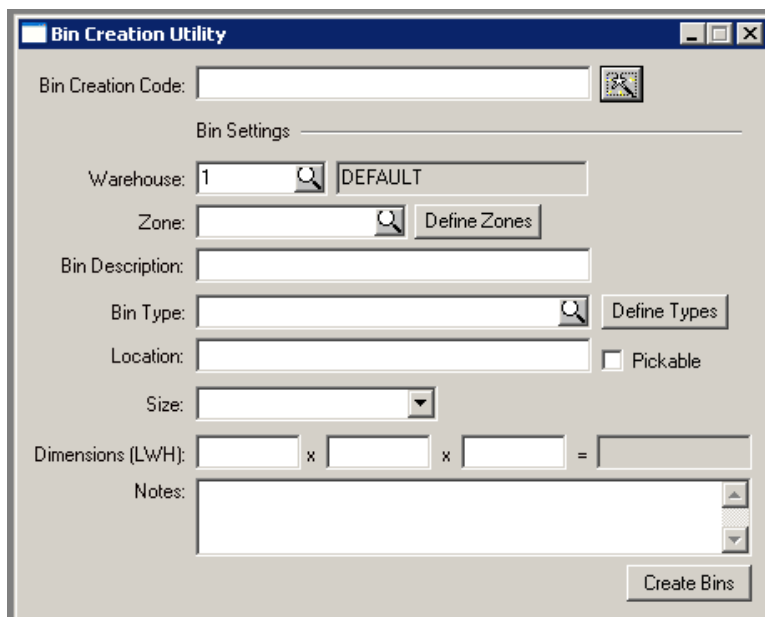


**Figure 2-36. Inventory Transfer from File Instruction popup window.**

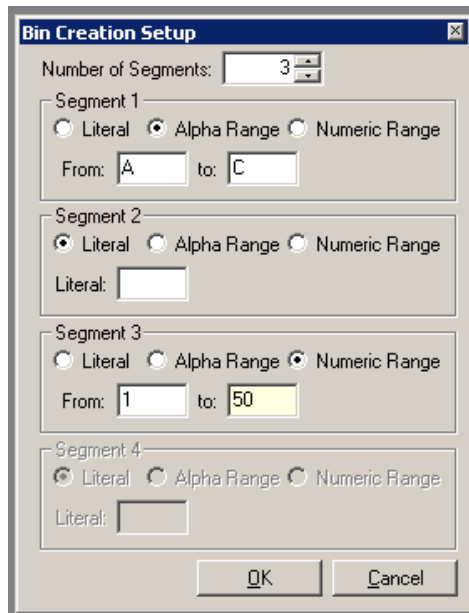
## Bin Creation Utility

**File menu > Inventory > Warehouse Setup > Bin Creation Utility.**

The Bin Creation utility will create many Bins at Once. The Bin Creation Code defines how bins are created. The WAND icon  Opens the Bin Creation Setup in (Figure 2-38) that guides you in creating the Bin Creation Code



**Figure 2-37. Bin Creation Utility Main View**



**Bin Creation Setup**

Number of Segments:

Segment 1  
☐ Literal ☒ Alpha Range ☐ Numeric Range  
 From:  to:

Segment 2  
☒ Literal ☐ Alpha Range ☐ Numeric Range  
 Literal:

Segment 3  
☐ Literal ☐ Alpha Range ☒ Numeric Range  
 From:  to:

Segment 4  
☒ Literal ☐ Alpha Range ☐ Numeric Range  
 Literal:

OK Cancel

**Figure 2-38. Wand Icon: Bin Creation Code Setup window**

Element	Description
<b>BIN CREATION CODE</b>	Use the <b>WAND</b> to open the Creation code Dialog. After you enter the Creation Code parameters and press OK the Bin Creation Code will be populated for you..
<b>BIN Settings Section</b>	The items under this line define the defaults to be used by the Creation Code. The Creation Code is the means to define the BIN IDs and how many there will be. This info it for all the other BIN parameters. This is why we say you may need to do this in small segments if an BIN settings here must be different.
<b>Warehouse ID</b>	Enter the warehouse number.
Zone	Choose a zone. If you don't have zones choose the default zone of (NONE)
BIN Description	Enter your Bin Descripton
Bin Type	Choose a BIN TYPE (required)
Define Types Button	Opens the Bin Types View dialog explained earlier in this chapter.
Location	Type in a free form description of the location of this Bin
Pickable Check box	Check if warehouse staff should pick from this bin. <b>If blank</b> Response will not consider qty in this bin for allocation
Size	Optional: choose a size from the drop down list
Dimensions	Optional: enter the dimensions of the BIN
Notes	Enter any free form notes about this Bin
Create Bins Button	Opens the Bin Locations View Dialog explained earlier in this chapter.

**Table 2-22. Bin Creation utility view dialog box..**

**A** The BIN Creation Setup is best Explained by Examples. Examples follow.

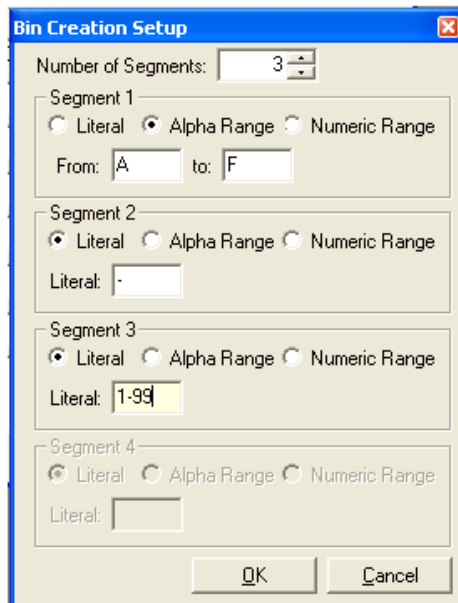
**First, four simple examples, each line in (Figure 2-39) represents one:**



Your bins look like this..	Bin Creation Code should be
A-01 thru F-99	[A-F]-[1-99]
001 thru 999	[1-999]
AA-001-A thru ZZ-999-Z	[AA-ZZ]-[1-999]-[A-Z]
AAA thru ZZZ	[AAA-ZZZ]

**Figure 2-39. Bin Creation Setup Example 1 spreadsheet.**

Here's the Bin Creation Setup for the First Line A-01 thru F-99. When you press OK, the Creation code looks like **[A-F]-[1-99]**. Note that segment 2 is putting the DASH in between the letter and the number.



The dialog box titled "Bin Creation Setup" has a "Number of Segments" dropdown set to 3. It contains four segments, each with radio buttons for "Literal", "Alpha Range", and "Numeric Range".

- Segment 1:** "Alpha Range" is selected. "From:" is "A" and "to:" is "F".
- Segment 2:** "Literal" is selected. "Literal:" is "-".
- Segment 3:** "Literal" is selected. "Literal:" is "1-99".
- Segment 4:** "Literal" is selected. "Literal:" is empty.

At the bottom are "OK" and "Cancel" buttons.

**Figure 2-40. Bin Creation Setup Example 1 Setup Window**

Try the other 3 examples above on your own, in your TEST Environment.

### Here is a longer more complex example:

A warehouse, designated "Warehouse A", has 6 aisles labeled A thru F and a bulk storage location labeled G. Each aisle has 30 horizontal segments labeled 1 thru 30, and each segment has 5 vertical shelves labeled A thru E. The bulk storage location just has 7 extra large bins marked 1 thru 7. Assume you can only pick from aisles A thru F and in those aisles, from only the first 4 vertical shelves (the 5th is too high for a picker to reach).

To create this setup, you would break the warehouse into:

1. Aisle locations pickable.
2. Aisle locations not pickable.
3. Bulk locations.

For "Aisle Locations Pickable" the bin creation code would be:

Bin Creation Code: A-[A-F]-[1-30]-[1-4]

Pickable = checked.

Type (ex.): Primary Pick Location.

Click on "Create Bins".

For "Aisle locations not pickable" the bin creation code would be:

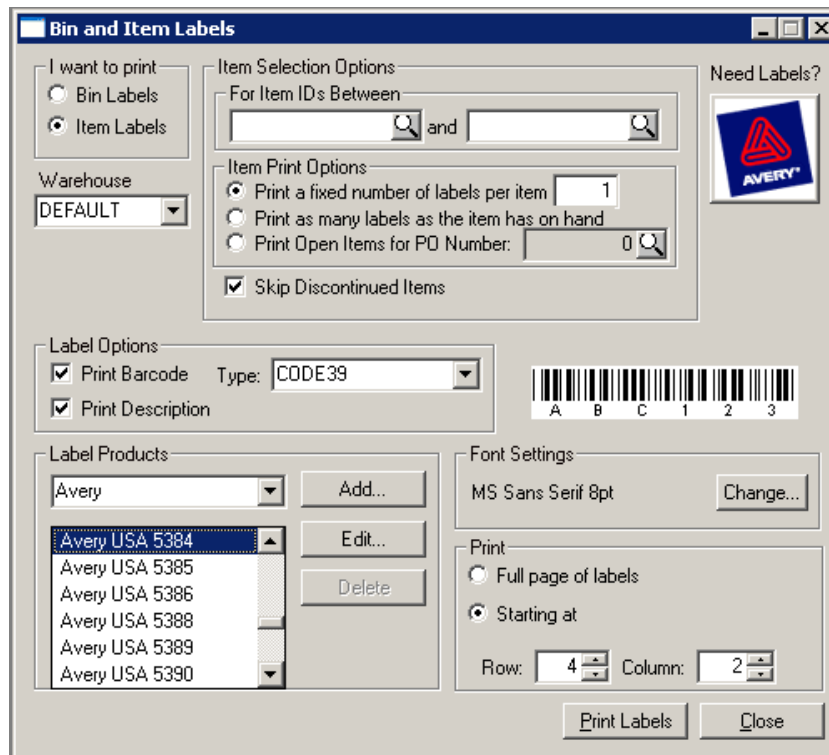
Bin Creation Code: A-[A-F]-[1-30]-5  
 Pickable = unchecked.  
 Type (ex.): Reserve #1  
 Click on "Create Bins".

For "Bulk Locations", the bin creation code would be:  
 Bin Creation Code: A-G-[1-7].  
 Pickable = unchecked.  
 Type (ex.): Bulk Storage  
 Click on "Create Bins".

## Print Bin and Item Barcode Labels

**File menu > Inventory > Warehouse Setup > Print BIN and ITEM Barcode Labels.**

In Response you can print Barcode fonts for just about anything, but Bin and Item labels are probably at the top of any users list. This utility on the warehouse setup menu automates the process for printing labels for both your BIN or the Item you stock in those BINS



**Figure 2-41. Inventory Bin and Item Labels View Dialog Box**

Element	Description
<b>I Want to print Group</b>	Use the radio button to choose Bin Labels or Item Labels
Warehouse Selection	Select your Warehouse from the Dropdown list

Element	Description	
<b>"BIN/ITEM" Selection Options Group</b>	Group Title differs based on the Radio button selection. Select a range of BIN OR ITEM records. The Print options in this group will only be available if you have selected to print ITEM Lables in the print group.	
<b>Item Print Options:inside the BIN/Item Selection</b>	Select one of the Three Item print options for 1. a random Qty, 2. the Qty on Hand, or 3. the Qty for PO #"X". Choose if you want to skip Items marked Dis-continued.	
<b>Label options Group</b>	Print Barcode	Check to print the Item ID in a barcode font on the label too. If you check box you must also choose your barcode font from the dropdown list.
	Print Description	Include the item description on the label.
<b>Label Products Group</b>	In the First Drop down, choose your label manufacturer, for example AVERY. The list below will let you choose a label number by the chosen manufacturer. you can add custom label sizes if yours is not listed.	
<b>Font Settings Group</b>	Choose your font name and size	
<b>Print Start Location Group</b>	You can specify a starting location on your page of labels.	
	Full page	Starts in the first label position.
	Starting At	Let's you specify where the first blank label is.
<b>Print Button</b>	Print the labels	
<b>Close Button</b>	close the Bin and Item Labels Utility view	

**Table 2-23. Bin and Item Lables Utility View Dialog Box.**

- A** Barcodes can be added to other Crystal Reports using the TrueType fonts we deploy with Response (Free 3 of 9, code39, C39HRP.). Look in CoLinear\r4w\fonts\ folder for these alphanumeric barcode\*. TTF files.

**This Ends Inventory Warehouse Setup.**

# Inventory Pricing

**File Menu > Inventory > Inventory Pricing (A Utility)**

## Overview

Of the many different ways Response allows you to configure the pricing your customers receive on any item, at Order Entry time Response will return the LOWEST calculated price allowed for the customer. Response looks at pricing based on price codes, qty pricing, group qty pricing, media pricing, and formula pricing, etc. This means any pricing applicable for the customer. The ONLY EXCEPTION is Contract Pricing. If the customer # has contract pricing established the contract price overrides all, even if it results in a higher price.

**This specialized utility for pricing your inventory items allows you to use formulas to batch update the values of the primary price code fields in the Inventory Master File. The fields you can modify are**

List\_Price  
Price\_Code\_1 thru Price\_Code\_16

Other optional item pricing such as qty price breaks, group qty pricing, media pricing, and formula pricing, etc cannot be updated here. This utility will NOT create an item that does not already exist in Inventory Master data file.

**There are three basic steps to the Inventory Pricing utility.**

Select the items to be updated. (part 1)  
Pricing Instruction: Provide a value for any price code field that should be updated. (part 2)  
Click 'Update' to make it happen. (part 2)

The selection Method of "File" is a special case and thus causes certain controls to act differently than they normally would. File method requires a comma delimited plain text file. Here is an example:

"shirt-001","5","4","3.33","2.87","0.5","2.9"

## **PART 1. Select Items to Be Updated.**

**Inventory Pricing**

Selection Method: ☒ Range ☐ Constrain To ☐ File

Selection Field: ☒ Item ID ☐ Vendor ID ☐ Product Class

Range Between: [ ] and [ ]

☒ Include Closeout Items ☒ Include Discontinued Items

Import File: [ ]

Rounding

☒ Round Prices Numbers to Round to: 49.95

Rounding Method

☒ Round Up ☐ Round Down ☐ Mathematical Rounding

Field	Formula - example: THIS_FIELD + (INVENTOR.LIST_PRICE * 0.05)
List_Price	
Price_Code_1	
Price_Code_2	
Price_Code_3	
Price_Code_4	
Price_Code_5	
Price_Code_6	
Price_Code_7	
Price_Code_8	

Figure 2-42. Inventory Pricing View: Part 1 Selecting Items

Element	Description	
<b>Selection Method: RANGE</b>	<b>RANGE</b> allows the <b>Selection Field</b> of Item ID or Vendor ID or Product Class. Values in the <b>Range Between</b> drop down lists will be values applicable to the Selection Field chosen. Choose the beginning and ending Range Value.	
	<b>Check List</b>	Gives you a visual of all the values included by the Range Between selected
	Constrain to	not applicable (N/A)
	Include Closeout	Check if you want to include items designated as Closeout
	Include Discontinued	Check if you want to include items designated as Discontinued
	Import File	N/A
<b>Selection Method: CON- STRAIN TO</b>	This method is useful when the user only want to update certain items that are not in any sort of range. <b>CONSTRAIN TO</b> allows the <b>Selection Field</b> of Item ID or Vendor ID or Product Class. Values presented under the <b>CONSTRAIN TO button</b> will be values applicable to the Selection Field chosen. Add items to the list in the Constraint dialog box. .	
	<b>Check List</b>	Gives you a visual of all the values included by the constraints selected
	<b>Constrain to</b>	described above

Element	Description	
	<b>Drill Down</b> – applies only when using the Product Class Selection Field. Product classes in general are set up in a tree structure. This allows the user to choose between selecting the items that are in the product classes that are specifically entered (not checked). <b>OR</b> Expanding the selected product classes to include all of the product classes that are contained within the entered product classes. Thus this would select all of the items that are in any of these product classes. (checked)	
	<b>Include Closeout</b>	Check if you want to include items designated as Closeout
	<b>Include Discontinued</b>	Check if you want to include items designated as Discontinued
	<b>Import File</b>	N/A
<b>Selection Method: FILE</b>	<b>FILE METHOD:</b> This Selection method changes the way the whole utility works. This method is used to import the field values from a comma delimited text file rather than derive a value (thru calculation) for the fields being updated. <b>This method DOES NOT Use:</b> Selection Field, Range or Constrain to.	
	<b>Check List</b>	When using the Import File Method then it checks that every line in the import file exists in the Inventory Master data file. Any Item ID that cannot be found will be listed in a log file called 'IPNoFind.log'
	Constrain to	N/A
	Include Closeout	Check if you want to include items designated as Closeout
	Include Discontinued	Check if you want to include items designated as Discontinued
	<b>Import File</b>	the location and name of the file. Use the Lookup button to open standard windows dialog to help you find your file. See more info in part 2 for the FILE method.

