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 The Auto Replenishment Process (page 4) 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. Update the AcuSport Catalog (page 7) 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 Vendor Product tab (page 60). 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. Set Up Items for Auto Replenishment (page 10) to activate AR functions and set ordering levels for select products.
5. Utilize Purchase Orders in the AXIS System (page 27) to let the AR module run efficiently and accurately.
6. View the Vendor Reorder Report (page 45) to review AR module usage and identify areas for improvement and expansion.
7. If needed, Troubleshoot Auto Replenishment Issues (page 74) to correct issues with unsent orders.

AcuSport®
Retail Technology Group

Notices

CustomerLink Exchange - Auto Replenishment Module Setup Guide
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Legal Counsel

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The following notice is required by law:

AcuSport products and services are not a substitute for the advice of an Attorney.
You are encouraged to seek the advice of your own attorney concerning the use and legality of this program, documentation, and forms.

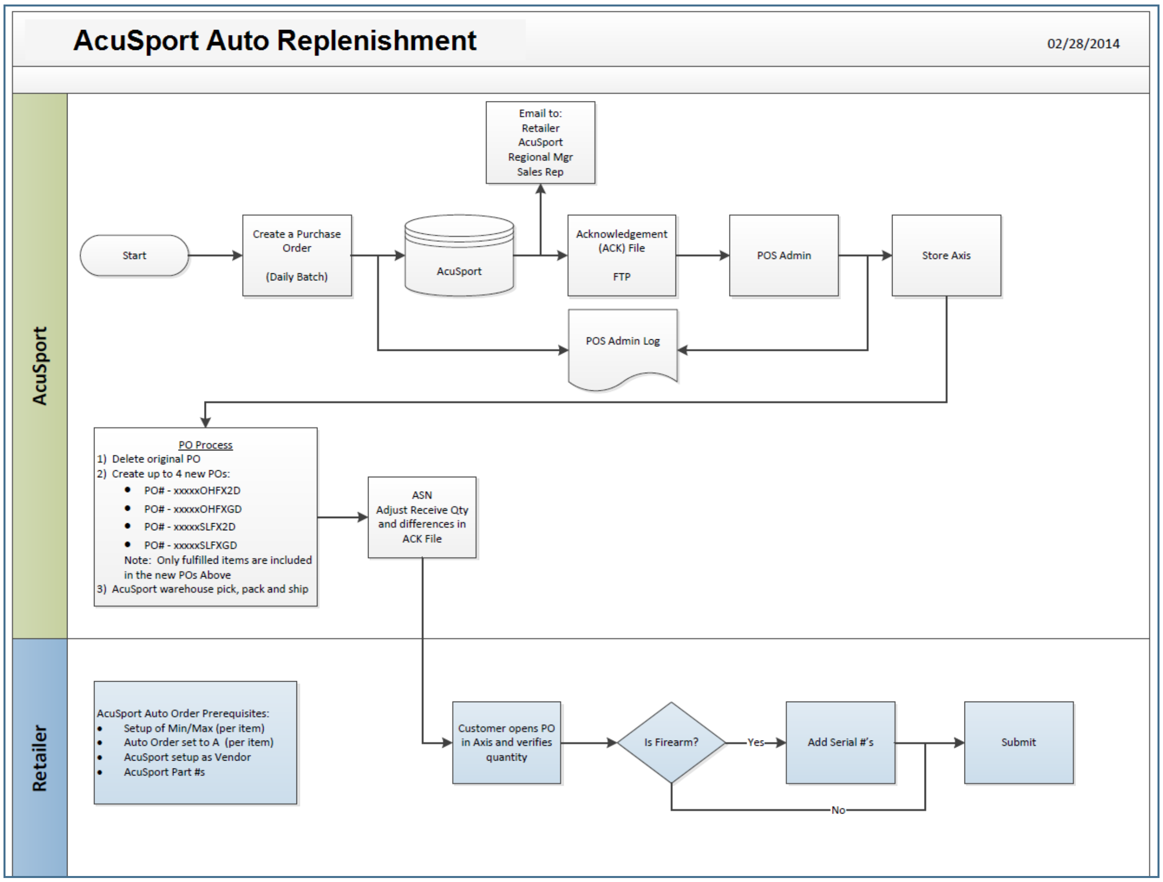
Contents

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 Receiving screen (page 71) in the **Data Center** application. See Receive Inventory Items (page 37) 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.

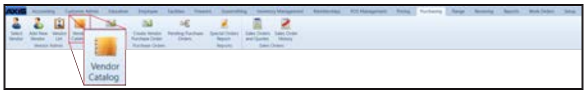
4. The Retailer receives the email containing the link to the End-User Agreement (EUA).
5. The Retailer reviews the EUA document.
6. The Retailer selects the "Agree" option to signify agreement with it.

   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.

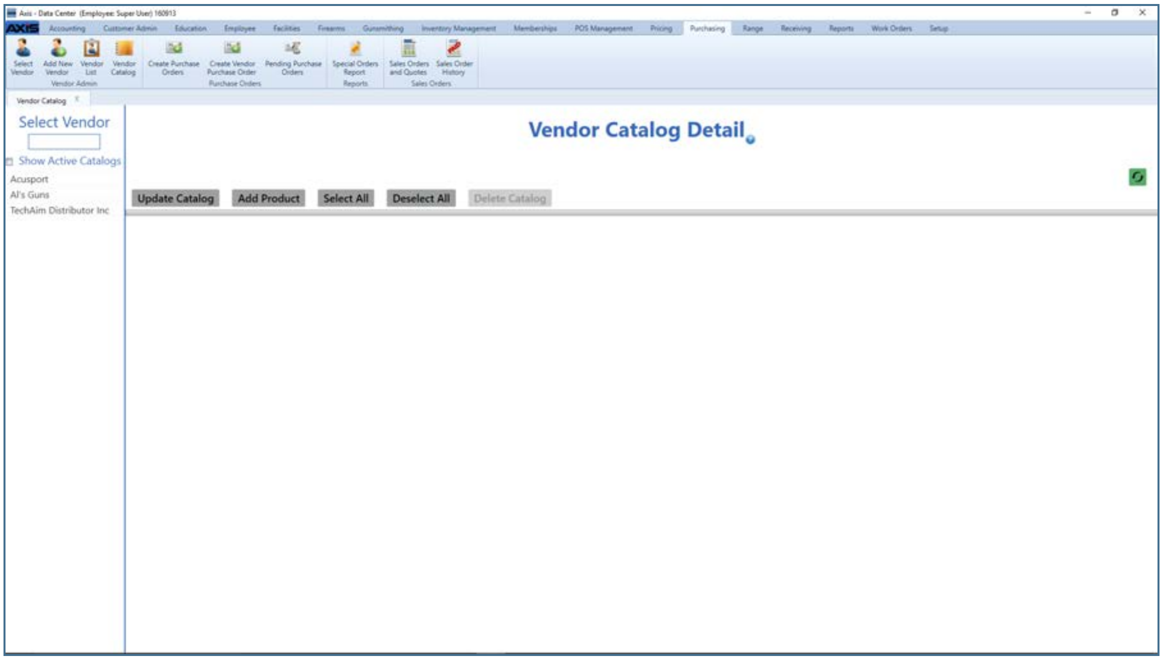
7. The Retailer's agreement automatically activates the installation of the Auto Replenishment (AR) module by the POS Admin site.

View and Update a Vendor Catalog

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.



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:

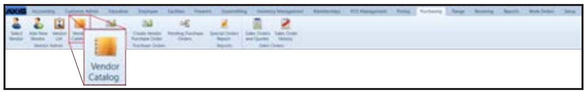
Vendor Part #	The vendor part number
MFG Part #	The manufacturer's part number
Receipt Description	A short (32 characters or less) description that will print on the register receipt
Item Description	A long (80 characters or less) description of the item used at the register
Size	Size
Color	Color
UoM	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

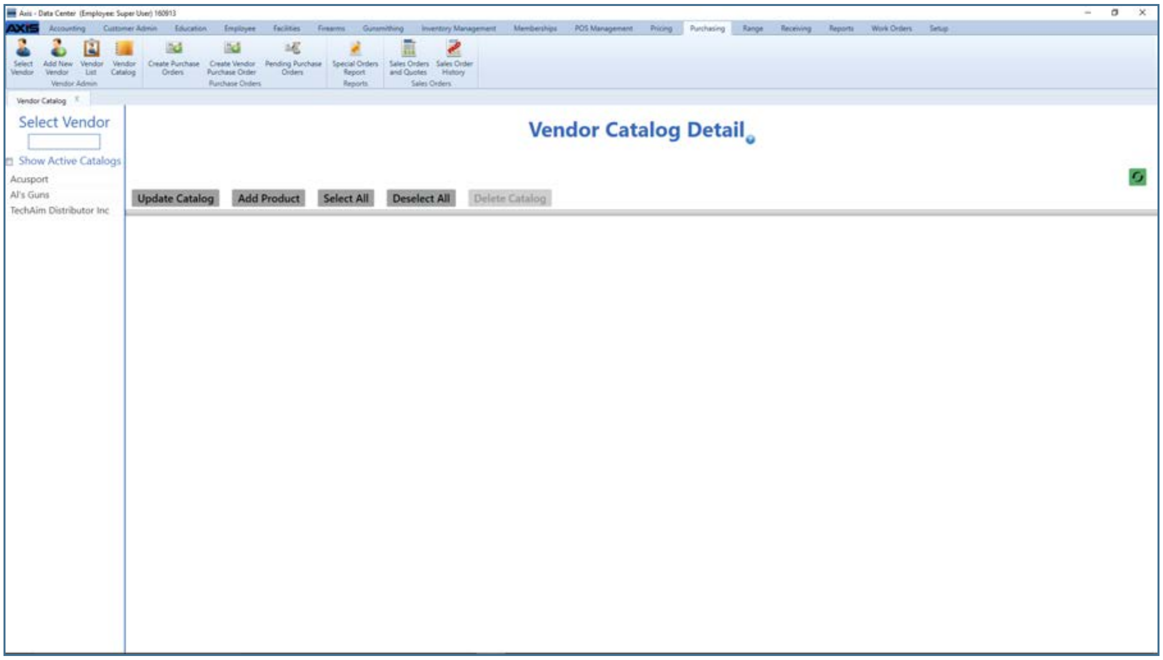
4. Sort and Filter Reporting Screen Data as needed to modify the list displayed on the screen.
5. If desired, Add a Product from a Vendor Catalog to the Product Database (page 8).
6. Click the tab's **Close** button to close the screen.

Add a Product from a Vendor Catalog to the Product Database

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.



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 Manage Product Information 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. Identify Potential Auto Replenishment Items (page 11) to determine which items to include in AR functions and where to set their **Min Level** and **Max Level** values.
2. Bulk Edit a Group of Products (page 12) to Set Auto Replenishment Status (page 14) (activate AR functions) and Set Min/Max Levels (page 14) for the group.
3. Create and Maintain a Product (page 17) to activate a single item's **Auto Replenishment** feature and set its **Current Min Level** and **Current Max Level** settings.
4. Complete the Set Up a Case Quantity (page 25) and Delete a Case Quantity (page 26) 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.)?

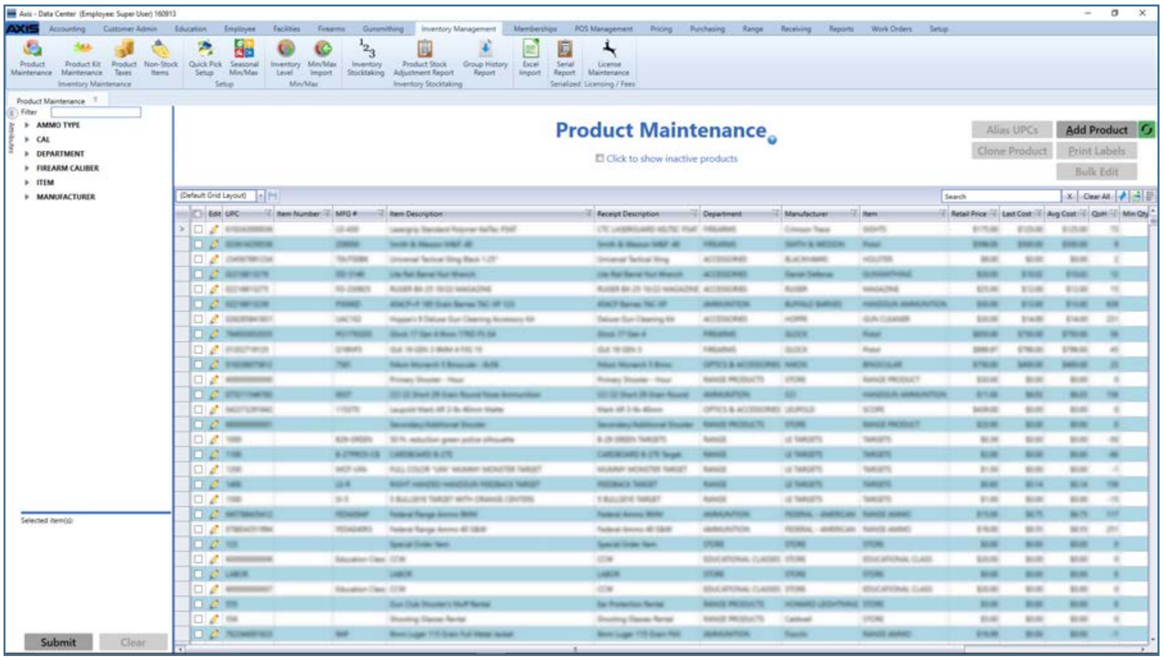
  Note: Refer to Set Up a Case Quantity (page 25) for more information.
- Is it difficult to acquire the item?
- Is the item in back stock?
- Should the item’s **Min Level** be set to 2 (or more) to ensure the AR module orders the item while it is still available in stock?

