

Setting Up Laundry Lists for Dealer Station

What It Does

A laundry list is a collection of the items a customer usually orders. It may also be the items that a customer's company permits him to order.

Laundry lists are particularly valuable with Dealer Station DDMS Edition, since customers do their own ordering. They can choose from a short list of the items they're interested in, instead of working through the thousands of items in your database.

Dealer Station DDMS Edition also lets you specify a laundry list for each user. This offers more flexibility than DDMS order entry, which allows only one laundry list for each account.

If you use headings for your laundry list, each heading becomes a link. Customers might click the heading Pens, for example, to see all the pens on their laundry list.

Creating a Laundry List

To create a laundry list for a customer, follow these steps:

Creating a Laundry List Identifier

- 1 Go to the (E) screen, and select the [A] Add action code.
- 2 In the Loc field, accept the default location by pressing Tab, or specify a different location.
- 3 In the Item# field, enter a laundry list identifier. It can be from one to four characters. If you're creating a laundry list for Bob Buyer, for example, you might specify BOB as the identifier.
- 4 Press Enter. (This leaves the Co field blank; you do not need a company for an identifier.)
- 5 At Unique Record - OK to Add, press Enter until you see the following prompt:

Change Detail Screen Y/N ?N

Type Y

- 6 Tab to the first Kit field, and type M
- 7 In the second Kit field, type C
- 8 Save the item record by pressing Enter until the screen refreshes itself.

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Enabling Laundry Lists on Your Terminal

Dealer Station DDMS Edition uses terminal settings to control some order entry options. The option that lets you use laundry lists is usually set when Dealer Station DDMS Edition is installed, but you should check to make sure. To do this, follow these steps:

- 1 Go to the (L1) screen.
- 2 Look at the line for the terminal you use for Dealer Station DDMS Edition, and make sure it has a B in the Option field, as shown below.

```
13:00:56          (L1)  TERMINAL AND TICKET PARAMETERS          02/27/01
=====
ACTION [C] (C=CHANGE, I=INQUIRY, H=HELP, W=WINDOWS)
=====
Starting Terminal to have Order Entry as Master [TE]
KEY:  AHD=Ahead, ST.=Status, ONL=Print online, P=Printer number
LOG.  KEY  O/E  T-I-C-K-E-T-S  SLIP  LABELS  INVOICES
TER.  LOC. AHD TYPE  ST. ONL  FORM P  FORM P  FORM P  ONL  FORM P  OPTION
1 [TO] [ 1] [Y] [ ] [6] [Y] [4T 1] [ ] [ ] [ ] [Y] [4I 1] [ ]
2 [TE] [ 1] [Y] [E] [6] [Y] [4T 1] [ ] [ ] [ ] [ ] [ ] [B ]
3 [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]
4 [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]
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12 [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]
13 [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]
14 [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]
15 [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]
```

If you're not sure which terminal Dealer Station DDMS Edition uses, notice the parameter near the top of the screen, Starting Terminal to have Order Entry as Master. The terminal you need must have a terminal that's the same as or higher than the name specified in this parameter. If this parameter is set to TE, as shown here, then the terminal for Dealer Station DDMS Edition must be TE or higher. (Higher means later in the alphabet, such as TF or TZ.)

If you have several terminals with names higher than the name in this parameter, set B in the Options field for all of them.

- 3 If your terminal does not already have a B in the Options field, do the following:
 - Select the [C] Change action code.
 - Press ENTER to move the cursor to the first terminal you need to set the Option field for.
 - Tab to the Options field, and type **B**. (If there are already codes there, add the B to the end.)
 - If you have additional terminals you want to set, repeat this process for each one.
 - Save your change by pressing ENTER until the screen refreshes itself.

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Adding Items to the Laundry List

To create your laundry list, follow these steps:

- 1 Go to the (EB) screen, and select the [A] Add action code.
- 2 At Item Number #, type the identifier you created earlier, and press ENTER.
- 3 At Correct Record, enter the appropriate response:

Y	Yes, this is the correct identifier.
N	No, this is not the correct identifier. The system displays the next item record.
ESC	No, this is not the correct identifier. The cursor goes back to the Item Number field so you can enter the correct one.
- 4 At Text, you can enter descriptive text for this laundry list, or press ENTER.
- 5 You can now create a heading or enter an item.

Headings let you break a large laundry list into sections, so it's easier to find what you're looking for. If your laundry list has more than 20 items, adding headings can reduce keystrokes, making it faster

for your customers to add items to their orders. You can create as many headings as you need.

To create a heading, go to **Adding a Heading**.

To place an item on the laundry list, go to **Adding an Item**.

Adding a Heading

- 6 At Item Number, type the heading (PENS or FOLDERS, for example) and press ENTER. The system brings up the item record that's closest to the heading you entered.
- 7 At Correct Record, type **H**. This identifies what you typed as a heading. Notice that the H column now has a Y in it, indicating that this is a heading.
- 8 In the G field, specify a group for this heading. Groups let you organize laundry lists. You can also sort your laundry list by group.

To create a group, specify a group code. It can be any single character, 1 or A, for example. (The figure on the next page shows groups in the G column.)