Table 2-24. Inventory Pricing Dialog Part 1, Selecting Items.

## PART 2 Pricing Instruction.

This second part has two components. Instructions for Rounding and the Field and Formula Grid:

**Note:** In Formula's the constant "THIS\_FIELD" may be used to refer to the field being updated. See example in the check list graphic (Figure 2-44).

**Inventory Pricing**

Selection Method: ☒ Range ☐ Constrain To ☐ File

Selection Field: ☒ Item ID ☐ Vendor ID ☐ Product Class

Range Between: [ ] and [ ]

☒ Include Closeout Items ☒ Include Discontinued Items

Import File: [ ]

**Rounding**

☒ Round Prices Numbers to Round to: 49.95

Rounding Method: ☒ Round Up ☐ Round Down ☐ Mathematical Rounding

Field	Formula - example: THIS_FIELD + (INVENTOR.LIST_PRICE * 0.05)
List_Price	
Price_Code_1	
Price_Code_2	
Price_Code_3	
Price_Code_4	
Price_Code_5	
Price_Code_6	
Price_Code_7	
Price_Code_8	

Load Setup Save Setup Undo Test Formulas Update Cancel

Figure 2-43. Inventory Pricing Dialog Part 2, Pricing Instruction

Element	Description	
<b>Pricing Instruction</b>	Instruction in this lower half of the view will be applied to all items selected in the upper section. Be sure to use CHECK LIST button from Part 1 to know which items you are changing.	
<b>Rounding</b>	Round prices	Yes (check) or No (uncheck)
	Numbers to round to	This allows you to round up or down to something other than a whole dollar amount. You may want all your prices to end with .49 or .95 or .98 or .88. Enter the cent value you want to round to.
	Rounding method	Choose one. You can choose to always round UP or always round down, or you can round the old fashion (mathematical) way.
<b>FIELD &amp; FORMULA GRID; Field Column</b>	Field – These are 17 fields that may be updated by this utility. Any field where the Formula or Column Number is left blank will not be updated	
<b>Formula Column: for Range &amp; Constrain To Method</b>	Enter a formula using the proper syntax. For Range and Constrain To Methods, enter a formula to determine the value for each field. Formulas may be as simple as a single number, or they very complex. Formulas may contain any mathematical symbol such as (/ * - +). They may also parentheses to nest expressions such as: ((2+4)*3). Finally, formulas may include other inventory fields such as: (inventor.last_cost * 1.35)	

Element	Description
<b>Formula Column: for FILE Method</b>	<p>When the File Method is being used, you'll first note the second column of the grid is labeled "Column Number". When the file method is used the import file should be in a csv format like the following example:</p> <pre>1001-blk,"19.99","18.99","17.77","17.5","17","16.5","abc","16.25",,,,"10",</pre> <p>Each "field" is separated by a comma. Think of each field like a column in an excel spreadsheet and number each column. So each field/column contains a price, or piece of data separated by commas, each data field is contained in quotes "". Field/Column 1 is reserved and must ALWAYS contain the ITEM ID. The field/column numbers following don't have to be consecutive, and column numbers could be skipped entirely. In the example above, "column 8", has alpha data, so it's obviously not a price. Column 10 &amp; 11 are skipped as indicated by the extra commas.</p> <p>In Response the Grid has two columns labeled "Field" and "Column Number". The "Field" column already lists the price codes. Now you are ready to fill in the Column Number Column. Indicate the NUMBER corresponding to the field/column number in your file that holds the amount for List_Price. Do the same for Price_Code_1, price_code_2, etc.</p>
<b>Load Setup</b>	Allows you to load a previously saved setup. These files have an *.ip extension and are created by the SAVE setup button. They contain all range, constrain to and file settings specified when the SAVE setup button was used.
<b>Save Setup</b>	Allows you to create a file you can use again.
<b>Undo</b>	Allows you do "undo" what the last "UPDATE" did
<b>Test Formula</b>	Tests all of the values or formulas in the grid to make sure that they will evaluate to a valid number. Highlights the first formula that fails the test. This DOES NOT guarantee your formula is correct, this only checks for syntax errors.
<b>Update</b>	Performs the action on the selected records. When you press the update button we update the prices but we're also trying to create a file named chgprice.log, which stores the "before" snapshot of all items in case you want to "undo".
<b>Cancel</b>	Closes the view without making any changes.

Table 2-25.

**A** 5 Examples of formulas for a price code
$$\text{List\_price} + (\text{inventor.list\_price} * 0.05)$$

$$((\text{inventor.last\_cost} * 2) * 1.15))$$

$$((\text{inventor.last\_cost} * 2) * 1.10))$$

$$((\text{inventor.last\_cost} * 2) * 1.05))$$

$$((\text{inventor.last\_cost} * 2))$$
**B** Pricing Check List: A list of the items that will be updated. This provided as a way for the user to check and make sure that the desired items will be affected in the desired manner.

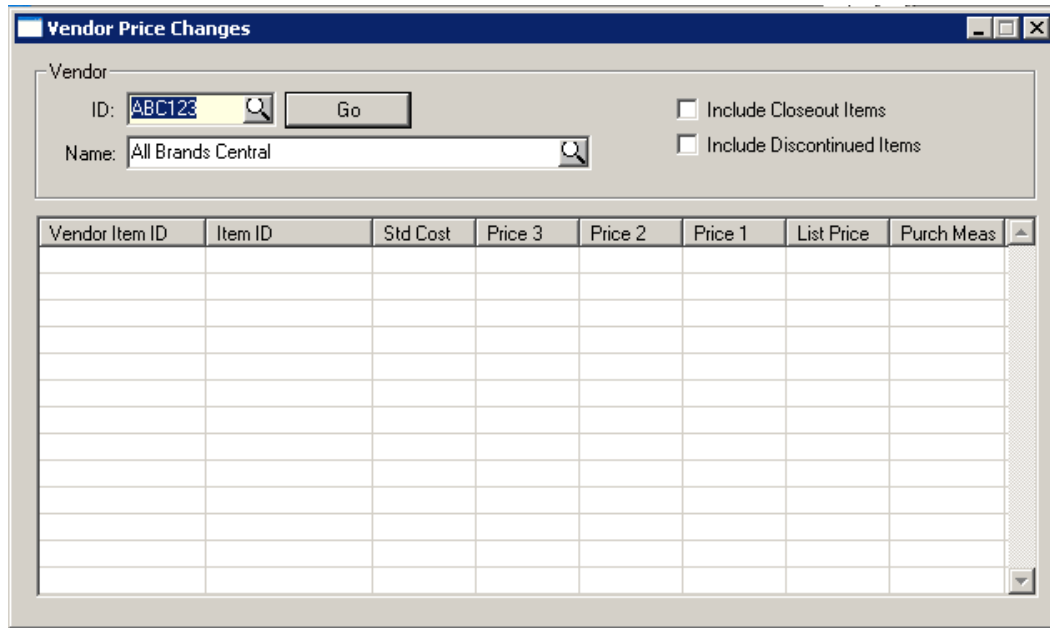




# Vendor Price Changes

**File Menu > Inventory > Vendor Price Changes**

This feature is currently under construction (build 5054)



**Figure 2-45. Vendor Price Changes view**

Element	Description	
Vendor Group	Vendor Id	
	Vendor Name	
	Go button	Fills the grid with all items related to this Vendor ID
	Include Closeout	
	Include Discontinued	
Vendo Item Pricng GRID	Displays information from the INVENTOR table and VENDITEM(?)table	
	Vendor Item Id	
	Item ID (Response)	
	Std Cost	
	Price 3	Displays Inventor.price_code_3
	Price 2	Displays Inventor.price_code_2
	Price 1	Displays Inventor.price_code_1
	List Price	
	Purch Measure	

**Table 2-26. Vendor Price Changes Dialog**

# Item Configurator

File menu > Inventory > Item Configurator

## Overview

This utility is used to configure items for order entry. It provides a front-end for the CSR to be used during Order Entry to select a final sku in a logical, progressive manner. It's helpful for the CSR to see at a glance the availability of, for example, what could be hundreds of combinations of sizes/colors/styles of some of your items

Use this utility to configure items for order entry when multiple sizes, colors, lengths or other features require multiple skus (Item ID) exist for an item. For example, a configurable item such as a shirt would have separate categories (levels) for size, color, and sleeve-length. (Figure 2-46) shows an example of how this looks in the Order Entry view. Note the qty next to color and size comes from current inventory numbers.

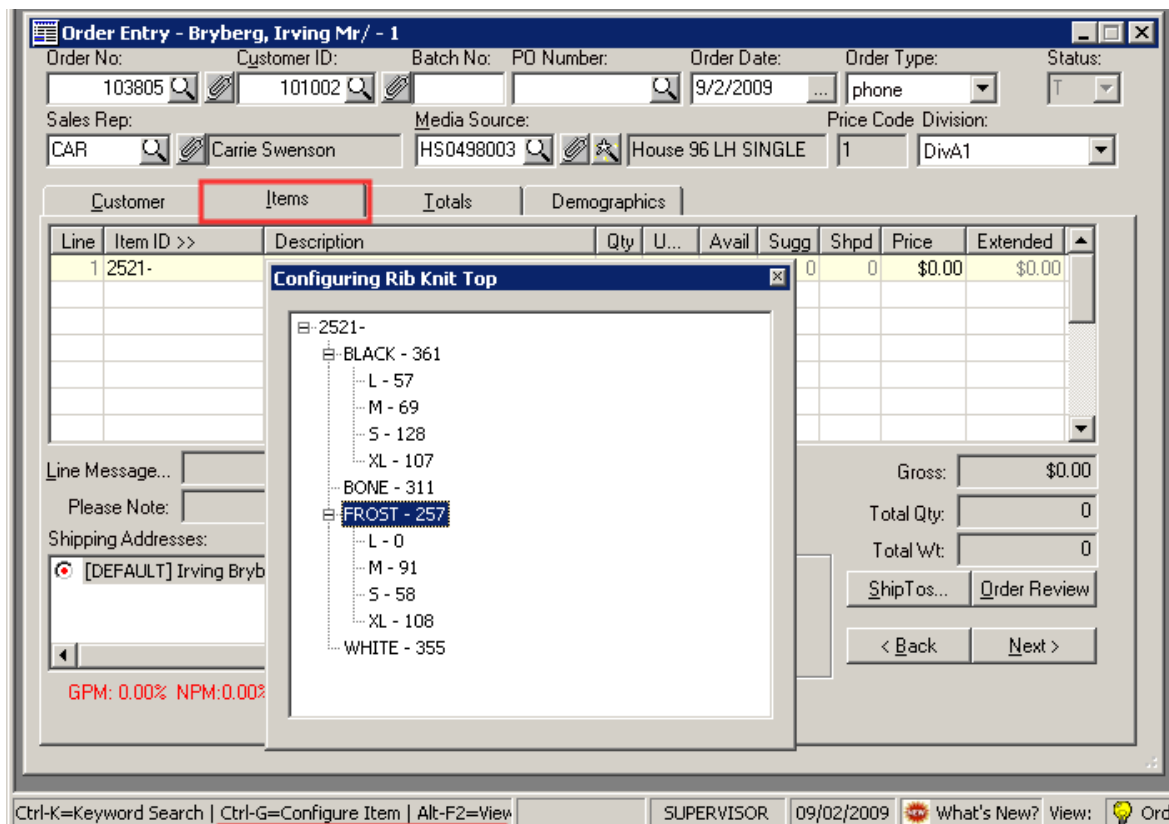


Figure 2-46. Item configurator example from Items tab in Order Entry view.

To configure items for order entry, perform the following steps:

- A** Click **File > Inventory > Item Configurator** from the **Main Menu**. The **Item Configurator** dialog box (Figure 2-47) appears.

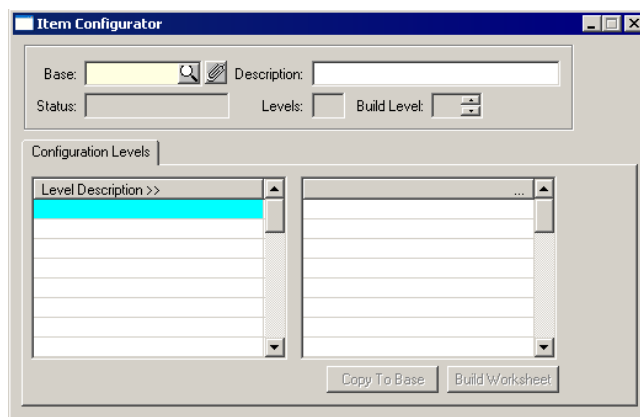



Figure 2-47. Item Configurator Dialog Box

Element	Description
<b>Base field</b>	Enter the BASE ID for the inventory item. TIP: The BASE ID is NOT an item ID but the Value that defines the item group. For example ShirtA1- could be a base, but when configuration is complete the Items related to this base may be ShirtA1-05blu, ShirtA1-07Blu, ShirtA1-05Red ShirtA1-07Red, etc.. The base does not have to be the prefix of the item ID, but it WILL be if you use the item configurator to CREATE the items for you.
<b>Base prompt</b>	Click to access the Configurable Items Table List on page 2-54. Select the desired configurable BASE ID from this list.
<b>Description field</b>	This field displays a description of the Base ID.
<b>Status field</b>	This field displays the status of the Base ID.
<b>Levels field</b>	This field displays how many levels the configurable item will have.
<b>Build Level field</b>	Click the up and down arrows to add or subtract levels from the configurable item.
<b>Config. Levels tab</b>	Use to build a series of cross-references for the configurable items

Table 2-27. Item Configurator Dialog Box Description

- B** Click in the **Base** field and enter the a new Configurable item base, or click  to access the **Configurable Items** table list (Figure 2-48).

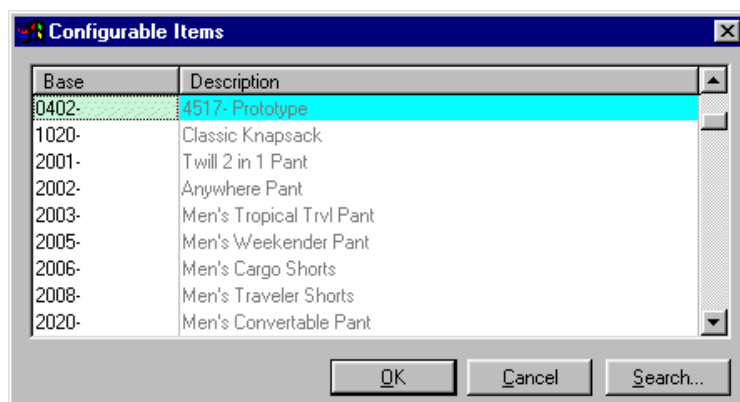
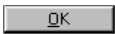


Figure 2-48. Configurable Items Table List

- C** Select the item to configure from this list.