Bulk Edit a Group of Products

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

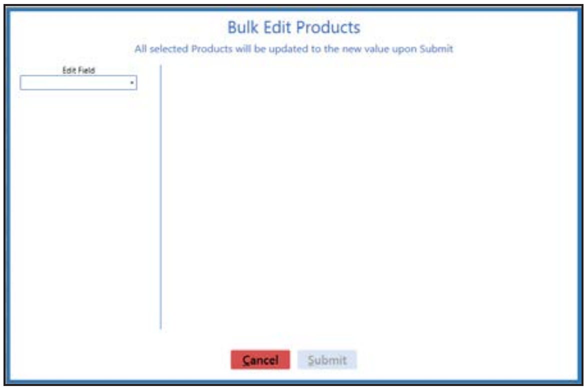
    

    2. Select **Inventory Management > Product Maintenance** from the main menu to display the **Product Maintenance** screen.



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** drop-downs 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** drop-down.
    4. Select the desired rounding option (No Rounding, Round to Nearest Value, Round Up, Round Down) from the **Rounding Option** drop-down.
    5. 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** 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 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.

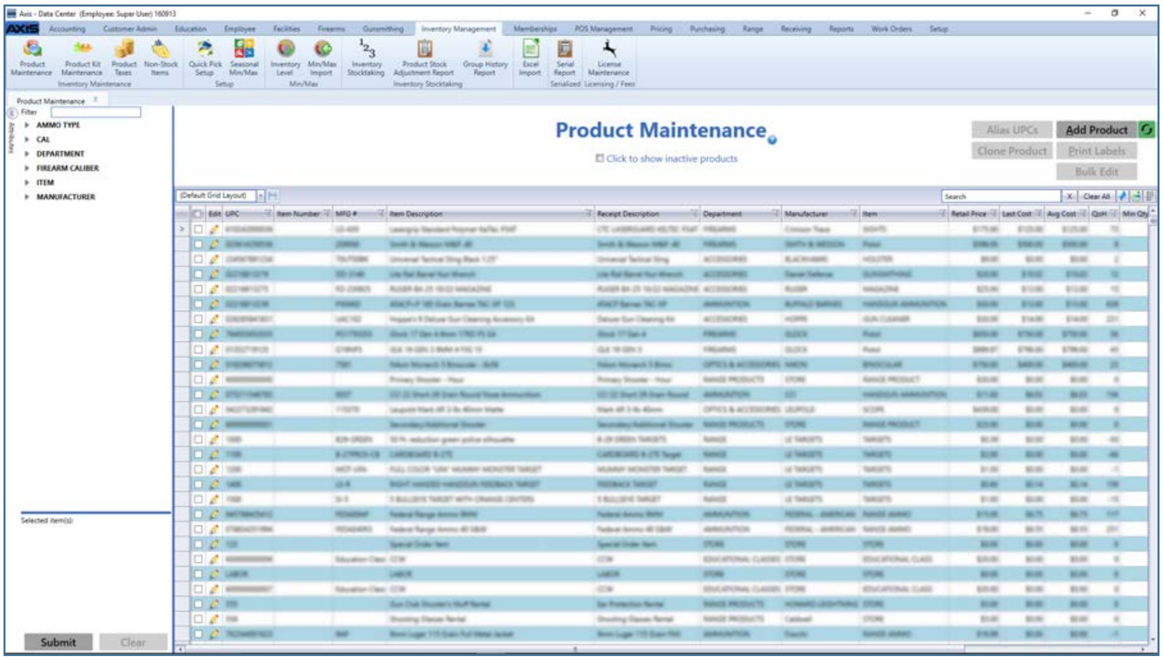
Create and Maintain a Product

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.



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

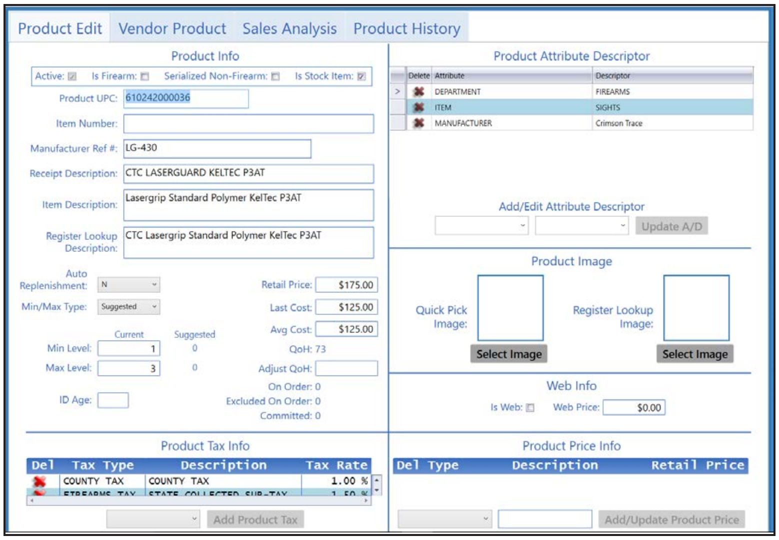
1. Click the **Add Product** button to display a blank **Product Edit** window.
2. Continue with the procedure below.

Clone a Product

1. Check a product's checkbox to select it.
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.



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

Note: Required fields and 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 Create a Vendor Purchase Order (page 33) 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 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 Manage Tax Types 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.

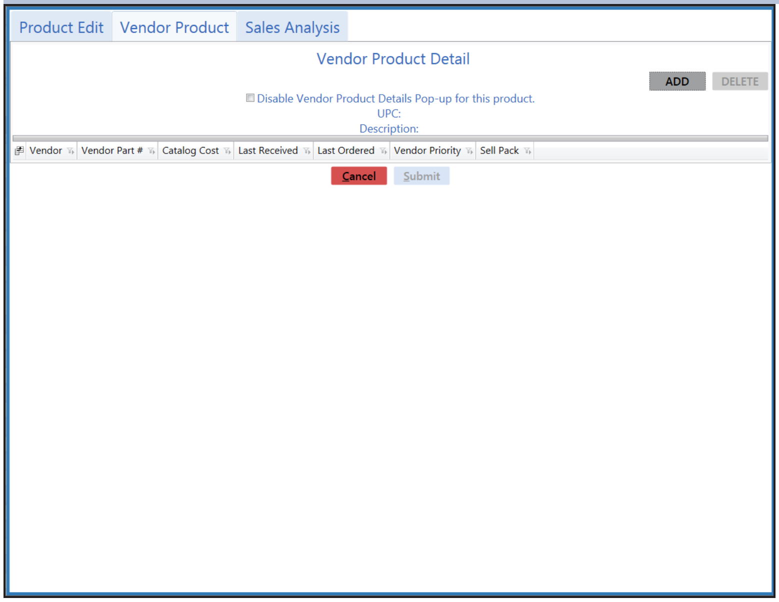
       Note: A descriptor must be selected for each mandatory attribute. Refer to Manage Mandatory Attributes for more information.

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.

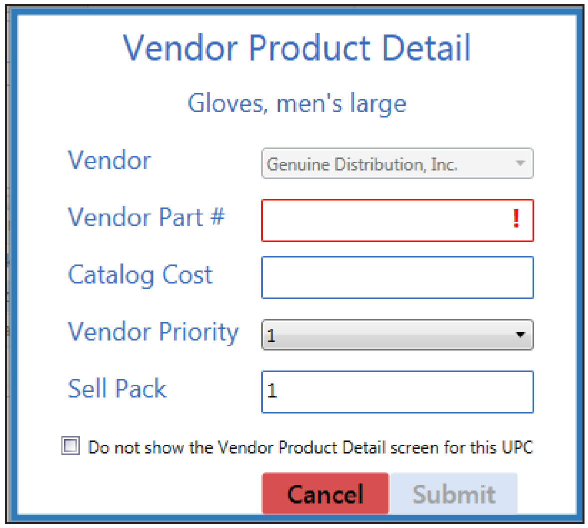
10. If desired, click the **Vendor Product** tab to display it and complete any of the following procedures:

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



Add a Vendor Product Detail Record for this UPC

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



2. Enter/edit the information in the fields:

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 **Submit** button to create a vendor part number for the product.

Delete a Vendor Product Detail Record for this UPC

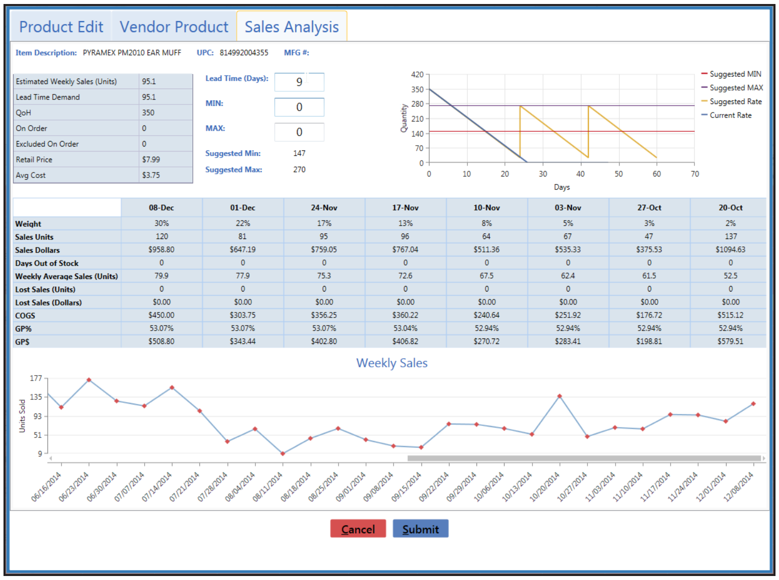
1. Check a **Vendor Product Detail** record’s checkbox to select it.
2. Click the **Delete** button to display a deletion confirmation window.
3. Click the **OK** button to close the window and remove the record from the screen.

Control the Behavior of this UPC's Vendor Product Detail Window

Check/uncheck the **Disable Vendor Product Details Pop-up for this product** checkbox as desired:

- Check the checkbox to prevent the window from displaying in the future.
- 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:

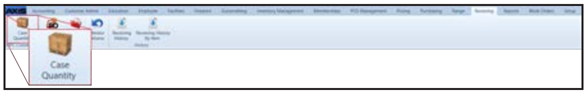


Display Case UPC or Unit UPC Data	• If the tab displays a **Case UPC** field, click the field to display the **Sales Analysis** tab for the associated case UPC. • If the tab displays a **Unit UPC** field, click the field to display the **Sales Analysis** tab for the associated unit UPC.
Adjust Lead Time	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.

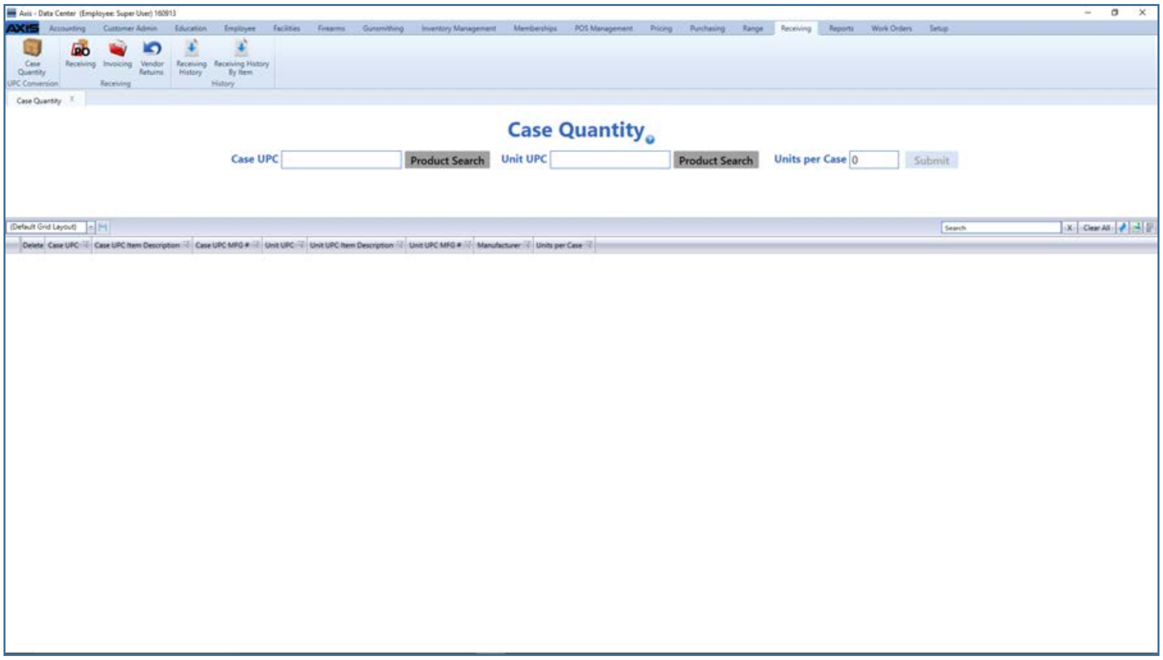
12. Click the **Submit** button to add/update the product on the **Product Maintenance** screen.
13. Click the tab's **Close** button to close the screen.

Set Up a Case Quantity

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.



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 **Case UPC** field and press the **Enter** key.
    - Click the **Search** button beside the **Case UPC** field to display the **Product Search** window and Select a Product to identify the case UPC.

    Note: If the case UPC does not exist in the database, refer to Manage Product Information 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 Select a 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.

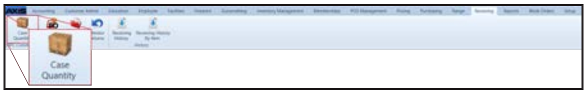
    Note: Because this procedure can modify the unit UPC's **QoH**, a physical count to confirm adjusted values is recommended. Refer to Perform a Physical Inventory Count for Non-Firearm Items for more information.
6. Click the **OK** button to add the case UPC to the **Case Quantity** screen.
7. Click the tab's **Close** button to close the screen.

