Auto Replenishment Module Setup Guide

A CustomerLink Exchange document

The **AcuSport® Retail Technology Group** (RTG) recommends completing the procedures in this guide to set up the Auto Replenishment (AR) module, assign AR values to specific items, and utilize purchase orders within the **AXIS** system.

- 1. Review <u>The Auto Replenishment Process (page 4)</u> for an overview of the method by which the AR module automatically creates purchase orders for low inventory AR items.
- 2. Install the Auto Replenishment Module (page 5) to add the AR module to the existing **AXIS** system.
- 3. <u>Update the AcuSport Catalog (page 7)</u> to ensure potential AR items are available from AcuSport.

Note: To be included in AR functions, the item must be available from AcuSport and AcuSport must be set up as a vendor for the item in the <u>Vendor Product tab (page 60)</u>. If the **AXIS** system finds an item that does not have a Vendor Part Number, it will match the item's UPC to an item in the AcuSport Catalog and add the appropriate Vendor Part Number to the item.

- 4. <u>Set Up Items for Auto Replenishment (page 10)</u> to activate AR functions and set ordering levels for select products.
- 5. <u>Utilize Purchase Orders in the AXIS System (page 27)</u> to let the AR module run efficiently and accurately.
- 6. <u>View the Vendor Reorder Report (page 45)</u> to review AR module usage and identify areas for improvement and expansion.
- 7. If needed, <u>Troubleshoot Auto Replenishment Issues (page 74)</u> to correct issues with unsent orders.



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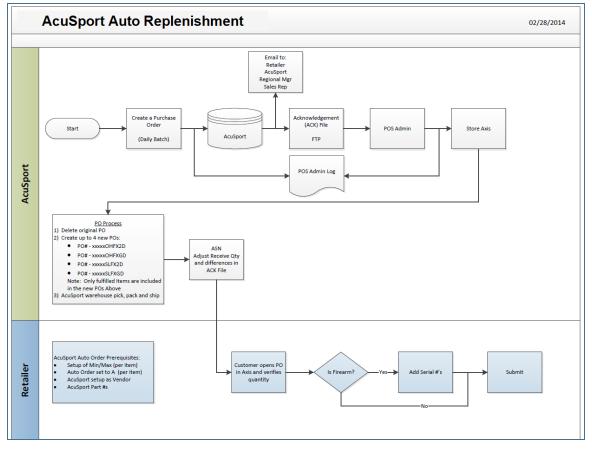
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The Auto Replenishment Process

- 1. Every evening, the Auto Replenishment (AR) module checks each AR item and compares its Quantity On Hand (QOH) to its **Min Level** value.
- 2. If the item's QOH is less than its **Min Level**, the AR module calculates the item's quantity to be ordered by subtracting its QOH from its **Max Level** value.
- 3. After checking all AR items and performing the necessary calculations, the AR module runs a batch process to create a purchase order containing all quantities to be ordered for all low inventory AR items.
- 4. The AR module automatically sends the purchase order to AcuSport.

Note: The purchase order can be reviewed through the <u>Receiving screen (page 71)</u> in the **Data Center** application. See <u>Receive Inventory Items (page 37)</u> for more information.

5. AcuSport receives the purchase order and forwards it to the AcuSport Fulfillment Program.



6. The AcuSport Fulfillment Program reviews the purchase order for quantities of items that AcuSport cannot currently fill and creates a fulfillment file to update (remove those items from) the purchase order.

Note: Until these ordered item quantities are filled, the AR module will continue to include them in the daily batch process.

- 7. If needed, AcuSport divides the purchase order into smaller purchase orders to accommodate different shipping methods.
- 8. When the ordered items arrive, the corresponding purchase order is used to receive the product, update inventory levels, and verify the new QOH.

Install the Auto Replenishment Module

Complete the following procedure to install the Auto Replenishment (AR) module.

- 1. AcuSport identifies the Retailer as an Auto Replenishment partner and the necessary hardcopy paperwork is completed.
- 2. AcuSport CustomerLink management notifies the AcuSport Retail Technology Group (RTG) to initiate the installation.
- 3. RTG sends the Retailer an email containing a link to the Retailer's End-User Agreement (EUA).

Note: The EUA should be addressed in a timely manner as the link will expire after a certain amount of time.

- 4. The Retailer receives the email containing the link to the End-User Agreement (EUA).
- 5. The Retailer reviews the EUA document.
- 6. The Retailer selects the "Agree" option to signify agreement with it.

Note: If the retailer does not agree to the End-User Agreement Terms, the installation process will cease until further action is taken by CustomerLink management at AcuSport. At this time an email notification will alert the proper parties at AcuSport and RTG.

7. The Retailer's agreement automatically activates the installation of the Auto Replenishment (AR) module by the POS Admin site.

- 1. Navigate to the Vendor Catalog Detail screen.
 - 1. Log In to the Data Center Application to display the Data Center ribbon menu.



2. Select **Purchasing > Vendor Catalog** from the main menu to display the **Vendor Catalog Detail** screen.

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2. Click a vendor name in the **Select Vendor** list to display the vendor's catalog on the screen.

Note: If needed, select onscreen options to determine which vendors are displayed in the **Select Vendor** list:

• Filter by Active Status:

Check the **Show Active Only** checkbox to show only active vendors in the list. (Uncheck the checkbox to display all vendors in the database.)

• Filter by Name: Enter all or part of a vendor's name in the field to show only matching vendors. 3. Complete the following procedures as appropriate to update the selected vendor's catalog:

Update the AcuSport Catalog

Note: This procedure applies only if AcuSport was selected as the vendor.

Note: If the **AXIS** system finds an item that does not have a Vendor Part Number, it will match the item's UPC to an item in the AcuSport Catalog and add the appropriate Vendor Part Number to the item.

- 1. Click the **Update Catalog** button to refresh the screen.
- 2. Continue with the procedure below

Update a Non-AcuSport Vendor Catalog

Note: This procedure applies if a vendor other than AcuSport was selected.

- 1. Click the **Update Catalog** button to display an **Open** window.
- 2. Browse to the desired location and double-click the appropriate file (.xlsx format) containing the vendor catalog to upload it.

Note: The vendor catalog file must be a formatted Excel spreadsheet (.xlsx format) containing 15 columns named and arranged (left-to-right) in the order shown below:

| • • • | · · · · · · · · · · · · · · · · · · · |
|---------------------|--|
| Vendor Part # | The vendor part number |
| MFG Part # | The manufacturer's part number |
| Receipt Description | A short (32 characters or less) description that will print on the |
| | register receipt |
| Item Description | A long (80 characters or less) description of the item used at the |
| | register |
| Size | Size |
| Color | Color |
| UoM | Unit of measure |
| Catalog Pg | Catalog page number |
| Class | Class (Item attribute descriptor) |
| Mfg | Manufacturer |
| UPC | The UPC code number with check digit included |
| Cost | Cost |
| Retail | Retail price |
| Weight | Weight |
| Sell Pack | Sell pack |
| | |

- 3. Continue with the procedure below
- 4. Sort and Filter Reporting Screen Data as needed to modify the list displayed on the screen.
- 5. If desired, Add a Product from a Vendor Catalog to the Product Database (page 8).
- 6. Click the tab's **Close** button to close the screen.

- 1. Navigate to the Vendor Catalog Detail screen.
 - 1. Log In to the Data Center Application to display the **Data Center** ribbon menu.



2. Select **Purchasing > Vendor Catalog** from the main menu to display the **Vendor Catalog Detail** screen.

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2. Click a vendor name in the **Select Vendor** list to display the vendor's catalog on the screen.

Note: If needed, select onscreen options to determine which vendors are displayed in the **Select Vendor** list:

Filter by Active Status:

Check the **Show Active Only** checkbox to show only active vendors in the list. (Uncheck the checkbox to display all vendors in the database.)

- Filter by Name: Enter all or part of a vendor's name in the field to show only matching vendors.
- 3. If needed, update the vendor catalog.

Note: Refer to View and Update a Vendor Catalog (page 6) for more information.

- 4. Complete any of these procedures to select the desired product(s):
 - Check a product's Add checkbox to select it. (Repeat as needed to select additional products.)
 - Uncheck a product's Add checkbox to deselect it.
 - Click the Select All button to select (check the Add checkbox for) all displayed items.
 - Click the **Deselect All** button to deselect (uncheck the **Add** checkbox for) all displayed items.
- 5. Click the Add Product button to add the selected product(s) to the Product Maintenance screen.

Note: Refer to <u>Manage Product Information</u> for more information on using the **Product Maintenance** screen.

6. Click the tab's **Close** button to close the screen.

Set Up Items for Auto Replenishment

Complete the following procedures as needed to identify and set ordering numbers for individual AR items:

- 1. <u>Identify Potential Auto Replenishment Items (page 11)</u> to determine which items to include in AR functions and where to set their **Min Level** and **Max Level** values.
- 2. <u>Bulk Edit a Group of Products (page 12)</u> to <u>Set Auto Replenishment Status (page 14)</u> (activate AR functions) and <u>Set Min/Max Levels (page 14)</u> for the group.
- 3. <u>Create and Maintain a Product (page 17)</u> to activate a single item's **Auto Replenishment** feature and set its **Current Min Level** and **Current Max Level** settings.
- 4. Complete the <u>Set Up a Case Quantity (page 25)</u> and <u>Delete a Case Quantity (page 26)</u> procedures as needed to ensure bulk packages (cases, multi-packs, etc.) of AR items are ordered and received correctly.

Identify Potential Auto Replenishment Items

Consider the following questions when determining whether an item should be included in AR functions and what its Min/Max Levels should be.

- What is the item's velocity?
- How much shelf space (in both store and warehouse) can/should be allocated for the item?
- Does the item represent one of the highest-selling lines/products in the store?
- Does the item support high selling items?
- Does the item have a quantity break?
- Is the item purchased and received in bulk packaging (i.e., cases, cartons, etc.)?

Note: Refer to Set Up a Case Quantity (page 25) for more information.

- Is it difficult to acquire the item?
- Is the item in back stock?
- Should the item's **Min Level** be set to 2 (or more) to ensure the AR module orders the item while it is still available in stock?

- 1. Navigate to the **Product Maintenance** screen.
 - 1. Log In to the Data Center Application to display the Data Center ribbon menu.



2. Select **Inventory Management > Product Maintenance** from the main menu to display the **Product Maintenance** screen.

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- 2. Select onscreen options to determine which products are displayed on the screen:
 - Check the Click to show inactive products checkbox to display all active and inactive products.
 - Enter a string of characters in the **Filter** field and press the **Enter** key to allow only Descriptors that contain the string to be available in the **Attributes** section.
 - Click an Attribute heading to display its list of available Descriptor options.
 - Check a **Descriptor** checkbox to add it to the **Selected item(s)** list. (Uncheck a **Descriptor** checkbox in the **Selected item(s)** list to remove it.)
 - Click the Clear button to remove all Attributes and Descriptors from the Selected item(s) list.
 - Click the **Submit** button to apply the filters in the **Selected item(s)** list to the main screen.
- 3. Check a product's checkbox to select it. (Repeat as needed to select additional products.)

4. Click the **Bulk Edit** button to display the **Bulk Edit Products** window.



- 5. Complete any of the following procedures as appropriate to modify the selected products:
 - Set Activity Status
 - 1. Select Active from the Edit Field drop-down to display a New Value field.
 - 2. Select the desired setting (Active or Inactive) from the New Value drop-down.
 - 3. Click the **Submit** button to close the window.
 - Set Auto Replenishment Status
 - 1. Select Auto Replenishment from the Edit Field drop-down to display a New Value drop-down.
 - 2. Select the desired setting (Yes or No) from the **New Value** drop-down.
 - 3. Click the **Submit** button to close the window.

Set Age Requirement Status

- 1. Select **ID Age** from the **Edit Field** drop-down to display a **New Value** field.
- 2. Enter the appropriate age (in years) in the **New Value** field.
- 3. Click the **Submit** button to close the window.

Set Firearm Status

- 1. Select Is Firearm from the Edit Field drop-down to display a New Value drop-down.
- 2. Select the desired setting (True or False) from the **New Value** drop-down.
- 3. Click the **Submit** button to close the window.

Set Stock Item Status

- 1. Select Is Stock Item from the Edit Field drop-down to display a New Value drop-down.
- 2. Select the desired setting (True or False) from the **New Value** drop-down.
- 3. Click the **Submit** button to close the window.

• Set Min/Max Levels

- 1. Select **Min Level / Max Level** from the **Edit Field** drop-down to display **Min Level** and **Max Level** fields.
- 2. Enter the desired value in the **Min Level** field.
- 3. Enter the desired value in the Max Level field.
- 4. Click the **Submit** button to close the window.