- D** Click . A description of the configurable item appears in the **Description** field. The **Status**, **Levels**, and **Build Levels** fields will display any available information. Also, The **Worksheet** tab appears.
- E** Continue to Configuration Levels Tab on page 2-55 for configuration levels tab procedures.
- F** Continue to Worksheet Tab on page 2-56 for worksheet tab procedures.
- G** Continue to Generate SKUs Utility Dialog Box on page 2-57 for generating SKUs procedures.

## Configuration Levels Tab

The **Configurations Levels** tab displays categories of the same item. For example, a configurable item such as a shirt would have separate categories (levels) for size, color, and sleeve-length.

- A** Activate the **Item Configurator Configuration Levels** tab by clicking the tab. Verify that the inventory item that you want to configure is selected in the **Base** field.

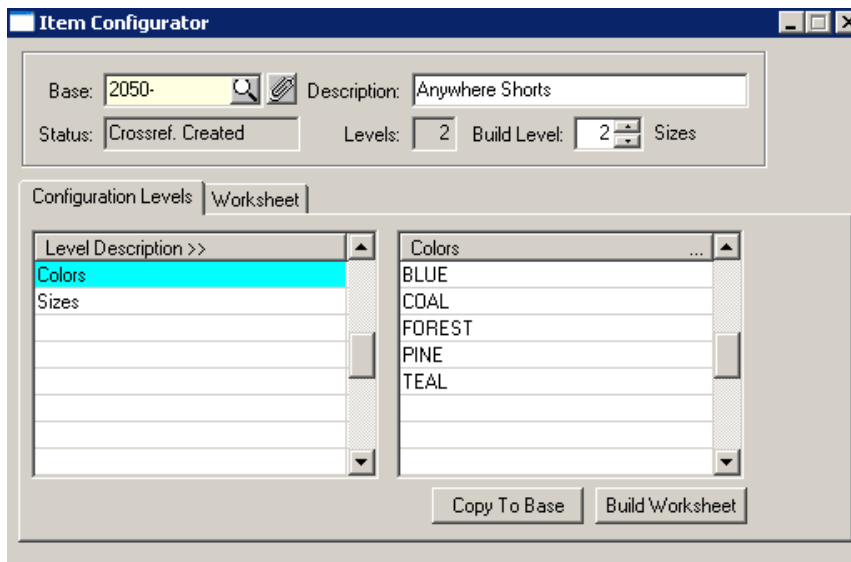


Figure 2-49. Configuration Levels Tab Category Entries

Element	Description
<b>Level Description &gt;&gt;</b> column	Enter the desired category levels of the selected inventory item (for example, color & size) in this column.
Column to the right of the <b>Level Description &gt;&gt;</b> column	Enter the different sub-categories for each category level of the selected inventory item in this column. For example, if the category was color, the colors that the item is available in might be red, blue, and green.
<b>Copy to Base</b> button	Once this button is active, click it to copy the information to the base worksheet.
<b>Build Worksheet</b> button	If this is a NEW configured item, click the button to build a new worksheet.

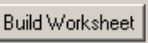
Table 2-28. Configuration Levels Tab Field Description

- B** Click in the first level in the **Level Description** pane and enter a category level, for example, Color (Figure 2-49).

- C** Click in the first level of the right pane and enter sub-categories within that category, using each level as a different sub-category, for example colors such as Blue, Coal, Forest, Pine, Teal
- D** Repeat these steps to add another category and sub-categories.
- E** Continue to Worksheet Tab on page 2-56 for worksheet tab procedures.

## Worksheet Tab

The **Worksheet** tab is used to build a series of cross-references for the configurable items. Before using the **Worksheet** tab, you must first complete the **Configuration Levels** tab procedure. Refer to Configuration Levels Tab on page 2-55 for more information.

- A** Click  Build Worksheet button from the **Configuration Levels** tab, and then click the **Worksheet** tab (Figure 2-50). The **Description** column lists every possible configuration of the inventory item. For example, one possible configuration could be:
  - ❖ 2050 (Base Number) -BLUE (color)-S (size). Your Item ID column will be blank if you just built your worksheet, otherwise it may contain values previously entered.

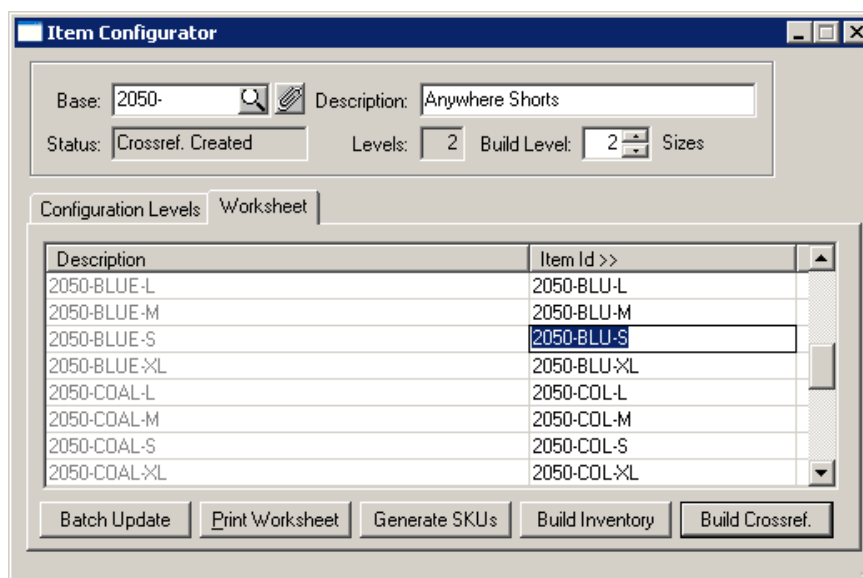


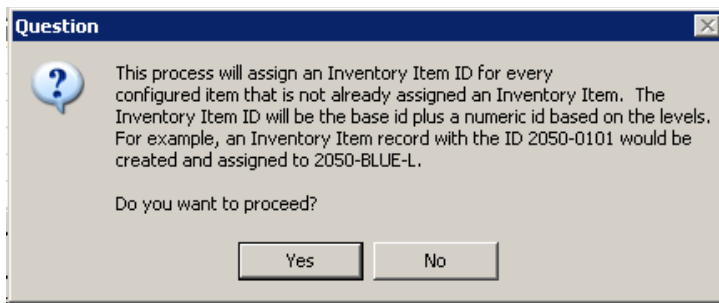
Figure 2-50. Item Configurator Worksheet Tab

Element	Description
<b>Description</b> column	Displays a description of each level.
<b>Item ID &gt;&gt;</b> column	Multiple options exist for populating this field. <ol style="list-style-type: none"> <li>1. If this is a NEW worksheet you will select the inventor sku that represents each item. Select existing items by placing the cursor in the Item ID field and pressing F4 to open your existing items list to select from there.</li> <li>2. If the worksheet already exists the skus may have already been selected.</li> <li>3. You can have Response "generate skus" (item ids) for you first, and then have it "build inventory" items for those skus too. See more in the details below.</li> </ol>
<b>Batch Update</b> button	Updates existing items ids and their cross reference records with changes entered in the next prompt for Standard Cost & List Price. More fields may be added to this batch update feature at a later time.


Element	Description
<b>Print Worksheet</b> button	Click this button to print a copy of worksheet.
<b>Generate SKUs</b> button	Click this button to Automatically ASSIGN skus (item ID's) for those with blank value in the item ID column. This shows you SKU's that will be BUILT if you use Build inventory Button. You can manually assign your existing skus to the items in lieu of using the Generate SKU's button..
<b>Build Inventory</b> button	You'll be asked one more time if you're ready to let Response BUILD the INVENTOR records for you. Next you will see the <b>Generate SKU's Utility</b> dialog box. See details below for "Generate SKUs Utility Dialog Box" (Figure 2-52)..
<b>Build Cross Ref.</b> button	This final step is important! After skus have been assigned to all items, Click "Build Cross Ref." to make a cross-reference of all the skus and their Item descriptions. The Cross Reference must be built to see the result of the Configured item in Order Entry.


**Table 2-29. Item Configurator Worksheet Tab Description**

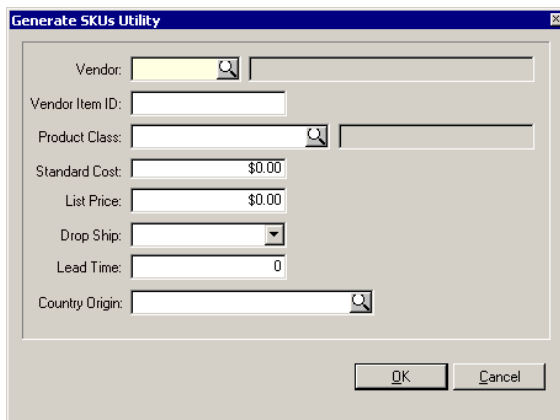
**B** Click  Generate Skus button and a prompt (Figure 2-51) appears.



**Figure 2-51. Generate SKUs Prompt**


**C** Click  to generate the **SKUs** names (Item ID's) that will be built IF you use the BUILD Inventory button. Don't confuse this with the Generate SKU's Utility dialog box you will see that is part of the BUILD INVENTORY process.

**D** Click  Build Inventory Button, The **Generate SKU's Utility** dialog box (Figure 2-52) appears.




**Figure 2-52. Generate SKUs Utility Dialog Box**

Before Response can generate the SKUs (Inventor records) you have to tell it the Vendor, Products class, Country of Origin and a few other items so the inventory items are created with completed information. More fields may be displayed here as needed in future builds.

Element	Description
<b>Vendor</b> field	Enter the vendor ID in this field or click  to access the <b>Vendors</b> lookup dialog..See chapter 1 for information on creating new vendors.
<b>Vendor Item ID</b> field	The ID the Vendor uses to identify the item if different than yours
<b>Product Class</b> field	Select an existing product class in this field.'
<b>Product Class</b> prompt	Click to access the "Product Class Codes Table List" (Figure 2-38). Select the desired product class from this list.
<b>Standard Cost</b> field	The item's Standard Cost
<b>List Price</b> field	The item MSRP or List price
<b>Drop Ship</b> field	choose a dropship designation, Never, optional or Always
<b>Lead Time</b> field	Optional lead time to assign to the item
<b>Country Origin</b> field	Enter the country origin in this field.
<b>Country Origin</b> field	Click to access the "Click to generate the SKUs names (Item ID's) that will be built IF you use the BUILD Inventory button. Don't confuse this with the Generate SKU's Utility dialog box you will see that is part of the BUILD INVENTORY process." (Figure C). Select the desired country of origin from this list.
<b>OK</b> button	Click to begin the generation of the SKUs.
<b>Cancel</b> button	Click to exit the Generate SKUs Utility dialog box without generating any SKUs.

**Table 2-30. Generate SKU's Utility Dialog Box Field Descriptions..**

- E** When you Click . OK the new inventory items are created. You can modify those in inventory maintenance.
- F** As the last step use the BUILD Cross Ref button when you're done. The Cross reference must be built to see the result of the Configured item in Order Entry. Press F2 to save changes after building the cross reference.

## Additional Information

### Accessing the Configured Item View

While entering line items in order entry, press Ctrl + G, and the configured items view will appear. Your CSR can see at a glance what sizes/colors are available in this example

A word about "N/A": The "n/a" designation in the configured items view means that this SKU is not currently available at all, which isn't the same as saying there are zero(0) in stock. The reason why we do this is simple. We don't have the ability to insert new records into the matrix once it's created. So, for example, a particular, say, shirt might be available in size XL in the colors BLACK, WHITE and BLUE only. The red, yellow and green are currently not available from the manufacture in size XL. But they might become available in the future. So, we display the "n/a" for these three colors and, if the item becomes available, it can be indicated as such and sold. Another reason we do this is for the CSR to note that XL is, in fact, a size that's carried, but just not in these particular (color) configurations. The customer could then be referred to another



color which is available in XL. Otherwise, the CSR would have no way of knowing (without drilling elsewhere) if XL is even an option.

### **Deleting an Item from the Item Configurator**

You cannot delete items out of the Item Configurator. You can however remove those items from the Tree View. To delete or add an item from the tree view you must reconfigure your items in the item configurator. If you decide to reconfigure the items, you must use the same Item Id for each item assigning it manually, otherwise Response will create all new inventory items.

1a. You can go in and delete the SKU # of an item that you no longer carry in the Item Configurator. The item will still show up in the tree view but will have a N/A next to it instead of the available inventory. This does not delete the inventory item from inventory.

OR

1b. You can also delete the item from inventory (if the item has never been ordered). The item will still show up in the tree view but will have a N/A next to it instead of the available inventory.

2. If you delete the inventory item or the SKU #, press the Build Cross Reference button and N/A will appear next to the item in the tree view.

## Product Classes

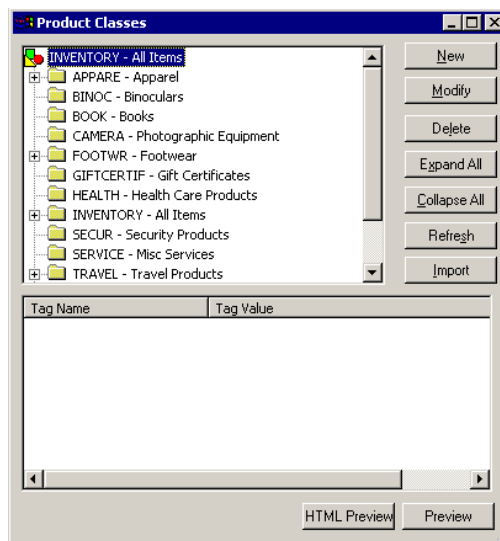
The **Product Classes** dialog allows you to create your Product Classes and their heirarchy to each other. This poplates table #51 PRODCLAS. During inventory creation you will assign a each item to a single “Product Class” catagory (required). Only one Product Class can be assigned per item.

Product classes facilitate reporting on item activity and sales totals at the product class group level.

Product classes are similar in nature to Catagories on the Inventory Catagories TAB, the primary difference is a item can be in multiple Catagories but only one Product Class.

To add inventory product classes, perform the following steps:

- A** Click **File > Inventory > Product Classes** from the **Main Menu**. The **Product Classes** dialog box (Figure 2-53) appears.



**Figure 2-53. Product Classes Dialog Box**

Element	Description
<b>Product Classes</b> panel	This panel displays all of the current product classes.
<b>New</b> button	Click this button to add a new product class.
<b>Modify</b> button	Highlight a product class and click this button to change it.
<b>Delete</b> button	Click this button to delete a product class. You cannot delete a product class if it is assigned to items.
<b>Expand All</b> Button	Click this button to expand the product class tree.
<b>Collapse</b> button	Click this button to collapse the product class tree.
<b>Refresh</b> button	Click this button to refresh the product class tree.
<b>Import</b> button	Opens the import product class dialog.
Tag display pane	Displays tag names and associated values.
<b>HTML Preview</b> button	Opens Tag preview in a browser type of display
<b>Preview</b> button	Shows the Tag preview and it's HTML tags but doesn't "render" them into a browser display

**Table 2-31. Product Classes Dialog Box Description**

- B** Continue to Adding Product Classes on page 2-61 to learn how to add product classes.
- C** Continue to Modifying and Deleting Product Classes on page 2-62 to learn how to modify and delete product classes.

## Adding Product Classes

The **Product Classes** dialog box allows you create and modify Product Classes.

To add inventory product classes, perform the following steps:

- A** Click **File > Inventory > Product Classes** from the **Main Menu**. The **Product Classes** dialog box (Figure 2-54) appears.

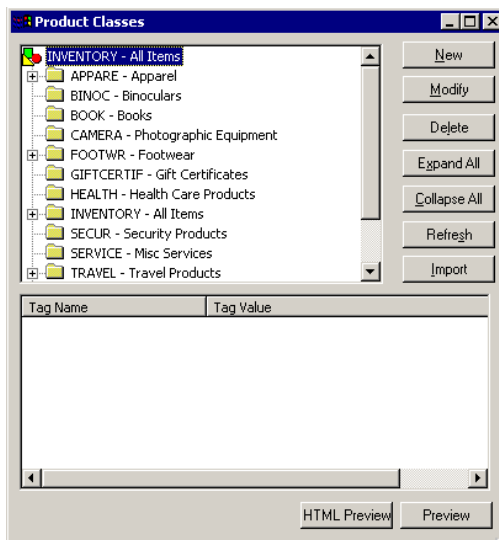


Figure 2-54. Product Classes Dialog Box

- B** Click **New** and the **Entering New Child of INVENTORY** dialog box (Figure 2-55) appears.