Delete a Case Quantity

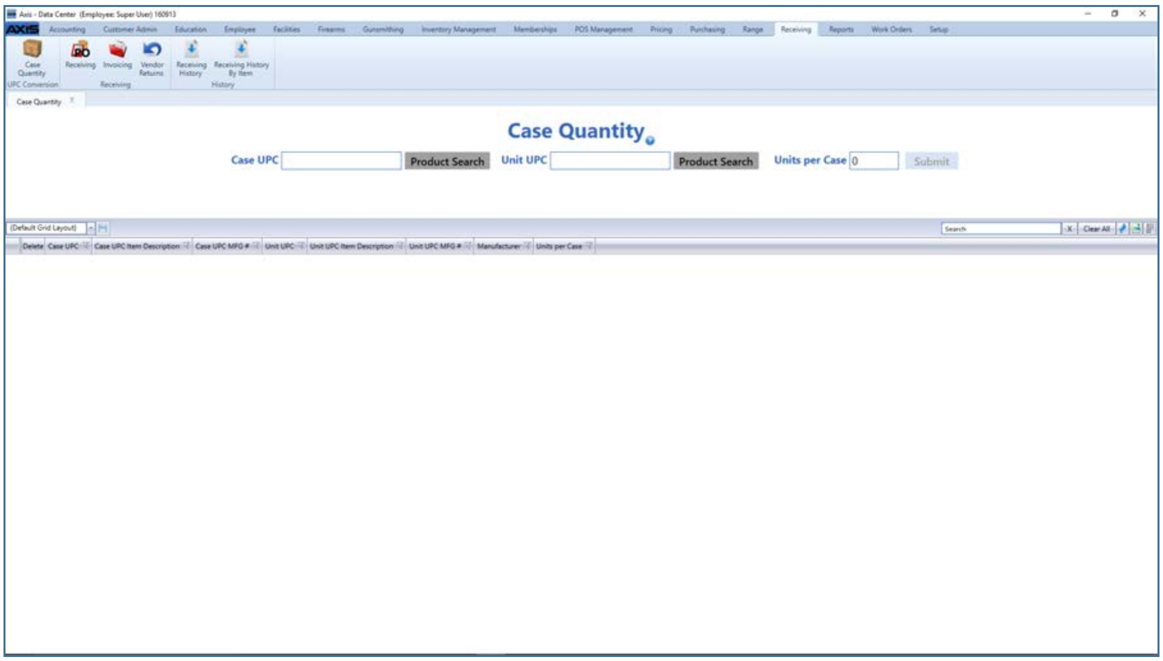
Complete the following procedure to delete a case quantity.

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.



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:
   - Create a Purchase Order (page 29) 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. Process a Pending Purchase Order (page 35) to forward it to the selected vendor.
4. Receive Inventory Items (page 37) to receive Purchase Order items when they arrive.

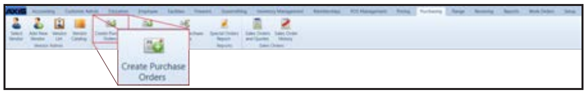
Exclude (Ignore) a Purchase Order

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.

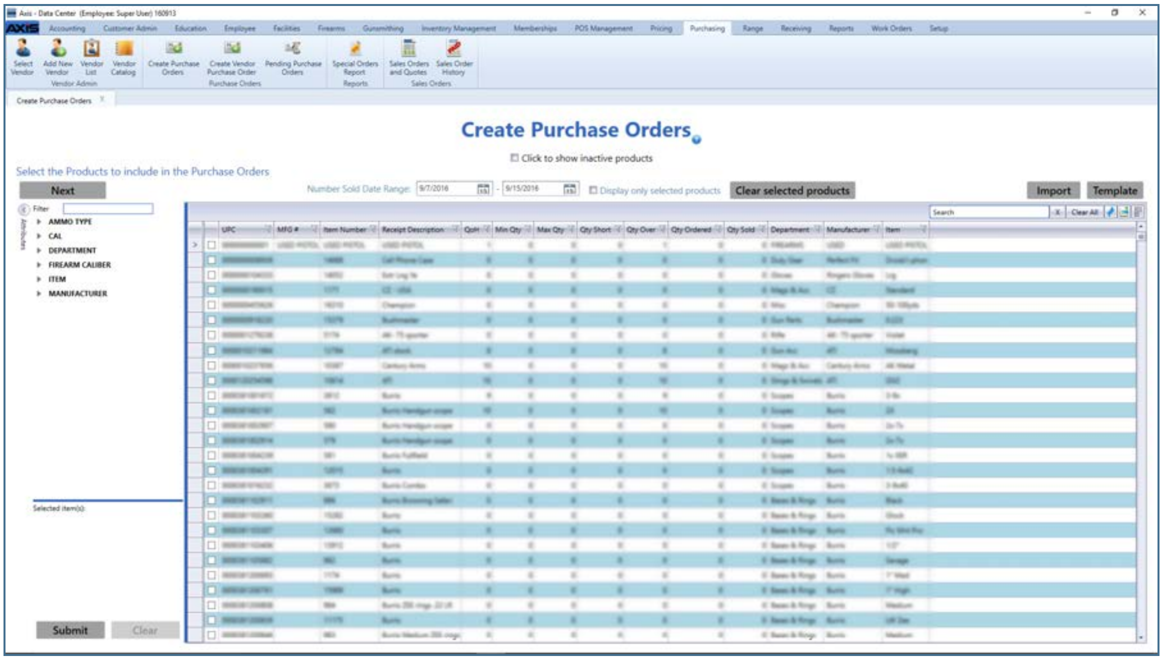
A purchase order can be excluded when it is processed (Process a Pending Purchase Order (page 35)) or when it is received (Receive Inventory Items (page 37)).

Create a Purchase Order

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.



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 Store	Select the store from the drop-down.
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	Note the autofilled ship date. If needed, enter a new 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.

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.
     2. Select a Product 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.

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 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 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.

3. Click the **Submit** button to close the **Purchase Order Preview** window.

Delete the Purchase Order

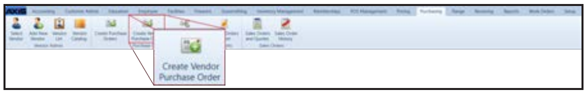
1. Click the purchase order's **Delete** button to display a deletion confirmation window.
2. Click the **Yes** button to close the window and remove the purchase order from the screen.

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

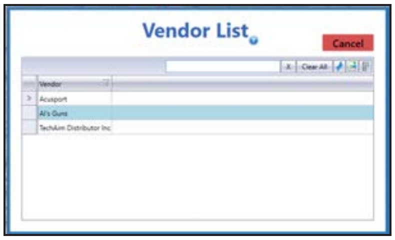
Note: If the purchase order was not processed (and not deleted), the system relocates it to the Pending Purchase Orders screen. Refer to Manage a Pending Purchase Order for more information.

Create a Vendor Purchase Order

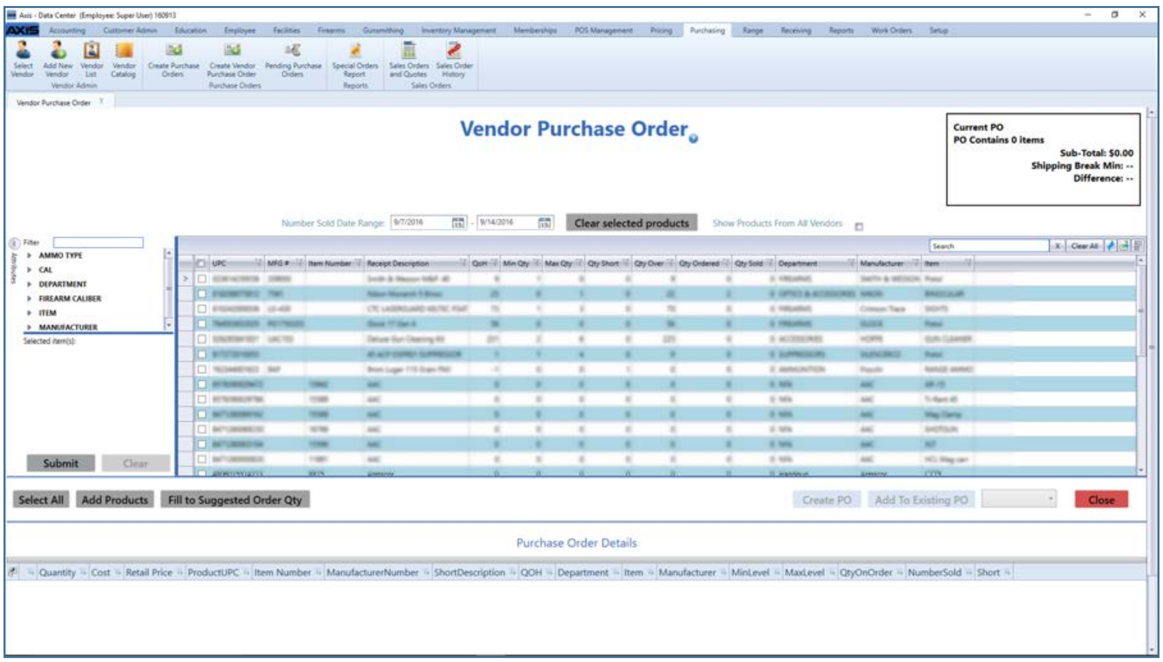
1. Navigate to the **Vendor Purchase Order** screen.
    1. Log In to the Data Center Application to display the **Data Center** ribbon menu.

    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.

    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.



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.

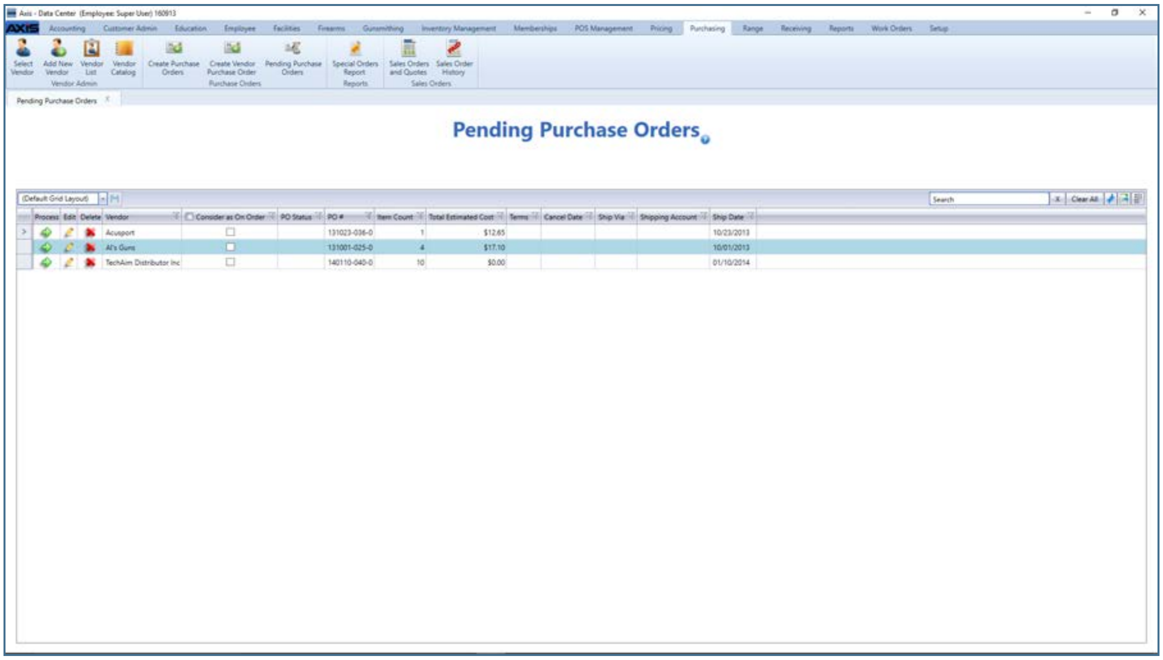
   Note: Refer to Manage a Pending Purchase Order for more information.
8. Click the tab's **Close** button to close the screen.

Process a Pending Purchase Order

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

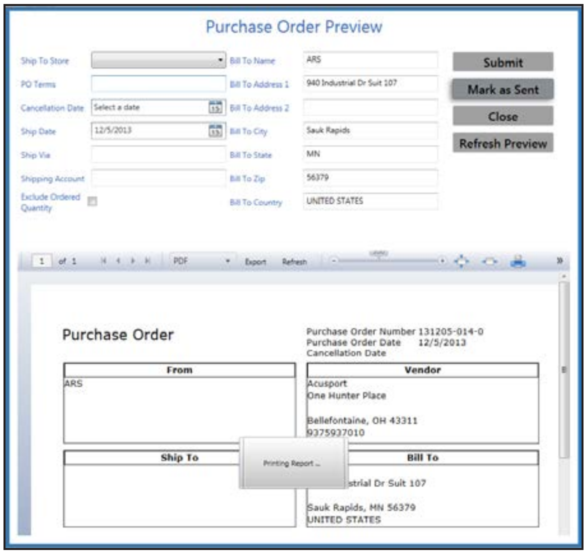
    2. Select **Purchasing > Pending Purchase Orders** from the main menu to display the **Pending Purchase Orders** screen.



2. Sort and Filter Reporting Screen Data 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.



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 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 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.

