# New Case Management Features In Inventory Maintenance



The General Store Version 10.0 makes case management extremely simple for those items that are ordered by the case, but only sold by the each..

Under this scenario, it is no longer necessary to use the case break feature, since the item is only sold by the each.

## **Adding New Items**

Click the plus sign on the navigational toolbar to add a new item.



Then scan or manually enter the item number, description, department, category and subcategory.

#### **Entering Case Data Automatically Calculates Each Cost**

In this example, we are entering Planters Cashews. However, when entering cost data skip down to the *Order Unit Cost* field and enter the case cost followed by the Enter key. The system will automatically set the each cost in the *Retail Unit Cost fi*eld as shown below.



## **Using The Margin Field to Set Selling Price**

You can enter a margin percentage to calculate your Retail Price as shown below:

I Flash Create	×
Item Number 02900001607 Description Planters Cashews Halves & Pieces	Age Pop Up
Retail 3.06 Retail 24.37 Boundary Sub-Category Sub-Catego	Weight
Rem Type	.00 Tare
POS Options C Prompt for quantity Assume 1 sold C Prompt for price - Quantity Calculated C Prompt for scale	.000
Quantity On Hand 0 Units in Package 1 Tax Level Exemptions Overide Tax Rate	G/L 120-010
Order Number Prime Vendor 🏘	
Order 36.72 Retail Units 12.00 in Order	
Accept	

In this example, we entered a margin percentage of 30 in the Margin field and hit the *Enter* key. This calculated a Retail Price of \$4.37. You can override the calculated price at any time.

Enter the rest of the pertinent data on the flash create form, including the vendor and the vendor order number.

In our example, AG, or Associated Grocers supplies the product, and their case order number is 675567.

I Flash Create	×
Item Number 02900001607 Description Planters Cashews Halves & Pieces	Age PopUp
Retail     3.06     Retail     4.37     Department     Category     Sub-Category       Unit Cost     Price     4.37     30.0000     Super MARK     SNACKS     SNACKS	Weight
Ferm Type     G Controlled C Non-Controlled C Matrixed C BOM C Tag along C Serial No. Track C Mfg. Coupon     POS Options	Tare Weight
Quantity On Hand 48 Units in Package 1 Tax Level Exemptions Overide Tax Rate	G/L 120-010 Post
Order Number 675567 Prime Vendor Vendor	
Unit Cost 36.72 Retail Units 12.00 in Order 4 Accept Cancel	

Finish by clicking the Accept button.

#### **Setting Case Management on Existing Items**

You can set/edit the necessary case management options on existing items through item file maintenance.

#### Item Detail Tab - Ordering Control

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tem Number		Item Des	cription						
02900001607		Planters	Cashews I	Halves & Piec	es				
1	D I II		_						
Description Store	Detail	)	I≁ Sp	ool price labe	Is. V Spool for shelf I	abels only. (1 label)			
Item Detail Ditail - Pa	age 2 Vend	or Data Notes	POS Sa	ales Links C	ustomer Instructions	Daily M	ovement		
			<u> </u>					Sales	1
Alt. Lookup 1>			E	Lock prices	s from external import. 🔲 PC	S fractional quanti	y override.	Purchase	
			— r	Do not disc	ount				
Alt. Lookup 2>				Г	Tax Level Exemptions			Use Case Mu	ltipl
Average Cost	\$3.06	Last Cost		\$3.06		Never Tax F	nite .0000	in both fiel	ds
			1			3	<b>L</b>		
	Units	Price I	Markup	Markup %	Accept zero price	Ordering Contro			-
Standard Retail	1	4.37 🗹	Margin	29.9800	without POS prompt.		Order Point	Max. Order	
Price Level (A)	1	0.00 🗹	Margin	0.0000		January	12.00	36.00	
Price Level (B)	1	0.00 🔟	Margin	0.0000	Pending Price	February	12.00	36.00	
Price Level (C)	1	0.00 🗹	Margin	0.0000	Changes	March	12.00	36.00	
Price Level (D)	1	0.00 🗹	Margin	0.0000		April	12.00	36.00	
Price Level (E)	1	0.00 🗹	Margin	0.0000		May	12.00	36.00	
Price Level (F)	1	0.00 🗹	Margin	0.0000		June	12.00	36.00	
Price Level (G)	1	0.00 🖌	Margin	0.0000	Sale Price Option	July	12.00	36.00	
Price Level (H)	1	0.00 🗹	Margin	0.0000	Buy X get Y at sale price	August	12.00	36.00	
Price Level (I)	1	0.00 🗹	Margin	0.0000	Buy Get	September	12.00	36.00	
THOSE COVER (I)		0.00	Margin	0.0000	0000 0000	October	12.00	36.00	
On Sale Price						Neuember	12.00	26.00	
On Sale Price Compare Price	1	0.00				November	12.00	30.00	
On Sale Price Compare Price Sale		0.00	Beginning	12:00:00 =	m ▲ T- 11:59:00 pm ▲	December	12.00	36.00	
On Sale Price Compare Price Sale Begin:	Thru	0.00	Beginning Daily	12:00:00 a	J m 🚔 To 11:59:00 pm 🚔	December	12.00	36.00	