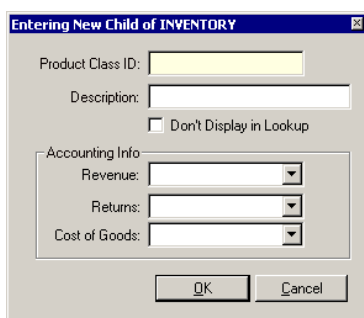
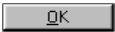



Figure 2-55. Entering New Child of INVENTORY Dialog Box

- C** Click in the **Product Class ID** field and enter a unique product class code (up to 12 characters in length), for example, COMPARTS (Computer Parts)
- D** Press <Tab> and enter a description of the product class code, for example, Computer Parts

- E** Accounting info is for selecting an Account from your Chart of Accounts that this product class is assigned too.
- F** Click  and the class is added to the product classes hierarchy. Repeat these steps to add product classes at any level within the tree.
- G** Click  to exit the **Product Classes** dialog box.

## Modifying and Deleting Product Classes

To modify or delete inventory product classes, from the **Main Menu**, perform the following steps:

- A** Click **File > Inventory > Product Classes**. The **Product Classes** dialog box appears (Figure 2-56).

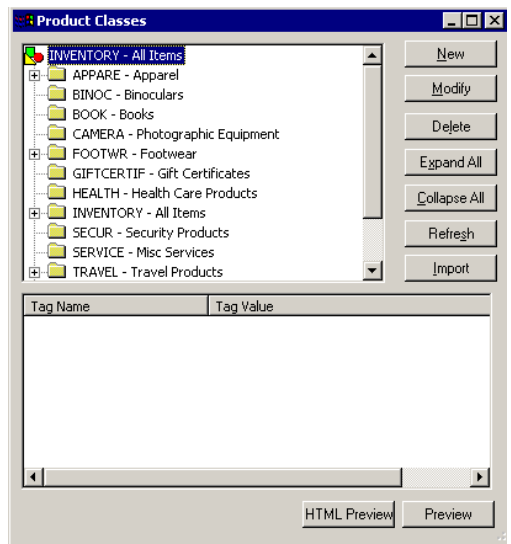



Figure 2-56. Product Classes Dialog Box

## Modifying Product Classes

- A** To modify a product class, click on any product class and click . The **Modifying Product Class** dialog box (Figure 6-5) appears.

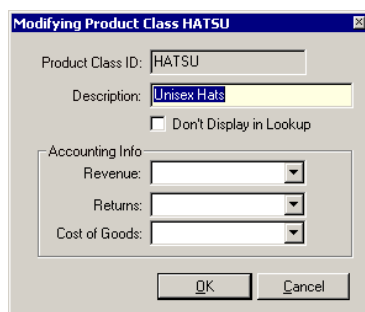



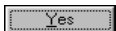
Figure 2-57. Modifying Product Class X Dialog Box

- B** Click in the **Description** field and make any textual changes that apply.
- C** Accounting info is for selecting an Account from your Chart of Accounts that this product class is assigned too.

**D** Click .

### **Deleting Product Classes**

**A** To delete a product class, click on the desired product class and click .

**B** Click  to confirm the deletion.

**C** Click  to exit the **Product Classes** dialog box.

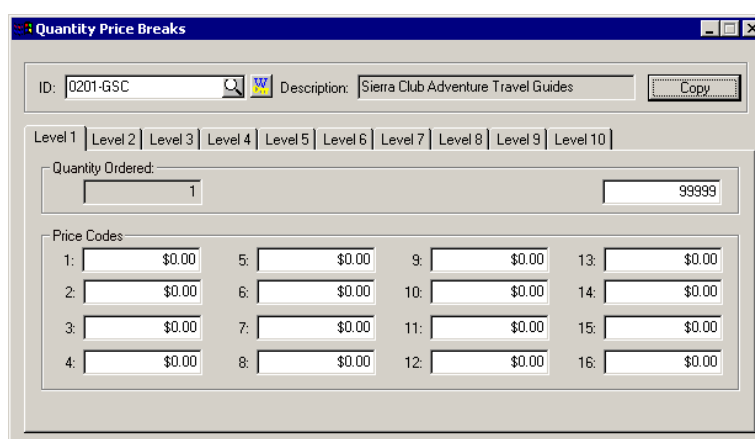
## Quantity Price Breaks

**Quantity Price Breaks** allows you to offer your customers a lower price when ordering larger quantities of a single product by assigning lower prices at different quantity Levels. This feature applies to a single SKU. For price breaks on groups of items see section in this chapter on Group Quantity Price Breaks.

For example, Level 1 might be a qty of 1-3, Level 2 a qty of 4-10 and level 3 qty of 11 or more. You can assign up to 10 levels. Because each level has price code distinction too, the Qty levels can be different for each Customer Type.

To change quantity price breaks, perform the following steps:

- A** Click **File > Inventory > Quantity Price Breaks** from the **Main Menu**. The **Quantity Price Breaks** dialog box (Figure 2-58) appears.

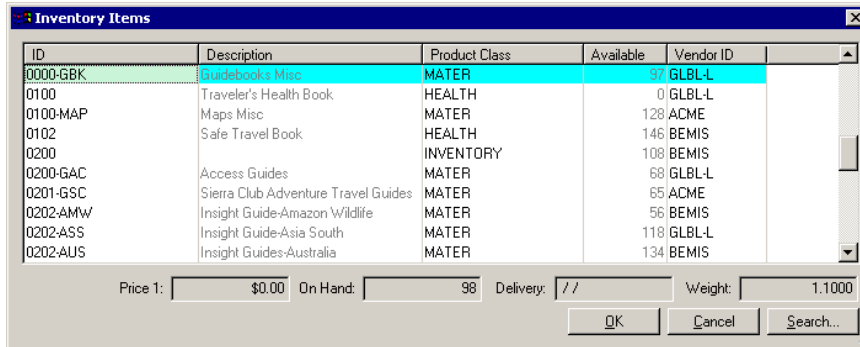


**Figure 2-58. Quantity Price Breaks Dialog Box**

Element	Description
<b>Item ID field</b>	Enter an inventory item ID or use the prompt to access the “Inventory Items Table List” (Figure 2-59) and select an inventory item ID from this list. You can do a key-word search for a particular inventory item in this table list
<b>Description field</b>	This field displays a description of the selected item ID.
<b>Copy button</b>	Allows you to copy the price break data from the currently selected Item to others.
<b>Quantity Ordered field</b>	Note the tabs for each Level 1 thru Level 10. Qty Ordered field is a read-only field that displays the beginning item quantity for the level. Level 1 always starts with one. Level 2, 3, 4 etc will sense the ending qty from the previous level and populate this field..
The field to the right of the <b>Quantity Ordered</b> field	Enter an ending item quantity for this level in this field. Your Final Level should end with all 9999999's
<b>Price Codes (1-16) group</b>	Enter the Level price for every active price code you have assigned to a Customer Type.

**Table 2-32. Quantity Price Breaks Dialog Box Description**

- B** For more information on setting up inventory items, refer to “Entering Inventory Items” on page 2-1.

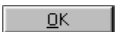



ID	Description	Product Class	Available	Vendor ID
0000-GBK	Guidesbooks Misc	MATER	97	GLBL-L
0100	Traveler's Health Book	HEALTH	0	GLBL-L
0100-MAP	Maps Misc	MATER	128	ACME
0102	Safe Travel Book	HEALTH	146	BEMIS
0200		INVENTORY	108	BEMIS
0200-GAC	Access Guides	MATER	68	GLBL-L
0201-GSC	Sierra Club Adventure Travel Guides	MATER	65	ACME
0202-AMW	Insight Guide-Amazon Wildlife	MATER	56	BEMIS
0202-ASS	Insight Guide-Asia South	MATER	118	GLBL-L
0202-AUS	Insight Guides-Australia	MATER	134	BEMIS

Price 1: \$0.00 On Hand: 98 Delivery: / / Weight: 1.1000

OK Cancel Search...

**Figure 2-59. Inventory Items Table List**



- C** Select the desired inventory ID from the list.
- D** Click . The fields populate with the appropriate quantity price break information. Make changes as desired.
- E** Press <F2> or click  to save the changes you made to the record.

To enter **new** quantity price breaks,

- A** Click the **Level 1** tab and press <Tab> to move to the ending **Quantity Ordered** field.
- B** Enter the ending number of the first quantity range (1 is the default beginning number value).
- C** Enter prices for all **Price Codes** you have assigned to customer **Types**.
- D** Click the **Level 2** tab and press <Tab> to move to the ending **Quantity Ordered** field.
- E** Enter the ending number for the second quantity range.



The beginning number is set according to the ending number entered in the **Level 1** tab. This prevents skipping or overlapping of numbers. Enter the prices for the price codes you set up earlier.

- F** Repeat these instructions for **Level 3** through **Level 10** tabs.
- G** Press <F2> or click  to save the record.
- H** Click  to exit the **Quantity Price Breaks** dialog box

# Group Quantity Price Breaks

## Overview

The Group Quantity Price Break tool in Response is used to set up discounts for a group of items. The Group Quantity Price Break (GQPB) tool allows you to set prices according to a group of inventory items ordered. For example: if you sell 10 different types of pants and you want to set up a promotion that if you buy 3 or more of any type of pants, you get \$10 off each pair. All this can be set up in the GQPB tool.

The Group Quantity Price Break differs from the Quantity price break because the Group Quantity Price Break allows you to apply your discount to a group of items rather than just a single item id.

To change quantity price breaks, perform the following steps:

Click **File menu > Inventory > Group Quantity Price Breaks**. The **Group Quantity Price Breaks** dialog box (Figure 2-60) appear

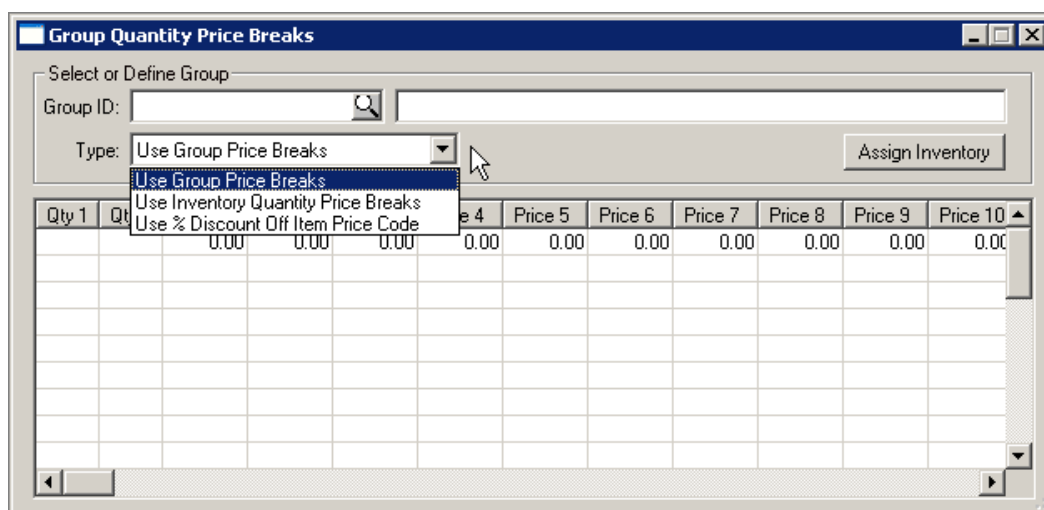


Figure 2-60. Group Quantity Price Breaks Dialog Box.

Element	Description
<b>Define the Group section</b>	Create a unique Group ID or use the lookup button to find the group you wish to view
<b>Group ID</b>	Create a unique group ID
<b>Group Description (unlabeled)</b>	Create a freeform group description
<b>Type drop down list box. Three choices available as follows:</b>	
	<b>1. Use Group Price Breaks-</b> uses a separate table you can create for this purpose. This keeps the integrity of the Inventory Price Breaks while allowing you to create new ones here for a group of items



Element	Description
	<b>2. Use Inventory Quantity Price Breaks</b> -Generally you won't use this option for a group of items. This uses the qty price breaks you created for each inventory item. To see Inventory Price Breaks info at Inventory items > charges tab > Price Breaks button.
	<b>3. Use % Discount Off Item Price Code</b> - uses a separate table you can create for this purpose. This keeps the integrity of the single item Inventory Price Breaks while allowing you to create new ones here
Assign Inventory Button	Opens a dialog box where you can see items in the group. Add or subtract items using this dialog.

**Table 2-33. Group Quantity Price Breaks Dialog box description**

Press F5 to clear the view, then enter an ID of your choice into the Group ID field. Next to the ID you can also give a long description of the ID.

### 1. Use Group Price Breaks

Create a Group ID by entering that id in the Group ID box, enter a longer description to the right.

For “Group Price Breaks” you could assign levels first if you wish, but we suggest you use the Assign Inventory Button first. See “Group Price Breaks and Assign Inventory button” (Figure 2-61). You'll choose the inventory items you want to include in the group

**Group Quantity Price Breaks**

Select or Define Group

Group ID: TRAVELBOOKS    Travel Guides and Books

Type: Use Group Price Breaks    Assign Inventory

Qty 1	Qty 2	Price 1	Price 2	Price 3	Price 4	Price 5	Price 6	Price 7	Price 8	Price 9	Price 10	Price 11
1	3	19.95	17.95	14.95	12.95	0.00	0.00	0.00	0.00	0.00	0.00	0.00
4	15	16.50	14.50	12.50	11.50	0.00	0.00	0.00	0.00	0.00	0.00	0.00
16	99999	14.25	12.25	10.25	10.25	0.00	0.00	0.00	0.00	0.00	0.00	0.00

**Items in Group: TRAVELBOOKS**

Group ID: TRAVELBOOKS    Travel Guides and Books

Item ID >>	Description	Price 1	Price 2	Price 3	Price 4
0202-ECU	Insight Guide-Ecuador	\$19.95	\$17.95	\$14.96	\$11.97
0202-EEU.A	Insight Guides-Eastern Europe	\$19.95	\$17.95	\$14.96	\$11.97
0202-EGY	Insight Guides-Egypt	\$19.95	\$17.95	\$14.96	\$11.97
0202-FRA	Insight Guides-France	\$19.95	\$17.95	\$14.96	\$11.97
0202-GER100	Insight Guides-Germany	\$19.95	\$17.95	\$14.96	\$11.97
0202-GIN100	Insight Guides	\$19.95	\$17.95	\$14.96	\$11.97
0202-IND100	Insight Guides-India	\$19.95	\$17.95	\$14.96	\$11.97
0202-IND	Insight Guides-Indonesia	\$19.95	\$17.95	\$14.96	\$11.97
0202-ISR	Insight Guides-Israel	\$19.95	\$17.95	\$14.96	\$11.97
0202-ITA	Insight Guides-Italy	\$19.95	\$17.95	\$14.96	\$11.97

Close

**Figure 2-61. Group Price Breaks and Assign Inventory button**

This Items in Group view allows you to ONLY enter the item ID. The values in Description, price 1, price 2 etc. are populated from the inventory record and cannot be changed here. Choose the items you want in your group. This example shows several books.

Choose **close** to go back to the **group qty levels** which are represented by the horizontal rows in the grid. You define the range of quantities in each level. For example Qty 1 column holds the starting Qty and Qty 2 column holds the ending qty for the range. Each row holds price codes for that level. In our example for Level 1 is the price for 1 to 3 books. Level 2 is for 4 to 15 books, Level 3 for 16 books or more. The price codes in level 2 reflect pricing lower than level 1 pricing. You can assign all 16 price codes here.