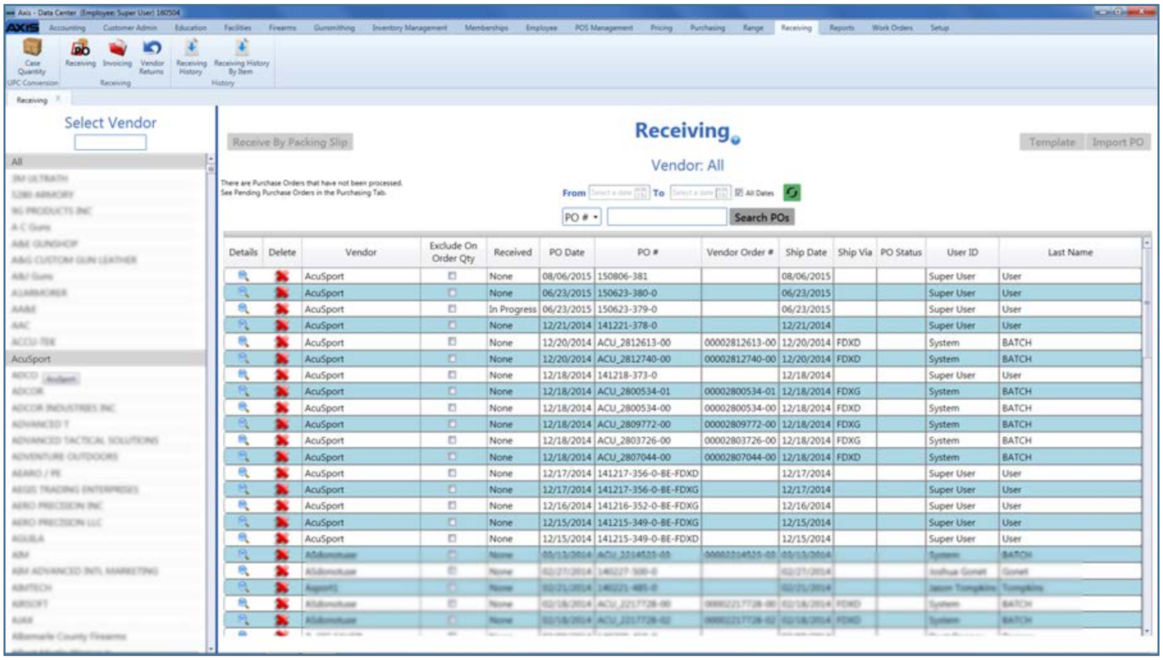
6. Click the tab's **Close** button to close the screen.

Receive Inventory Items

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.



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 drop-down, 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:

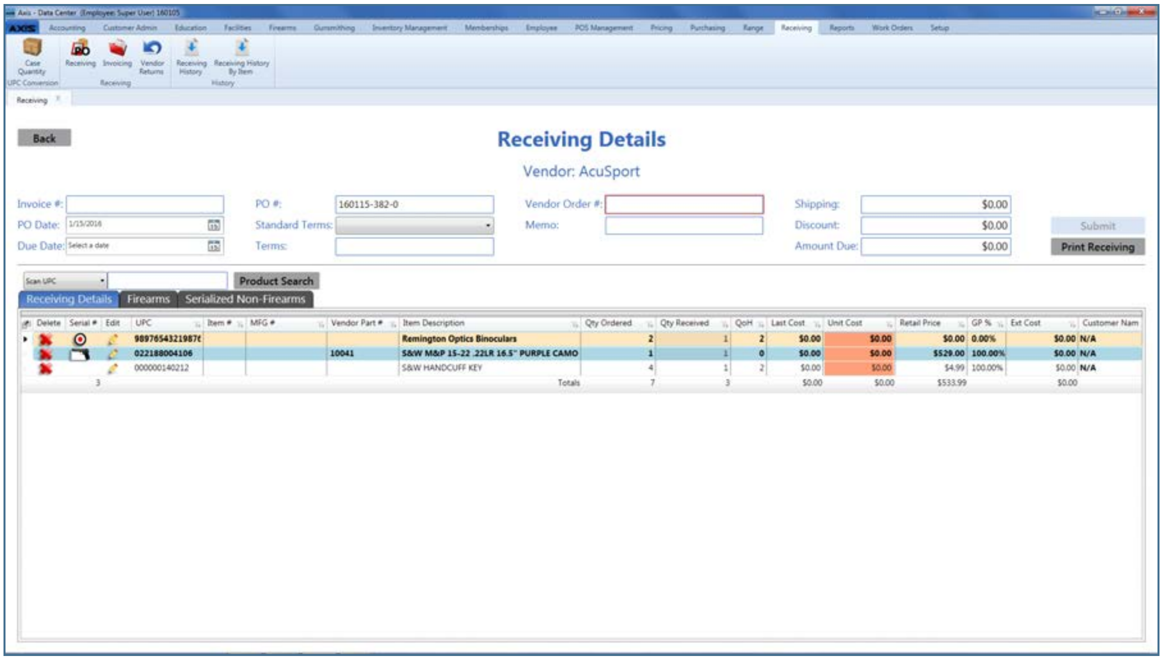
    1. Click a purchase order's **Details** button to display the **Receiving Details** screen.
    2. Continue with the procedure below.

- ### 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.



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 Create and Maintain a Product (page 17) 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 Select a Product for more information.
5. If the system displays a **Vendor Product Detail** window, Complete a Vendor Product Detail Window as appropriate.

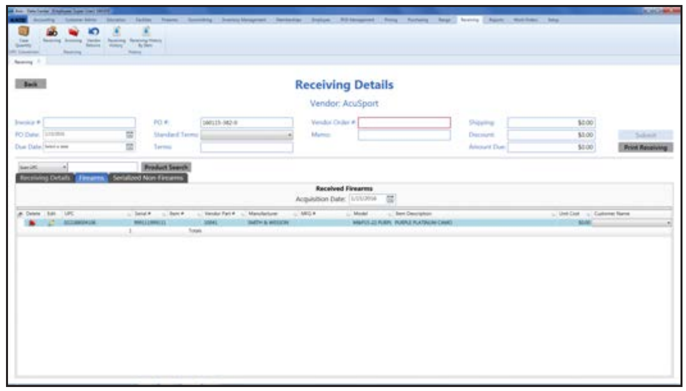
6. The system displays information based on the type of product identified:

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).

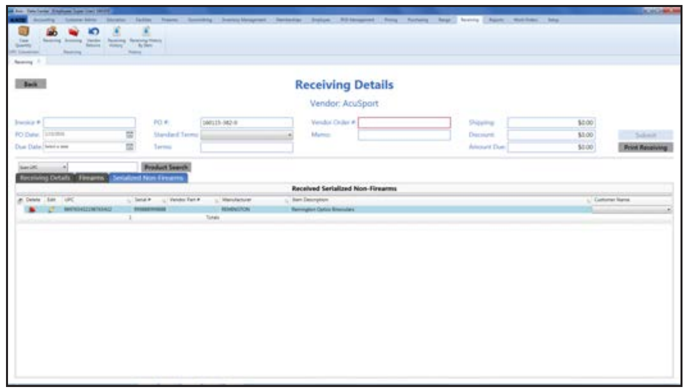
If a serialized non-firearm product was identified...

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.



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.)

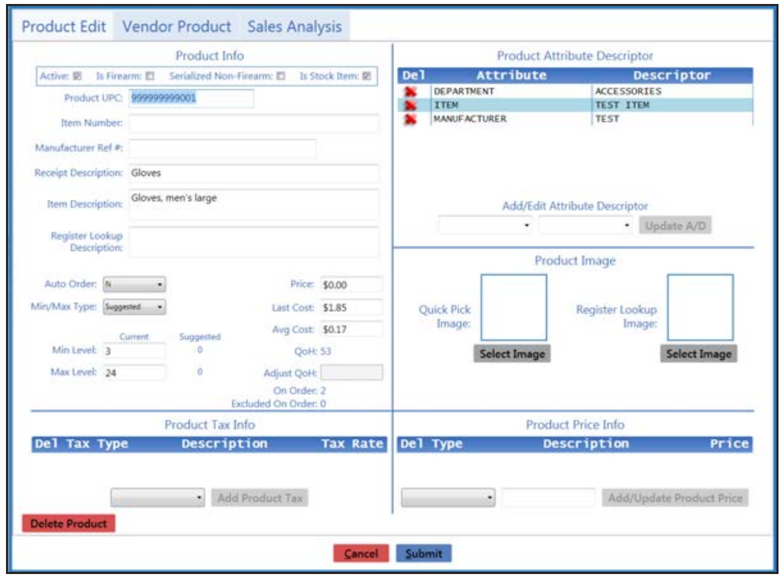
7. Complete the following procedures as needed to update received products:

Edit a Product's Quantity

1. Locate the product in the product list.
2. Edit the number in the product's **Qty Received** field.
3. Continue with the procedure below.

Edit a Product's Information

1. Click a product's **Edit** button to display its **Product Edit** window.



2. Edit product information as needed.

   Note: Refer to Manage Product Information for more information on modifying information in this window.

3. Click the **Submit** button to close the **Product Edit** window.
4. Continue with the procedure below.

Edit a Firearm's Serial Number or Description

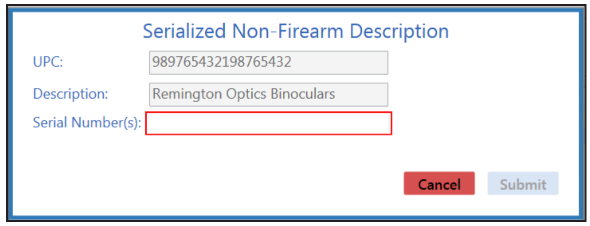
1. Locate the firearm on the **Firearms** tab.
2. Click the firearm 's **Edit** button to display its **Firearm Description** window.
3. Edit the serial number in the **Serial Number(s)** field as needed.

   Note: Refer to Describe a Firearm 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.



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**.

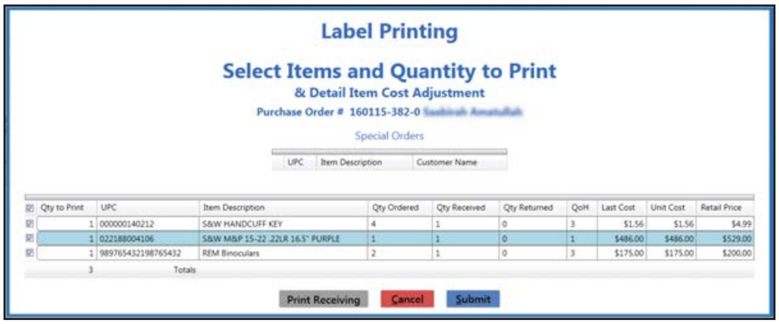
9. Enter/edit Purchase Order information in the window as needed.

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

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 Select a Date with the calendar button.
Due Date	Enter the date payment is due to the vendor (mm/dd/yyyy) or Select a Date 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.



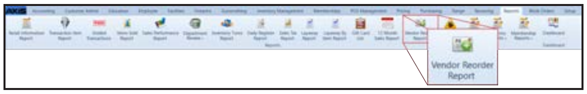
11. Complete the Label Printing Window to print labels and/or a receiving details report as needed.
12. The system sends the purchase order to the **Receiving History** screen and generates a corresponding invoice on the **Invoicing** screen.
13. Click the tab's **Close** button to close the screen.

Note: When appropriate, complete the Manage Invoices procedure to process the invoice for the purchase order.
If needed, complete the View and Use the Receiving History Record procedure to review the purchase order.

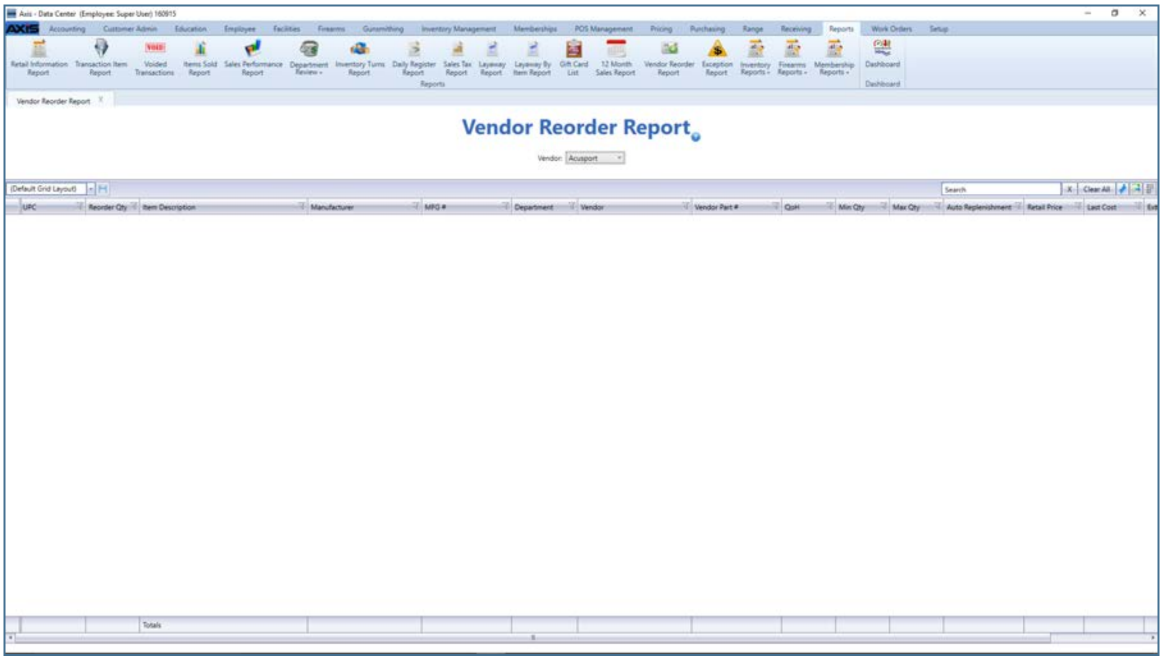
View the Vendor Reorder Report

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..