• Set Min/Max Type Status

- 1. Select Min/Max Type from the Edit Field drop-down to display a New Value drop-down.
- 2. Select the desired type (Suggested, Manual, or Automatic) from the **New Value** drop-down.
- 3. Click the **Submit** button to close the window.

Set an Attribute/Descriptor Combination

- 1. Select **Product Attribute Descriptor** from the **Edit Field** drop-down to display **Attribute** and **Descriptor** drop-downs and fields.
- 2. Complete either of these procedures to select an attribute:
 - Select the desired attribute from the **Attribute** drop-down.
 - Select <Add New> from the Attribute drop-down and enter the name of a new attribute in the New Attribute field.

Note: Be sure to spell and capitalize the attribute name correctly as it cannot be edited after entry.

- 3. Complete either of these to select a descriptor:
 - Select the desired descriptor from the **Descriptor** drop-down.
 - Select <Add New> from the Descriptor drop-down and enter the name of a new descriptor in the New Descriptor field.

Note: Be sure to spell and capitalize the descriptor name correctly as it cannot be edited after entry.

4. Click the **Submit** button to close the window.

Set Product Price Information

- 1. Select **Product Price Information** from the **Edit Field** drop-down to display a **New Value** list showing available price types.
- 2. Complete the following procedure for each price type to be assigned to the selected products.
 - 1. Check the type's **Include Price** checkbox.
 - 2. Select the desired option from the **Price** drop-down.
 - Select "Set Price" to manually set the price for all products in this window.
 - Select "Retail Price" to leave the product prices alone.
 - 3. If "Set Price" was selected from the **Price** drop-down, enter the desired price in the **Set Price** field.
- 3. Check the **Exclude Price** checkbox for each price type that will not be assigned to the selected products.
- 4. Click the **Submit** button to close the window.

Set Retail Price Adjustment and Rounding

- 1. Select **Retail Price** from the **Edit Field** drop-down to display **Adjustment** and **Rounding** dropdowns and fields.
- 2. Select the desired type (blank (none), Retail Price, \$ above/below Retail Price, or % above/below Retail Price) from the **Adjustment Type** drop-down.
- 3. Enter the desired value in the Adjustment Value field.

Note: The field's format changes according to the type selected from the **Adjustment Type** dropdown.

- 4. Select the desired rounding option (No Rounding, Round to Nearest Value, Round Up, Round Down) from the **Rounding Option** drop-down.
- Enter the desired values in the Dollar Round To, Dime Round To, and Penny Round To fields.
 Note: Fields are activated/deactivated according to the option selected from the Rounding Option drop-down.
- 6. Click the **Submit** button to close the window.

Set Serialized Non-Firearm Status

- 1. Select **Serialized Non-Firearm** from the **Edit Field** drop-down to display a **New Value** dropdown.
- 2. Select the desired setting (True or False) from the **New Value** drop-down.
- 3. Click the **Submit** button to close the window.

• Set Tax Type Status

- 1. Select **Tax Type** from the **Edit Field** drop-down to display a **New Value** list showing available tax types.
- 2. Check the **Include Tax** checkbox for each tax type to be assigned to the selected products.
- 3. Check the **Exclude Tax** checkbox for each tax type that will not be assigned to the selected products.
- 4. Click the **Submit** button to close the window.

Set Web Product Status

- 1. Select Web from the Edit Field drop-down to display a New Value drop-down.
- 2. Select the desired setting (True or False) from the New Value drop-down.
- 3. Click the **Submit** button to close the window.
- 6. Click the tab's **Close** button to close the screen.

Complete the following procedure to add, clone, or modify a product.

- 1. Navigate to the Product Maintenance screen.
 - 1. Log In to the Data Center Application to display the Data Center ribbon menu.



2. Select **Inventory Management > Product Maintenance** from the main menu to display the **Product Maintenance** screen.

| Suct Maintenance II | s Setup Min/Max Level le Setup Min/Ma | nport Stocktaking | | | | | | | | | |
|---|--|-------------------|--|-------------------------------|--|--|-------------------|---------------|---------------|--------------|------------|
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| DEPARTMENT FIREARM CALIBER ITEM MANUFACTURER | Click to show inactive products | | | | | | | | | | |
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| | Edit GPC To Item Number | NIG # | Item Description | 7 Receipt Description | Department 7 | Manufacturer 7 | Ren (2) | letal Price 1 | aut Cost 7 Ar | ing Cost i T | JoH T Min |
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- 2. Select onscreen options to determine which products are displayed on the screen:
 - Check the Click to show inactive products checkbox to display all active and inactive products.
 - Enter a string of characters in the **Filter** field and press the **Enter** key to allow only Descriptors that contain the string to be available in the **Attributes** section.
 - Click an Attribute heading to display its list of available Descriptor options.
 - Check a **Descriptor** checkbox to add it to the **Selected item(s)** list. (Uncheck a **Descriptor** checkbox in the **Selected item(s)** list to remove it.)
 - Click the Clear button to remove all Attributes and Descriptors from the Selected item(s) list.
 - Click the Submit button to apply the filters in the Selected item(s) list to the main screen.

3. Complete the following procedures as needed to manage product information:

| Add a Product | 1. Click the Add Product button to display a blank Product Edit window. |
|---------------|--|
| | 2. Continue with the procedure below. |
| Clone a | 1. Check a product's checkbox to select it. |
| Product | 2. Click the Clone Product button to display a copy of the product's Product |

- 2. Click the **Clone Product** button to display a copy of the product's **Product Edit** window.
- 3. Enter the UPC for the new (clone) product in the UPC field.
- 4. Continue with the procedure below.

| Edit a Product | |
|-----------------------|--|
|-----------------------|--|

- 1. Click a product's Edit button to display the product's Product Edit window.
- 2. Continue with the procedure below.

| | Product Info | b | | Product Attrib | ute Descriptor |
|---------------------------------|--------------------------|------------------------------------|-----------------|-----------------|-------------------|
| Active: 😰 🛛 Is Firea | irm: 🗖 Serialized Non-F | Firearm: 📰 🛛 Is Stock Item: 😰 | Delete Attribut | e | Descriptor |
| Product UPC: | 610242000036 | | > 🌋 DEPART | MENT | FIREARMS |
| | | | 🗯 ITEM | | SIGHTS |
| Item Number: | | | S MANUF | ACTURER | Crimson Trace |
| Manufacturer Ref #: | LG-430 | | | | |
| Receipt Description: | CTC LASERGUARD KELTE | C P3AT | | | |
| Item Description: | Lasergrip Standard Polyn | ner KelTec P3AT | _ | Add/Edit Attrib | pute Descriptor |
| Register Lookup Description: | CTC Lasergrip Standard P | Polymer KelTec P3AT | | <u> </u> | ~ Update A/D |
| Auto | | | | Produc | t Image |
| Replenishment: N | ~ | Retail Price: \$175.00 | | | |
| Min/Max Type: Sugge | ested ~ | Last Cost: \$125.00 | Ouick Pic | :k | Register Lookup |
| | urrent Suggested | Avg Cost: \$125.00 | Image | e: | Image: |
| Min Level: | 1 0 | OoH: 73 | | Select Image | Select Image |
| Max Level: | 3 0 | Adjust QoH: | | Select Image | Select Image |
| | | On Order: 0 | | Web | Info |
| ID Age: | Ex | cluded On Order: 0 Committed: 0 | | ls Web: 🔲 🛛 Web | 9 Price: \$0.00 |
| | Product Tax Ir | nfo | | Product | Price Info |
| Del Tax Ty | pe Descrip | tion Tax Rate | Del Type | Descript | tion Retail Price |
| COUNTY TAX | COUNTY TAX | 1.00 % | | | |

4. Enter/edit Product information in the **Product Info** section:

| Note: Required fields ar | nd settings are displayed with red borders. |
|--------------------------------|---|
| Active | Check the checkbox to mark the item as active and make it available for search and selection in the Register application. |
| Is Firearm | Check the checkbox to mark the item as a firearm. |
| Serialized Non- Firearm | Check the checkbox to mark the item as a serial non-firearm and require a serial number to receive or sell it. |
| Is Stock Item | Check the checkbox to mark the item as a physical item that can be inventoried and sold. |
| Product UPC | Enter the product's UPC code. |
| Manufacturer Ref # | Enter the manufacturer's stock number for the item. |
| Receipt Description | Enter a concise item description (30 characters maximum) to be shown on labels and customer receipts. |
| Item Description | Enter a lengthy item description (80 characters maximum) to be shown on information screens in the Register application. |
| | Note: If an item has been automatically added to the system by a vendor, a description beginning with "AUTO" displays in this field. Feel free to remove the "AUTO" and modify the description as needed. |
| Register Lookup Description | This field automatically populates for AcuSport items. The field may be left blank for Non-AcuSport items. |
| Auto Replenishment | Select Y (yes) to let the system automatically order the item to maintain inventory levels (as defined by the Min Level and Max Level values). Select N (no) to retain standard ordering procedures for this item. |
| | Note: The Auto Replenishment feature is available only to AcuSport Exchange retailers. |
| Min/Max Type | Select a min/max type (Suggested , Manual , or Automatic) to modify the product's Min/Max Type designation on the Inventory Level screen. |
| Current Min Level | Enter/edit a value to modify the product's Current Min value on the Inventory Level screen. |
| | If the item's inventory level drops below the minimum, the system can calculate the number of items needed to restock the item to the Max Level value. For example, after a big sale, an item having a Min Level of 3 and a Max Level of 10 has only 2 items remaining in inventory. The system recognizes that inventory is below the minimum level and calculates that 8 (10-2) need to be ordered to bring the item inventory to the maximum level. |
| | Note: If an item's Min Level is set to 0, the Auto Replenishment feature will not order it. |
| | If Auto Replenishment is activated for the item, the system automatically recognizes these shortages and orders items accordingly. |
| | Min/Max calculations are also used to generate suggested ordering quantities when manually creating a vendor-specific purchase order. Refer to <u>Create a Vendor Purchase Order (page 33)</u> for more information. |
| Current Max Level | Enter/edit a value to modify the product's Current Max value on the Inventory Level screen. |

| | The field displays the unadjustic Quanageted Min value as the sum as the |
|---------------------|--|
| Suggested Min Level | The field displays the product's Suggested Min value as shown on the |
| | Inventory Level screen. |
| Suggested Max Level | The field displays the product's Suggested Max value as shown on the |
| | Inventory Level screen. |
| ID Age | Enter the minimum age (in years) a customer must be to purchase the |
| | product. (If the product has no age requirement, leave the field blank.) Refer |
| | to Bulk Edit a Group of Products (page 12) for information on setting this |
| | value for an entire group of products (i.e., firearms, ammunition, etc.). |
| Retail Price | Enter/edit the standard price for the item as needed. |
| | Note: If no price is entered, the item will ring up for \$0.00 in the Register |
| | application. |
| Last Cost | Edit the last cost for the item as needed. |
| | Note: If the item is a firearm, this field may not be edited. |
| Avg Cost | Edit the average cost for the item as needed. |
| | Note: If the item is a firearm, this field may not be edited. |
| QoH | The field displays the product's quantity on hand. |
| Adjust QoH | Edit the quantity on hand for the item as needed. |
| | Note: The Adjust QoH field should not be used with firearms or serialized nonfirearm items. |
| | Note: If an item's QoH is a negative number, the Auto Replenishment feature will not order it. |
| On Order | The field displays the quantity of the product that is on order. |
| Excluded On Order | The field displays the quantity of the product that is on order but is not included in QoH calculations. |
| Committed | The field displays the quantity of the product that has been committed for use outside of inventory (i.e., reserved for a customer, designated a rental item, etc.). |

5. Complete the **Product Tax Info** section to apply tax types to the item:

1. Select the appropriate tax for the item from the drop-down field.

Note: If the required tax type is not available, complete <u>Manage Tax Types</u> to create it.

- 2. Click the Add Product Tax button to display the selected tax in the list.
- 3. Repeat as needed to add additional taxes.
- 6. Complete the **Product Attribute Descriptor** section:
 - 1. Select an attribute from the first Add/Edit Attribute Descriptor drop-down field.
 - 2. Select a descriptor from the second Add/Edit Attribute Descriptor drop-down field.
 - 3. Click the **Update A/D** button to display the selected attribute/descriptor combination in the list.
 - 4. Repeat as needed to add additional attribute/descriptor combinations.

Note: A descriptor must be selected for each mandatory attribute. Refer to <u>Manage Mandatory</u> <u>Attributes</u> for more information.