Our Group ID is “TRAVELBOOKS”

Since our discount starts with 4 or more, enter 1 in the Qty 1 field and then enter 3 the QTY 2 field.

Price 1, Price 2, Price 3 columns represent the price codes for your customer types. We’ve entered amounts in the Price columns.

If the customer buys 4 to 15 items from TRAVELBOOKS you see the lower cost of each item defined on row 2. The same in row 3 when they buy 16 or more items.

This is now the new price for all items we’ve assigned to TRAVELBOOKS group. Response now uses these prices in Order Entry if 3 or more are ordered.

## 2. Use Inventory Quantity Price Breaks-

As explained above this option uses the Quantity price breaks you created for the single inventory item. You can see Inventory Qty Price Breaks info when you go to inventory items > charges tab > Qty Price Breaks button.

Generally you won’t use this option for a group of items.

## 3. Use % Discount Off Item Price Code

This option uses a separate table you can create for this purpose. This keeps the integrity of the Inventory Price Breaks while allowing you to create new ones based on discount % here.

(no more info for this feature at this time)

# Media / Item Prices

## Overview

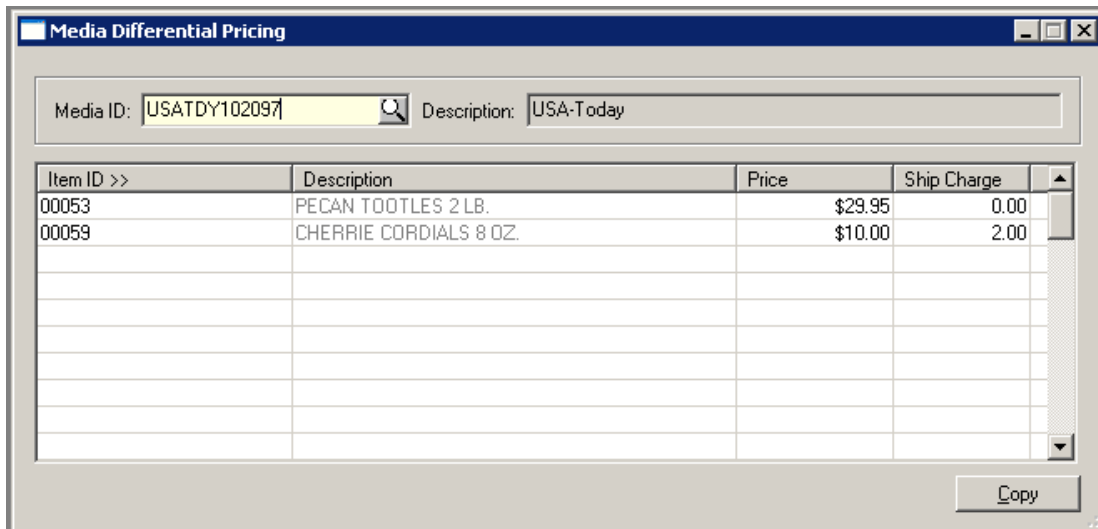
Media Item Pricing is also called Media Differential Pricing or Catalog pricing. Media Item pricing is not required. It uses the CatPrice (table #10) and CatPrice2\* (table #155) tables. The purposes is for Order Entry to find a special price for designated items when the media code is selected for the order.

A pre-requisite to using Media/Item/Catalog pricing is to create your Media ID or Catalog ID. Media pricing is most common so we'll describe it here first and show you later how to choose Catalog pricing and the different view you have for it.

With an existing MEDIA ID in Response, you establish any special item prices from the Media/Item Prices menu option. Simply add any items to the grid that need a special price for this media code.

File Menu > Inventory > Media/Item Prices.

TIP: Press F5 to clear the screen.



**Figure 2-62. Media Differential Pricing**

<b>Media ID</b>	From a blank screen, enter a new media ID, or use the lookup icon to find an existing Media ID	
<b>Description</b>	Add a description for your new Media ID	
<b>The Item Grid</b>	This grid contains items related to this Media ID with special pricing.	
	Item ID	Enter the item ID or use F4 to open the Inventory Items view to find an item.
	Description	This will be populated automatically from the item ID chosen.

	Price	Enter the special Media price. This is the price Response will find for the item if this media code is designated on their order.
	Ship charge	Enter the shipping charge if any. Response will use this shipping amount in it's shipping calculation instead of the shipping amount designated at item level
<b>COPY button</b>	Allows you to copy all items and their special pricing from one media code to another.	

Table 2-34. Media Pricing Dialog box description

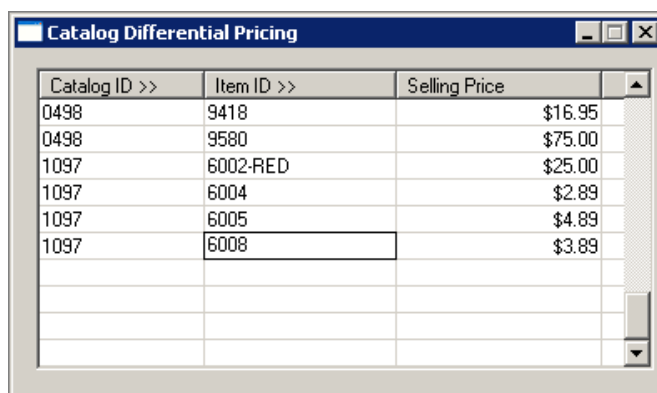


Reminder! Of the many different ways Response allows you to configure the pricing your customers receive on any item, at Order Entry time Response will return the **LOWEST** calculated price allowed for the customer. Response looks at pricing based on price codes, qty pricing, group qty pricing, media pricing, and formula pricing, etc.

- I Media Item prices are used if you are entering orders directly into response via order entry screens. If you are using BATCH Order Import module the orders, Response will use the imported price.
- J To remove Media Pricing you can highlight the line and press SHIFT + F

### Catalog Item Pricing:

The CATPRICE2.flg in Flag options, if selected will display Catalog Differential pricing based on Catalog ID instead of Media ID. The information for prices based on Catalog ID is stored in table #155 CATPRIC2



Catalog ID >>	Item ID >>	Selling Price
0498	9418	\$16.95
0498	9580	\$75.00
1097	6002-RED	\$25.00
1097	6004	\$2.89
1097	6005	\$4.89
1097	6008	\$3.89

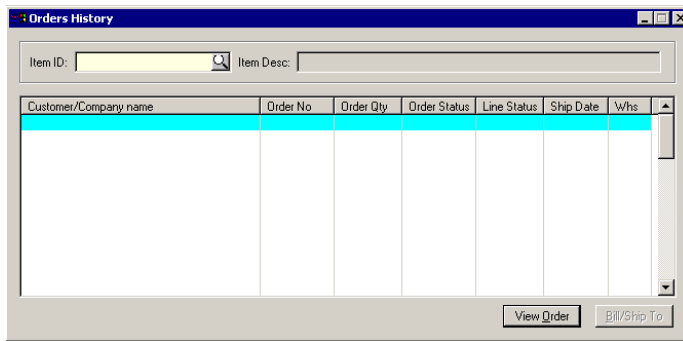
Figure 2-63. Catalog Differential Pricing

# Orders History

## Overview

Use this option to view all unpurged orders for any item. To check an order history for an inventory item, perform the following steps:

- A** Click **File > Inventory > Orders History** from the **Main Menu**. The **Orders History** dialog box (Figure 2-64)) appears.



**Figure 2-64. Orders History Dialog Box**

Element	Description	
<b>Item ID field</b>	Enter an inventory item ID or use the prompt to access the table list..	
<b>Item Desc. field</b>	This field displays a description of the selected item.	
<b>Order Grid</b>	The grid displays information from order header records (SYSOENT)	
	<b>Customer/Company Name</b> column	This field displays the name of the customer(s) or company(s) that have bought the selected item.
	<b>Order No.</b> column	This field displays the order number(s).
	<b>Order Qty</b> column	This field displays how many of the selected item where purchased.
	<b>Order Status</b> column	This field displays the status from order header..
	<b>Line Status</b> column	The status from the lineitem record.
	<b>Ship Date</b> column	This field displays the ship date of each order listed.
	<b>Whs</b> column	Displays the warehouse id of where the order was filled.
<b>View Order</b> button	Click to open the order in the Service Lookup View.	
<b>Bill/Ship To</b> button	Click this button to display the billing and shipping address of the customer/company displayed in the <b>Customer/Company Name</b> field.	

**Table 2-35. Orders History Dialog Box Description**

- B** Click  to exit the **Orders History** dialog box.

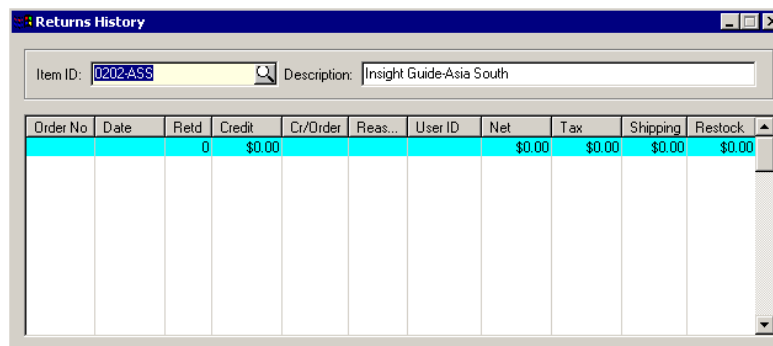
# Returns History

## Overview

Use this option to check on inventory return history.

To check a return history for an inventory item, perform the following steps:

- A** Click **File > Inventory > Returns History** from the **Main Menu**. The **Returns History** dialog box (Figure 2-65) appears.






The screenshot shows the 'Returns History' dialog box. It has a title bar with 'Returns History' and standard window controls. Below the title bar, there are two input fields: 'Item ID:' with the value '0202-ASS' and a search icon, and 'Description:' with the value 'Insight Guide-Asia South'. Below these fields is a table with the following columns: Order No, Date, Retd, Credit, Cr/Order, Reas..., User ID, Net, Tax, Shipping, and Restock. The first row of the table contains the values: 0, \$0.00, \$0.00, \$0.00, \$0.00, \$0.00, \$0.00, \$0.00, \$0.00, and \$0.00. The rest of the table is empty.

Figure 2-65. Returns History Dialog Box

Element	Description
<b>Item ID field</b>	Enter an inventory item ID or use the prompt to access the table list..
<b>Description field</b>	This field displays a description of the selected item ID.
<b>Returns Records GRID</b>	The grid displays records from the RETURNS table #30. For more information see the documentation on Returns & Exchanges.
<b>Order No field</b>	The order number for each return record..
<b>Date field</b>	The Return.date.
<b>Credit field</b>	The credit returned.
<b>Cr/Order field</b>	The amount of credit used for the order.
<b>Reason field</b>	The reason code for the return.
<b>User ID field</b>	The user ID of the person who handled each order listed.
<b>Net field</b>	The net amount returned.
<b>Tax field</b>	The dollar amount of tax returned.
<b>Shipping field</b>	The shipping charges refunded.
<b>Restock field</b>	The restock charge, if any applies.

Table 2-36. Returns History Dialog Box Description

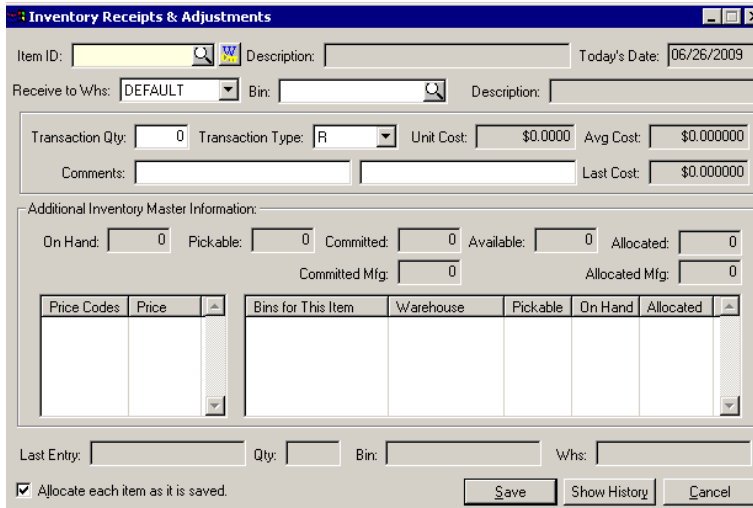
- B** Click in the **Item ID** field and enter an inventory item ID, or click  to access the **Inventory Items** table list (Figure 2-50).
- C** Select the desired inventory item from the list.
- D** Click . The fields populate with the return history of the inventory item you selected.
- E** Click  to exit the **Returns History** dialog box.

# Receipts / Adjustments

## Receive / Adjust Inventory Qty

To receive or adjust inventory quantity on hand, perform the following steps:

- A** Click **File > Inventory > Receipts/Adjustments > Receive/Adjust Inventory** from the **Main Menu**. The **Inventory Receipts & Adjustments** dialog box (Figure 2-66) appears.



**Inventory Receipts & Adjustments**

Item ID: [ ] Description: [ ] Today's Date: 06/26/2009

Receive to Whs: [DEFAULT] Bin: [ ] Description: [ ]

Transaction Qty: [0] Transaction Type: [R] Unit Cost: [\$0.0000] Avg Cost: [\$0.000000]

Comments: [ ] Last Cost: [\$0.000000]

Additional Inventory Master Information:

On Hand: [0] Pickable: [0] Committed: [0] Available: [0] Allocated: [0]

Committed Mfg: [0] Allocated Mfg: [0]

Price Codes	Price	Bins for This Item	Warehouse	Pickable	On Hand	Allocated

Last Entry: [ ] Qty: [ ] Bin: [ ] Whs: [ ]





☒ Allocate each item as it is saved. [Save] [Show History] [Cancel]

**Figure 2-66. Inventory Receipts & Adjustments Dialog Box**

Element	Description
<b>Item ID</b> field	Enter an inventory item ID in this field.or select from the Inventory Items table List.
<b>Inventory Keyword</b> prompt	Click to display the Inventory Keyword Search table list. You can do a keyword search for a particular inventory item in this table list.
<b>Description</b> field	This field displays a description of the selected item ID.
<b>Today's Date</b> field	This field displays today's date.
<b>Receive to Whs</b> field	If you use the multiple warehouse module, choose the appropriate warehouse ID
<b>Bin</b> field	Select the BIN ID the qty recieved or adjusted will affect.
<b>Transaction Qty</b> field	Enter the transaction quantity adjustment or receipt in this field.
<b>Transaction Type</b> field	Click the down arrow in this field to select a transaction type. <b>R</b> for Receipt <b>A</b> for Adjustment
<b>Unit Cost</b> field	This field displays the unit price of the selected item.
<b>Avg Cost</b> field	displays the average cost from the inventory record.
<b>Comments (1 &amp; 2)</b> field	Type any comments about the inventory adjustment or receipt in this field.
<b>Lost Cost</b> field	This field displays the last cost of the inventory item.

Element	Description	
<b>Additional Information Master Information</b> group	<b>Qty On Hand</b> field	these fields Displays stock.qty & price information from the Inventory record. Qtys here are combined qtys from all Bins
	<b>Committed</b> field	
	<b>Available</b> field	
	<b>Bin Location</b> field	
	<b>List Price</b> field	
	<b>Price Codes (1-5)</b> fields	.
<b>Last Entry</b> field	This field displays the last entry date.	
<b>Qty</b> field	This field displays the last adjustment quantity.	
<b>Allocate Each Item as Saved</b>	Check this box so allocation occurs immediately	
<b>Save</b> button	Click this button to save. When you SAVE the record the Adjustment is performed.	
<b>Show History</b> button	Click this button to show the history of this inventory item.	
<b>Cancel</b> button	Click this button to exit the <b>Inventory Receipts &amp; Adjustments</b> dialog box without making any adjustments.	

