

*ECinteractive® &
is.D-Force2®*

Administrative Site:

Quantity On Hand



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About Quantity On Hand

On hand quantity information is obtained from the back office business system.

When you shop online, you want to know whether an item is in stock and ready to be shipped. Knowing an item is out of stock could affect your shopping decisions. This enhancement lets you display your on hand quantities. You can set up on hand quantity preferences for the entire site using the Site Preferences page. Then, use the Quantity On Hand Management page to customize preferences for individual accounts which can then be applied to all customers within the account or to specific customers.

Note: You can also use the Parameter Maintenance page to mass change the Quantity On Hand setting for your users.



Before You Begin

Before you can begin using the Quantity On Hand feature, you must:


- Install the latest version of DDMS software, 10.2.20 or later.
- Next, have your network administrator open firewall ports 9965 and 9966 to use the new ECi EBS SQL pipeline, required for these vendor communications features.
- **WARNING:** You *must* also import your data through the EBS SQL Import Panel. You must import your file information and then set up a schedule for importing future data. Do NOT proceed with these instructions until you do so. For details, see *Using the EBS SQL Import Panel* handout by visiting our website at www.ddms.com/Resources/Support/faq/utilities/EBSSQLimport.pdf.

Setting Up the Quantity On Hand Feature

To effectively use the quantity on hand feature, there are steps you must perform on the back office system. Then, you must set up your Administrative website.

Setting Up Back Office System Parameters


On the ECi DDMS back office system, there are two parameters you can set, as shown in Figure 1.

- 1 From the DDMS Master Menu, double-click  , then double-

click



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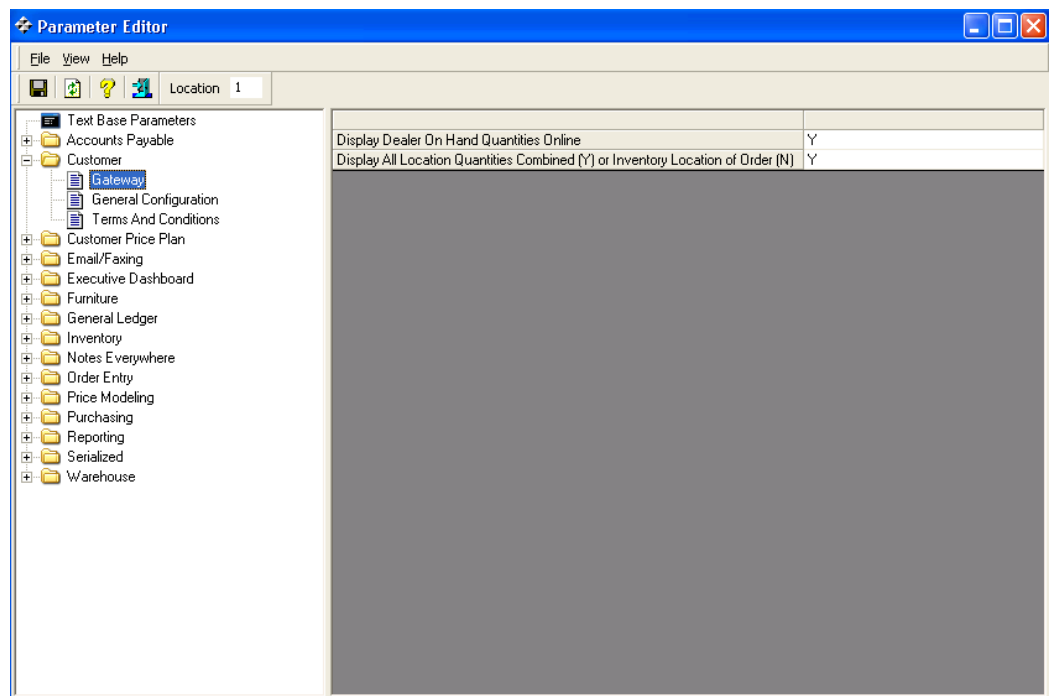
- 2 From the Parameter Editor window, double-click Customer then click Gateway.
- 3 In the Display Dealer On Hand Quantities box, you can specify whether to display on hand quantities online. Type **Y** in this box to display dealer on hand quantities online. Type **N** to not display on hand quantities online. The default setting for this box is N. The on hand quantity is pulled from the On Hand box in the Item History Add Item Aux Record Dialog Box.
- 4 In the Display All Location Quantities Combined (Y) or Inventory Location of Order (N) box, you specify whether to display all on hand quantities of an item or only display quantities by location. To display all quantities, type **Y**. To display only quantities for this item by location, type **N**. The default response for this box is N.
- 5 Click .