- 7. Complete the **Product Image** section:
 - To add an image of the product to the Quick Picks screen,
 - 1. Click the **Select Image** button under the **Quick Pick Image** field to display an **Open** window.
 - 2. Browse to the desired location and double-click the appropriate file (.png or .jpg format) to display it in the **Quick Pick Image** field.
 - To add an image of the product to the Register Lookup screen,
 - 1. Click the **Select Image** button under the **Register Lookup Image** field to display an **Open** window.
 - 2. Browse to the desired location and double-click the appropriate file (.png or .jpg format) to display it in the **Register Lookup Image** field.
- 8. Complete the Web Info section:
 - 1. Check the **Is Web** checkbox to permit the product information to be available through the web portal. (Uncheck the box to remove this permission for the product.)
 - 2. If appropriate, enter the product's web-specific price in the **Web Price** field.
- 9. Complete the **Product Price Info** section:
 - 1. Select a price type from the drop-down (first) field.

Note: If the required price type is not available, refer to Manage Price Types to create it.

- 2. Enter a price in the second field.
- 3. Click the Add/Update Product Price button to display the price in the list.
- 4. Repeat as needed to add additional price types.

10. If desired, click the **Vendor Product** tab to display it and complete any of the following procedures:

Note: This tab is disabled when a new product is being created (i.e., added, cloned) or received.

| Product Edit | Vendor Product | Sales Analysis | |
|------------------|---------------------------|------------------------|--|
| | | Vend | dor Product Detail |
| | | Disable Vendor Pr | ADD DELETE Oduct. Details Pop-up for this product. UPC: Description: |
| 🖉 Vendor 😘 Vendo | r Part # 😙 Catalog Cost 🕉 | Last Received % Last O | rdered % Vendor Priority % Sell Pack % |
| | | | ance Submit |
| | | | |

Add a Vendor Product Detail Record for this UPC

1. Click the **Add** button to display the UPC's **Vendor Product Detail** window.

| Vendor | Product Detail | |
|---------------------|--|--|
| Glove | es, men's large | |
| Vendor | Genuine Distribution, Inc. | |
| Vendor Part # | ! | |
| Catalog Cost | | |
| Vendor Priority | 1 | |
| Sell Pack | 1 | |
| Do not show the Ven | dor Product Detail screen for this UPC | |
| | Cancel Submit | |

2. Enter/edit the information in the fields:

| | <u> </u> | Entor, out ti | |
|---|----------|----------------------------------|--|
| | | Vendor | Select a vendor from the drop-down. |
| | | Vendor Part # | Enter the vendor's part number for the product. |
| | | Catalog Cost | Enter the product's cost from the vendor's catalog. |
| | | Vendor Priority | Select the vendor's relative rank (1-5) among possible vendors of this product from the drop-down. |
| | | Sell Pack | Enter the minimum number (generally 1) of the product that can be purchased. |
| | 3. | Click the Su the product. | bmit button to create a vendor part number for |
| Delete a Vendor Product Detail Record for this UPC | | Check a Ve it. | ndor Product Detail record's checkbox to select |
| | 2. | Click the De window. | elete button to display a deletion confirmation |
| | 3. | Click the Ok record from | (button to close the window and remove the the screen. |
| Control the Behavior of this UPC's Vendor | | | e Disable Vendor Product Details Pop-up for ckbox as desired: |
| Product Detail Window | • | Check the ch future. | neckbox to prevent the window from displaying in the |
| | • | Uncheck the | checkbox to allow the window to display in the future. |
| | | | |

11. If desired, click the **Sales Analysis** tab to display it and complete any of the following procedures:



| Display Case UPC or Unit UPC Data | If the tab displays a Case UPC field, click the field to display the Sales Analysis tab for the associated case UPC. If the tab displays a Unit UPC field, click the field to display the Sales Analysis tab for the associated unit UPC. |
|--------------------------------------|--|
| Adjust Lead Time | Enter/edit the value in the Lead Time (Days) field to display its effect on calculations. |
| | Note: This adjustment is only temporary. To change the value permanently, modify the value of the Lead Time Days field on the vendor's Vendor Information for screen. Refer to Set Up and Maintain a Vendor Record for more information. |
| Modify Min/Max Levels | Enter/edit the value in the MIN field to update the product's Current Min value on the Inventory Level screen. Enter/edit the value in the MAX field to update the product's Current Max value on the Inventory Level screen. |

12. Click the **Submit** button to add/update the product on the **Product Maintenance** screen.

13. Click the tab's **Close** button to close the screen.

- 1. Navigate to the Case Quantity screen.
 - 1. Log In to the Data Center Application to display the Data Center ribbon menu.



2. Select **Receiving > Case Quantity** from the main menu to display the **Case Quantity** screen.

| All Cancer de Marcel Sancel Sance Sancer de Marcel Nager Sance Nager S | Anis - Data C | enter (Emple | oyee: Super l | User) 16091 | 3 | | | | | | | | | | | | | | - | o x |
|---|------------------|--------------|---------------|-------------|------------|-------------|------------|---------------|--------------|---------------------|--------------------|---------------|-----------|-----------------|----------|-----------------------|-------------|--------|-------------|--------|
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| Case UPC | 100 | 12 | - | 0 | 12 | 1 | | | | | | | | | | | | | | |
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| Case Quantity | | recently | | Returns. | History | By hen | | | | | | | | | | | | | | |
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- 2. Complete one of the following procedures to identify the case UPC (typically a case or multi-pack item):
 - Scan or enter the appropriate UPC in the $\ensuremath{\text{Case UPC}}$ field and press the $\ensuremath{\text{Enter}}$ key.
 - Click the Search button beside the Case UPC field to display the Product Search window and <u>Select a</u>
 <u>Product</u> to identify the case UPC.

Note: If the case UPC does not exist in the database, refer to <u>Manage Product Information</u> for information on adding the case UPC to the product database. Be sure to check the **Is Stock Item** checkbox and set the price according to the contents of the case UPC.

- 3. Complete one of the following procedures to identify the unit UPC (typically a single item):
 - Scan or enter the appropriate UPC in the **Unit UPC** field and press the **Enter** key.
 - Click the **Search** button beside the **Unit UPC** field to display the **Product Search** window and <u>Select a</u> Product to identify the unit UPC.
- 4. Enter the number of units per case in the Units per Case field.
- 5. Click the **Submit** button to display a quantity conversion confirmation window.

Note: Because this procedure can modify the unit UPC's **QoH**, a physical count to confirm adjusted values is recommended. Refer to <u>Perform a Physical Inventory Count for Non-Firearm Items</u> for more information.

- 6. Click the **OK** button to add the case UPC to the **Case Quantity** screen.
- 7. Click the tab's **Close** button to close the screen.

Delete a Case Quantity

Complete the following procedure to delete a case quantity.

Note: A case quantity may not be deleted if an item associated with it is included in a physical inventory stocktaking count group.

1. Navigate to the Case Quantity screen.

1. Log In to the Data Center Application to display the Data Center ribbon menu.



2. Select **Receiving > Case Quantity** from the main menu to display the **Case Quantity** screen.

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- 2. Click a case quantity's **Delete** button to display a deletion confirmation window.
- 3. Click the **Yes** button to remove the case quantity from the screen.
- 4. Click the tab's **Close** button to close the screen.

Utilize Purchase Orders in the AXIS System

Complete the following procedures to utilize purchase orders to order and receive items within the AXIS system.

Note: Purchase orders should be utilized for ordering and receiving items from all vendors and manufacturers to ensure the AR module runs properly and accurately.

- 1. Review information on when to Exclude (Ignore) a Purchase Order (page 28).
- 2. Complete either of these procedures as needed to create a purchase order:
 - <u>Create a Purchase Order (page 29)</u> to build an order by selecting items and the vendor(s) from which they will be ordered.
 - Create a Vendor Purchase Order (page 33) to build an order for a specific vendor.
- 3. <u>Process a Pending Purchase Order (page 35)</u> to forward it to the selected vendor.
- 4. <u>Receive Inventory Items (page 37)</u> to receive Purchase Order items when they arrive.

Exclude (Ignore) a Purchase Order

If a purchase order contains items that should not be included in AR module calculations (such as special order items or items that are not scheduled to arrive for weeks or months), the purchase order can be excluded to prevent it from adversely affecting AR calculations. When a purchase order is excluded, the AR module ignores the quantities of items on that order and continues to order based on actual QOH values.

A purchase order can be excluded when it is processed (<u>Process a Pending Purchase Order (page 35)</u>) or when it is received (<u>Receive Inventory Items (page 37)</u>).

- 1. Navigate to the Create Purchase Orders screen.
 - 1. Log In to the Data Center Application to display the Data Center ribbon menu.



2. Select **Purchasing > Create Purchase Orders** from the main menu to display the **Create Purchase Orders** screen.

| Add New Vendor Vendor Create | Purchase Create Vendor Pending Purchase Orders Purchase Orders | rchase Special Orders Sale Report and Reports | Sonders Sales Order Quotes History Sales Orders | | | | | | | | | |
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2. Select onscreen options to determine which products are displayed on the screen:

Filter by Active Status:

Check the **Click to show inactive products** checkbox to display both active and inactive products. (Uncheck the checkbox to display only active products.)

• Filter by Date:

Enter starting and ending dates in the **Number Sold Date Range** fields and press the **Enter** key to display only sales results from a specific time frame.

- Filter by Attribute/Descriptor Combination:
 - Enter a string of characters in the **Filter** field and press the **Enter** key to allow only Descriptors that contain the string to be available in the **Attributes** section.
 - Click an Attribute heading to display its list of available Descriptor options.
 - Check a **Descriptor** checkbox to add it to the **Selected item(s)** list. (Uncheck a **Descriptor** checkbox in the **Selected item(s)** list to remove it.)
 - Click the Clear button to remove all Attributes and Descriptors from the Selected item(s) list.
 - Click the Submit button to apply the filters in the Selected item(s) list to the main screen.
- Sort and Filter Reporting Screen Data.
- 3. Check a product's checkbox to select it. (Repeat steps as needed to display and select additional products. Click the **Clear selected products** button to deselect all products.)

- 4. If desired, check the **Display only selected products** checkbox to display only selected items on the screen.
- 5. Click the Next button to display the Create Purchase Orders (Enter the Vendor, Order Qty and Estimated Cost for each Product) screen.
- 6. Select the desired vendor from a product's **Order From Vendor** drop-down field. (Selecting a vendor for one product will autoselect that vendor for all products. Select a different vendor for other products as needed.)
- 7. Enter a quantity for each product in its **Order Qty** field.
- 8. Enter/edit the cost for each product in its **Estimated Cost** field as needed.
- 9. If needed, click a product's **Delete** button to remove it from the list.
- 10. Click the **Next** button to display the completed purchase order on the **Create Purchase Orders** screen.
- 11. Check/uncheck the purchase order's **Consider as On Order** checkbox to choose its effect on Auto Replenishment calculations.

Note: If the box is checked, the system includes the purchase order's quantities in the Auto Replenishment batch process. If the box is not checked, it does not.

12. Complete the following procedures as needed to continue working with the purchase order:

Edit the Purchase Order

- 1. Click the purchase order's **Edit** button to display the **Edit Purchase Order** window.
- 2. Edit Purchase Order information in the window as needed.

| Vendor | Select the vendor from the drop-down. |
|--------------|---|
| Ship To | Select the store from the drop-down. |
| Store | |
| PO Terms | Enter terms as needed. |
| Cancellation | Enter the cancellation date (mm/dd/yyyy) or |
| Date | Select a Date with the calendar button. |
| Ship Date | Note the autofilled ship date. If needed, enter |
| | a new ship date (mm/dd/yyyy) or <u>Select a</u> |
| | Date with the calendar button. |
| Ship Via | Enter the shipping method. |
| Shipping | Enter the shipping account number. |
| Account | |

- 3. Complete the following procedures as needed to manage products on the purchase order:
 - Add a Product:
 - 1. Click the Add Product button to display the Product Search screen.
 - <u>Select a Product</u> to add it to the purchase order. (Repeat as needed to add additional products to the purchase order.)
 - Edit a Product:
 - Complete the following procedures as needed:
 - Edit a product's quantity in its **Quantity** field.
 - Edit a product's cost in its **Cost** field.
 - Remove a Product:

Click a product's **Delete** button to remove it from the purchase order.