Table 2-37. Inventory Receipts &amp; Adjustments Dialog Box Description

- B** Click in the **Item ID** field and enter an inventory ID, or click  to access the **Inventory Items** table list. For more information on setting up inventory items, refer to “Entering Inventory Items” on page 2-1
- C** Click . The fields populate with the inventory receipts and adjustments information.
- D** Press <Tab> and enter a number in the **Transaction Qty** field for inventory adjustments or receipts.
- E** Click  to save the record.
- F** Click  to exit the **Inventory Receipts & Adjustments** dialog box.

## Allocate Inventory to Lines

To perform inventory allocation, choose this menu option. You will see the following prompt.

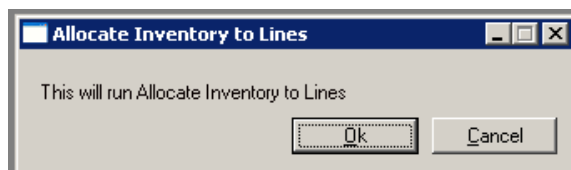


Figure 2-67.

An informational prompt will follow. Choose yes to proceed.

memo: Allocate to Lines typically happens automatically after PO receive is performed or after inventory Receipts and Adjustments are entered and saved. This menu option is available to kick of that process again in the event it was suppressed or somehow didn't happen. Running this option will do nothing if there are no new items to allocate.



## **PO Receive**

Opens the **Purchase Order Receive** dialog box. This same dialog box is found on the menu for Add-ons > Purchase Orders. See Purchase Order module documentation for more detail.

# Perform Physical Inventory

## Overview

The purpose of this utility is to allow the user to reconcile the inventory quantity on hand figures in Response with actual number of units for each item in inventory. The general steps to this process is as follows:

1. Print a Count Worksheet.
2. For each item on the Worksheet, count the actual number of units on hand.
3. Enter the Inventory Adjustments for each item. On the Perform Physical Inventory view, enter the physical count for each item. Entries are added to the PHYSINV table. (this table, physinv #7, can be imported, see details below)
4. Print the Deviation Report
5. Verify that the Deviation Report is correct and all of items to be adjusted are correct.
6. Commit the new inventory figures to the inventory master file.



Inventory should be a stationary target during a physical count. The reasons are obvious. Even if an “intended” pull from inventory were recorded on the count sheet, there's no guarantee that they would be complete (partial or in total) at the time the physical count were taken. The best practice is to either stop shipping/moving inventory completely during the physical (warehouse-wide) or limit the physical to a range of bin locations and avoid those until the physical is complete

## File menu > Inventory > Perform Physical Inventory

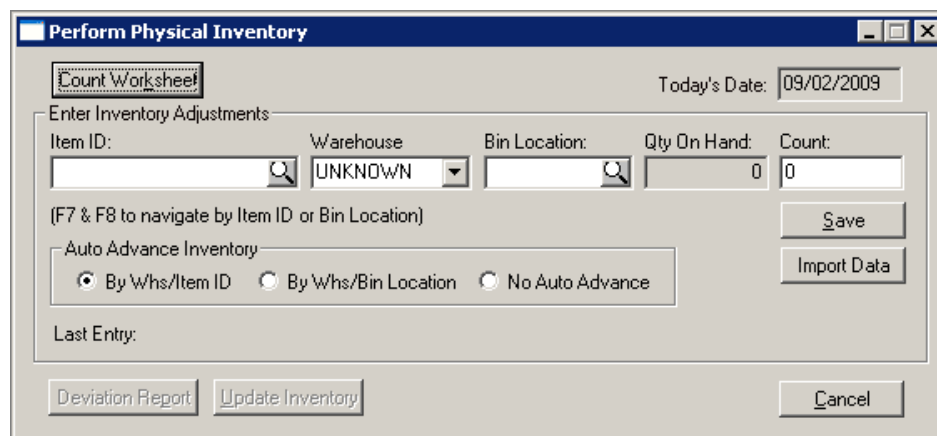


Figure 2-68. Perform Physical Inventory Dialog Box

Element	Description	
<b>Count Worksheet</b>	Opens the Physical Count Worksheet" view. Additional detail below	
<b>Today's Date</b>	The system date according to the sysfile (table#1)	
<b>Inventory Adjustments Group</b>	Where the user enters the actual count found during the physical count. The data entered here are saved to the "Physical Inventory" file.	
<b>Item ID</b>	Enter or select an item ID needing correction to quantity on hand figure. Entries added here save to the "Physical Inventory" data file (PHYSINV).	
<b>Item ID PROMPT button</b>	The prompt button here opens the "Physical Inventory Count" lookup which displays INVBIN table. (so if it's a new item with no INVBIN records you can't lookup here, just type in the item ID). The selection list and the find keys (F7 & F8) also look at the inventory/bin master file (INVBIN). Additional notes below.	
<b>Warehouse</b>	choose Warehouse #1 if you do not have the Response multiple-warehouse add-on capabilities.	
<b>Bin Location</b>	The receiving BIN ID where the qty will end up	
<b>Bin Location PROMPT button</b>	? Tech note: The prompt button here opens the "Physical Inventory Count" lookup. Even though this field saves to the "Physical Inventory" data file, the selection list and the find keys (F7 & F8) look at the inventory master file. This way the user can select the items that need to be changed out of the inventory file.	
<b>Qty On Hand</b>	The number of units that the system believes is in the warehouse. (this is for reference only, the operator cannot make an entry here)	
<b>Count (Physical Count)</b>	Enter the number of units that is actually in the warehouse, according to the Inventory Count Worksheet	
<b>Auto Advance</b>	Choose the method you wish to advance thru your inventory items when you press SAVE	
<b>Save</b>	This saves the entered item to the "Physical Inventory" data file (physinv). The adjustment isn't actually made until you process the whole file.	
<b>Import Data button</b>	Opens a dialog that allows you to import records into the PHYSINV table	
<b>Deviation Report button</b>	Prints the Deviation Report. The Deviation Report summarizes what is in the "Physical Inventory" data file (PHYSINV). It shows the net changes (in the Variance column) to the inventory levels so that they can be verified before the Inventory Master file is changed. This button will be disabled if there are no records in the Physical Inventory (PHYSINV) file.	
<b>Update Inventory button</b>	This commits the changes in the Physical Inventory file (PHYSINV) to the Inventory Master file. This button will be disabled if there are no records in the Physical Inventory file	
<b>Cancel</b>	Closes the view	

Table 2-38. Perform Physical Inventory view dialog

- ❖ • This view is not supposed to be used for minor/frequent changes in inventory levels. The “Receive/Adjust Inventory” view is for that.
- ❖ • Once the Inventory Master file is changed via “Update Inventory” those changes cannot be reversed.
- ❖ • Inventory items cannot be created using the Physical Inventory view. If an Item exists in the Physical Inventory file but not in the Inventory Master file then it will be written to the physinv.log file.
- ❖ • Also note, this ITEM ID Prompt button is showing you the Item ID list from INVBIN table, not the PHYSINV table. The point being you won't see your Item ID(s) in the drop-down list until at least one INVBIN record exists for the item. But you can manually type in your INVENTORY ITEM ID AND In the BIN Location field type in an existing BIN name. The adjustment created this way will create an INVBIN record.

### The Physical Count Worksheet

This view is used to control what items will be printed on the Physical Inventory Worksheet

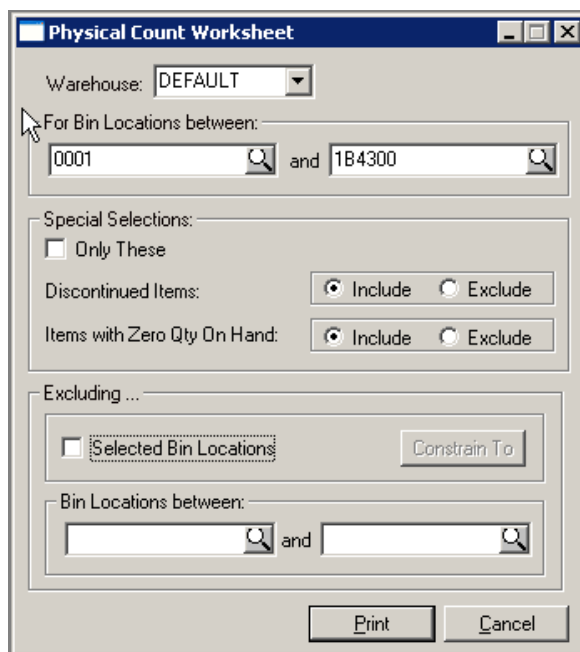


Figure 2-69. Physical count worksheet view.

Element	Description	
<b>Warehouse</b>	Choose the applicable Warehouse	
<b>Bin Location Range</b>	All items whose Bin locations is within this range will be printed	
<b>Special Selections</b>	<b>Only These</b>	Checking this box will disregard the bin selection and print based on the criteria in the Special selections box

Element	Description	
	<b>Discontinued Items</b>	Allows the user to either exclude discontinued items altogether or restrict the worksheet to only discontinued items
	<b>Items with Zero Qty on Hand</b>	Allows the user to either exclude all items with zero quantity on hand or restrict the worksheet to only those items
<b>Excluding Section</b>	These selections will be EXCLUDED from the bin range designated in the top section of this view. You use one or the other, not both.	
	Selected Bin Locations	Check the box then use the Constrain to Button to enter a list of individual Bins you wish to exclude from printing. For Example your Doc bin or returns bin
	Bin Locations Between	Exclude this range of Bins
<b>Print</b>	Prints the worksheet according to the selected settings.	
<b>Cancel</b>	Closes the view.	

Table 2-39. Physical Count Worksheet dialog.

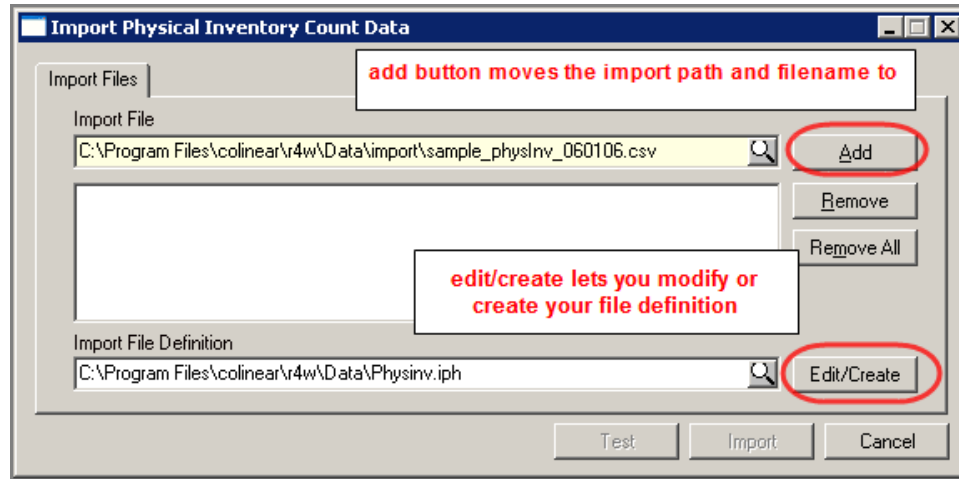
Report sample below: Count the items in the Bin Location and enter the actual count for the item in the Phys Count Column.

COLINEAR DEVELOPMENT					
Physical Inventory Count: Worksheet					
9/9/2009 2:38PM	For Warehouse: DEFAULT				Page: 1
Bin	Item ID	Description	Unit	Pack	Count
0A02A	1208-TAN	Leather Field Bag Brown			
0A02B	0202-GIN100	Insight Guides			
0A02B	1209-TAN	Leather Rucksack			
0A02B	YELL202	Yellow Yarn #202			
0A02B	YELL203	Yellow Yarn #203			
0A02C	1210-BLK	Convertible Leather Brief Black			
0A02D	1210-BRN	Convertible Leather Brief Brown			
0A03A	1211-BLK	Classic Leather Dopp Kit			

Figure 2-70. Physical inventory count worksheet example

### Importing Physical Count data (to populate PHYSINV)

Menu: Inventory > perform physical inventory > import button. This import option populates the PHYSINV table #7. As with all Imports, you must create a file definition (\*.iph) and your source file must match it.



**Figure 2-71. Import Physical Inventory Count view**

To import inventory quantities all you need in PhysInv is item\_id, bin, phys\_count, Warehouse\_Id (if you don't have multiple warehouse feature your whse\_id = 1 and you MUST populate that in the PHYSINV file).

If you import physical counts into PHYSINV table (field:phys\_count), that count will be used to update the INVBIN record with the amount of inventory on hand. (just as if you created the record manually. The important thing is to realize you're making separate counts of each BIN, not the total number of items you have in all bins. The addition is done by Response (adding items from separate bins to a "total" count). This has been tested and it works as expected. Only caveat is you cannot import counts of items into a BIN that does not exist. You CAN, however, import a count of an item into a bin where that item is not currently stored, it will create the INVBIN record.

The field PHYSINV.qty\_on\_hand is there for reference only. We do not use this data so it's not necessary to import it.

After importing your items will show in the deviation report.

#### **How physical inventory in Response works.**

- ❖ Entering data in the "Perform Physical Inventory" view creates records in the PHYSINV table.
- ❖ Item\_id, bin\_id, phys\_count.
- ❖ The import physical inventory count data does the same to create records in the PHYSINV table
- ❖ The deviation report shows only the records you have entered or imported into the PHYSINV table.

When printing the Physical inventory worksheet, you may, For example, choose to ONLY do physical inventory counting for a single item or a group of items (maybe not ALL items). Create selections for printing the report as needed.

With your worksheet in hand you may see something like this

Example: Item A101 exists in bin locations B, C, and D.

B = 3  
C = 10  
D = 12

If you do a count and find 3 in B, 8 in C, and none in D, you'd have to enter 3 different counts:  
(enter these onto your worksheet the same way)

A101, B, 3  
A101, C, 8  
A101, D, 0

Entering all three counts would update Response properly.

If you only entered:

A101, B, 3  
A101, C, 10

Then you'd leave the 12 of A101 in D alone, resulting in qty 25 total (not 13).

Another Example:

Assume Response shows you have 10 of item Z9 in bin location Y. That's the only bin location for the item in Response.

If a physical count reveals 10 of item Z9, but in bin location X, then the following must be entered:

Z9, Y, 0  
Z9, X, 10

If you only entered

Z9, X, 10

You'd result in total qty of 20 (10 in each bin location).

Since you may have PHYSINV records (item, bin) that don't exist in INVBIN (item, bin) or vice/versa, there's no way to show the true variance of one or the other (in Crystal, the linking just won't work - you need to go both ways), so we do the best we can.

Finally The UPDATE INVENTORY button adjusts the inventory. It creates records here in sysinvra, just as if you entered an adjustment manually:

```
sysinvra.record_type="A"  
sysinvra.reason_1="Physical Inventory Count"  
sysinvra.trans_qty = the difference in what they counted and what was there.
```

## Vendors

Use this dialog box to enter and store information about each vendor.

To change or enter vendor ID information, perform the following steps:

Click **File > Inventory > Vendors** from the **Main Menu**. The **Vendors** dialog box (Figure 2-72) appears.

