

*Setting Up & Using
United
Substitutions*



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Setting Up United's Substitution Program

United's substitution program works with the PSN service to allow dealers to have substitution lists assigned to their accounts in the United system. Dealers can select to use a custom substitution list or use the generic list that United provides. The list allows dealers to control what items are subbed when transmitted and which items are subbed for them. Since United assigns this list to the dealer's individual United account numbers, this feature works with National Drop Ship (NDS) accounts and any of the dealer's standard delivery accounts.

Before You Begin

Before setting up and using the United substitution feature, you must:

- Install DDMS version 8.15.20 or later.
- Set up PSN. For more information see *Phase II: Setting Up & Using United's PSN*.
- Contact United to request a substitution list.

Note: If a dealer needs information on the substitution feature and/or needs to obtain a custom item substitution list, they should contact United Technical Support at 800-733-5555.

Setting up United Substitutions

- 1 In the DDMS Master Menu, click



- 2 In the Keyop Menu, click



- 3 Double click Text Base Parameters.
- 4 Type **L6F**. The (L6F) United Communications screen opens.
- 5 Tab to the Sub List field and type **Y**. See Figure 1. For more information on setting parameters in the (L6F) screen, see *Phase II: Setting Up & Using United's PSN*.

Note: If you list multiple accounts in the (L6F) screen, contact United to assign the substitution list to a specific account in the United System. Parameters do not allow a dealer to specify which account number uses the substitution list in the (L6F) screen

- 6** When finished editing parameters in the (L6F) screen, press Enter to save.
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Note: You can also activate the substitution parameter in the third screen of the Auto Short-Buy call or toggle the parameter on or off on the fly while manually transmitting a P.O. by changing the Sub Field parameters in the second screen of SR-B.

Using United Substitutions

When this Sub List parameter is activated, changes are made in the way that orders are processed and displayed. The following is a summary of changes:

- The United acknowledgment shows a Check Change Information message with a Shipped Item Number message followed by the substitution stock number.
- The original item on the pick ticket and purchase order is replaced with the substitution item.
- The sell price remains the same as the original item, and the cost is updated with the substituted item.
- If a dealer is using a canned DDMS picket ticket and purchase order format, a line item special is created to identify the original item ordered. It displays as follows: Vendor Sub: Original Item #.
- Canned usage reports show the original item ordered, not the substitute.
- It is up to the dealer and United to make sure the United substituted item's unit of measure matches the dealers selling unit of measure when creating the substitute list.
- If an item is partially filled (as long as split lines are used) the unshipped quantity is put on the next line using the original item stock number.

United Substitutions Flow

The item that United is subbing is searched for using I-SUPER. If the subbed item does not exist in the dealer's database, then the original item remains on the pick ticket and purchase order. An exception is generated in the COM-EXCEPT file (New Sub List Item Not on File).

Although the original item is subbed by United, the DDMS ticket and purchase order do not reflect the substitute item. Whole the Super Index is not re-

quired, it is highly recommended because of situations where the dealer's Master inventory record may not match the wholesaler's number.

United Substitutions and the I-AUX File

The following fields are updated in I-AUX for the original item:

- Last P/O field is cleared
- Qty Of field is cleared
- Vendor field is cleared
- On-Order field has quantity deducted
- Backorder field has quantity deducted

The following fields are updated in I-AUX for the subbed item:

- Last P/O field is updated
- Qty Of field is updated
- Vendor field is updated
- On-Order field has quantity added
- Backordered field has quantity added

United Substitutions and Tickets

Purchase orders display the following changes from original to subbed item information:

- Item Key
- Description
- Item Class and Department
- Unit of Measure name (This is not a UOM conversion—just a unit name change if applicable.)
- Prefix (based on United's prefix for the number)
- Any previous line item specials are moved from original item to the subbed item
- A Line Item Special is created to denote the substitution (Vendor Sub:original item key)

Receipts show the following changes if the dealer has Final Receive turned on in the ASB or L6F screen:

- The original item is deducted.
- The subbed item is added.

Setting Up & Using United Substitutions

On the pick ticket, the original item is changed to the subbed item. The following fields reflect the subbed item information:

- Item Number
- Item Company
- Description
- Item Stock Class
- Item Department
- Unit of Measure (name)
- List
- Actual Cost (A Cost) is updated from the P/O cost of the subbed item.
- Pricing Cost (P Cost) is updated from the item file for the subbed item unless the item's price is based on cost plus. The consumer's price is not changed.
- Any previous line item comments are moved from original item to subbed item
- A line item special is added to denote the substitution. This includes the original item key.

United Substitutions and Reporting

When the United substitutions program is activated, changes are seen in report writer, usage report, and SQL reporting fields.

- The report writer programs SORTU/EXECU and SORTT/EXECT have been modified to report the subbed item usage as the original item usage.
- The ticket/invoice printing program (GTAP) prints the original number as an additional line.
- Usage reports can be modified to reflect United substitutions by selecting the query item # from P-LINE or JO-LINE. Type **TYPEOI** to print the OI special (Vendor Sub: [original item key]).
- In SQL Reports for usage, the new OI special populates the OrderedAsSKU and OrderedAsMACCode fields in the SalesOrderDetail table.