4. Click the **Finished** button to close the **Edit Purchase Order** window.

Process the Purchase Order

- 1. Click the purchase order's Process button to display the Purchase Order Preview window.
- 2. Edit Purchase Order Preview information in the window as needed

| | | needed. | |
|------------------------------|----|------------------------------------|--|
| | | Ship To | Select the appropriate store from the drop- |
| | | Store | down field. |
| | | PO Terms | Enter terms as needed. |
| | | Cancellation | Enter the cancellation date (mm/dd/yyyy) or |
| | | Date | Select a Date with the calendar button. |
| | | Ship Date | Enter the ship date (mm/dd/yyyy) or Select a |
| | | | Date with the calendar button. |
| | | Ship Via | Enter the shipping method. |
| | | Shipping Account | Enter the shipping account number. |
| | | Email Address | Select the desired vendor email address from the drop-down field. |
| | | Exclude On Order Qty | Check the checkbox to prevent the system from considering the ordered item(s) when performing Min/Max calculations for Auto Replenishment numbers or suggested quantities for purchase orders. |
| | | Bill To Name | Enter/edit the store name as needed. |
| | | Bill To | Enter/edit the first line of the street address as |
| | | Address 1 | needed. |
| | | Bill To | Enter/edit the second line of the street |
| | | Address 2 | address as needed. |
| | | Bill To City | Enter/edit the city as needed. |
| | | Bill To State | Enter/edit the two-letter abbreviation for the state as needed. |
| | | Bill To Zip | Enter/edit the ZIP code as needed. |
| | | Bill To Country | Enter/edit the country as needed. |
| | 3. | | hit button to close the Purchase Order ow. |
| Delete the Purchase Drder | 1. | Click the purch confirmation wi | ase order's Delete button to display a deletion indow. |
| | 2. | | utton to close the window and remove the r from the screen. |
| | | | |

13. Click the tab's **Close** button to close the screen.

Note: If the purchase order was not processed (and not deleted), the system relocates it to the Pending Purchase Orders screen. Refer to Manage a Pending Purchase Order for more information.

- 1. Navigate to the Vendor Purchase Order screen.
 - 1. Log In to the Data Center Application to display the Data Center ribbon menu.



2. Select **Purchasing > Create Vendor Purchase Order** from the main menu to display the **Vendor List** window in front of the **Vendor Purchase Order** screen.

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| TechAim Distributor Inc | |

- 3. If needed, enter all or part of the vendor's name in the **Name** field and press the **Enter** key to display all matching results.
- 4. Double-click a name to select the vendor and close the **Vendor List** window.

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2. Select onscreen options to determine which products are displayed on the screen:

• Filter by Vendor:

Check the **Show Products From All Vendors** checkbox to display products from all vendors. (Uncheck the checkbox to display only products from the selected vendor.)

• Filter by Date:

Enter starting and ending dates in the **Number Sold Date Range** fields and press the **Enter** key to display sales results from only a specific time frame.

- Filter by Attribute/Descriptor Combination:
 - Click an Attribute button and one of its associated **Descriptor** buttons to display only products with matching attribute/descriptor pairs. (Repeat as needed to further restrict the products displayed with additional attribute/descriptor pairs.)
 - Click the **Delete** button beside an attribute/descriptor pair to remove it as a restriction on displayed products.
 - Click the **Clear** button to remove all attribute/descriptor pairs to remove them as restrictions on displayed products.
- Sort and Filter Reporting Screen Data.
- 3. Select the desired product(s):
 - Check a product's checkbox to select it. (Repeat as needed to select additional products.)
 - Uncheck a product's checkbox to deselect it.
 - Click the Select All button to select all products on the screen.
 - Click the Clear Selected Products button to deselect all products.
- 4. Click the Add Products button to add the selected product(s) to the Purchase Order Details section.
- 5. Complete the following procedures as needed to enter a quantity for each product:
 - Enter a quantity in a product's **Quantity** field.
 - Click the **Fill to Suggested Order Qty** button to display a confirmation screen. Click the **Yes** button to close the screen and automatically populate the **Quantity** field(s).

Note: The system calculates the suggested order quantity for a product by subtracting its **QOH** from its **Max Level**. If the product's **QOH** is greater than its **Min Level**, the system does not calculate a suggested order quantity for the product.

- 6. Complete the following procedures as needed to assign the selected product(s) to a purchase order:
 - Create a New Purchase Order:

Click the Create PO button to display the Pending Purchase Orders screen.

- Amend an Existing Purchase Order:
 - 1. Select the desired existing purchase order from the drop-down field.
 - 2. Click the Add to Existing PO button to display the Pending Purchase Orders screen.
- 7. Continue working with the purchase order as appropriate.

Note: Refer to Manage a Pending Purchase Order for more information.

8. Click the tab's **Close** button to close the screen.

- 1. Navigate to the **Pending Purchase Orders** screen.
 - 1. Log In to the Data Center Application to display the **Data Center** ribbon menu.



2. Select **Purchasing > Pending Purchase Orders** from the main menu to display the **Pending Purchase Orders** screen.

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- 2. <u>Sort and Filter Reporting Screen Data</u> as needed to modify the list displayed on the screen.
- 3. Check/uncheck a purchase order's **Consider as On Order** checkbox to choose its effect on Auto Replenishment calculations.

Note: If the box is checked, the system includes the purchase order's quantities in the Auto Replenishment batch process. If the box is not checked, it does not.

4. Click a purchase order's **Process** button to display the **Purchase Order Preview** window.

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5. Edit Purchase Order Preview information in the window as needed.

| Ship To Store | Select the appropriate store from the drop-down field. |
|----------------------|--|
| PO Terms | Enter terms as needed. |
| Cancellation Date | Enter the cancellation date (mm/dd/yyyy) or Select a Date with the calendar |
| | button. |
| Ship Date | Enter the ship date (mm/dd/yyyy) or <u>Select a Date</u> with the calendar button. |
| Ship Via | Enter the shipping method. |
| Shipping Account | Enter the shipping account number. |
| Email Address | Select the desired vendor email address from the drop-down field. |
| Exclude On Order Qty | Check the checkbox to prevent the system from considering the ordered item |
| | (s) when performing Min/Max calculations for Auto Replenishment numbers |
| | or suggested quantities for purchase orders. |
| Bill To Name | Enter/edit the store name as needed. |
| Bill To Address 1 | Enter/edit the first line of the street address as needed. |
| Bill To Address 2 | Enter/edit the second line of the street address as needed. |
| Bill To City | Enter/edit the city as needed. |
| Bill To State | Enter/edit the two-letter abbreviation for the state as needed. |
| Bill To Zip | Enter/edit the ZIP code as needed. |
| Bill To Country | Enter/edit the country as needed. |
| | |

6. Click the tab's **Close** button to close the screen.

- 1. Navigate to the **Receiving** screen.
 - 1. Log In to the Data Center Application to display the Data Center ribbon menu.



2. Select **Receiving > Receiving** from the main menu to display the **Receiving** screen.

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| CARACINES | | | AcuSport | | None | | 150623-380-0 | | 06/23/2015 | _ | <u> 1</u> | Super User | User | |
| uutut | | | AcuSport | 0 | | and the second design of the s | 150623-379-0 | | 06/23/2015 | | | Super User | User | _ |
| AC. | - | - | AcuSport | 0 | None | | 141221-378-0 | | 12/21/2014 | | | Super User | User | |
| COJ-78K | | | AcuSport | 13 | None | | ACU_2812613-00 | 00002812613-00 | | | | System | BATCH | _ |
| kcuSport | | - 26 | AcuSport | 0 | None | and the second se | ACU_2812740-00 | 00002812740-00 | | FDXD | _ | System | BATCH | _ |
| OCD (Aulant) | | | AcuSport | 0 | None | | 141218-373-0 | | 12/18/2014 | | - | Super User | User | _ |
| ADCOR. | 1.12 | - 24 | AcuSport | 0 | None | | ACU_2800534-01 | 00002800534-01 | | | | System | BATCH | _ |
| ECOR INDUSTRIES INC. | | 35 | AcuSport | 0 | None | | ACU_2800534-00 | 00002800534-00 | | | | System | BATCH | _ |
| ADVANCED T | - et | - 36 | AcuSport | 0 | None | and the second se | ACU_2809772-00 | 00002809772-00 | and the second second | and the second designed of the second designe | S. 3 | System | BATCH | |
| REVANCED TACTICAL SOLUTIONS | | 25 | AcuSport | 0 | None | | ACU_2803726-00 | 00002803726-00 | Contraction of the local division of the loc | Contraction of the local division of the loc | | System | BATCH | _ |
| ADVENTURE OUTDOORS | 1 | - 26 | AcuSport | 10 | None | and the second s | ACU_2807044-00 | 00002807044-00 | | FDXD | 3 | System | BATCH | |
| EARO / HE | 4 | 25 | AcuSport | 13 | None | | 141217-356-0-BE-FDXD | - | 12/17/2014 | | - | Super User | User | _ |
| BUS TRADING INTERNOLS | 1 | - 26 | AcuSport | 0 | None | and the local division of the local division | 141217-356-0-BE-FDXG | | 12/17/2014 | - | | Super User | User | |
| ERO PRECISION INC. | | - 26 | AcuSport | 13 | None | and the second se | 141216-352-0-BE-FDXG | | 12/16/2014 | | - | Super User | User | |
| ERO PRECISION LLC | - R | - 26 | AcuSport | | None | 12/15/2014 | 141215-349-0-BE-FDXG | | 12/15/2014 | | | Super User | User | |
| OUBA | | | AcuSport | 6 | None | | 141215-349-0-BE-FDXD | | 12/15/2014 | | 2 | Super User | User | _ |
| 54 | | - 36 | ASdoruture | 0 | New | 02/23/2004 | ACU,2254525-03 | 00002254525-00 | 05/13/3054 | | | System | BATCH | |
| BA ADVANCED INTI, MARKETING | | - 26 | Aldonotuse | 6 | None | 42/27/2014 | 140227-500-0 | | 42/27/2014 | | _ | Andhua Gonet | Gonet | |
| AM/TECH | | - 36 | August1 | | Nove | | 140221-485-0 | | 63/21/2014 | | | Jators Torrighting | Torrykins | |
| RSOFT | | - 36 | KSdonotuse | 10 | None | 02/18/2014 | ACU_2257728-00 | 00002237728-00 | 62/18/2014 | FORD | | System | 647CH | _ |
| LOADE | 1 | - 26 | Alidomotuse | | None | 82/58/2654 | ACU_3217728-62 | 000002217728-02 | 10138/2014 | FOKD | | System | 8470H | |
| diamarke County Finants | (| * | A care database | | and the second second | Tara and there a | Francisco anno a | | and said from a | | | 10 | Ta. | |

2. Select onscreen options to determine which purchase orders are displayed on the screen:

Filter by Vendor:

Click a vendor name in the **Select Vendor** list to display only purchase orders for that vendor. (Click the **All** vendor name to display purchase orders for all vendors.)

Note: If needed, enter all or part of a vendor's name in the field to show only matching vendors in the **Select Vendor** list.

• Filter by Date:

Uncheck the **All Dates** checkbox, enter dates in the **From** and **To** fields, and click the **Refresh** button to display only purchase orders from that date range.

• Filter by Significant Number:

Select an option (**PO#**, **Scan UPC**, **Scan MFG #**, **Scan Item #**,**Scan Vendor Part #**) from the dropdown, enter all or part of the desired identifier in the text field, and click the **Search POs** button to display only purchase orders that contain the entered text.

• Sort and Filter Onscreen Data.

- 3. Complete either of the following procedures as appropriate to receive inventory items:
 - Receive Items with a Purchase Order:
 - 1. Click a purchase order's **Details** button to display the **Receiving Details** screen.
 - 2. Continue with the procedure below.
 - Receive Items with a Packing Slip:
 - 1. Click the appropriate vendor name in the **Select Vendor** list to activate the **Receive By Packing Slip** button.
 - 2. Click the **Receive By Packing Slip** button to display the **Receiving Details** screen.

Note: From this point forward, the receiving record for the packing slip will be considered a purchase order.

3. Continue with the procedure below.

| | | | | | | Details | Receiving | | | k |
|--------------------------|--|----------------------------|----------------------------|---|---|-------------|---|---------------------|--------------------------------|------------------|
| | | | | | | cuSport | Vendor: A | | | |
| | \$0.00 | - | Shipping: | _ | | | 12-0 Vendor Orde | PO #: 160115-38 | DC. | #: |
| Submit | \$0.00 | | Discount: | | | | Memo: | Standard Terms: | | 1/15/2016 |
| Print Receiv | \$0.00 | | Amount Due: | | | 0 | | Terms | | e: Select a date |
| \$0.00 N/A \$0.00 N/A | \$4.99 100.00% | \$0.00 | \$0.00 | 2 | 1 | 4 | S&W M&P 15-22 22LR 16.5" PURPLE CAMO S&W HANDCUFF KEY | 10041 | 022188004106 000000140212 | 0 4 |
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| | \$0.00 0.00% \$529.00 100.00% \$4.99 100.00% | \$0.00 \$0.00 \$0.00 | \$0.00 \$0.00 \$0.00 | 2 | 1 | 2 1 4 | Remington Optics Binoculars Saw Marp 15-22, 22LR 16.5" PURPLE CAMO Saw HANDCUFF KEY | | 98976543219876 022188004106 | 8 |

- 4. Complete the following procedures as appropriate to identify the product(s) being received:
 - Click a firearm's Receive Firearm button.
 - Click a serialized non-firearm's Receive Serialized Non-Firearm button.
 - Enter a product's UPC (or other identification number):
 - 1. Select a product identification option (Scan UPC, Scan MFG #, Scan Item #, or Scan Vendor Part #) from the drop-down field.
 - 2. Scan or enter the appropriate identifier (UPC, etc.) in the blank field and press the Enter key.