The ordering control fields, *Order Point* and *Max. Order* affect the purchase order and receiving programs, as well as the hot list report, which lists all items that have reached of fallen below reorder point, but which have not had an order cut for them yet.. In our example, you can see that we set both fields to multiples of the case quantity (12 per case). So, we are basically saying that for this item, when we get down to one case, or 12 pieces, we will order up to 3 cases, or 36 pieces.

#### **Vendor Tab - Vendors and Case Data**

The *Vendor Tab* contains the case quantity and case cost for each of up to five vendors that you can attach to an item.

Inventory Maintenance		D			
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Item Number	Item Description Planters Cashews Halves 8	& Pieces			
Description Store Detail	Spool price	e labels. 🔽 Spool for s	helf labels only. (1 label)		
Item Detail Detail - F 2 2 Vendor Dat	a Notes POS Sales Link	ks Customer Instructions	Daily Movement	]	
3 Vendor #	mber required when defining ASSOCIATED GROCER	g multiple vendors. RIES			
Order # 675567		Last Retail \$3.06 Unit Cost	Retail Units 12.00 in Order		
Lead Time 000 Min	nimum Order .00	Last Order Unit Cost \$36.72	Dark red = case order data		
Last Order .00	Date	Outstanding .00			
Last Received .00	Date				
					11.

The data you enter here also affects the purchase order, receiving, and inventory reporting programs in the system.

- 1. This tab contains:
- 2. The vendor, or Associated Grocers.
- 3. The each cost in the *Last Retail Unit Cost* field (\$3.06)
- 4. The case quantity in the *Retail Units in Order* field (12)
- 5. The vendor part number in the **Order #** field (675567)
- 6. The case cost in the *Last Order Unit Cost* field (\$36.72)

#### **Minimum Order Quantity**

You will notice in the above example that the *Minimum Order* field is set to .00, this is because we enter order points and max order quantities.

If your vendor has a required minimum order quantity on the item, enter it in he minimum order field. For example, if the minimum is 4 cases, and the case quantity is 12, you would enter 48 in the *Minimum Order* field.



### **Case Management and Purchase Orders**

When you are ordering items that have the case management data set properly, you will see both a piece count and a case count on the purchase order screen.

If an item does not have case management data set, you will see "N/A" in the case quantity field.



Since the first item was set with an order point of 12, a maximum order of 36, and because it has an on hand of 8 pieces, the purchase order program suggested an order of 36 pieces, or 3 cases.

# **Additional Purchase Order Enhancements**

## **Item History Lookup**

You can hit the ALT and I keys on you keyboard on any line and you will pull up the item movement history for that line.