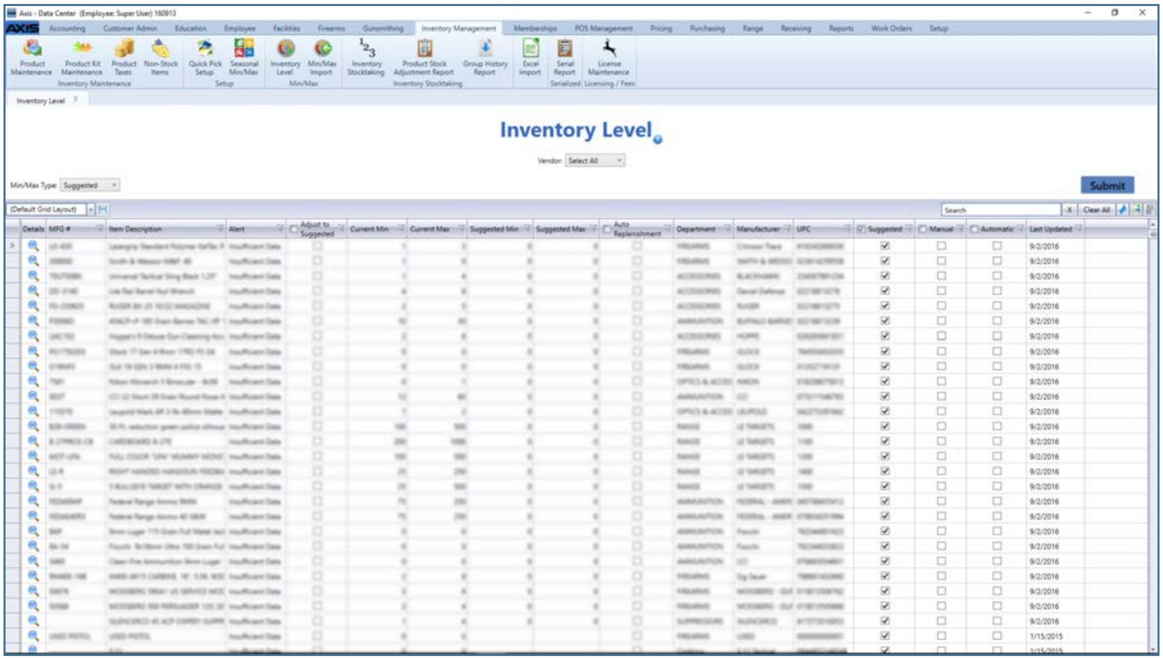
2. Select a vendor from the **Vendor** drop-down to display a list of the vendor's items with inventory values below their minimum levels. (Select the **Select All** option to view items from all vendors.)

    Note: An item with a **QoH** that is lower than its minimum level will not 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.

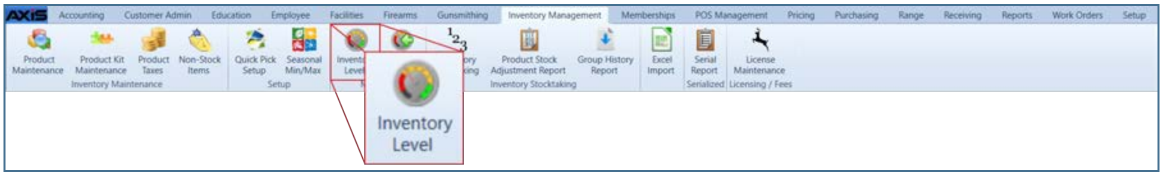
Inventory Level screen

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

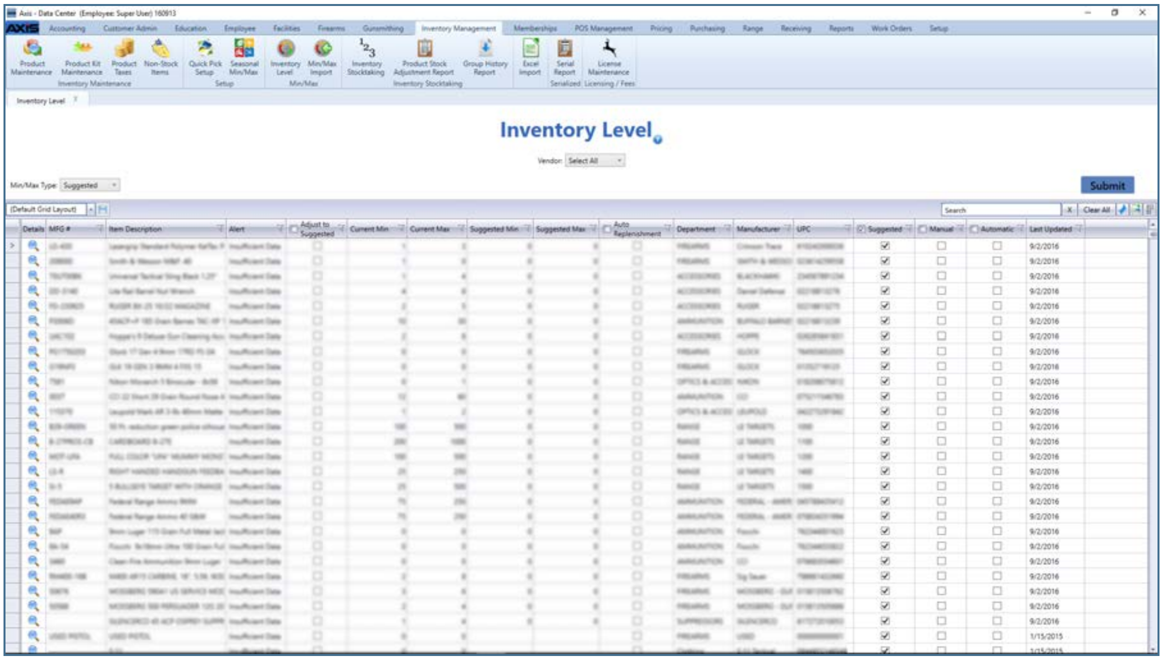


Use the Inventory Level screen

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.



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

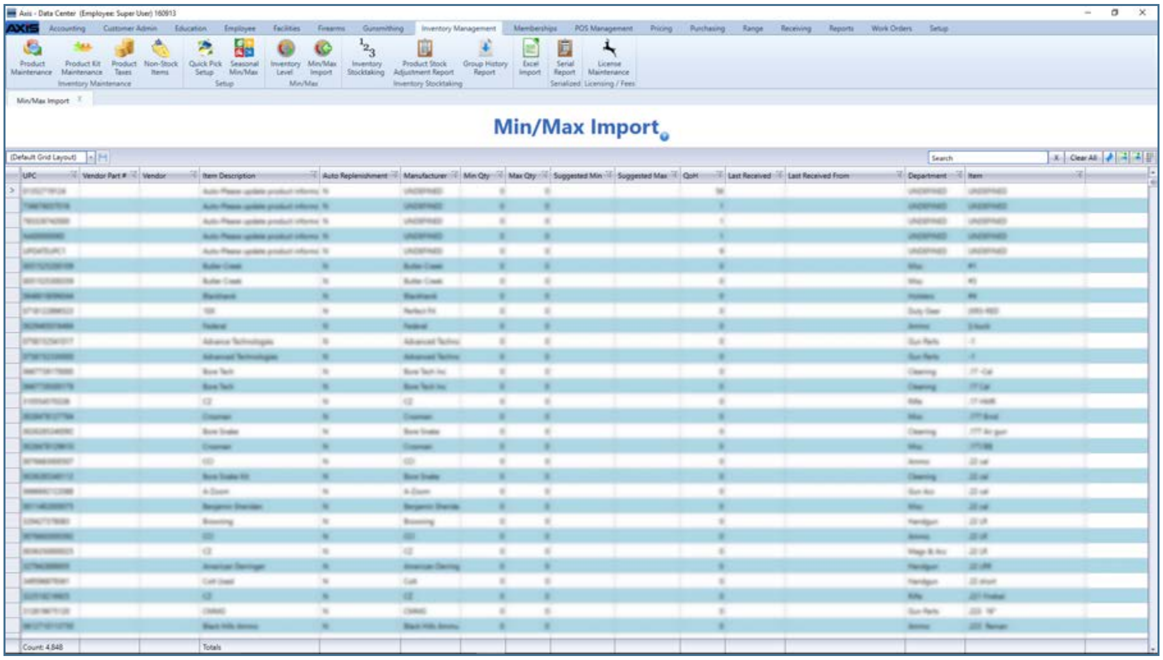
Vendor drop-down	Select a vendor from the **Vendor** drop-down to display only items associated with that vendor. (Click the **Select All** vendor name to display items from all vendors.
Min/Max Type drop-down	Select an option from the **Min/Max Type** drop-down to display items that utilize the corresponding 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: 1. Select the desired combination of filters, sorts, groupings, etc. 2. 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.
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 checkbox	Check an item’s **Adjust to Suggested** checkbox (and click the **Submit** button) to update its **Current Min** and **Current Max** cells to match its **Suggested Min** and **Suggested Max** cells.
Auto Replenishment checkbox	Check an item’s **Auto Replenishment** checkbox (and click the **Submit** 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.
Suggested, **Manual**, and **Automatic** radio buttons	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

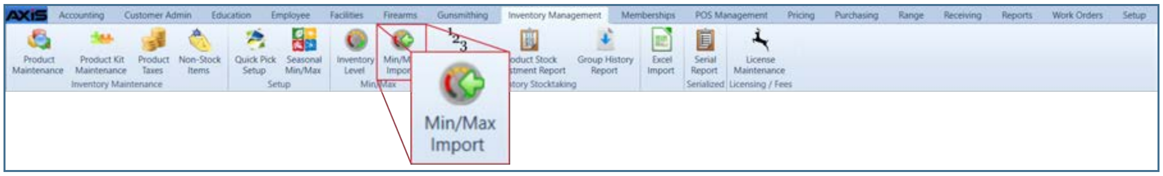
Min/Max Import screen

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

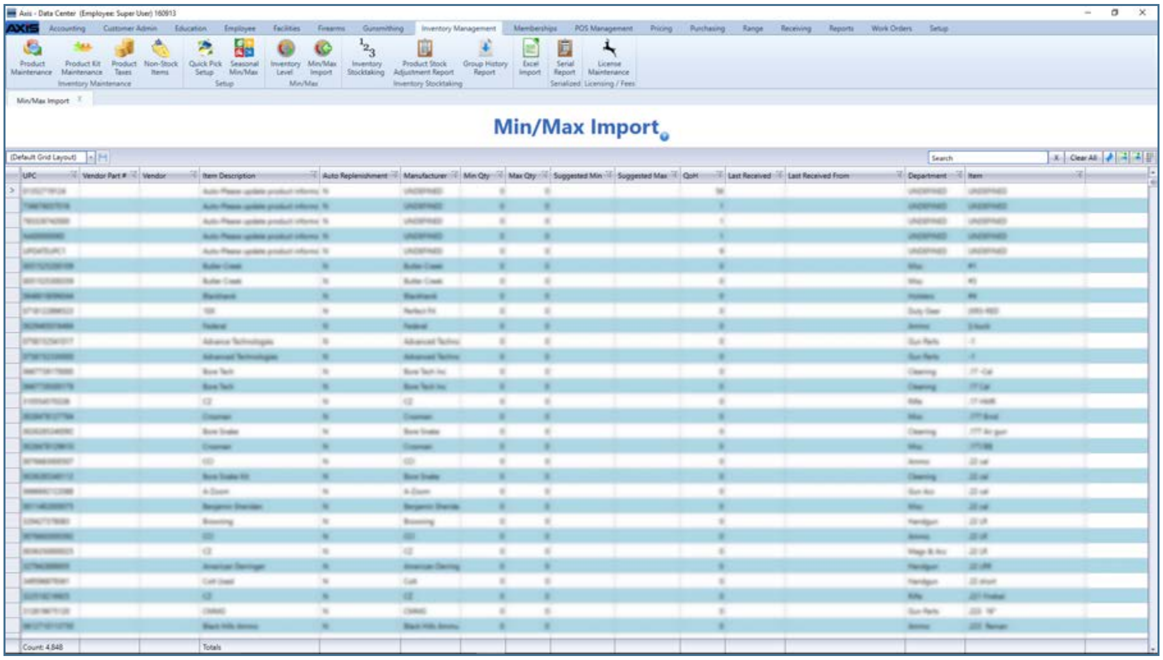


Use the Min/Max Import screen

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.



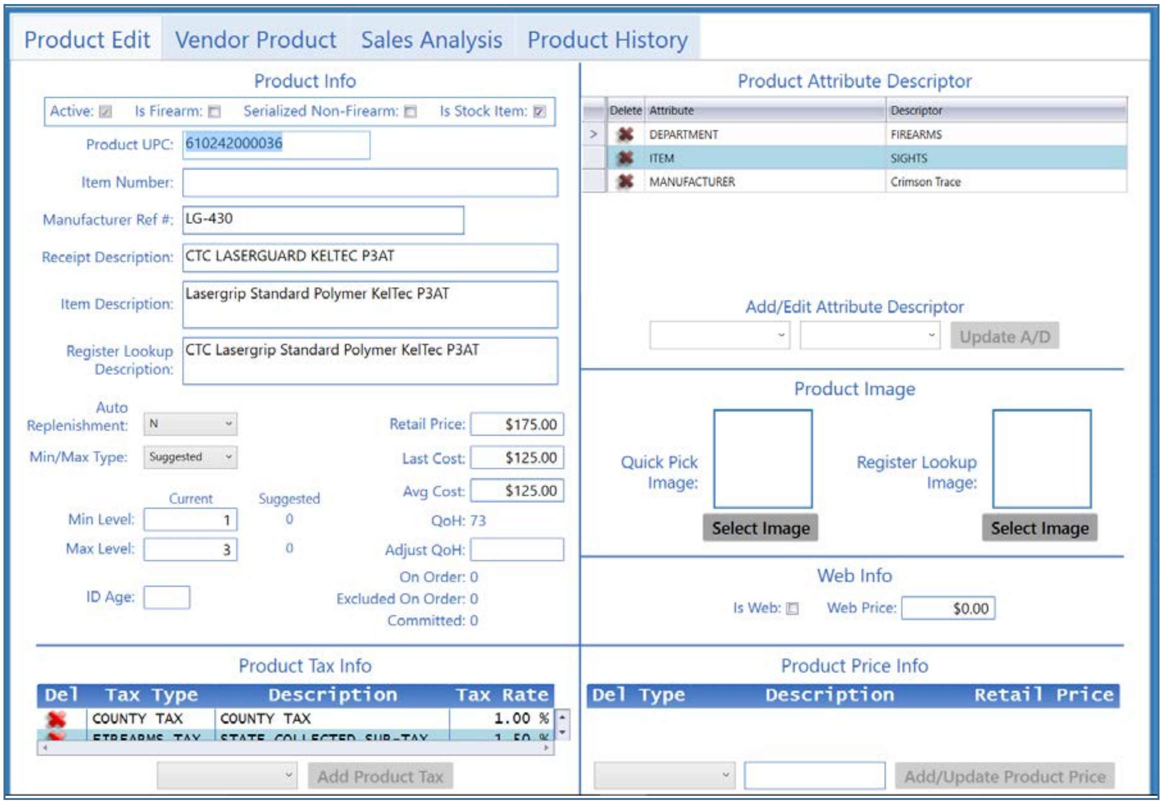
3. Complete the desired procedure(s) with onscreen features.