Note: If the identifier is not already in the database, the system displays an identifier not found message window featuring either a set of **Yes** and **No** buttons or a single **OK** button. Complete one of the following as appropriate:

- Click a **Yes** button to display a new **Product Edit** window for the entered identifier. (Refer to <u>Create and Maintain a Product (page 17)</u> for information on using this window.)
- Click a No button to close the window and use the Product Search function to locate the desired item.
- Click an **OK** button to close the window and use the **Product Search** function to locate the desired item.
- Select product(s) through the **Product Search** function:
 - 1. Click the **Product Search** button to display the **Product Search** window.
 - 2. Select the product(s) to be received.

Note: Multiple standard (non-serialized) products may be selected from the window. Although this screen allows for the selection of multiple serialized (firearm or non-firearm) products, the system will display a description window for only one of them. For this reason, RTG suggests selecting only one serialized product at a time through this feature. Refer to <u>Select a Product</u> for more information.

5. If the system displays a **Vendor Product Detail** window, <u>Complete a Vendor Product Detail Window</u> as appropriate.

6. The system displays information based on the type of product identified:

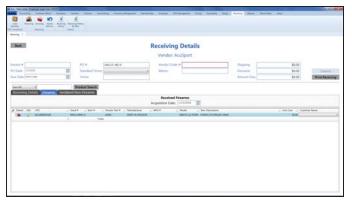
If a firearm was identified...

The system displays the Firearm Description window.

1. Describe a Firearm.

Note: To receive multiples of the same firearm in a single step, enter a serial number in the **Serial Number(s)** field and press the **Enter** key to create a line for the next serial number.

- 2. The product list displays the selected firearm and increases the value in its **Qty Received** field by the quantity of entered serial numbers.
- 3. Click the **Firearms** tab to display each unique firearm/serial number combination.



4. If needed, edit the date in the **Acquisition Date** field to reflect the proper date of receiving for the Bound Book(s).

If a serialized non-firearm product was identified...

The system displays the **Serialized Non-Firearm Description** window.

1. Describe a Serialized Non-Firearm Item.

Note: To receive multiples of the same item in a single step, enter a serial number in the **Serial Number(s)** field and press the **Enter** key to create a line for the next serial number.

- 2. The product list displays the selected serialized product and increases the value in its **Qty Received** field by the quantity of entered serial numbers.
- 3. Click the **Serialized Non-Firearms** tab to display each unique product/serial number combination.

| Back. | | | Receiving Details Vendor: AcuSport | | | |
|--------------------|------------|--------------|---------------------------------------|------------|--------|-----------------|
| | PO.# | 000113-002-0 | Vendor Criber # | Pitering | \$2.00 | |
| Date: Date: | Stanlard 1 | farms | a Marrie | Decount | \$1.00 | School |
| on Date into a see | III Irres | | | Always Due | \$100 | Print Receiving |
| | | Tonis | | | | |
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If a standard (non-serialized)
product was identified...The system displays the selected product in the product list and
increases the value in its Qty Received field by one. (Refer to Edit a
Product's Quantity for information on manually editing this field.)

7. Complete the following procedures as needed to update received products:

| Edit a Product's Quantity | Locate the product in the product list. Edit the number in the product's Qty Received field. Continue with the procedure below. |
|---|--|
| Edit a Product's Information | Click a product's Edit button to display its Product Edit window. |
| | Product Edit Vendor Product Sales Analysis |
| | Product Info Product Attribute Descriptor Active: E Is Firearm: E Sofialized Non-Firearm: E Is Stock Item: E Product UPC: 99999999001 Item Activitie: Item Number: MANUFACTURER TEST |
| | Manufacturer Rel #: Receipt Description: Gloves Item Description: Gloves, men's large Add/Edit Attribute Descriptor Updiate A/D |
| | Register Lookup Description: Price: \$0.00 Auto Order: n Price: \$0.00 Min_Max Type: loggened: Last Cost: \$1.85 Quick Pick Image: Image: Min Leveb: 3 0 Qott 53 |
| | Max Level: 24 0 Adjust Qott O Older: 2 Excluded On Order: 0 Product Tax Info Del Tax Type Description Tax Rate Add Product Tax Add Product Price Info Del Type Description Price |
| | Delete Product Cancel Submit |
| | 2. Edit product information as needed. |
| | Note: Refer to <u>Manage Product Information</u> for more information on modifying information in this window. |
| | Click the Submit button to close the Product Edit window. Continue with the procedure below. |
| Edit a Firearm's Serial Number or Description | Locate the firearm on the Firearms tab. Click the firearm 's Edit button to display its Firearm Description window. |
| | Edit the serial number in the Serial Number(s) field as needed. |
| | Note: Refer to <u>Describe a Firearm</u> for information on changing values in other fields. |
| | 4. Click the Submit button to close the Firearm Description window. |
| | 5. Continue with the procedure below. |

Edit a Serialized Non-Firearm Product's Serial Number

- 1. Locate the serialized non-firearm product on the **Serialized Non-Firearms** tab.
- 2. Click the product's **Edit** button to display its **Serialized Non-Firearm Description** window.

| | Serialized Non-Firearm Desc | ription | |
|------------------|-----------------------------|---------|--------|
| UPC: | 989765432198765432 | | |
| Description: | Remington Optics Binoculars | | |
| Serial Number(s) | | | |
| | | | |
| | | Cancel | Submit |
| | | | |

- 3. Edit the serial number in the **Serial Number(s)** field as needed.
- 4. Click the **Submit** button to close the **Serialized Non-Firearm Description** window.
- 5. Continue with the procedure below.
- 8. Enter/edit Received Values as needed for each item.

Note: A user must be granted the ProductCost permission to view/use some of these fields.

Note: If an item is a firearm or a serialized non-firearm product, some of these fields may not be edited directly.

| • | |
|--------------|--|
| Qty Ordered | Enter the quantity of the item ordered. |
| Qty Received | Enter the quantity of the item received. |
| Unit Cost | Enter the actual unit cost for the item. |
| Retail Price | Enter the retail price for the item to automatically calculate and display the GP % value. |
| | Note: GP% = (Retail Price - Unit Cost) / Retail Price |
| GP % | Enter the gross profit percentage for the item to automatically calculate and display the Retail Price value. |
| | Note: Retail Price = Unit Cost / (1-GP%) |
| Ext. Cost | The system automatically calculates this amount by multiplying the Qty Received by the Unit Cost . |

9. Enter/edit Purchase Order information in the window as needed.

Note: Required fields and settings are displayed with red borders.

| | a settings are displayed with red borders. |
|----------------|--|
| Invoice # | Enter the invoice number. |
| | Note: If an invoice number is not available, enter a placeholder number (e.g., employee initials and the received date/time) and revise it at a later date. |
| PO Date | Enter the purchase order date (mm/dd/yyyy) or <u>Select a Date</u> with the calendar button. |
| Due Date | Enter the date payment is due to the vendor (mm/dd/yyyy) or <u>Select a Date</u> with the calendar button. |
| PO# | Enter the purchase order number. |
| Standard Terms | Select the appropriate terms option from the drop-down field. |

| Terms | Enter additional or non-standard terms. |
|----------------|---|
| Vendor Order # | Enter the vendor's order number. |
| Memo | Enter notes as needed. |
| Shipping | Enter shipping charges (e.g., freight, fuel surcharge, fees, etc.) included on the invoice. |
| Discount | Enter the discount amount for the entire invoice. (Do not include discounts for individual items as these are entered in each item's Discount % or Amount cell.) |
| Amount Due | Enter the total amount due for the invoice. To calculate this amount, add the sum of all Ext. Cost fields to the amount in the Shipping field and subtract the amount in the Discount field. |

10. Click the **Submit** button to display the **Label Printing** window.



- 11. <u>Complete the Label Printing Window</u> to print labels and/or a receiving details report as needed.
- 12. The system sends the purchase order to the **Receiving History** screen and generates a corresponding invoice on the **Invoicing** screen.
- 13. Click the tab's **Close** button to close the screen.

Note: When appropriate, complete the <u>Manage Invoices</u> procedure to process the invoice for the purchase order.

If needed, complete the <u>View and Use the Receiving History Record</u> procedure to review the purchase order.

Complete the following procedure to generate and view a record of items that have fallen below their minimum inventory level.

- 1. Navigate to the Vendor Reorder Report screen.
 - 1. Log In to the Data Center Application to display the Data Center ribbon menu.



2. Select **Reports > Vendor Reorder Report** from the main menu to display the **Vendor Reorder Report** screen..

| Anis - Data Cente | | | | | | | | | | | | | | | | | - 0 | X |
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| Report | Report | Transactions | Report | Report | Review - | Report Re | port Report Repo | t Nem Report | List Sales Report | Report | Report Repo | rts - Keports - | Reports - | | | | | |
| | | | | | | | Reporta | | | | | | | Dashboard | | | | |
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2. Select a vendor from the **Vendor** drop-down to display a list of the vendor's items with inventory values below their minimum levels. (Select the **Select All** option to view items from all vendors.)

Note: An item with a **QoH** that is lower than its minimum level will <u>not</u> display if either of the following is true:

- The item is not associated with the selected vendor(s).
- The item's on-order quantity is sufficient to bring its inventory value up to or above its maximum value.
- 3. Complete the following procedures as needed to modify the list displayed on the screen:
 - Use the scroll bar(s).
 - Sort and Filter Reporting Screen Data.
- 4. Click the tab's **Close** button to close the screen.

The **Inventory Level** screen allows the user to control the method by which an item's min/max levels are set and adjusted.

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1. Log In to the Data Center Application to display the Data Center ribbon menu.



2. Select **Inventory Management > Inventory Level** from the main menu to display the **Inventory Level** window.

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 $3. \ \ Complete the desired procedure(s) with onscreen features.$

| Vendor drop-down | Select a vendor from the Vendor drop-down to display only items associated with that vendor. (Click the Select All vendor name to display items from all vendors. |
|--|--|
| Min/Max Type drop- | Select an option from the Min/Max Type drop-down to display items that |
| down | utilize the corresponding method to set min/max levels. |
| Submit button | Click the Submit button to activate modifications. |
| Grid Layout Controls | Complete the following to save a layout: |
| | Select the desired combination of filters, sorts, groupings, etc. Enter a name for the layout in the Default Grid Layout field. |
| | Note: Some screens allow the user to modify and save changes to the default (Default Grid Layout) layout, though most do not. |
| | 3. Click the Save button beside the field to save the current layout under the name in the field. |
| | Select the desired layout from the Default Grid Layout drop-down to recall that layout. |
| | Note: Select the Default Grid Layout option to recall the default layout. |
| Sort and Filter Reporting Screen Data | containing that term. |
| | Click the Clear Search (X) button to undo the Search field filter. |
| | Click the Clear All button to undo all filters. |
| | Click the Toggle Filters button to display filter controls at the tops of the columns. (Click again to hide the controls.) |
| | Click the Export to Excel (Table) button to export the data to an Excel file. |
| | Click the Column Chooser button to hide or display individual columns. |
| Details button | Click an item's Details button to display its Sales Analysis tab (page 63) in |
| | the Product Edit window (page 53). |
| Alert column and highlights | Note the Alert column and color-coded highlighting to identify items with Current min/max values that may need attention. |
| | A blank Alert setting with no highlighting indicates both of the item's Current values match the corresponding Suggested values. |
| | • A "Medium" Alert setting with yellow highlighting indicates one or both of the item's Current values are relatively close to (between half and 1.5 times) their corresponding Suggested values. |
| | • A "High" Alert setting with red highlighting indicates one or both of the item's Current values are relatively distant from (either less than half or greater than 1.5 times) their corresponding Suggested values. |
| | • An "Insufficient Data" Alert setting with no highlighting indicates the system does not have enough data to generate Suggested values for the item. |
| Adjust to Suggested | Check an item's Adjust to Suggested checkbox (and click the Submit |
| checkbox | button) to update its Current Min and Current Max cells to match its |
| | Suggested Min and Suggested Max cells. |
| Auto Replenishment | Check an item's Auto Replenishment checkbox (and click the Submit |
| checkbox | button) to mark it for Automatic Replenishment. (Uncheck the checkbox to |

| remove the item from Automatic Replenishment.) | | | | | |
|---|--|--|--|--|--|
| Note: The Auto Replenishment feature is available only to AcuSport Exchange retailers. | | | | | |
| Click an item's Suggested , Manual , or Automatic radio button (and click the Submit button) to set its min/max type. | | | | | |

- Manage a Product's Min/Max Levels
- View and Update a Product's Sales Analysis
- Set a Product's Min/Max Levels to Suggested Values
- Change a Product's Min/Max Type

The Min/Max Import screen allows the user to import min/max data into the system.

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1. Log In to the Data Center Application to display the Data Center ribbon menu.