Setting Up Vendor Supply Options

If you use PSN with S.P. Richards and/or United Stationers and plan to use the quantity on hand feature with them, there are options that must be set in the Vendor database.

You must also set up the appropriate destination ID for each PSN wholesaler and select the features to enable.


Figure 1: Setting Parameters



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Using PSN, you can check vendor stock availability and price from within Order Entry. When you check an item's price or availability, PSN checks your I-CAT file (updated by your O/PUS load) to see which vendor(s) carries the item. Then it checks the wholesaler's available quantities and pricing via the Internet. The results display in Order Entry.

The system calculates total on hand quantities and displays them online. This total includes on hand amounts from your item database and stock check quantities from all vendors whose stock facilities you set up to display online.

- 1 From the DDMS Master Menu, double-click  .
- 2 In the Vendor # box, retrieve the vendor for which to display on hand quantities, S.P. Richards or United Stationers, for example.
- 3 Click the View menu and click Supply Options.
- 4 The Supply Options window opens. In the Location box, enter a G/L location, or accept the default of 1. This dialog box is location specific.

Note: If you limit stock and price checks to specific wholesaler facilities, you can have different facility settings for different general ledger locations.

- 5 In the Destination ID box, type **SPARCO**, as shown in Figure 2, or **UNITED**.
- 6 From the Supported Features list, check those to enable.
 - Price Check
 - Stock Check
 - Purchase Order.

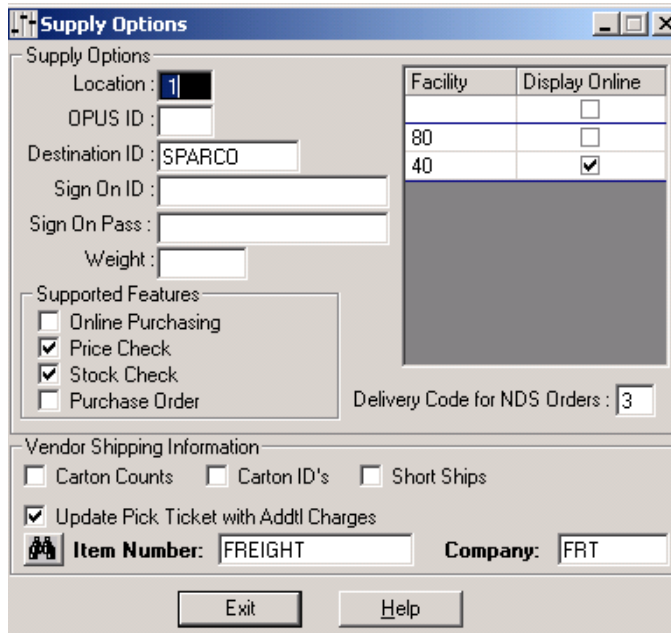


Figure 2: The Supply Options Window

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- 7 Use the Facility box to limit price and stock checks to specific wholesaler facilities. To do this, in the Facility box, enter the location ID.

Note: Since the Vendor Supply Options dialog box is location specific, you can have different facility settings for different general ledger locations. For information on valid facility codes, contact your wholesaler.


- 8 To display on hand quantities from this facility on the Web, check the Display Online box.
- 9 To update the ticket with carton counts and carton ids, click the Carton Counts and Carton IDs boxes.
- 10 To process freight charges and post them to the pick ticket, click the Update Pick Ticket with Addtl Charges box. Then, enter the item number and company name in the following boxes.
- 11 When you are finished, click Exit.
- 12 Click Save.

Note: For more information on setting up your system to use PSN, see the appropriate PSN handout on our website at <http://www.ddms.com/support/doc/psn.htm>.

To specify quantity on hand settings for individual accounts, you can use the Quantity On Hand Management page.

Setting Up Site Preferences

Next, set up your Administrative website to use the quantity on hand feature.



- 1 Go to your Administrative website.
- 2 Click Global Settings and select Site Preferences. You can also click the Site Config training menu and choose Site Preferences.
- 3 The Site Preferences page opens. The page is divided into several sections. To edit quantity on hand settings, click  beside the Quantity On Hand section.

Note: When you first open the Site Preferences page, the Quantity On Hand section's Display option is set to Off by default. To use the Quantity On Hand feature, you must specify the site preferences to use.