- 9 The U1 and U2 fields let you add comments to each line of a laundry list. Some dealers use them to indicate preferences for certain items, like 1ST and 2ND. Others use them to specify who buys a certain item;

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```

14:28:50          (EB) Bill of Materials Link rev. (05/25/00)          02/27/01
ACTION [A] =====
A=Add, C=Chg, D=Del, I=Inq, S=Sub, X=Xerox, W=Where used, B=Back to E, R=Reindex
=====
Item Number #BOB          :          Unit :          kit A/B/C/L/M :M Price A/C ?C
Description :          Alt. :
Text :LAUNDRY LIST FOR BOB BUYER          Price $.....
=====
Seq  Item Number  Mfg          Description          Un H G  U1  U2
-----
110  PENS          EA Y 1
120  BK90A         PEN  PEN, BALLPT, RSV, FN, BK  EA N 1 1ST
130  BK90C         PEN  PEN, BALLPT, RSV, FN, BE  EA N 1 2ND
140  87101        PAP  PEN, BALLPT, RETRAC, MED, BE  EA N 1 BOB
150  BLP51ASST    BIC  HIGHLIGHTER, BRTLNER, 5PK  PK N 1 BOB MARY
160  REL1PE       BIC  PEN, ROLLER, METAL PT, PE  EA N 1 STEVE JEAN
170  FOLDERS      EA Y 2
180  SS330AD      SMD  FLDR, 1/3, 30PK, ASST  BX N 2
190  SS3A        SMD  FLDR, FILE, LTR, 1/3, ASST  PK N 2
200  72640       AVE  FOLDER, DISK&DOCUMNT, 3/PAK  PK N 2 BOB
** ENTER ITEM OR <????> FOR OPTIONS !!

```

you may type MARY by the pens that Mary prefers, for example. See the figure above.

Specify comments in the U1 and U2 fields for this heading, or tab past them.

Note: Dealer Station does not use the U1 and U2 fields; they are only used by the DDMS system.

Adding an Item

- At Item Number, specify the number for the item you're adding and press ENTER. At Correct Record, confirm that you have the right item or select another.

- With the cursor in the G field, you can specify a group number or change the sequencing (the order in which items appear).

If you want to change the sequencing, go to **Step 12**.

If you want to specify a group code, go to **Step 13**.

- To change the sequencing, press ESC with the cursor in the G field. The cursor moves back to the SEQ field. Notice in the figure on the left that the system numbers items in increments of 10. To change the sequence, specify a number that puts your item where you need it. If its sequence number is now 120, for example, but you want to place it after an item with sequence number 240, you might enter 245.

Items do not appear in their new order until the display is refreshed. A fast way to do this is to type REVIEW in the Item Number field.

- Group codes let you organize and sort items on a laundry list, as stated earlier. You can use any single character as a group code.

Specify a group code by entering it in the G field. (See the figure on the left.)

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- 14 In the U1 and U2 fields, you can enter comments, as described in **Step 9**.
- 15 Continue to add items and headings to complete the laundry list.

Reindexing the Laundry List

When you're finished adding items, you must reindex the laundry list to ensure that it's displayed properly.

Follow these steps:

- 16 Press ESC until the cursor moves back to the action code field.
- 17 Select the [R] Reindex action code.
- 18 At Item Number #, specify the identifier and press ENTER.
At Correct Record, type Y.
- 19 At Sort Assembly by Group Code, type Y.
- 20 At Sequence Number, type X. The system sorts first by group code and then by sequence number.

Assigning Laundry Lists to End Users

After creating your laundry lists, you need to assign them to the appropriate end users. Follow these steps:

- 1 Go to the Admin pages of your Dealer Station DDMS Edition site.

- 2 Click the **Site Preferences** button.

Scroll down to the Max Display List field. The setting you select here determines whether the headings in a customer's laundry list appear in Dealer Station DDMS Edition. If this field is set to 20, for example, there must be 20 or more items under a particular heading before the heading itself appears. If there are fewer than 20 items under this heading, the items would appear without the heading.

Select the appropriate number for this field, from 5 through 30.

- 3 At the bottom of the Site Preferences page, click **Update**.
- 4 Click the **User Accounts** button.
- 5 Retrieve the first user you're assigning a laundry list to by specifying their account, name, or user name, and clicking **Submit Search**.
- 6 When the system displays a list of users that match what you typed, click the appropriate name.

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- 7 Scroll down to the User Settings heading, and set the following boxes, as shown on the right:
 - At Order from Contract (Laundry List), click **Yes**.
 - At Laundry List, type the identifier you're assigning to this user. Remember to use upper case.
- 8 Scroll to the bottom of the screen, and click **Save**.
- 9 Repeat **Steps 5-8** for each additional user you need to assign a laundry list to.

User Settings	
Super User:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Edit Budgets:	<input type="radio"/> Yes <input checked="" type="radio"/> No
View Orders:	<input type="radio"/> View orders only for this username <input type="radio"/> View all orders for this user's department <input checked="" type="radio"/> View all orders for this user's account number
Order From Catalog:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Order From Contract (Laundry List):	<input checked="" type="radio"/> Yes <input type="radio"/> No
Laundry List:	BOB