<table>
<tr><td>Grid Layout Controls</td><td>Complete the following to save a layout:
1. Select the desired combination of filters, sorts, groupings, etc.
2. 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.</td></tr>
<tr><td>Sort and Filter Reporting Screen Data</td><td>• 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.</td></tr>
</table>

- Import Min/Max Levels

Product Edit window

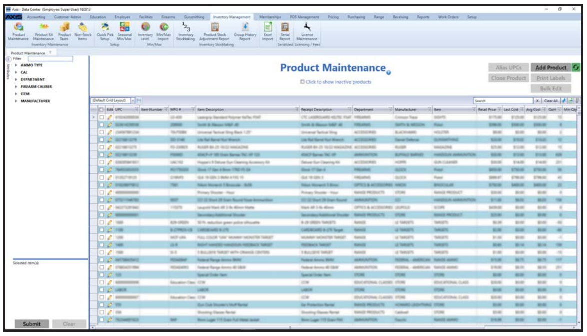
The **Product Edit** window allows the user to define a product's characteristics, control inventory and ordering levels; set receiving options; and review and utilize sales analytics.



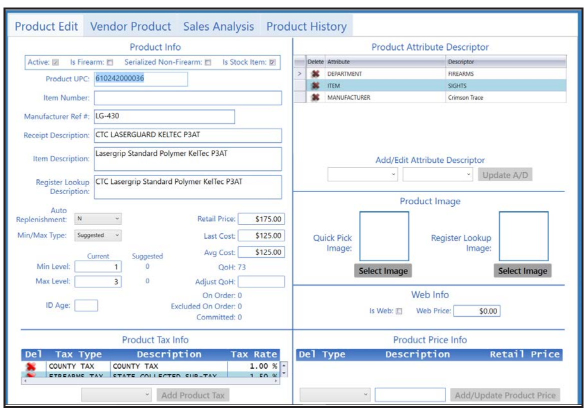
Use the Product Edit window

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.



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.

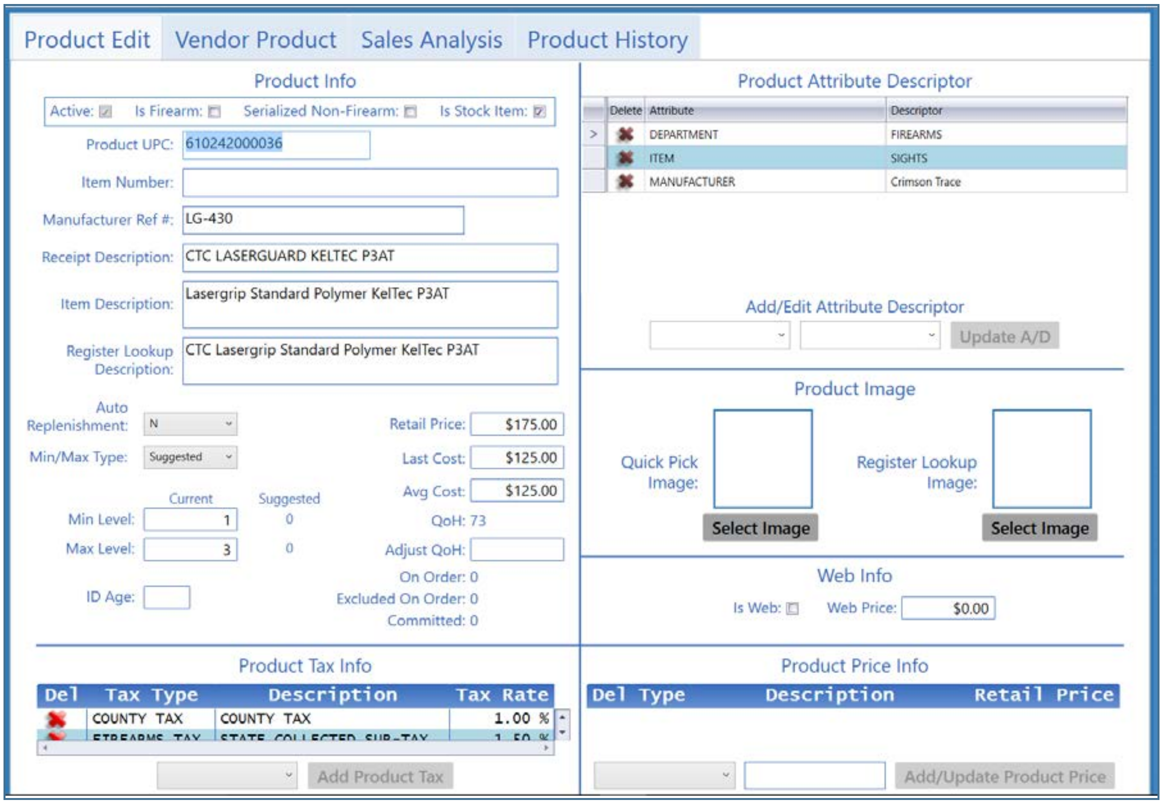


4. Complete the desired procedure(s) on the appropriate tab(s).

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 [Vendor Product tab (page 60)](#) allows the user to manage a product's vendor product detail record and control the behavior of its [Vendor Product Detail window](#).
   - The [Sales Analysis tab (page 63)](#) 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.

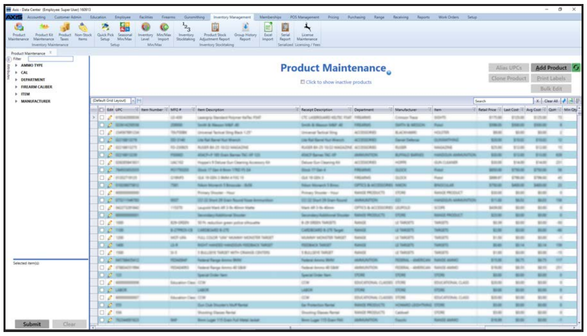
The **Product Edit** tab allows the user to define a product's characteristics and values.



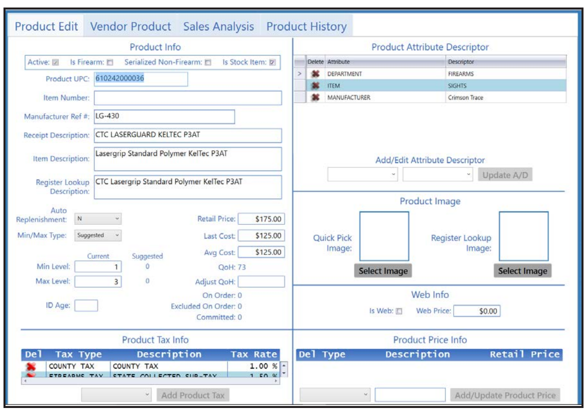
Use the Product Edit tab

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

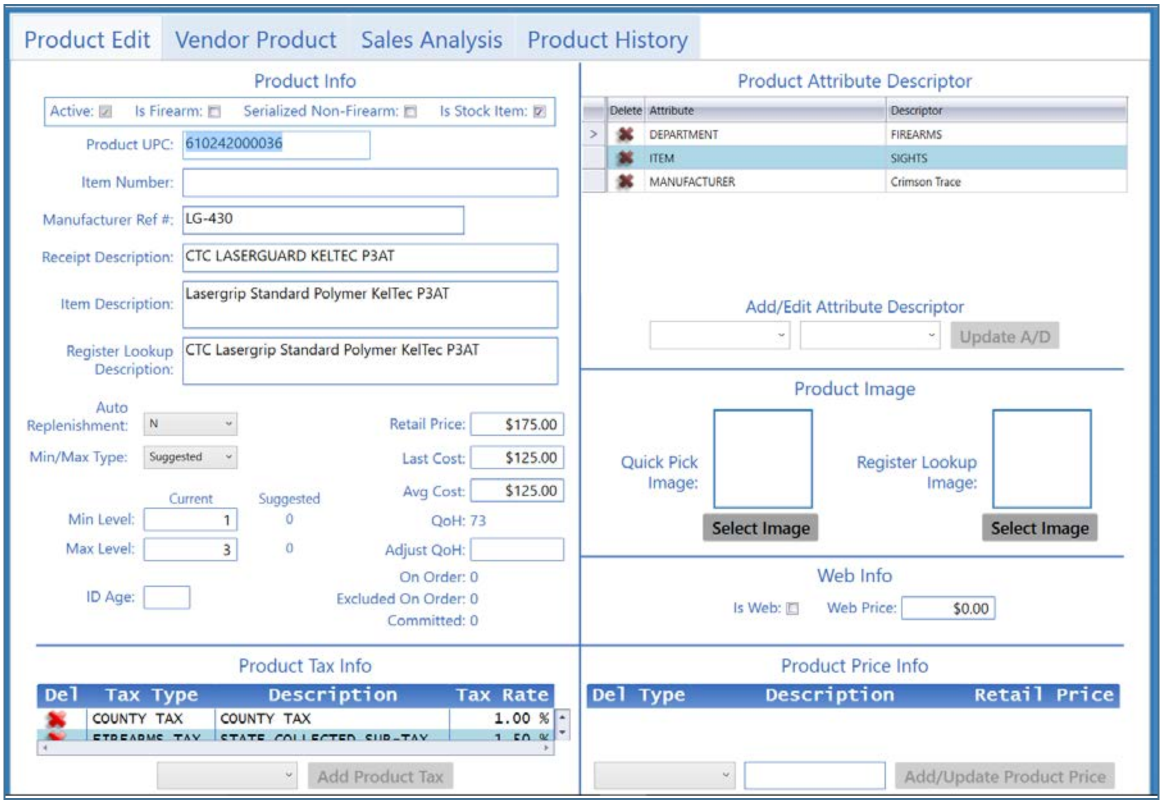
2. Select **Inventory Management > Product Maintenance** from the main menu to display the **Product Maintenance** screen.



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.



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

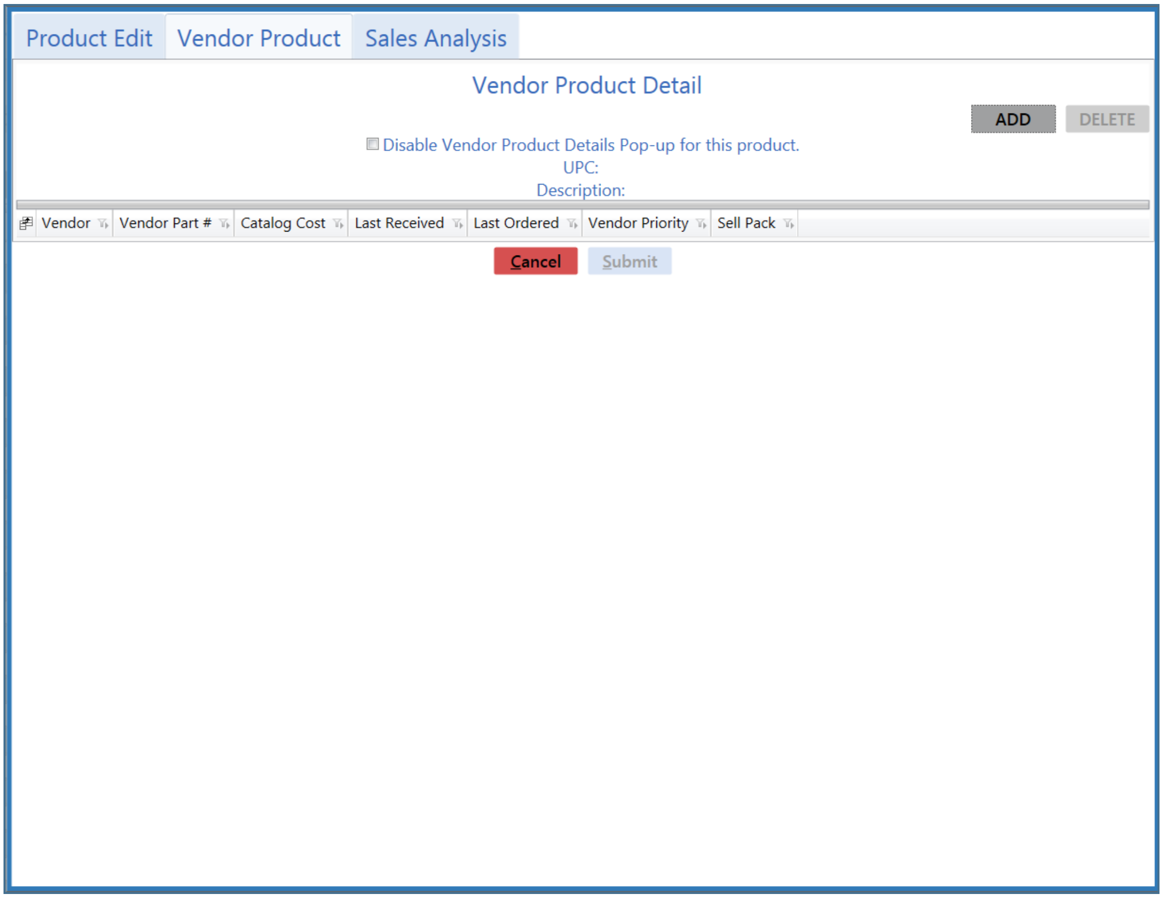
Product Info section	Complete the appropriate fields and settings:.
Note: Required fields and settings are displayed with red borders.	
Active	Check the checkbox to mark the item as active and make it available for search and selection in the **Register** application.
Is Firearm	Check the checkbox to 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 Create a Vendor Purchase Order (page 33) 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 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.).
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 section	Select a price type from the drop-down field, enter a price in the second field, 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

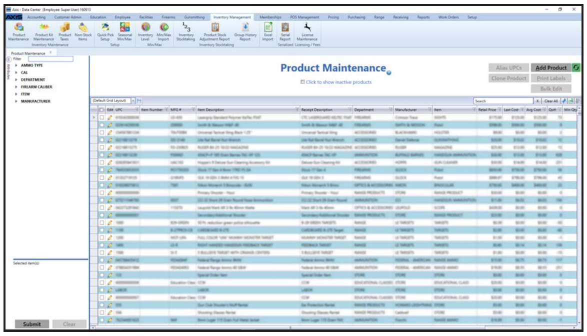
The **Vendor Product** tab allows the user to manage a product's vendor product detail record and control the behavior of its Vendor Product Detail window.