2. Select Inventory Management > Min/Max Import from the main menu to display the Min/Max Import window.

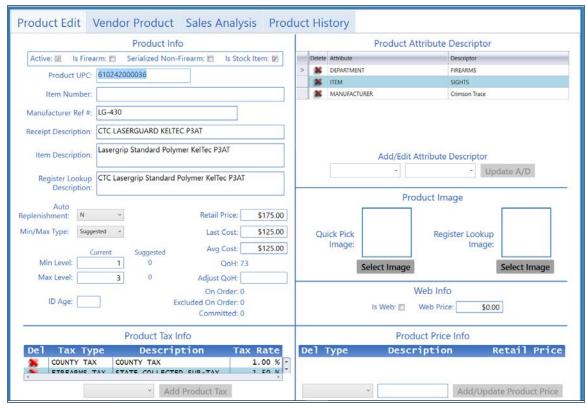
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 $3. \ \ Complete the desired procedure(s) with onscreen features.$

| Grid Layout Controls | Complete the following to save a layout: |
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| | Select the desired combination of filters, sorts, groupings, etc. Enter a name for the layout in the Default Grid Layout field. |
| | Note: Some screens allow the user to modify and save changes to the default (Default Grid Layout) layout, though most do not. |
| | 3. Click the Save button beside the field to save the current layout under the name in the field. |
| | Select the desired layout from the Default Grid Layout drop-down to recall that layout. |
| | Note: Select the Default Grid Layout option to recall the default layout. |
| Sort and Filter Reporting Screen Data | Enter a term (string of characters) in the Search field to display only records containing that term. Click the Clear Search (X) button to undo the Search field filter. Click the Clear All button to undo all filters. Click the Toggle Filters button to display filter controls at the tops of the columns. (Click again to hide the controls.) Click the Export to Excel (Table) button to export the data to an Excel file. Click the Import from Excel button to import data from a formatted Excel file. Click the Column Chooser button to hide or display individual columns. |
| Import Min/Max Leve | |
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Import Min/Max Levels

The **Product Edit** window allows the user to define a product's characteristics, control inventory and ordering levels; set receiving options; and review and utilize sales analytics.



Use the Product Edit window

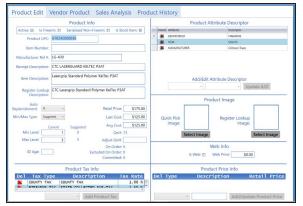
1. Log In to the Data Center Application to display the Data Center ribbon menu.



2. Select **Inventory Management > Product Maintenance** from the main menu to display the **Product Maintenance** screen.

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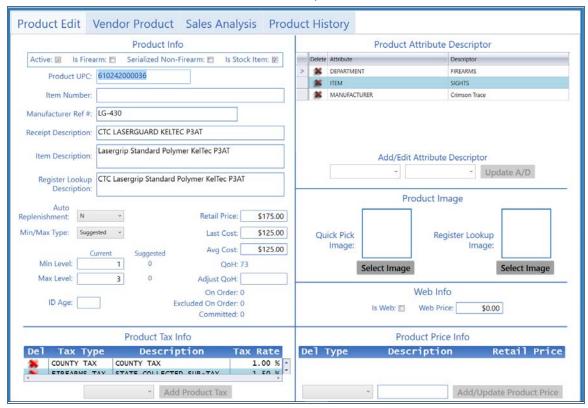
- 3. Complete one of the following procedures as appropriate to display the **Product Edit** window.
 - Click the Add Product button to create a new product record.
 - Check a product's checkbox and click the **Clone Product** button to create a new product record based on the selected product.
 - Check a product's checkbox and click the Edit Product button to modify an existing product record.



4. Complete the desired procedure(s) on the appropriate tab(s).

Note: If necessary, click a tab to display its contents.

- The Product Edit tab (page 55) allows the user to define a product's characteristics and values.
- The <u>Vendor Product tab (page 60)</u> allows the user to manage a product's vendor product detail record and control the behavior of its Vendor Product Detail window.
- The <u>Sales Analysis tab (page 63)</u> allows the user to review an item's sales data and set its min/max values.
- The Product History tab (page 67) allows the user to review an item's inventory and transactional history.



The Product Edit tab allows the user to define a product's characteristics and values.

Use the Product Edit tab

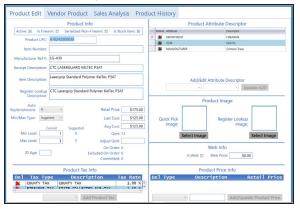
1. Log In to the Data Center Application to display the **Data Center** ribbon menu.



2. Select **Inventory Management > Product Maintenance** from the main menu to display the **Product Maintenance** screen.

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- 3. Complete one of the following procedures as appropriate to display the **Product Edit** window.
 - Click the Add Product button to create a new product record.
 - Check a product's checkbox and click the **Clone Product** button to create a new product record based on the selected product.
 - Check a product's checkbox and click the Edit Product button to modify an existing product record.



4. If needed, click the **Product Edit** tab to display the **Product Edit** tab.

| | Prod | luct Info | Product | Attribute Descriptor |
|---------------------------------|------------------|--------------------------------------|------------------|----------------------|
| Active: 🖉 Is Fire | arm: 🗉 Serializ | ed Non-Firearm: 🗖 Is Stock Item: 🕅 | Delete Attribute | Descriptor |
| Draduct LIDC | 610242000036 | | > 🗱 DEPARTMENT | FIREARMS |
| Product OPC: | 010242000050 | | 😹 ITEM | SIGHTS |
| Item Number: | | | MANUFACTURER | Crimson Trace |
| Manufacturer Ref #: | LG-430 | | | |
| Receipt Description: | CTC LASERGUAR | RD KELTEC P3AT | | |
| Item Description: | Lasergrip Standa | ard Polymer KelTec P3AT | Add/Edit | Attribute Descriptor |
| Register Lookup Description: | CTC Lasergrip St | tandard Polymer KelTec P3AT | | Update A/D |
| Auto | - | | Pr | oduct Image |
| Replenishment: N | ~ | Retail Price: \$175.00 | | |
| Min/Max Type: Sugg | ested ~ | Last Cost: \$125.00 | Ouick Pick | Register Lookup |
| | urrent Sugg | Avg Cost: \$125.00 | Image: | Image: |
| Min Level: | 1 0 | | Select Image | Select Image |
| Max Level: | 3 0 | Adjust QoH: | Select mage | Select mage |
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| ID Age: | | Excluded On Order: 0 Committed: 0 | Is Web: 🗖 | Web Price: \$0.00 |
| | Produc | ct Tax Info | Pro | duct Price Info |
| Del Tax Ty | pe De | scription Tax Rate | Del Type Desc | ription Retail Price |
| COUNTY TA | | AX 1.00 % | | |
| 4 | | * | | 122 |

5. Complete the desired procedure(s) with onscreen features.

| Product Info section | Complete the appropriate fields and settings:. |
|--------------------------------|---|
| Note: Required fields an | d settings are displayed with red borders. |
| Active | Check the checkbox to mark the item as active and make it available for search and selection in the Register application. |
| ls Firearm | Check the checkbox to mark the item as a firearm. |
| Serialized Non- Firearm | Check the checkbox to mark the item as a serial non-firearm and require a serial number to receive or sell it. |
| Is Stock Item | Check the checkbox to mark the item as a physical item that can be inventoried and sold. |
| Product UPC | Enter the product's UPC code. |
| Manufacturer Ref # | Enter the manufacturer's stock number for the item. |
| Receipt Description | Enter a concise item description (30 characters maximum) to be shown on labels and customer receipts. |
| Item Description | Enter a lengthy item description (80 characters maximum) to be shown on information screens in the Register application. |
| | Note: If an item has been automatically added to the system by a vendor, a description beginning with "AUTO" displays in this field. Feel free to remove the "AUTO" and modify the description as needed. |
| Register Lookup Description | This field automatically populates for AcuSport items. The field may be left blank for Non-AcuSport items. |
| Auto Replenishment | Select Y (yes) to let the system automatically order the item to maintain inventory levels (as defined by the Min Level and Max Level values). Select N (no) to retain standard ordering procedures for this item. |
| | Note: The Auto Replenishment feature is available only to AcuSport Exchange retailers. |
| Min/Max Type | Select a min/max type (Suggested , Manual , or Automatic) to modify the product's Min/Max Type designation on the Inventory Level screen. |
| Current Min Level | Enter/edit a value to modify the product's Current Min value on the Inventory Level screen. |
| | If the item's inventory level drops below the minimum, the system can calculate the number of items needed to restock the item to the Max Level value. For example, after a big sale, an item having a Min Level of 3 and a Max Level of 10 has only 2 items remaining in inventory. The system recognizes that inventory is below the minimum level and calculates that 8 (10-2) need to be ordered to bring the item inventory to the maximum level. |
| | Note: If an item's Min Level is set to 0, the Auto Replenishment feature will not order it. |
| | If Auto Replenishment is activated for the item, the system automatically recognizes these shortages and orders items accordingly. |
| | Min/Max calculations are also used to generate suggested ordering quantities when manually creating a vendor-specific purchase order. Refer to <u>Create a Vendor Purchase Order (page 33)</u> for more information. |
| Current Max Level | Enter/edit a value to modify the product's Current Max value on the |

| | Inventory Level screen. |
|---|--|
| Suggested Min Level | The field displays the product's Suggested Min value as shown on the Inventory Level screen. |
| Suggested Max Level | The field displays the product's Suggested Max value as shown on the Inventory Level screen. |
| ID Age | Enter the minimum age (in years) a customer must be to purchase the product. (If the product has no age requirement, leave the field blank.) Refer to <u>Bulk Edit a Group of Products (page 12)</u> for information on setting this value for an entire group of products (i.e., firearms, ammunition, etc.). |
| Retail Price | Enter/edit the standard price for the item as needed. |
| | Note: If no price is entered, the item will ring up for \$0.00 in the Register application. |
| Last Cost | Edit the last cost for the item as needed. |
| | Note: If the item is a firearm, this field may not be edited. |
| Avg Cost | Edit the average cost for the item as needed. |
| | Note: If the item is a firearm, this field may not be edited. |
| QoH | The field displays the product's quantity on hand. |
| Adjust QoH | Edit the quantity on hand for the item as needed. |
| | Note: The Adjust QoH field should not be used with firearms or serialized nonfirearm items. |
| | Note: If an item's QoH is a negative number, the Auto Replenishment feature will not order it. |
| On Order | The field displays the quantity of the product that is on order. |
| Excluded On Order | The field displays the quantity of the product that is on order but is not included in QoH calculations. |
| Committed | The field displays the quantity of the product that has been committed for use outside of inventory (i.e., reserved for a customer, designated a rental item, etc.). |
| Product Tax Info section | Select the appropriate tax for the item from the drop-down field and click the Add Product Tax button to add a tax. |
| Product Attribute Descriptor section | Select an attribute from the first Add/Edit Attribute Descriptor drop-down field, select a descriptor from the second Add/Edit Attribute Descriptor drop-down field, and click the Update A/D button to add the selected attribute/descriptor combination to the item. |
| Product Image section | Click the Select Image button under the Quick Pick Image (or Register Lookup Image) field and select an image to accompany the item on the Quick Picks (or Register Lookup) screen. |
| Web Info section | Check the Is Web checkbox to mark the item a web portal product and enter its web-specific price (if appropriate) in the Web Price field. (Uncheck the checkbox to remove the web portal designation.) |
| Product Price Info | Select a price type from the drop-down field, enter a price in the second field, |
| section | and click the Add/Update Product Price button to add the price to the item. |

• Create and Maintain a Product (page 17)

Vendor Product tab

The **Vendor Product** tab allows the user to manage a product's vendor product detail record and control the behavior of its <u>Vendor Product Detail window</u>.

| Product Edit | Vendor Product | Sales Analysis | | | | | | | | | | |
|--|--|----------------|--------------------|--|--|--|--|--|--|--|--|--|
| | | Ven | dor Product Detail | | | | | | | | | |
| | ADD DELETE Disable Vendor Product Details Pop-up for this product. UPC: Description: | | | | | | | | | | | |
| 😰 Vendor 🕉 Vendor Part # 🖏 Catalog Cost 🕉 Last Received 🖏 Last Ordered 🖏 Vendor Priority 🖏 Sell Pack 🖏 | | | | | | | | | | | | |
| | | 2 | ancel Submit | | | | | | | | | |
| | | | | | | | | | | | | |

1. Log In to the Data Center Application to display the Data Center ribbon menu.



2. Select **Inventory Management > Product Maintenance** from the main menu to display the **Product Maintenance** screen.