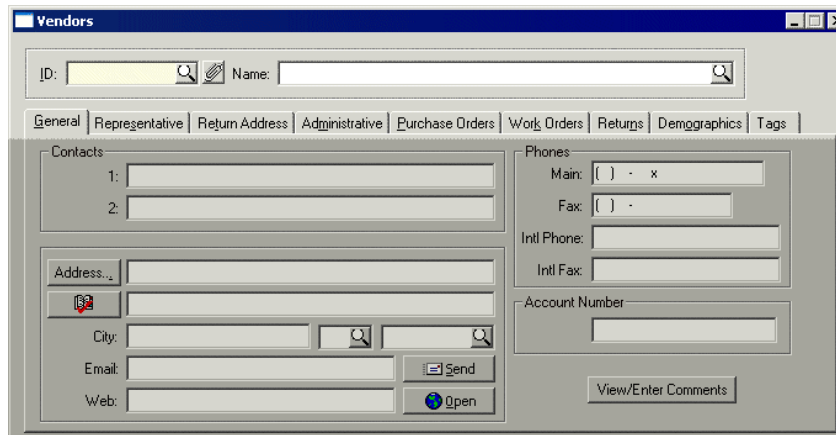



Figure 2-72. Vendors Dialog Box

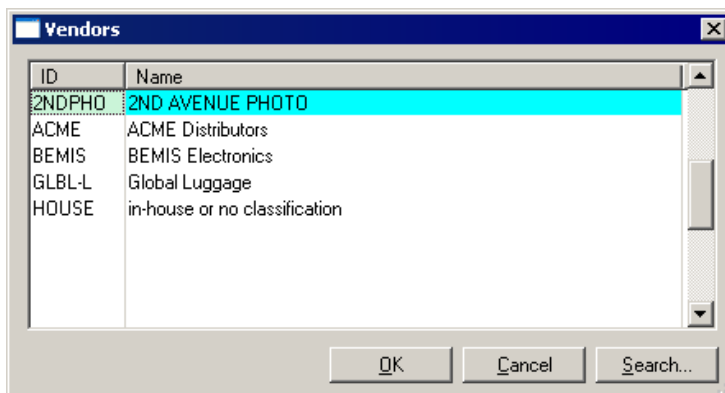
Element	Description
<b>ID field</b>	Enter the vendor's ID in this field, or lookup and existing vendor..
<b>ID Attach button</b>	Click to display the Attachment for Vendor dialog. View, add, or delete documents, attributes, or notes associated with Vendors.
<b>Name field</b>	Type the vendor's name in this field.
<b>General tab</b>	Click this tab to gain access to general vendor information (name, address, phone numbers, etc.).
<b>Representative tab</b>	Click this tab to gain access to information about the vendor's representative(s) (name, address, phone numbers, etc.).
<b>Return Address tab</b>	Click this tab to gain access to information for vendor returns.
<b>Administrative tab</b>	Click this tab to gain access to administrative information (minimum order amounts, terms, management rating, discount notes, P.O. Comment, etc.).
<b>Purchase Orders tab</b>	Click this tab to gain access to vendor purchase order information (month-to-date, year-to-date, last year, and previous year purchase orders made from any vendor).
<b>Work Orders tab</b>	Click this tab to gain access to vendor work order information.
<b>Returns tab</b>	Click this tab to gain access to vendor returns information.
<b>Demographics tab</b>	User defined fields created for Vendors, appear on this tab.
<b>Tags tab</b>	Click this tab to gain access to vendor tags.

Table 2-40. Vendors Dialog Box Descriptions



- A** Click in the **ID** field and enter a unique code (up to 6 characters in length) if you want to create a **new** vendor record.
- B** Click in the **Name** field and type the vendor's name.
- C** Press <F2>, or click  to save the new vendor to the system.



- D** Click the vendor prompt button to access the **Vendors** table list (Figure 2-73) to select an *existing* vendor to modify.



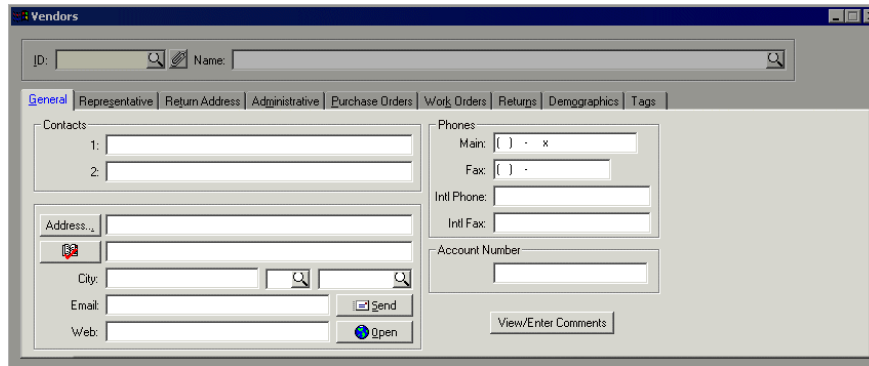
**Figure 2-73. Vendors Table List**

- E** Select the desired vendor from the list
- F** Click . The fields automatically populate with the appropriate information.
- G** Press <F2>, or click  to save the changes made to the record.
- ❖ See Vendors General Tab on page 2-83 for **Vendors General** tab procedures.
  - ❖ See Vendors Representative Tab on page 2-85 for **Vendors Representative** tab procedures.
  - ❖ See Vendors Return Address Tab on page 2-87 for **Vendors Return Address** tab procedures
  - ❖ See Vendors Administrative Tab on page 2-88 for **Vendors Administrative** tab procedures.
  - ❖ See Vendors Purchase Orders Tab on page 2-89 for **Vendors Purchase Orders** tab procedures
  - ❖ See Vendors Work Orders Tab on page 2-90 for **Vendors Work Orders** tab procedures
  - ❖ See Vendors Returns Tab on page 2-91 for **Vendors Returns** tab procedures
  - ❖ See Vendors Demographics Tab on page 2-92 for **Vendors Demographics** tab procedures
  - ❖ See Vendors Tags Tab on page 2-92 for **Vendors Tags** tab procedures

## Vendors General Tab

Use the **General** tab to enter information about vendors' contacts (name, address, phone number, etc.).

Activate the **General** tab (Figure 2-74) by clicking on it if not already activated. Verify that the vendor whose information is to be entered or changed is selected in the **ID** and **Name** fields.



**Figure 2-74. Vendors Dialog Box - General Tab**


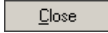
Element	Description	
<b>Contacts</b> group	<b>1</b> field	Enter in this field the name of the primary person with whom you usually deal with when conducting business with this vendor.
	<b>2</b> field	Enter in this field the name of another person with whom you deal with when conducting business with this vendor.
<b>Phones</b> group	<b>Main</b> field	Type the vendor's main phone number in this field.
	<b>Fax</b> field	Type the vendor's fax number in this field.
	<b>Int'l Phone</b> field	Type the vendor's international phone number in this field.
	<b>Int'l Fax</b> field	Type the vendor's international fax number in this field.
<b>Address</b> group	<b>Address</b> button	Click to access the <b>Full Address</b> dialog box. You can enter all address and international numbers on this dialog.
	<b>Verify and Standardize Address</b> button	Click to access Verify & Standardize Address dialog box. You can enter address and zip code information, click OK, and the system will generate the rest, including the 9-digit zip code.
	<b>Line 1</b> field	Type the vendor's address in this field.
	<b>Line 2</b> field	Continue the vendor's address in this field if <b>Line 1</b> does not provide sufficient space.
	<b>City</b> field	Enter the vendor's city of residence in this field.
	<b>State</b> field	Enter the vendor's state of residence in this field. Use the Prompt Icon to choose a state from the list of valid States..
	<b>ZIP Code</b> field	Enter the vendor's ZIP Code in this field.
	<b>Email</b> field	Type the vendor's e-mail address in this field.
	<b>Web</b> field	Enter the vendor's web site address.
	<b>Send</b> button	Click to send an e-mail to the vendor whose address is listed in the <b>Email</b> field.
	<b>Open</b> button	Click to open the vendor's Web site address listed in the <b>Web</b> field.
<b>Account Number</b> field	Type the vendor's account number in this field if you have the Purchase Order Module. If you do not have the Purchase Order Module, leave this field blank.	

Element	Description
<b>View / Enter Comments</b> button	Click to access the Vendor Comments dialog box to view, add, edit, or delete comments for the selected vendor.


**Table 2-41. Vendors Dialog Box - General Tab Description**

**A** Type the name(s) of the people with whom you usually deal with when conducting business with this vendor under **Contacts**, in **Line 1** and **Line 2**.


**B** If the Vendor is International or needs more than 2 address lines:

1. Click the  button. The **Full Address** dialog box appears.
2. Enter the information for the Vendor and click . The information appears on the General tab

**C** For all other Vendors:

1. Enter the two address lines and the zip code.
2. Click . The **Web Based Address Correction** process runs and populates the remainder of the address information including the 9-digit zip. (This information can also be input manually).



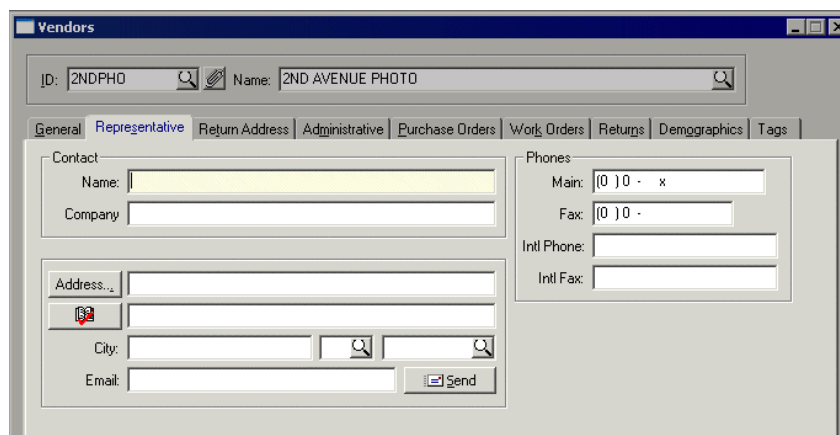
Clicking the  button before address information is entered activates the **Verify & Standardize Address** dialog box. Enter the two address lines and zip code information in the fields provided and click OK. The **Web Based Address Correction** process runs and populates the remainder of the address information including the 9-digit zip on the General tab.

**C** Click **F2** to save the information.

## Vendors Representative Tab

Use the **Representative** tab to enter contact information for the vendor's representative.

- ❖ Activate the **Representative** tab by clicking on it. Verify that the vendor whose information is to be entered or changed is selected in the **ID** and **Name** fields.


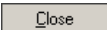


**Figure 2-75. Vendors Dialog Box - Representative Tab**


Element	Description	
<b>Contact</b> group	<b>Name</b> field	Type the name of the vendor's representative in this field.
	<b>Company</b> field	Type the company's name for which the vendor's representative works in this field.
<b>Phones</b> group	<b>Main</b> field	Type the vendor's main phone number in this field.
	<b>Fax</b> field	Type the vendor's fax number in this field.
	<b>Int'l Phone</b> field	Type the vendor's international phone number in this field.
	<b>Int'l Fax</b> field	Type the vendor's international fax number in this field.
<b>Address</b> group	<b>Address</b> button	Click to access the <b>Full Address</b> dialog box. You can enter all address and international numbers on this dialog.
	<b>Verify and Standardize Address</b> button	Click to access Verify & Standardize Address dialog box. You can enter address and zip code information, click OK, and the system will generate the rest, including the 9-digit zip code.
	<b>Line 1</b> field	Type the vendor's address in this field.
	<b>Line 2</b> field	Continue the vendor's address in this field if <b>Line 1</b> does not provide sufficient space.
	<b>City</b> field	Enter the vendor's city of residence in this field.
	<b>State</b> field	Enter the vendor's state of residence in this field. Use the Prompt Icon to choose a state from the list of valid States.
	<b>ZIP Code</b> field	Enter the vendor's ZIP Code in this field.
	<b>Email</b> field	Type the vendor's e-mail address in this field.
	<b>Send</b> button	Click to send an e-mail to the vendor whose address is listed in the <b>Email</b> field.

**Table 2-42. Vendors Dialog Box - Representative Tab Description**


**D** If the Vendor is International or needs more than 2 address lines:

1. Click the  button. The **Full Address** dialog box appears.
2. Enter the information for the Vendor and click . The information appears on the General tab

**C** For all other Vendors:

1. Enter the two address lines and the zip code.
2. Click . The **Web Based Address Correction** process runs and populates the remainder of the address information including the 9-digit zip. (This information can also be input manually).

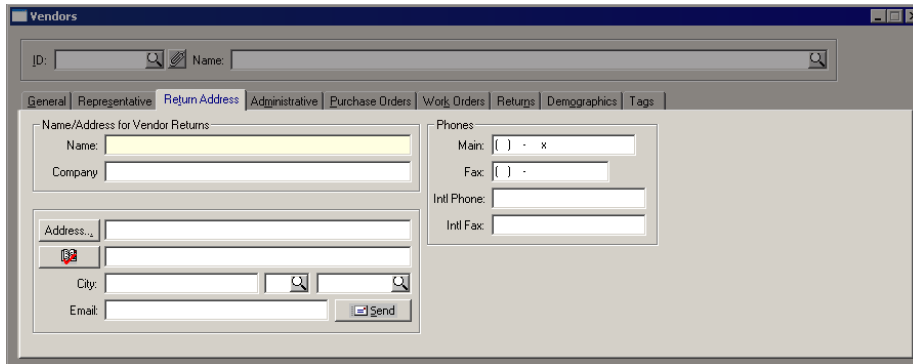


Clicking the  button before address information is entered activates the **Verify & Standardize Address** dialog box. Enter the two address lines and zip code information in the fields provided and click OK. The **Web Based Address Correction** process runs and populates the remainder of the address information including the 9-digit zip on the General tab.

## Vendors Return Address Tab

Use the **Return Address** tab to enter contact and address information for vendor returns.

Activate the **Return Address** tab by clicking on it if not already activated. Verify that the vendor whose information is to be entered or changed is selected in the **ID** and **Name** fields.





**Figure 2-76. Vendors Dialog Box - Return Address Tab**


Element	Description	
<b>Name/Address for Vendor Returns</b> group	<b>Name</b> field	Type the name of the responsible for the vendor's returns in this field.
	<b>Company</b> field	Type the company's name for the vendor's returns in this field.
<b>Phones</b> group	<b>Main</b> field	Type the vendor's main phone number in this field.
	<b>Fax</b> field	Type the vendor's fax number in this field.
	<b>Int'l Phone</b> field	Type the vendor's international phone number in this field.
	<b>Int'l Fax</b> field	Type the vendor's international fax number in this field.
<b>Address</b> group	<b>Address</b> button	Click to access the <b>Full Address</b> dialog box. You can enter all address and international numbers on this dialog.
	<b>Verify and Standardize Address</b> button	Click to access Verify & Standardize Address dialog box. You can enter address and zip code information, click OK, and the system will generate the rest, including the 9-digit zip code.
	<b>Line 1</b> field	Type the vendor's address in this field.
	<b>Line 2</b> field	Continue the vendor's address in this field if <b>Line 1</b> does not provide sufficient space.
	<b>City</b> field	Enter the vendor's city of residence in this field.
	<b>State</b> field	Enter the vendor's state of residence in this field. Use the Prompt Icon to choose a state from the list of valid States..
	<b>ZIP Code</b> field	Enter the vendor's ZIP Code in this field. Use the prompt button to choose from a list of valid zip codes.
	<b>Email</b> field	Type the vendor's e-mail address in this field.
	<b>Send</b> button	Click to send an e-mail to the vendor whose address is listed in the <b>Email</b> field.

**Table 2-43. Vendors Dialog Box - Return Address Tab Description**


**A** If the Return Address is International or needs more than 2 address lines:

1. Click the  button. The **Full Address** dialog box appears.
2. Enter the information for the Vendor and click . The information appears on the General tab

**A** For all other Vendors:

1. Enter the two address lines and the zip code.
2. Click . The **Web Based Address Correction** process runs and populates the remainder of the address information including the 9-digit zip. (This information can also be input manually).