- 4 The Edit Site Preferences page opens. See Figure 3.
 - 4.1 The Edit Quantity On Hand Setting options let you specify how to display your available on hand quantities to the shopper.
 - Click the Do Not Display Quantity On Hand option to disable the ability to view on hand quantities. If you select this option, the Quantity On Hand feature is disabled for the entire site.

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Any shopper level on hand quantity settings you may have specified are ignored.

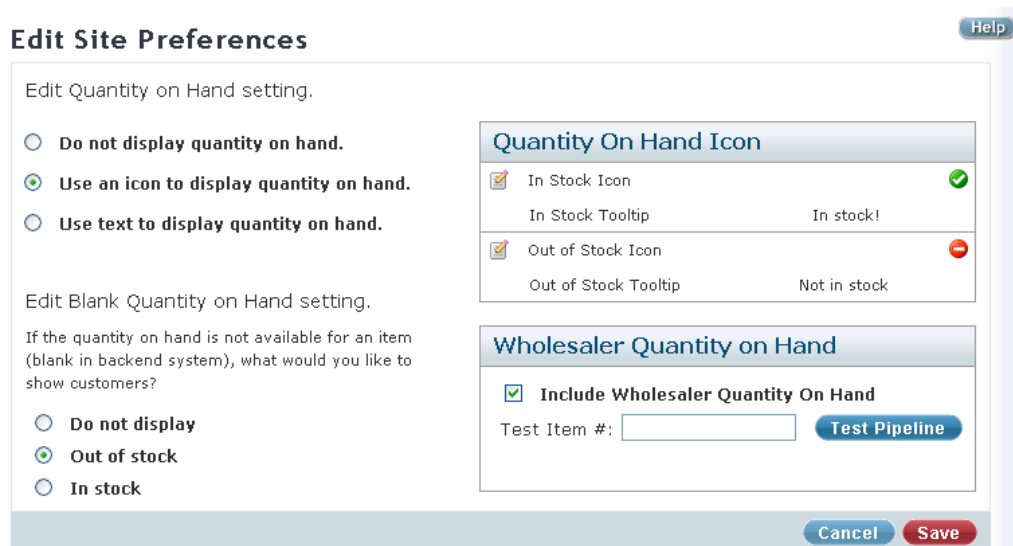
- Click the Use An Icon To Display Quantity On Hand option to display an icon for available and non-stock item quantities. The system defaults to use  as the in stock icon and  as the out of stock icon. You can easily customize the defaults using the Quantity On Hand Icon section.
- Click the Use Text to Display Quantity On Hand option to display text for in stock and non-stock item quantities. The system defaults to use In Stock and Out of Stock as the default text. You can easily customize the defaults using the Quantity On Hand Text section.





4.2 The Edit Blank Quantity On Hand Setting options let you specify how the system should handle items you don't stock (non-stock).

Note: In ECi DDMS, when an ECinteractive or is.D-Force2 shopper orders an item you don't stock, the system returns a blank on hand quantity. The Edit Blank Quantity On Hand Setting option lets you specify how the system should handle and display the information to the shopper on the front end site.

- Click the Do Not Display option to not display non-stock item quantity on hand information.
- Click the Out of Stock option to display the out of stock icon or out of stock text for items you don't carry.

Figure 3: Editing Quantity On Hand Site Preferences



Quantity On Hand Icon	
 In Stock Icon	
In Stock Tooltip	In stock!
 Out of Stock Icon	
Out of Stock Tooltip	Not in stock


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- Click the In Stock option to display the in stock icon or in stock text for items you don't carry. You can use this option for non-stock items since you can easily purchase them to complete the shopper's order.
- 4.3 In the Quantity On Hand Icon/Text section you can edit the icon or text settings, depending on your response in the Edit Quantity On Hand Setting box.

Click  beside the option to change.

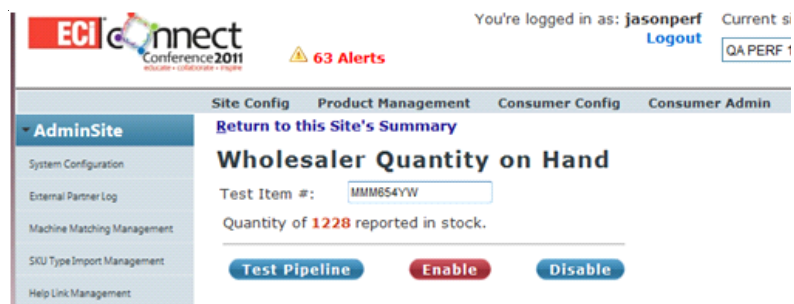
For example, if you select the Use an Icon to Display Quantity on Hand option, this section lets you choose the icon that displays for in stock and out of stock items. You can also enter the tooltip text the user sees when the cursor hovers over the icon. You can also specify to not display information for items that are not in stock.