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| CRL | Product Maintenance | | | | | | | | | | | | | | ŝ |
| DOWNEDWEDT | | E Click to show inactive products | | | | | | | | | | | | | |
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- 3. Complete one of the following procedures as appropriate to display the **Product Edit** window.
 - Click the Add Product button to create a new product record.
 - Check a product's checkbox and click the **Clone Product** button to create a new product record based on the selected product.
 - Check a product's checkbox and click the Edit Product button to modify an existing product record.

| Product Edit | Vendor Product | Sales Analysis P | roduct H | listory | | | |
|---------------------------------|--------------------------|-----------------------------------|----------|----------------|----------------|-------------------------|-------------------|
| | Product Infe | 0 | | | Product Attrib | ute Descriptor | |
| Active: 🗵 Is Fire | arm: 🗈 Serialized Non-I | irearm: 📰 🛛 Is Stock Item: 🛛 | 0 | lete Attribute | | Descriptor | |
| Product UPC: | 610242000036 | | 2 1 | CEPARTME | NT | FIREARMS | |
| Item Number: | | | | MANUFACT | | SIGHTS Crimson Trace | |
| | | | | MANUTAL | IUNER | Crimson inace | |
| Manufacturer Ref #: | LG-430 | | | | | | |
| Receipt Description: | CTC LASERGUARD KELTE | C P3AT | | | | | |
| Item Description: | Lasergrip Standard Polyn | ner KelTec P3AT | | | Add/Edit Attri | oute Descriptor | |
| Register Lookup Description: | CTC Lasergrip Standard R | olymer KelTec P3AT | ī 🗆 | | - | | pdate A/D |
| Auto | | | - | | Produc | t Image | |
| Replenishment: N | * | Retail Price: \$175. | 00 | | | | |
| Min/Max Type: Sugg | pested ~ | Last Cost: \$125. | 00 | Quick Pick | | Register Lookup | |
| | Ourrent Suggested | Avg Cost: \$125 | 00 | Image: | | Image | |
| Min Level: | 1 0 | QoH: 73 | | | Select Image | | Select Image |
| Max Level: | 3 0 | Adjust QoH: | | | | | |
| ID Age: | 7 | On Order: 0 cluded On Order: 0 | | | Web | Info | |
| ib Age. | | Committed: 0 | | | Is Web: 🖾 🛛 We | o Price: \$0. | 00 |
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| COUNTY TA | | 1.00 | K . | | | | |
| | ~ Add | Product Tax | | | ¥ | Add/Upd | ate Product Price |

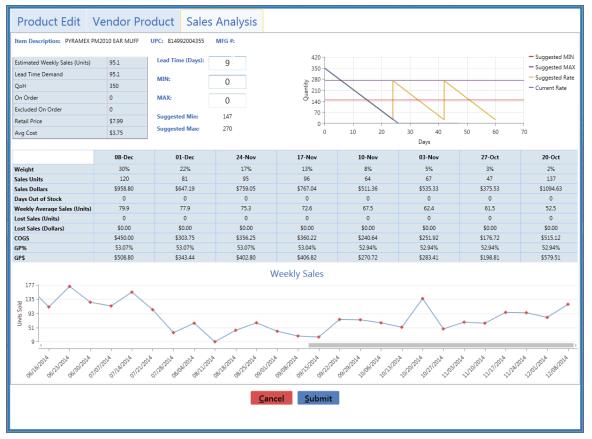
4. If needed, click the **Vendor Product** tab to display the **Vendor Product** tab.

| Product Edit | Vendor Product | Sales Analysis | |
|------------------|---------------------------|--------------------------|--|
| | | Ven | dor Product Detail |
| | | Disable Vendor Pr | ADD DELETE oduct Details Pop-up for this product. UPC: Description: |
| 🗗 Vendor 😘 Vendo | r Part # 🐃 Catalog Cost 🐃 | Last Received The Last O | rdered 🚯 Vendor Priority 🚯 Sell Pack 🚯 |
| | | | Submit |
| | | | |
| | | | |
| | | | |

5. Complete the desired procedure(s) with onscreen features.

| Product Details Pop- | Check the checkbox to prevent the UPC's Vendor Product Details window from displaying in the future. Uncheck the checkbox to allow the window to display in the future. |
|----------------------|--|
| | Click the Add button, populate the Vendor Product Detail window, and click the Submit button to create a vendor part number for the product |
| Delete button | Select a Vendor Product Detail and click the Delete button to remove the record. |

- Add a Vendor Product Detail Record for this UPC (page 23)
- Delete a Vendor Product Detail Record for this UPC (page 23)
- Control the Behavior of this UPC's Vendor Product Detail Window (page 23)



The Sales Analysis tab allows the user to review an item's sales data and set its min/max values.

Use the Sales Analysis tab

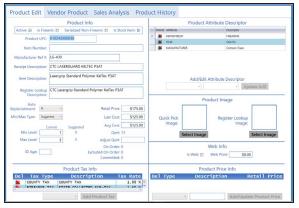
1. Log In to the Data Center Application to display the Data Center ribbon menu.



2. Select **Inventory Management > Product Maintenance** from the main menu to display the **Product Maintenance** screen.

| dual Mantenance I ter Attempt | | | P | roduct Maint | enance | | | 2/14 | s UPCs | 2410 | roduct (|
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| | A MATTER AND A | 110070 | Inspirit Mark AT 3 for Allison Halles | 1744 AP 1 9-40mm | OPICS & ACCESSIONED | UNIPOLE | 9099 | and the second | 81.00 | 00.00 | |
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| | 0.2 100 | \$ 279823-13 | LADROND 6.2% | Call Block & 27 June | And a | ia faecors | 144275 | 1.0 | | | - |
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| | 0 🖉 💷 | | Special Delectors | Special Date Non. | 1104 | 1004 | 100 | 10.00 | 810 | 10.00 | 1.0 |
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| | C) 🖉 Linkin. | | LINE . | LARCH | 10.04 | 1004 | 17246 | 10.00 | 8.00 | 81.00 | |
| | 0 / | Reador De | e. 0.0 | 104 | BUCKNING CARD | 1704 | EDGPUMA DAS | 80.00 | 81.01 | 81.00 | |
| | 00 | | Earl Date Traces in Million and | far Frankriss Seriel | And PERSON | HOMAS (2017) MAK | 17046 | 20.00 | 10.00 | | 1.0 |
| | | | | | | | | | | | |

- 3. Complete one of the following procedures as appropriate to display the **Product Edit** window.
 - Click the Add Product button to create a new product record.
 - Check a product's checkbox and click the **Clone Product** button to create a new product record based on the selected product.
 - Check a product's checkbox and click the Edit Product button to modify an existing product record.



4. If needed, click the Sales Analysis tab to display the Sales Analysis tab.

| Product Edit | Vendor Pro | oduct Sal | es Analysis | | | | | | | | | | |
|-------------------------------|------------|-------------------|-------------|---------------------|----------|----|-----|-----|------|-----|-----|-----|--|
| Item Description: UPC | : MFG #: | | | | | | | | | | | | |
| Estimated Weekly Sales (Units | ;) 0 | Lead Time (Days): | | | 1 | | | | | | | | Suggested MIN Suggested MAX |
| Lead Time Demand | N/A | MIN: | 0 | | ~ | | | | | | | | Suggested Rate |
| QoH | 0 | | | | Quantity | | | | | | | | - Current Rate |
| On Order Excluded On Order | 0 | MAX: | 0 | | ° | | | | | | | | |
| Retail Price | \$0.00 | Suggested Min: | N/A | | 0 | | | | | | | | |
| Avg Cost | \$0.00 | Suggested Max: | N/A | | 0 | 50 | 100 | 150 | 200 | 250 | 300 | 350 | 400 |
| | | | | | | | | | Days | | | | |
| | | | | Weekly No data t | o plot | | | | | | | | |
| | | | | <u>C</u> ancel | Submit | ŧ | | | | | | | |

5. Complete the desired procedure(s) with onscreen features.

| 1 | |
|---|--|
| Case UPC and Unit UPC fields | If the item is a unit UPC associated with a case UPC, the Case UPC field is displayed. The user may click the Case UPC field to display the case UPC's Sales Analysis tab. |
| | If the item is a case UPC associated with a unit UPC, the Unit UPC field is displayed. The user may click the Unit UPC field to display the unit UPC's Sales Analysis tab. |
| Calculation Data section | The Calculation Data section includes the Estimated Weekly Sales (Units), Lead Time Demand, QoH, On Order, Excluded On Order, Retail Price, and Avg Cost fields. Some of these fields may be edited on the Product Edit tab (page 55). |
| Lead Time (Days) field | The Lead Time (Days) field reflects the value displayed in the Lead Time Days field on the vendor's Vendor Information for screen. The user may temporarily adjust this value on this tab to display its effect on calculations, but it can only be permanently changed on the vendor's Vendor Information for screen. Refer to Set Up and Maintain a Vendor Record for more information. |
| MIN and MAX fields | The MIN and MAX fields reflect the item's current minimum and maximum values (respectively). They may be edited on this tab. |
| Suggested Min and Suggested Max fields | The Suggested Min and Suggested Max fields reflect the suggested minimum and maximum values (respectively). The system calculates these values according to the item's lead time, lead time demand, safety stock percentage, relative weekly weights, and estimated weekly sales. |
| | Note: If an item does not have 8 weeks of sales data or the item was out of stock for more than 50% of the 8-week period, the suggested values will be "0." If the Lead Time Days field is not populated, the suggested values will be "N/A." |
| Saw Tooth Graph section | The Saw Tooth Graph section presents a graphic representation of comparative inventory levels over the past year. This graph allows the user to identify how changes to min/max levels can help avoid overstock and out of stock situations. |
| 8-Week Sales Data section | The 8-Week Sales Data section includes the Weight, Sales Units, Sales Dollars, Days Out Of Stock, Weekly Average Sales (Units), Lost Sales (Units), Lost Sales (Units), COGS, GP%, and GP\$ fields. |
| | Note: The Days Out Of Stock, Lost Sales (Units), and Lost Sales (Dollars) fields display values for items that go out of stock after the system software is updated. Values are not calculated for items that are or were out of stock prior to the update. |
| Weekly Sales section | The Weekly Sales section presents a graphic representation of weekly sales over a 52-week period. The user may hover over a week's red diamond to display data from that week. |
| Display Case UPC of the second s | or Unit UPC Data (page 24) |

- Display Case UPC or Unit UPC Data (page 24)
- Adjust Lead Time (page 24)
- Modify Min/Max Levels (page 24)

Product History tab

The **Product History** tab allows the user to review an item's inventory and transactional history.

| Product Edit | Vendor Product | Sales Analysis | Product History | | | |
|----------------------------|-------------------------------------|-----------------------------------|------------------------------------|----------------------|------|-------------|
| | Iter | n Description: Universal Tactica | al Sling Black 1.25" UPC: 23456789 | 1234 MFG #: 70UT008K | | |
| | | Date Range: 1/1/2015 | 9/13/2016 | Submit | | |
| | | | | | | |
| Transaction History Receiv | ing History Purchase Orders Sales C | Inders Layaways Special Order | Work Orders Product Holds | | | |
| (Default Grid Layout) | | | | Sec | arch | X Clear All |
| Date T Time T Reg | ister 1 TRX # 1 TRX Type 1 Qty | Sold Price U Last Name | First Name T Employee T | | | |
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Use the Product History tab

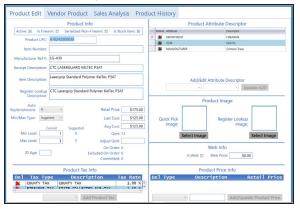
1. Log In to the Data Center Application to display the **Data Center** ribbon menu.



2. Select **Inventory Management > Product Maintenance** from the main menu to display the **Product Maintenance** screen.

| tul Mantenance 1 | 1 | | | | | | | | | | |
|------------------|--|------------------------|--|------------------------------------|---------------------|-------------------|-------------------------------------|----------------|---------------|--------------|----------|
| AMENO THPE | | | F | Product Maint | enance. | | | Alias | UPCs | Add Pr | oduct |
| CAL | | | | | 0 | | | Close | Product | Print L | abala |
| TREATM CALIBOR | | | | Click to show inactive | products | | | 1305035 | Loosen | Bulk | |
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| | 00 | | Investing Additional Tracket | Incoming Additional Transfer | Among Photoschi | 0104 | Associate Processor | 10.00 | 848 | 8.00 | 1.0 |
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| | | Muster De | - 10W | 100 | ENGINE LASS | antone . | RUCIPUNA GAB | 6.0.0 | 81.00 | 81.00 | |
| | C) 🖉 LABOR | | UNION. | 1404 | 10.04 | 1004 | 17246 | 10.00 | 8.00 | 10.00 | |
| | | Mudie De | | 104 | BUCKTONE CARD | 1000 | EDGENINE CASE | 80.00 | 81.00 | 81.00 | |
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- 3. Complete one of the following procedures as appropriate to display the **Product Edit** window.
 - Click the Add Product button to create a new product record.
 - Check a product's checkbox and click the **Clone Product** button to create a new product record based on the selected product.
 - Check a product's checkbox and click the Edit Product button to modify an existing product record.