000002 Vend	dor# AG ASSOCIA	TED GROCERIES lanket order on mati	ix items.		P/O Total	\$110.16
Item Number 02900001607 010900003308	Order Number 675567 Sales/Purchase History	Planters Cashews	Description		Cost         On Hand         On Order         Unit(s           3.06         8.00         36.00         36	) Case(s) · .00 3 .00 N/A
	January Feburary March And June June June June June June June June	Purchases           0         0           0         36           0         0           0         0           0         0           0         0           0         0           0         0           0         0           0         0           0         0           0         0           0         0           0         36	Receipts         A           0         0           0         0           0         0           0         0           0         0           0         0           0         0           0         0           0         0           0         0	dj./Mnt. 0 8 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	Last 12 Months Last Calendar Year Last 2 Calendar Years Average Last 5 Calendar years Average Show Ext	

#### **Label Printing**

#### **First Spool From Purchase Order Menu**

Many larger stores that turn inventory at a fast pace need the ability to have labels ready for an order before they receive it. This way, they can apply the price labels while physically verifying a received shipment against the packing list or purchase order.



With the purchase order on the screen, select Edit, Spool Labels.

Price Label Request	
You have requested price labe have completely finished with th in duplicate labels in the label s order cancel this request now.	ls. It is important to only print labels when you his purchase order. Multiple label requests result pool. If you are not finished with this purchase
Spool Shelf Labels Only	On case orders spool only a case label. (Default: Spools 1 label for each item in the case unless printing a shelf label.)
Accept	Cancel

If you simply hit Accept, you will spool for price labels for all quantities received ("*eaches*"). Or, you can spool for shelf tags, or you can spool for case price labels.

## **Then Print Spooled Labels**

Maintenance Inquiry Purchase Orders						
Receiving Transfer Items					Pri	ce Labele p
Stock Status Report						Pending
Receiving Recap Report						
Item Movement						
Open Purchase Orders						
Item Movement Audit						
Pending Price Change List						
Labels	▶ 1'	" X 2.75" Lab	el (Avery	5260 Laser : 8	8160 InkJet)	N
Price List	.5	" X 1.75" Lab	el (Aven	5267 Laser :	8167 Inklet)	3

Standard Item Labels		
ltem Number 🏟	Description	Shelf Labels
	Number of Labels           0000         Quit         Print Spooled Labels	

# **Case Management and Direct Receiving**

When an item is properly set with case management data on the vendor tab, the direct receiving program will allow you to receive cases as opposed to "eaches". You can also enter a new case cost if necessary, and the system will automatically apply the new cost to the case and the each.

