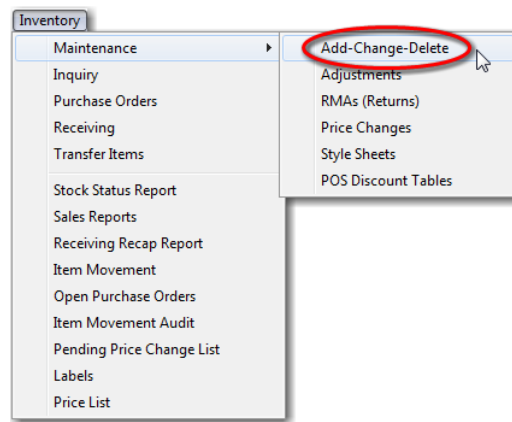


# New Case Management Features In Inventory Maintenance

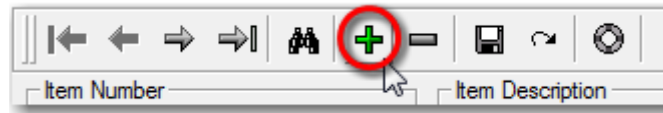


The General Store Version 10.0 makes case management extremely simple for those items that are ordered by the case, but only sold by the each..

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** field as shown below.

A screenshot of the 'Flash Create' form. The 'Item Number' is 02900001607 and the 'Description' is 'Planters Cashews Halves & Pieces'. The 'Retail Unit Cost' field is highlighted with a red box and a callout arrow pointing to it with the text 'Enter the case cost'. The 'Order Unit Cost' field is also highlighted with a red box and a callout arrow pointing to it with the text 'Enter the case quantity and hit the Enter key on your keyboard. The Retail Unit Cost, or each cost, will be calculated automatically'. The 'Retail Units in Order' field is 12. The 'Order Number' is empty. The 'Prime Vendor' is empty. The 'Accept' and 'Cancel' buttons are at the bottom.

## Using The Margin Field to Set Selling Price

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

A screenshot of the 'Flash Create' form. The 'Item Number' is 02900001607 and the 'Description' is 'Planters Cashews Halves & Pieces'. The 'Retail Unit Cost' is 3.06. The 'Retail Price' is 4.37. The 'Margin' field is highlighted with a red box and a callout arrow pointing to it with the text 'Enter the margin percentage'. The 'Retail Price' field is also highlighted with a red box and a callout arrow pointing to it with the text 'The calculated Retail Price'. The 'Order Unit Cost' is 36.72 and the 'Retail Units in Order' is 12.00. The 'Accept' and 'Cancel' buttons are at the bottom.

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.

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

	Units	Price	Markup	Markup %
Standard Retail	1	4.37	Margin	29.9800
Price Level (A)	1	0.00	Margin	0.0000
Price Level (B)	1	0.00	Margin	0.0000
Price Level (C)	1	0.00	Margin	0.0000
Price Level (D)	1	0.00	Margin	0.0000
Price Level (E)	1	0.00	Margin	0.0000
Price Level (F)	1	0.00	Margin	0.0000
Price Level (G)	1	0.00	Margin	0.0000
Price Level (H)	1	0.00	Margin	0.0000
Price Level (I)	1	0.00	Margin	0.0000
On Sale Price	1	0.00	Margin	0.0000
Compare Price	1	0.00		

	Order Point	Max. Order
January	12.00	36.00
February	12.00	36.00
March	12.00	36.00
April	12.00	36.00
May	12.00	36.00
June	12.00	36.00
July	12.00	36.00
August	12.00	36.00
September	12.00	36.00
October	12.00	36.00
November	12.00	36.00
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 or 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

Edit Navigate Mig-n-Match Style Sheet Maintenance Help Exit

Double Click a date to clear.

Item Number: 02900001607

Item Description: Planters Cashews Halves & Pieces

Description Store Detail

✓ Spoil price labels. ✓ Spoil for shelf labels only. (1 label)

Item Detail Detail - R Vendor Data Notes POS Sales Links Customer Instructions Daily Movement

Primary Vendor Secondary Vendor Third Vendor Fourth Vendor Fifth Vendor

Vendor # A6 ASSOCIATED GROCERIES

Order # 675567

Last Retail Unit Cost \$3.06

Retail Units in Order 12.00

Lead Time 000 Minimum Order .00

Last Order .00 Date

Last Received .00 Date

Last Order Unit Cost \$36.72

Outstanding .00

Dark red = case order data

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 the 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.

Vendor number required when defining multiple vendors.

Vendor #  ASSOCIATED GROCERIES

Order #  Last Retail Unit Cost  Retail Units in Order

Lead Time  Minimum Order  Last Order Unit Cost  Dark red = case order data

Last Order  Date  Outstanding

Last Received  Date

## 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.

Purchase Order

Edit Navigate Help Exit

Alt-F on an order line shows history.

Order #  Vendor #  ASSOCIATED GROCERIES P/O Total

Instructions ☐ Prompt for blanket order on matrix items.

Item Number	Order Number	Description	Cost	On Hand	On Order	Unit(s)	Case(s)
02900001607	675567	Planters Cashews Halves & Pieces	3.06	8.00	0.00	36.00	3
010900003308	010900003308	REYNOLDS CUT-RITE WAX PAPER	0.00	-2.00	0.00	12.00	N/A

Case Management Data set properly

Case Management Data not set properly.