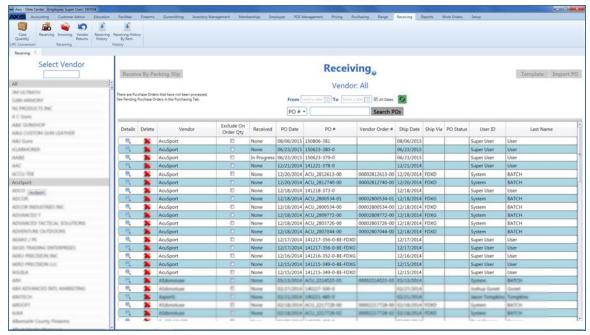
4. If needed, click the **Product History** tab to display the **Product History** tab.

| Product Edit | Vendor Product | Sales Analysis | Product History | | | |
|-------------------------------|--|----------------------------------|------------------------------------|--------------------|--------|-------------------|
| | Ite | m Description: Universal Tactica | al Sling Black 1.25" UPC: 23456789 | 1234 MFG #: 70UT00 | юк | |
| | | Date Range: 1/1/2015 | · 9/13/2016 · | Submit | | |
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| Transaction History Receiving | ng History Purchase Orders Sales C | Orders Lavaways Special Order | Work Orders Product Holds | | | |
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5. Complete the desired procedure(s) with onscreen features.

| Date Range fields | Enter starting and ending dates in the Date Range fields to display only emails from the defined time frame. |
|--|---|
| Submit button | Click the Submit button to activate the selected list restrictions (Date Range). |
| Tabs | Click a tab to display the associated records. |
| Grid Layout Controls | Complete the following to save a layout: |
| | Select the desired combination of filters, sorts, groupings, etc. Enter a name for the layout in the Default Grid Layout field. |
| | Note: Some screens allow the user to modify and save changes to the default (Default Grid Layout) layout, though most do not. |
| | 3. Click the Save button beside the field to save the current layout under the name in the field. |
| | Select the desired layout from the Default Grid Layout drop-down to recall that layout. |
| | Note: Select the Default Grid Layout option to recall the default layout. |
| Sort and Filter Reporting Screen Data | Enter a term (string of characters) in the Search field to display only records containing that term. Click the Clear Search (X) button to undo the Search field filter. Click the Clear All button to undo all filters. Click the Toggle Filters button to display filter controls at the tops of the columns. (Click again to hide the controls.) Click the Export to Excel (Table) button to export the data to an Excel file. Click the Column Chooser button to hide or display individual columns. |

The **Receiving** screen allows the user to receive inventory items, manage purchase orders, and import purchase order data from a formatted Excel file.



Use the Receiving screen

1. Log In to the Data Center Application to display the Data Center ribbon menu.

| AXIS | Accounting | Customer Admin | Education | Employee | Facilities | Firearms | Gunsmithing | Inventory Management | Memberships | POS Management | Pricing | Purchasing | Range | Receiving | Reports | Work Orders | Setup |
|-------------------------------|------------|----------------|-----------|--------------------|------------|----------|-------------|----------------------|-------------|----------------|---------|------------|-------|-----------|---------|-------------|-------|
| | 1 AD | - | + | ÷ | | | | | | | | | | | | | |
| Case | Receive | - | | Receiving His | | | | | | | | | | | | | |
| Case Quantity UPC Conve | rsion | 1-L | History | By Item History | | | | | | | | | | | | | |
| | | PO | | | | | | | | | | | | | | | |
| | | Receiving | | | | | | | | | | | | | | | |
| | | Receiving | | | | | | | | | | | | | | | |
| | V | | | | | | | | | | | | | | | | |

2. Select **Receiving > Receiving** from the main menu to display the **Receiving** screen.

| Axis - Data Center (Employee: Super User) 160504 | | | | | | | | | | | | | 00 |
|--|------------------|-----------|--|-----------------|-----------------------|--------------------|--|------------------------|--|------------|--------------|-----------------|-----------------|
| | ation Facilities | Freams | Gursmithing Inventory N | lanagement Mend | sensisept Emp | poyee PCS1 | Management Pricing Put | chasing Range | Receiving | leports 18 | ork Orders | Nob | |
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| Conversion Receiving | History | | | | | | | | | | | | |
| eceiving * | | | | | | | | | | | | | |
| Select Vendor | | | | | | | Dessin | in a | | | | | |
| | Rece | ive By Pa | cking Slip | | | | Receiv | ing | | | | | Template Import |
| | | | | | | | Mandan | | | | | | |
| UL TRACTA | - | | | | | | Vendor | : All | | | | | |
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| ING CUSTOM GUN LEATHER | Details | Delete | Vendor | Order Qty | Received | PO Date | PO # | Vendor Order # | Ship Date | Ship Via | PO Status | User ID | Last Name |
| Ad Game | R | | AcuSport | | None | 08/06/2015 | 150806-381 | | 08/06/2015 | | | Super User | User |
| ABACHER | 0.8 | | AcuSport | 0 | None | | 150623-380-0 | | 06/23/2015 | | 9 | Super User | User |
| A.C. | | * | AcuSport | 63 | In Progress | Contraction of the | 150623-379-0 | | 06/23/2015 | | | Super User | User |
| c . | 19 | | AcuSport | 10 | None | 12/21/2014 | 141221-378-0 | | 12/21/2014 | - | 1 | Super User | User |
| Cu-Rek | 8 | * | AcuSport | 13 | None | 12/20/2014 | ACU_2812613-00 | 00002812613-00 | 12/20/2014 | FDXD | | System | BATCH |
| uSport | R | * | AcuSport | 0 | None | 12/20/2014 | ACU_2812740-00 | 00002812740-00 | 12/20/2014 | FDXD | | System | BATCH |
| CD (hulert) | | * | AcuSport | 0 | None | 12/18/2014 | 141218-373-0 | | 12/18/2014 | | | Super User | User |
| DCD# | (P) | * | AcuSport | 1 | None | 12/18/2014 | ACU_2800534-01 | 00002800534-01 | 12/18/2014 | FDXG | | System | BATCH |
| COR INDUSTRIES INC. | | 36 | AcuSport | 0 | None | 12/18/2014 | ACU_2800534-00 | 00002800534-00 | 12/18/2014 | FDXD | | System | BATCH |
| NAMCED T | 0.0 | * | AcuSport | | None | 12/18/2014 | ACU_2809772-00 | 00002809772-00 | 12/18/2014 | FDXG | | System | BATCH |
| NANCED SACTICAL SOLUTIONS | 8 | 26 | AcuSport | 0 | None | 12/18/2014 | ACU_2803726-00 | 00002803726-00 | 12/18/2014 | FDXG | | System | BATCH |
| NENTURE OUTDOORS | 1 | * | AcuSport | | None | 12/18/2014 | ACU_2807044-00 | 00002807044-00 | 12/18/2014 | FDXD | | System | BATCH |
| ARO / PE | | - 36 | AcuSport | 13 | None | 12/17/2014 | 141217-356-0-BE-FDXD | | 12/17/2014 | | | Super User | User |
| GIS TRADING ENTERMISES | 1.12 | - 26 | AcuSport | | None | 12/17/2014 | 141217-356-0-BE-FDXG | | 12/17/2014 | | | Super User | User |
| RO PRECISION INC. | | - 36 | AcuSport | 13 | None | 12/16/2014 | 141216-352-0-8E-FDXG | | 12/16/2014 | | | Super User | User |
| NO PRECESSON LLC | 8 | - 25 | AcuSport | | None | 12/15/2014 | 141215-349-0-8E-FDXG | | 12/15/2014 | | | Super User | User |
| 10,4 | 8 | - 36 | AcuSport | 0 | None | | 141215-349-0-8E-FDXD | | 12/15/2014 | | 4 | Super User | User |
| | . 6 | - 26 | Addemontant | | New | 03/13/2014 | ACU,2254525-02 | 00002214525-00 | 05/15/3054 | | | System | BATCH |
| ADVANCED INTI, MARKETING | | - 36 | Aldonotuse | 6 | None | 42/27/2014 | 140227-500-0 | | 42/27/2014 | | _ | Andhua Gonet | Gonet |
| MTECH | | - 36 | August1 | | Nove | 10/71/0014 | 140221-485-0 | | 63/21/2014 | | | Jaton Torophics | Torrykins |
| BOFT | | 35 | Kidonoluse | 10 | None | 02/18/2014 | ACU_2257728-00 | 00002237728-00 | 60/18/2014 | FORD | - | System | 6A7CH |
| A.R. | 2 | - 36 | Alidonotuse | | None | | ACU_3217728-82 | 000002217728-02 | 10138/2014 | FDKD | | System | BATCH |
| bemarke County Finaema | | ~ | A CARLENDAR | | and the second second | Taxa and the s | Frances are a | | and state in the local distance in the | | | and the second | 1.4 |

3. Complete the desired procedure(s) with onscreen features.

| Select Vendor list | Click a vendor name in the Select Vendor list to display only purchase |
|--|--|
| | orders for that vendor. (Click the All vendor name to display purchase |
| | orders for all vendors.) |
| Receive By Packing | Click the button to receive a packing slip for the selected vendor. (This button |
| Slip button | is available only when a vendor has been selected.) |
| From and To fields | Enter dates in the From and To fields to display only purchase orders from |
| | that date range. (These fields are active only when the All Dates checkbox |
| | is noit checked.) |
| All Dates checkbox | Check the All Dates checkbox to display purchase orders from all dates. |
| | Uncheck the All Dates checkbox to activate the From and To fields. |
| Refresh button | Click the Refresh button to activate the selected list restrictions. |
| PO# drop-down, blank | Select an option from the drop-down, enter all or part of the desired identifier |
| field, and Search POs | in the text field, and click the Search POs button to display only purchase |
| button | orders that contain the entered text. |
| Template button | Click the button to export the purchase order template format to an Excel file. |
| • | (This button is available only when a vendor has been selected.) Refer to |
| | Import Purchase Order Data for more information. |
| Import PO button | Click the button to import purchase order data from a formatted Excel file. |
| - | (This button is available only when a vendor has been selected.) Refer to |
| | Import Purchase Order Data for more information. |
| Details button | Click a purchase order's Details button to display its details on the Receiving |
| | Details screen. |
| Receive Inventory It | ems (page 37) |

• Import Purchase Order Data

• Print a Receiving Details Report from the Receiving Details Screen

• Delete a Purchase Order

Troubleshoot Auto Replenishment Issues

If the **Auto Replenishment** module does not send orders as intended (sending improperly or not at all), consider the following potential causes and their corresponding fixes.

Stuck Purchase Orders

Search the <u>Pending Purchase Orders screen</u> for purchase orders marked "Submit Failed" in the **PO Status** column. Delete the failed order(s) and allow the system to run as scheduled.

Old Purchase Orders

Check the system for old purchase orders (including vendor orders, manufacturer orders, and purchase orders with back order items that are no longer valid). Delete unneeded orders to keep the AR module operating properly and ensure that on order quantities are accurate.

Check for Duplicate or Incorrect Cross References Check the cross reference table to verify:

- No item has duplicate cross references.
- Every item's cross reference matches its AcuSport part number exactly.

Non-Excluded/Non-Ignored Purchase Orders

Check the system for purchase orders that should have been excluded (including future orders and special orders) but were not. These may interrupt daily ordering and prevent an item from being ordered when needed.

Linking & Package Quantities

Check package quantities to ensure the proper amounts are being ordered by the AR module.

Other Issues

The following situations can also affect whether AR orders are sent or not. Check and address them as needed:

- Windows Firewall Issues
- Power Outage
- Server Down
- No Internet Connectivity
- Verify Correct Min/Max on item

Potential Issues for V6 Software Users

Check Scheduler

Verify scheduler is running and set to correct date and time.

Verify ARS2 Is Not Checked

Verify that ARS2 is not checked. If found for a particular item that may be causing issues globally uncheck ARS2 in the system to confirm that it will not affect their Auto Replenishment.

CustomerLink Exchange Contact

Information

For assistance with technical issues and questions, contact RTG Support Line at 1-800-547-7120. For assistance with business issues and questions, contact the following as appropriate:

| AcuSport | | |
|----------------------------------|-------------------------------|--------------------|
| Alyson Stanford | CustomerLink Exchange Manager | 800.543.3150 x6252 |
| Becky Nessler | Retail Services Professional | 800.543.3150 x6250 |
| AcuSport Retail Technology Group | | |
| Lyndsie Rosebrook | CustomerLink Specialist | 800.547.7120 x5738 |
| EricWille | CLX Support Technician | 800.547.7120 x5742 |
| ToolBox Solutions | | |

AcuSportSupport@ToolBoxSolutions.com