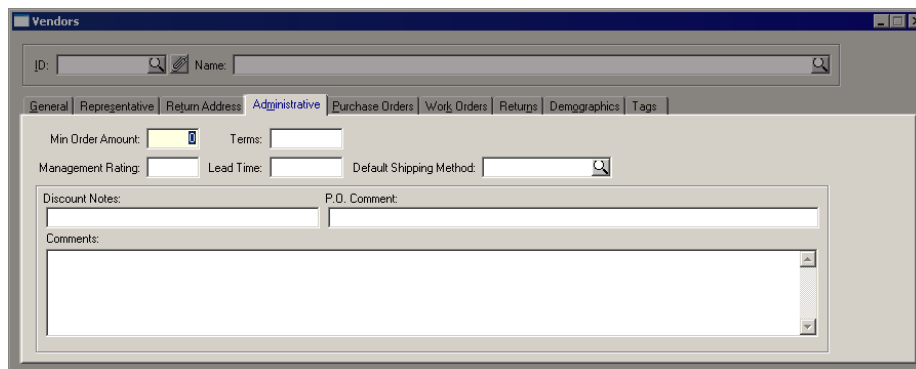


Clicking the  button before address information is entered activates the **Verify & Standardize Address** dialog box. Enter the two address lines and zip code information in the fields provided and click OK. The **Web Based Address Correction** process runs and populates the remainder of the address information including the 9-digit zip on the General tab.

## Vendors Administrative Tab

Use the **Administrative** tab to enter and view information on minimum order amounts, terms, management ratings, shipping methods, lead times, discount notes, P.O. Comments, and general comments.

- ❖ Activate the **Administrative** tab by clicking on it if it is not already activated. Verify that the vendor whose information is to be entered or changed is selected in the **ID** and **Name** fields.



**Figure 2-77. Vendors Dialog Box - Administrative Tab**

Element	Description
<b>Min Order Amount</b> field	Type in this field the minimum dollar value spent on an order by this vendor.
<b>Terms</b> field	Enter the payment terms you have negotiated with the vendor (NET 30, NET 60, COD, etc.) in this field. This value prints on any purchase order generated through <b>Response</b> .
<b>Management Rating</b> field	Type the code for rating the vendor in this field.
<b>Lead Time</b> field	Enter the number of days lead time the Vendor needs for orders.
<b>Default Shipping Method</b> field	Enter the vendor's preferred shipping method.

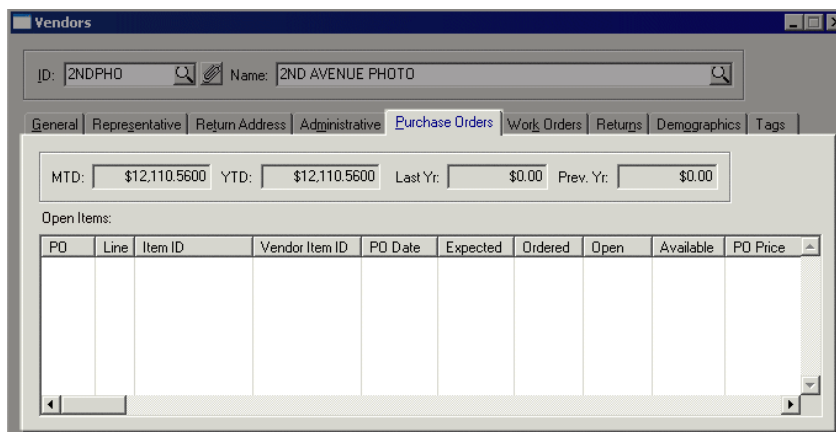
Element	Description
<b>Default Shipping Method</b> prompt	Activates the Shipping Methods table
<b>Discount Notes</b> field	Type a discount-related message in this field. For example, “All orders over \$5,000 less 3%.”
<b>P.O. Comment</b> field	Type any comments that you want to print on the purchase orders in this field. For example, “Keep in a cool dry storage area.”
<b>Comments</b> field	Type any narrative comments that you want to keep on file regarding this vendor.

**Table 2-44. Vendors Dialog Box - Administrative Tab Description.**

## Vendors Purchase Orders Tab

Use the **Purchase Orders** tab to view dollar amounts for month-to-date, year-to-date, last year, and previous year purchase orders made by any vendor. Current “Open” purchase orders are listed in the Open Items grid.

- ❖ Activate the **Purchase Order** tab (Figure 2-78) by clicking on it if not already activated. Verify that the vendor whose information is to be entered or changed is selected in the **ID** and **Name** fields.



**Figure 2-78. Vendors Dialog Box - Purchase Orders Tab**



The fields automatically populate with the vendor purchase order information if you have the Purchase Order module

Elements	Description
<b>MTD</b> field	Shows month-to-date purchase amount from the vendor.
<b>YTD</b> field	Shows year-to-date purchase amount made by the vendor.
<b>Last Year</b>	Shows the amount of purchase orders made by the vendor for last year.
<b>Prev. Year</b>	Shows the amount of purchase orders made by the vendor for the year previous to last year.

Elements	Description	
<b>Open Items GRID</b>	<b>PO</b> column	Shows open purchase orders for the selected vendor.
	<b>Line</b> column	Shows the line number each order.
	<b>Item ID</b> column	Shows the item IDs of the purchased items.
	<b>Vendor Item ID</b> column	Shows the vendor's Item ID for the specified item.
	<b>P.O. Date</b> column	Shows the date each order was placed.
	<b>Expected</b> column	Shows the expected receive date of the PO.
	<b>Ordered</b> column	Shows how many of each item was ordered.
	<b>Open</b> column	Shows how many purchases orders are open.
	<b>Available</b> column	Shows the how many of each is currently available.
	<b>PO Price</b> column	Shows the price of the item for this PO.
	<b>WHS</b> column	Shows the warehouse name the item will come from.

Table 2-45. Vendors View - Purchase Orders Tab Description

## Vendors Work Orders Tab

Use the **Work Orders** tab to view any work order information for the selected vendor.

Activate the **Work Order** tab. Verify that the vendor whose information is to be entered or changed is selected in the **ID** and **Name** fields.

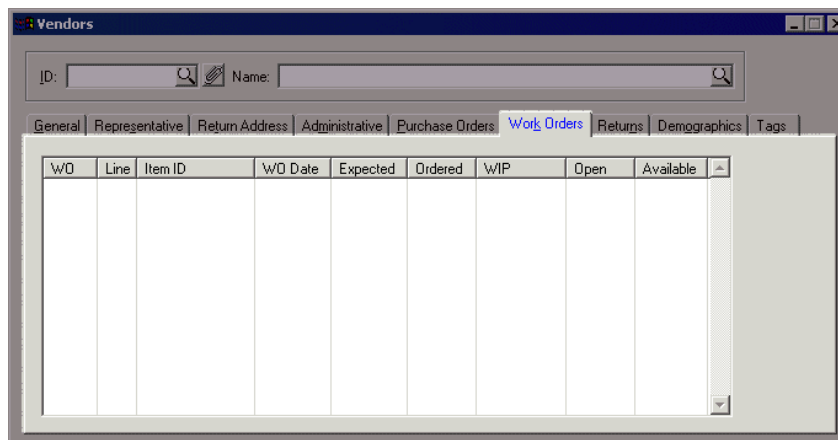


Figure 2-79. Vendors View - Work Orders Tab



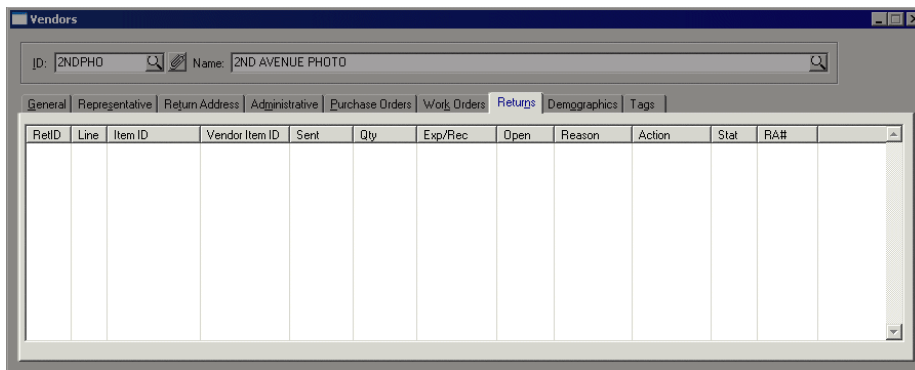
Elements	Description	
<b>Work Order Tab</b> columns	<b>WO</b> column	Work Order ID number.
	<b>Line</b> column	Shows what line number each order is on.
	<b>Item ID</b> column	Displays the item IDs of the purchased items.
	<b>WO Date</b> column	Shows the create date of the work order.
	<b>Expected</b> column	Shows the expected due date for the work order.
	<b>Ordered</b> column	How many of each item was ordered.
	<b>WIP</b> column	Shows Work In Progress status for the item.
	<b>Open</b> column	How many purchases orders are open.
	<b>Available</b> column	The number of this item is available.

**Table 2-46. Vendors View - Work OrdersTab Descriptions**

## Vendors Returns Tab

Use the **Returns** tab to view returns information for the selected vendor.

Activate the **Returns** tab (Figure 2-80) by clicking on it if not already activated. Verify that the vendor whose information is to be entered or changed is selected in the **ID** and **Name** fields.



**Figure 2-80. Vendors View - Returns Tab**

Elements	Description	
<b>Returns Tab GRID</b>	<b>RetID</b> column	Return ID
	<b>Line</b> column	Displays what line number each order is on.
	<b>Item ID</b> column	The item IDs of the purchased items.
	<b>Vendor Item ID</b> column	Vendor's item id.
	<b>Sent</b> column	The return item's sent date.
	<b>Qty</b> column	The number of items being returned.
	<b>Exp/Rec</b> column	The expected receipt date for the item.
	<b>Open</b> column	Shows how many purchases orders are open.
	<b>Reason</b> column	Displays the reason or reason code the item was returned.
	<b>Action</b> column	Displays the follow-up action required.
	<b>Stat</b> column	The current status of the return
	<b>RA#</b> column	The Return Authorization #.

Table 2-47. Vendors View -Returns Tab Descriptions

## Vendors Demographics Tab

The Customer's Demographics tab displays **User Defined Fields** that have been established for vendors. If no **User Defined Fields** have been established, the tab appears as shown in (Figure 2-81).

For information on adding **User Defined Fields**, refer to Technical Reference for Customizing Response.

- ❖ Activate the **Demographics** tab (Figure 2-81) by clicking on it if not already activated. Verify that the vendor whose information is to be entered or changed is selected in the **ID** and **Name** fields.
- ❖ Make entries for any fields defined by your organization.

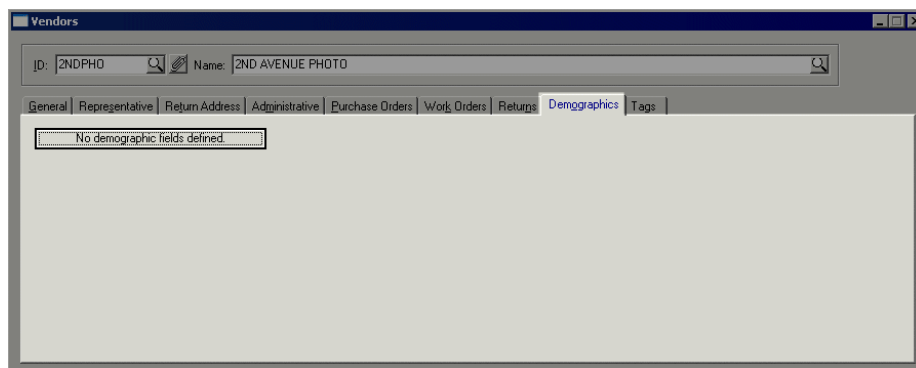
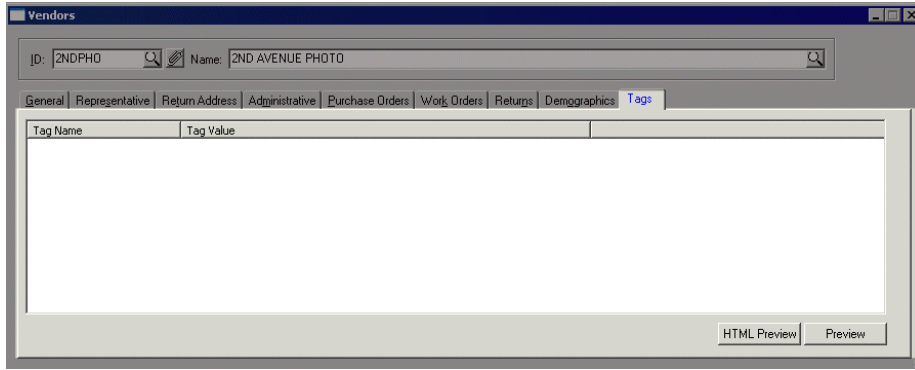


Figure 2-81. Vendors View - Demographics Tab

## Vendors Tags Tab

Activate the **Tags** tab (Figure 2-82) by clicking on it if not already activated. Verify that the vendor whose information is to be entered or changed is selected in the **ID** and **Name** fields.



**Figure 2-82. Vendors View - Tags Tab**

Elements	Description
<b>Tag Name</b> column	Shows the Tag names that have been added for this vendor.
<b>Tag Value</b> column	Shows the first 50 or so characters of the Tab (depending on column width).

**Table 2-48. Vendors View - Tags Tab**

# Stock Retrieval Devices

## Overview

Stock Retrieval Devices are created here. They are used by the Warehouse PickList Report. You can find more information on the report in Chapter 7 Orders.

File Menu > Inventory > Stock Retrieval Devices.

Tip: Press F5 to clear the screen before creating a new device ID

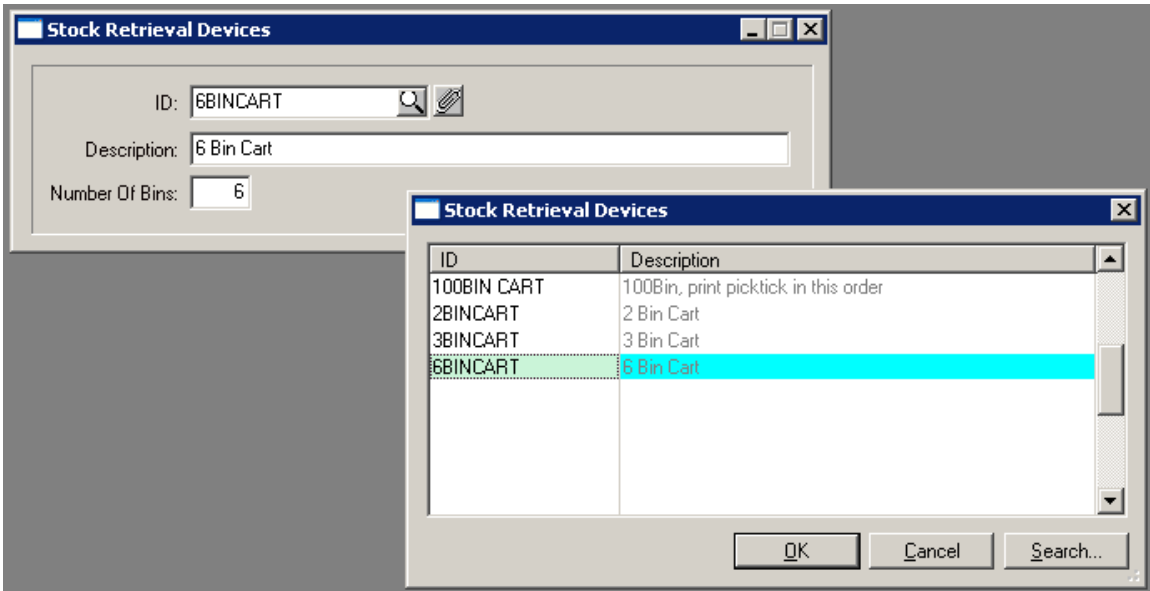


Figure 2-83. Stock Retrieval Devices setup view

Element	Description	
Device ID	Enter and ID for the picking Device	
Description	Description of the picking devide	
Number of Bins	The number of bins on the device for holding items	

Table 2-49. Stock Retrieval Devices dialog.