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.

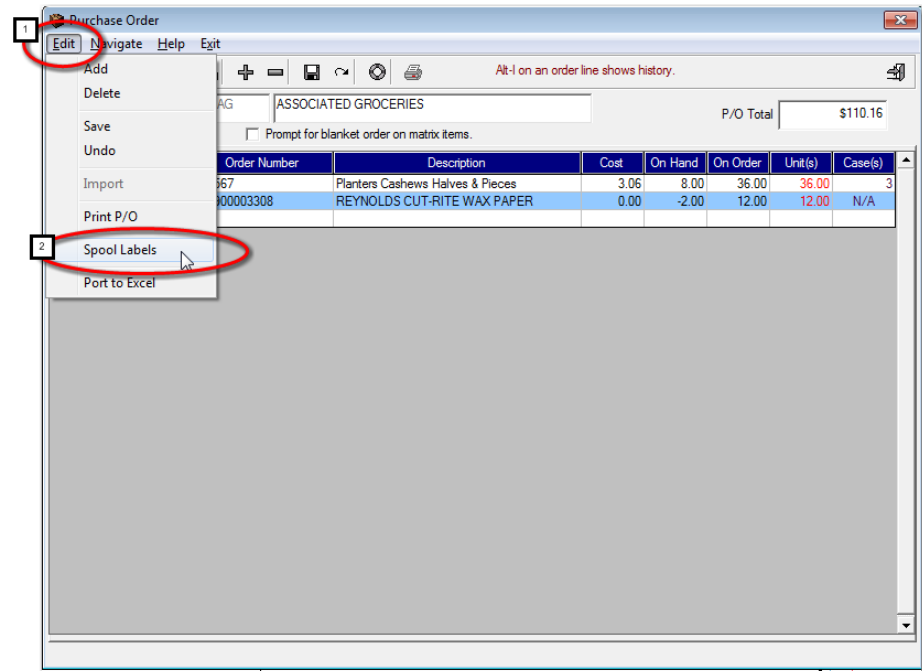
The screenshot shows a 'Purchase Order' window with a menu bar (Edit, Navigate, Help, Exit) and a toolbar. A red circle highlights the text 'Alt-I on an order line shows history' in the toolbar. A yellow arrow points from this text to a 'Sales/Purchase History' dialog box. The dialog box contains a table with columns: Sales, Purchases, Receipts, and Adj./Mnt. The table lists months from January to December, with a 'Totals' row at the bottom. To the right of the table are four radio buttons: 'Last 12 Months' (selected), 'Last Calendar Year', 'Last 2 Calendar Years Average', and 'Last 5 Calendar years Average'. At the bottom of the dialog are 'Show' and 'Exit' buttons.

	Sales	Purchases	Receipts	Adj./Mnt.
January	0	0	0	0
February	0	0	0	0
March	0	36	0	8
April	0	0	0	0
May	0	0	0	0
June	0	0	0	0
July	0	0	0	0
August	0	0	0	0
September	0	0	0	0
October	0	0	0	0
November	0	0	0	0
December	0	0	0	0
** Totals **	0	36	0	8

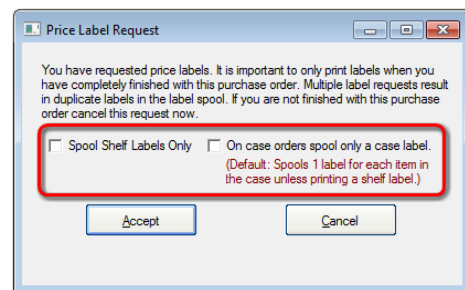
## Label Printing

### 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.

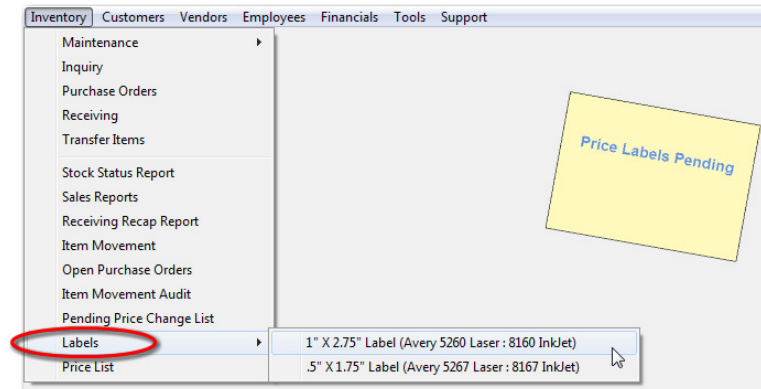


With the purchase order on the screen, select **Edit**, **Spool Labels**.



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





## 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.

The image displays two overlapping screenshots of the 'Inventory Maintenance' software interface. The top screenshot shows the 'Each' data tab, which includes fields for 'Average Cost' (\$1.30) and 'Last Cost' (\$1.30). The bottom screenshot shows the 'Case' data tab, which includes fields for 'Last Retail Unit Cost' (\$1.30), 'Retail Units in Order' (6.00), 'Last Order Unit Cost' (\$7.80), and a note 'Dark red = case order data'. Both screenshots show the item description 'MT DEW DIET 2LT BTL' and the item number '012000007460'.

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.

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

Item/Order Number	Description	Size	Ordered	BackOrd	Receive	Cost
012000007460	MT DEW DIET 2LT BTL		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.

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