If you select the Use Text to Display Quantity On Hand option, this section lets you customize the text that displays to the user for in stock and out of stock items. You also have the option to not display text for items that are not in stock.

Note: When editing the quantity on hand tooltip or text, an additional option lets you show the actual on hand quantity of an item, along with the text, such as We Have [[inventory_count]] Items in Stock. To use this option, click . The text [[inventory_count]] appears.


- 4.4 The Wholesaler On Hand Quantity box lets you include wholesaler on hand quantities in the search results. To use this option, click the Include Wholesaler Quantity On Hand check box.
- 4.5 Click the Test Pipeline button to view the wholesaler item with the settings you selected. Enter the wholesaler item number and click Test Pipeline, shown in Figure 4. If the test is unsuccessful, contact DDMS Support.


Figure 4:
Testing the
Pipeline



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- 4.6 The Wholesaler Quantity On Hand section also defaults to display your icon/text preferences depending on your response in the Edit Quantity On Hand Setting box. However, you can change the preferences.

If you select the Use an Icon to Display Quantity on Hand option, this section lets you choose the icon that displays for in stock and out of stock items. You can also enter the tooltip text the user sees when the cursor hovers over the icon. Click  and make the necessary icon and tooltip text changes. You can also specify to not display information for items that are not in stock.

If you select the Use Text to Display Quantity On Hand option, this section lets you customize the text that displays to the user for in stock and out of stock items. Click  and make the necessary text changes. You can also specify to not display text for items that are not in stock.

Note: You can also use the Quantity On Hand Management page to set up quantity on hand preferences for individual accounts which can then be applied to all customers within the account or to specific customers.

- 4.7 When finished, click Save.

Using Quantity On Hand Management

After you set up the Site Preferences page to specify on hand quantity information for all your customers, this page lets you customize those settings for specific accounts.

- 1 Click Global Settings and select Quantity On Hand Management. You can also click the Site Config training menu and choose Quantity On Hand Management.
- 2 The Quantity On Hand Management page opens. See Figure 5. You can change the quantity on hand settings for all accounts or you can change settings for a specific account.

Note: To limit the information on this page, click the box by which to limit and then click the down arrow to select the filter. For example, you can limit to include a specific account number. Click the Account box and enter the number. Click the down arrow and select the Contains filter.

The ability to edit on hand quantity settings for new or existing customers is not available if the on hand quantity settings on the Site Preferences page is disabled.

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


- To change settings for a specific account, click  beside the account to change. Click the appropriate option from the list. You can specify to use the default settings, to not display on hand quantities, to display an icon for on hand quantities or to display text for on hand quantities. If you choose the icon or text option, you can edit the icons and text that displays to the user.
 - To change the settings for all accounts shown, click  at the top of the page. The Edit for Site page opens. This page displays all the options of the Edit Site Preferences page. Click each option to make the necessary changes.
- 3 When finished, click Save.

Figure 5: The Quantity On Hand Management Page

[Help](#)

Quantity On Hand Management

Site

Your website will display quantity on hand using the default site level setting shown below. Click  to edit the setting.










ERP Pipeline Communications On

Quantity On Hand Icon

Quantity Not On Hand Icon


Account

By default, all accounts will use the site setting shown above. To override the default quantity on hand setting for a specific account, click the edit icon and customize the setting.

	Account	Name	Quantity On Hand Setting
	<input type="text"/> 	<input type="text"/> 	<input type="text"/> 
	10059	ANTONIO SANCHEZ	Use Default
	10060	a	Use Default
	10062	OS2	Use Default
	10063	OP2	Use Default
	392495		Use Default
	AVD	MAIN AVD DEPARTMENT	Use Default

Using Customer Management

The on hand quantity settings are also available when adding and editing a shopper or the guest user account. Since the settings you specify override the settings on the Site Preferences page, this lets you customize on hand quantity settings for specific shoppers.

When editing existing shoppers or the guest user, go to the Customer View page and click  beside the Quantity On Hand section.

When adding new shoppers, click  on the Customer Wizard page.

Since you can set up custom icons and text for accounts and customers within accounts, you have a number of customization options available when setting up the quantity on hand feature, as shown in Figure 6.

Quantity on Hand Custom Icon Override

Figure 6:
Example of
Quantity On
Hand
Customization
Options