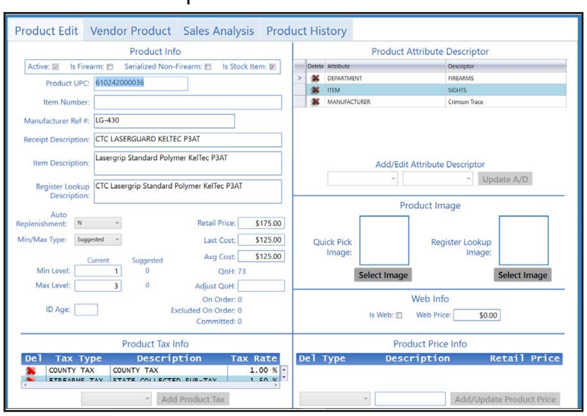
Use the Vendor Product tab

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

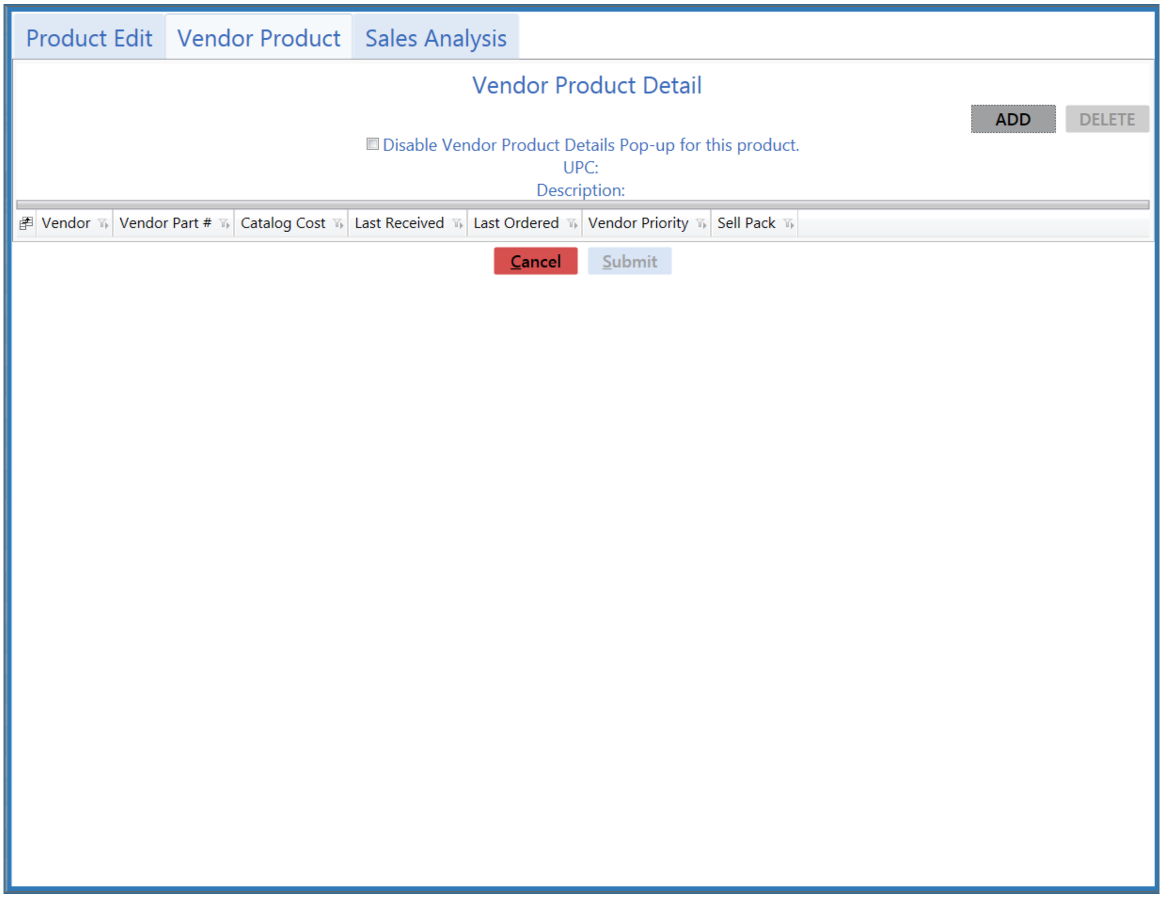
2. Select **Inventory Management > Product Maintenance** from the main menu to display the **Product Maintenance** screen.



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 **Vendor Product** tab to display the **Vendor Product** tab.



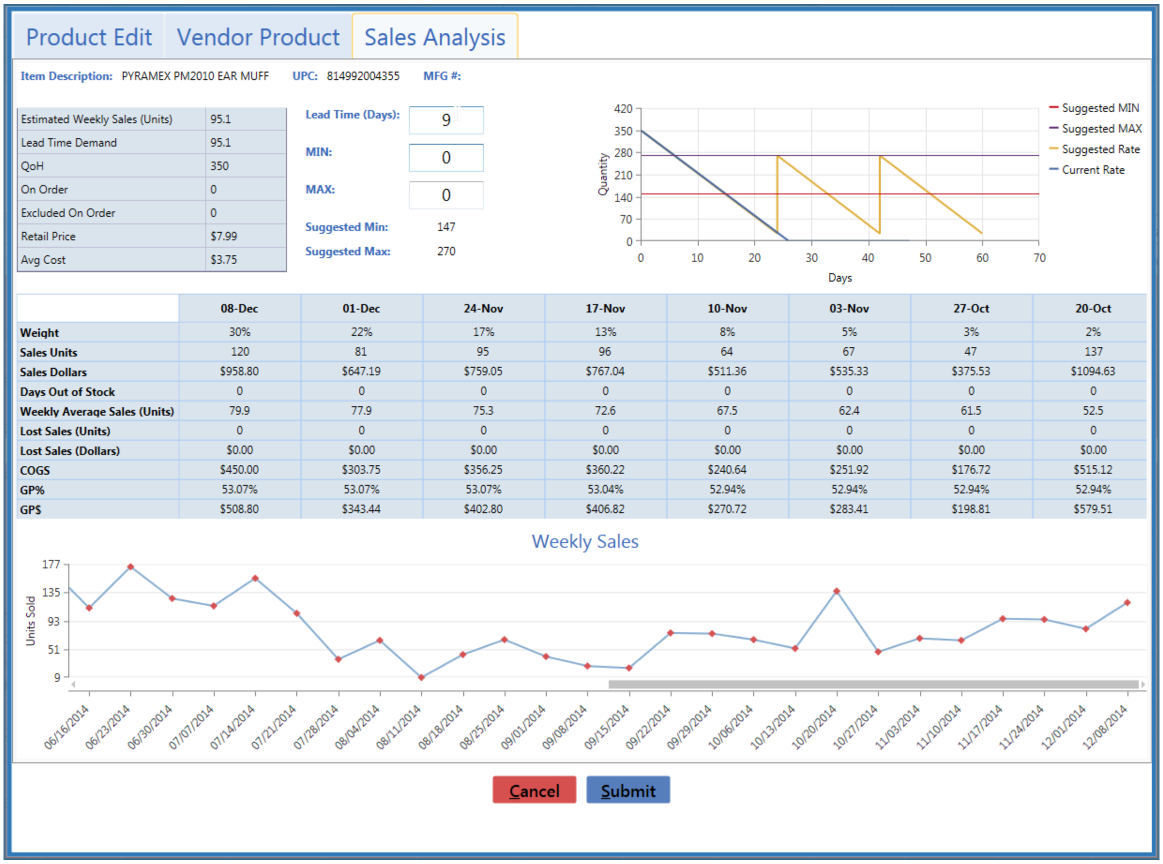
5. Complete the desired procedure(s) with onscreen features.

Disable Vendor Product Details Pop-up for this product checkbox	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.
Add button	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)

Sales Analysis tab

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

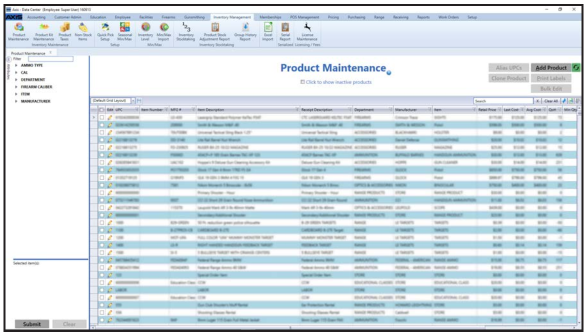


	08-Dec	01-Dec	24-Nov	17-Nov	10-Nov	03-Nov	27-Oct	20-Oct
Weight	30%	22%	17%	13%	8%	5%	3%	2%
Sales Units	120	81	95	96	64	67	47	137
Sales Dollars	$958.80	$647.19	$759.05	$767.04	$511.36	$535.33	$375.53	$1094.63
Days Out of Stock	0	0	0	0	0	0	0	0
Weekly Average Sales (Units)	79.9	77.9	75.3	72.6	67.5	62.4	61.5	52.5
Lost Sales (Units)	0	0	0	0	0	0	0	0
Lost Sales (Dollars)	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
COGS	$450.00	$303.75	$356.25	$360.22	$240.64	$251.92	$176.72	$515.12
GP%	53.07%	53.07%	53.07%	53.04%	52.94%	52.94%	52.94%	52.94%
GP$	$508.80	$343.44	$402.80	$406.82	$270.72	$283.41	$198.81	$579.51

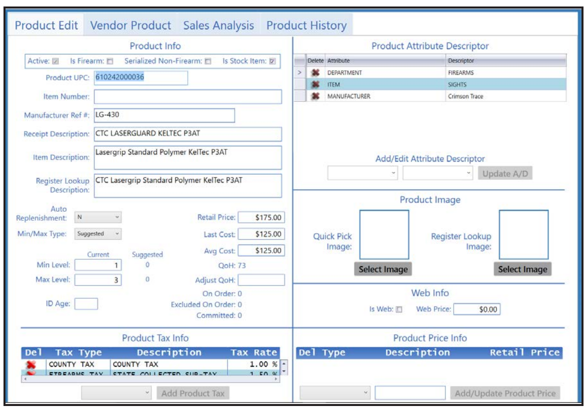
Use the Sales Analysis tab

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

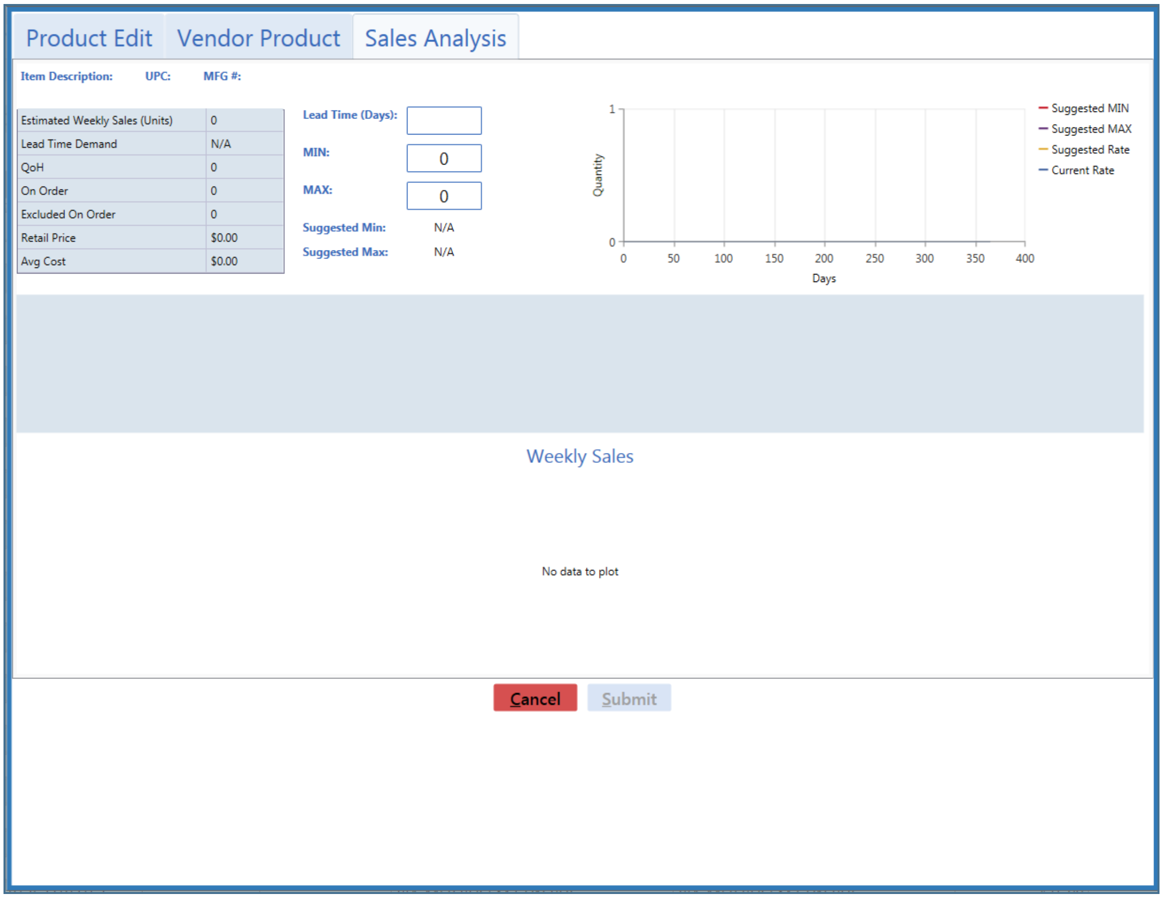
2. Select **Inventory Management > Product Maintenance** from the main menu to display the **Product Maintenance** screen.