· + + + 00 + =		Do	uble Click a date to clear.	ø	-9
Number	tem Description				_
00000N-50	MT DEW DIET 2LT BTL				
scription Store Detail	Spool price lab	els. 🔽 Spool for shelf	labels only. (1 label)		
Petel I fand, Days 2] Mandard	Data   Material DOS Cater Links	Customer bada utilizes I	1 I Dat Harrison	1	
Loose   Ment - Fast 2   Menters	ane i cenes i cuo sees unes i	LUNCTOR FRANCISCO		Sales	
Att. Lookup 1>	☐ Lack price	a from external import. 🥅 R	OS fractional quantity over	le. Purcha	
At Lookup 2-	("Each" Data	Tes Level Freedom		9	
Average Cost \$1.30	Last Cost \$1.30		E Never Dyetde	0000 Hevit	swr
luce la second			Ordering Control		
Standard Retail 1	2.29 Margin 43.23	without POS prompt.	Order	Point Max. Order	
Over Land (B)	Control Marrier Door	Pending Price	January Enhancer	0.00 0.0	0
Inventory Maintenance	- Contract - Contract			N	
Edit Navigate Mix-n-M	atch Style Sheet Maintenance	Help Exit		4	
			Double Click a dat	to cheer. I	-4
P ben Number	ten Description				
012000007460	MT DEW DIET 2L	T BTL			
e Description Store Der	tail rs	odi price labels. T Sp	ool for shelf labels only. (1 is	bel)	
han Dated Dated Press	Vendor Data Notes   BOS Se	the local days in the second		Movement	
DALE LOGINE   LOGINE - FROM		HE LINE   LUIDING PRIVES	ere i i i ea		
Primary Vendor Second	Sary Vendor   Herd Vendor   Four	th Vendor   Fifth Vendor	ere i i i ere		
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Primary Vendor Second	Vendor number required when Vendor number required when r II 1997 Not on File	th Vendor   Pith Vendor   defining multiple vendors.	- (°Ca	e"Data	
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Pilinay Vendor Second Vendo Orde	Vendor Hed Vendor Fou Vendor number required when # 007460	the United Autometer Contracts the Vender Fifth Vender defining multiple vendors.	s1.30 Retail Units 6	e"Data	
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Primary Vendor Second Vendor Second Orde Lead To Lat Or	Option         Thead Wendor         Final           Vendor number request when ell         Thead Wendor         Final           ell         Thead Wendor         Pilot on File           ell         0007460         Thead Wendor         Difference           mma         0000         Mensmum Onder         Difference           der         000         Date         Difference	Last Retail     Last Retail     Last Order     Last     Last	s130 Petal Units in Order 5780 Dark red = case	ie" Data	)
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Privacy Vendor Second Privacy Vendor Second Vendo Orde Lead Th Last On	Image Number         Time         Final         Vendor         Final           Vendor         number         required         when         required         required         when         required         required         when         required         req         required         req <td>Harder (Heft) Vender defining nullple vendos.      Last Retail Unt Cost     Last Order Last Order Outstanding 300</td> <td>s1.30 Petal Units 6 in Order \$780 Dark red = case</td> <td>se<sup>*</sup>Data</td> <td>)</td>	Harder (Heft) Vender defining nullple vendos.      Last Retail Unt Cost     Last Order Last Order Outstanding 300	s1.30 Petal Units 6 in Order \$780 Dark red = case	se <sup>*</sup> Data	)
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In the above example, we have set case management data for Diet Mountain Dew, 2 Liter bottles. The case cost is currently \$7.80 and each case hold 6 units (case pack).

Upon receiving a bottle, the system will automatically prompt us for the number of cases, as shown below.

	Order Unit	Entry
	tem Number	012000007460
0	r <mark>der Numbe</mark> r	007460
		MT DEW DIET 2LT BTL
Case Par 1 Enter number cases receiv 3 Click to receive cases		Retail Units in Order Unit 6 Order Unit Cost Order Units Received-> 6 Skip - Receiving by Retail Unit

In this example we received 6 cases at a reduced cost of \$6.86 which resulted in the following:

Inventory Receipts					N		
File Navigate Help Exit					13		
∬i← ← → →i   ⋈	$+ - \square \sim   \otimes  $					4	Ð
Automatically change prices r	maintaining current margins using: 🧿 Average cos	t. C Received cost.			т	iotal 41	1.16
	Round to ne	arest .05 📃 🗖 Round	l to nearest .	х9.			
Received from vendor# PEPSI	Pepsi				Rig	ht-Click a cost f	field
tem/Order Number	Description	Siza	Ordered	BackOrd	Receive	Cost	
012000007460 -	MT DEW DIET 2LT BTL	0/20	0.00	0.00	36.00	1.1433	

On the receiving screen you can see that this equates to 36 bottles at an adjusted bottle cost of \$1.1433.

Upon saving the receiving session:

- 1. The last cost on the case will be adjusted down from \$7.80 to \$6.86.
- 2. The last cost on the bottle will be adjusted down from \$1.30 to \$1.14.
- 3. The average cost on the bottle will also be adjusted down from \$1.30 to \$1.17.

Vendor # PEPS Pepsi			
Order # 007460	Last Retail Unit Cost	\$1.14	Retail Units 6.00 in Order
Lead Time 000 Minimum Or	der .00 Last Order Unit Cost	\$6.86	Dark red = case order data
Last Order .00 Date	Outstanding	.00	
Last Received 36.00 D N	ew "Each" Costs		

So you can see that properly setting an item's case management data greatly simplifies the receiving process.