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.



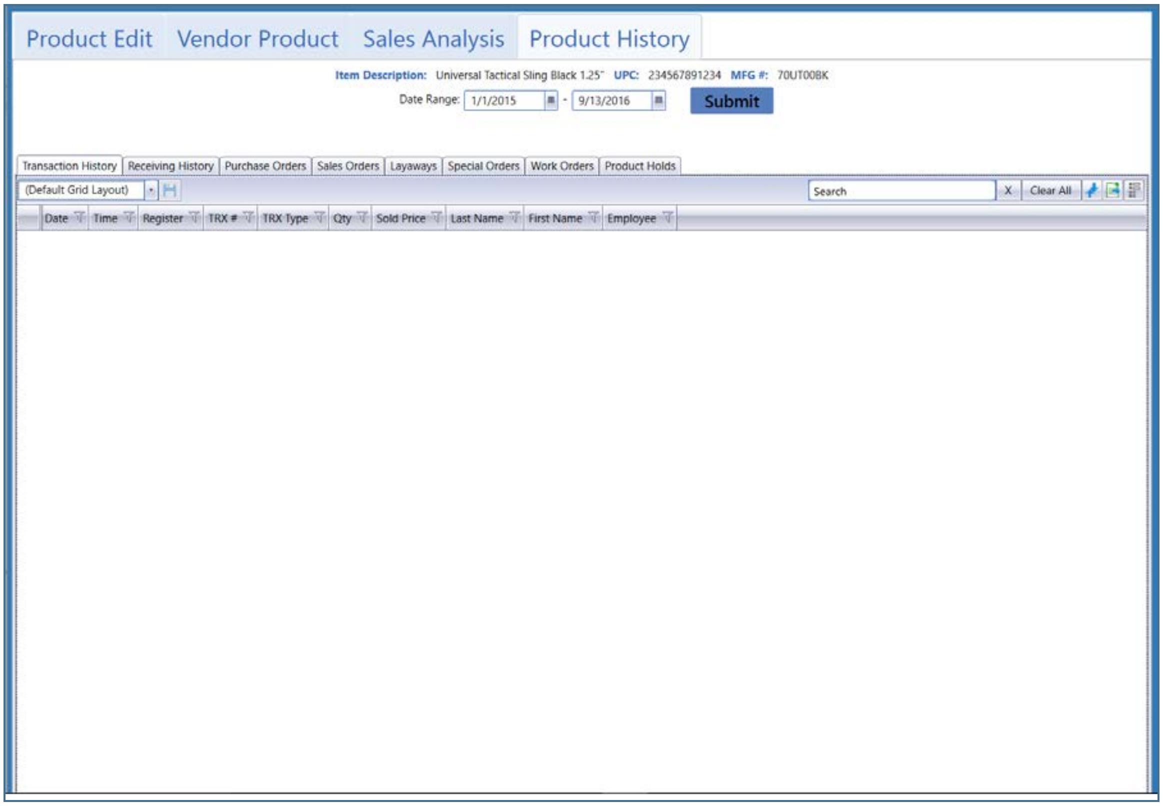
5. Complete the desired procedure(s) with onscreen features.

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 (Dollars)**, **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 or Unit UPC Data (page 24)
- Adjust Lead Time (page 24)
- Modify Min/Max Levels (page 24)

Product History tab

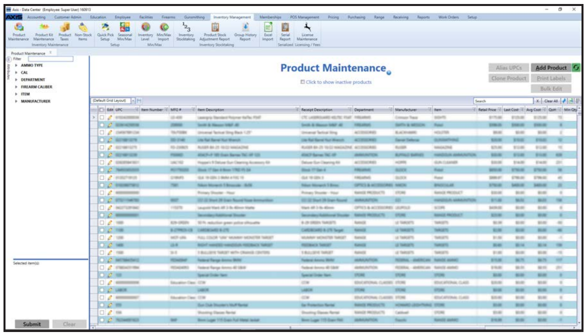
The **Product History** tab allows the user to review an item's inventory and transactional history.



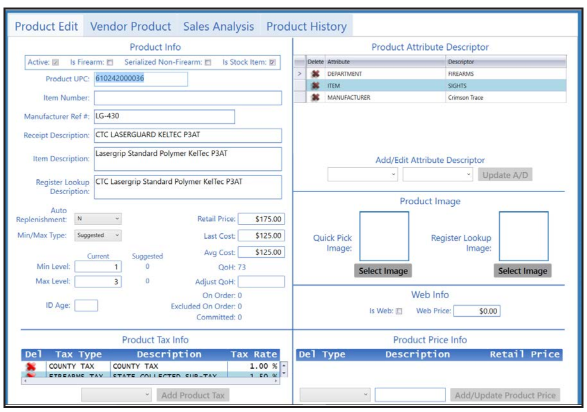
Use the Product History tab

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

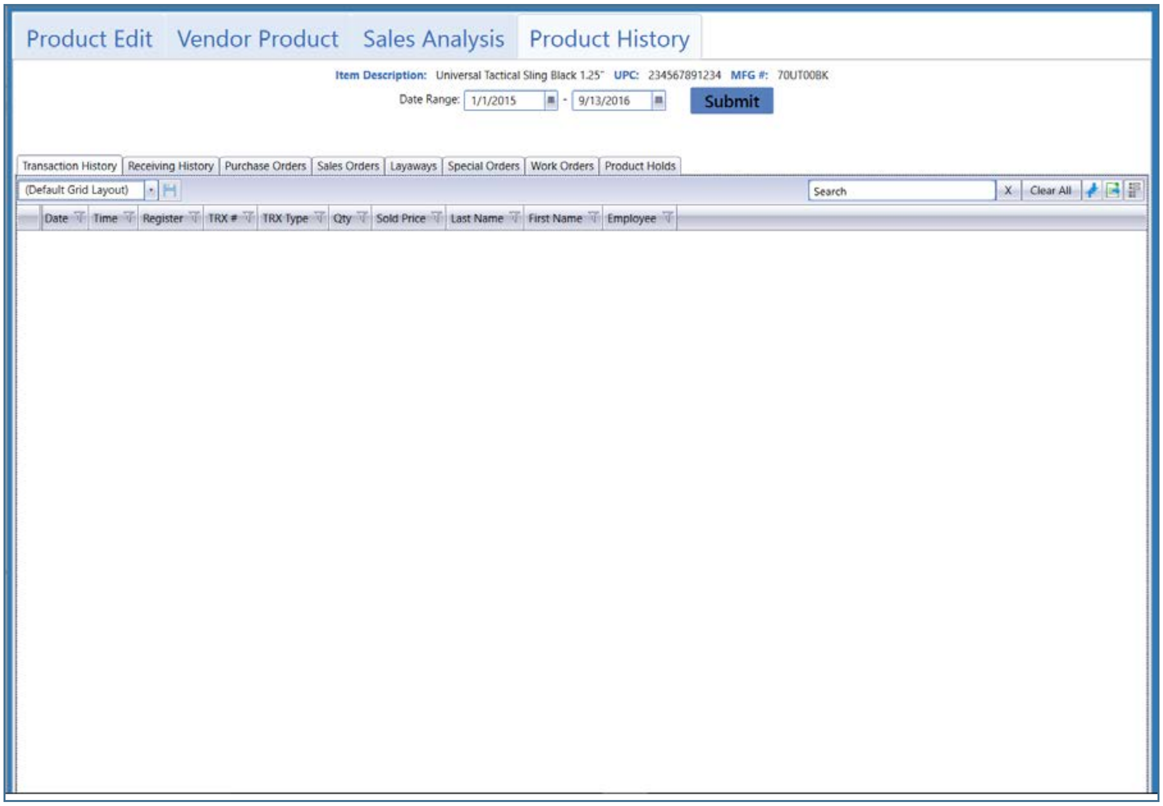
2. Select **Inventory Management > Product Maintenance** from the main menu to display the **Product Maintenance** screen.



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.



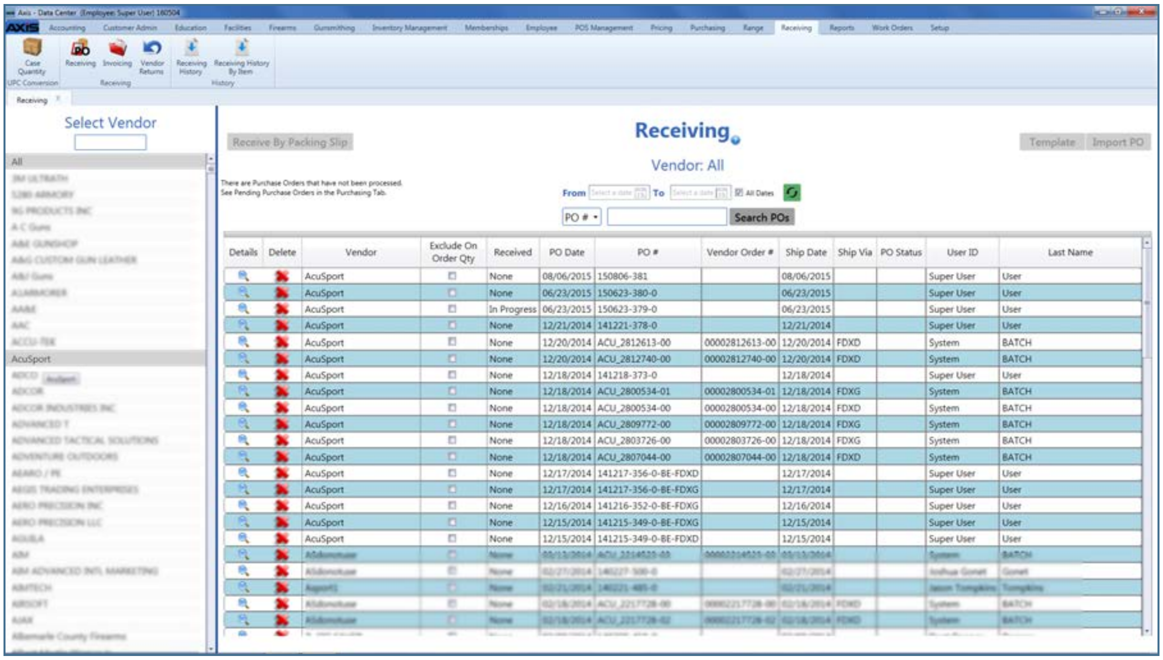
4. If needed, click the **Product History** tab to display the **Product History** tab.



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: 1. Select the desired combination of filters, sorts, groupings, etc. 2. 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.

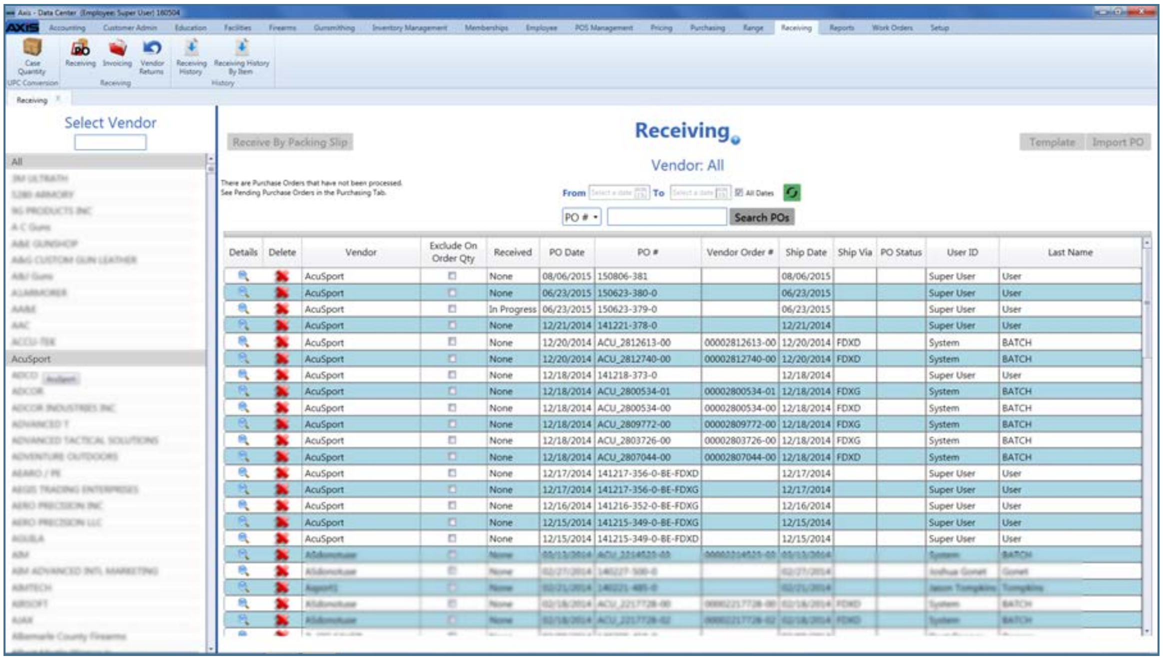
The **Receiving** screen allows the user to receive inventory items, manage purchase orders, and import purchase order data from a formatted Excel file.



Use the Receiving screen

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

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



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 Slip button	Click the button to receive a packing slip for the selected vendor. (This 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 field, and **Search POs** button	Select an option from the drop-down, 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.
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 Items (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 Pending Purchase Orders screen 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
Eric Wille	CLX Support Technician	800.547.7120 x5742

ToolBox Solutions

AcuSportSupport@ToolBoxSolutions.com