



File #219

Platform: ALL

Switching Your Primary Vendor During Quarterly OPUS Updates



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What It Does

Sometimes while loading OPUS quarterly updates, a dealer decides to change the primary wholesaler. It may be because the primary vendor's distribution center was not as fast at filling back orders as another vendor, for example.

Whatever the reason, the task of switching the vendor sequence during OPUS updates is easy. However, you will run into cost discrepancies if you don't change a related but easily overlooked parameter.

You see, OPUS tries to match each item on the update with an item in your Inventory database. Then it looks for the item's Purchasing Vendor or the Primary Vendor you selected in your OPUS parameters to update the item's cost, pricing, and other data. If that vendor doesn't have the item on the update, OPUS looks to the exception vendors in the order you specified. But your OPUS parameter settings determine whether OPUS looks first to the Purchasing Vendor, the old existing Primary Vendor, or your newly selected Primary Vendor.

Understanding Text-Based OPUS Parameters

The text-based OP-db Vendor Selection and Print Parameters screen is shown below.

A) Select the number of your PRIMARY choice for loading or updating items allows you to select the order in which OPUS will look for a vendor to update each item's data.

B) Match on Wholesale Vendor determines which

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O/PUS ! OP-db Vendor Selection and Print Parameters Screen
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OPUS will print the EXCEPTIONS (items not updated) report automatically !
P1 1) Printer assignment.(P1, P2, P3 etc... A printer MUST be specified !)
N 2) Print the NEW RECORDS added to your file ? (Y/N)
N 3) Print NEW RECORDS not written to file ? (Y/N)
N 4) Print UPDATED Items ? (Y/N)
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Proprietary Property of and Copyrighted by O/PUS !
4 A) Select the number of your PRIMARY choice for loading or updating items.
Load EXCEPTIONS from the following vendors.[ 3] [ 9] [ 6] [ 8] [ ] [ ] [ ]
Select in order of preference !
1 Micro United
2 Azerty Inc.
3 Sparco
4 United
5 Action wholesale
6 OHenry
7
8 Daisytek
9 Emco Sales & Service
10 Pens Plus, Inc.
N B) Match on Wholesale Vendor ?(Y/N/X)
Prompts C-F will Change Item keys and
create the NEW-C-ITEM file on work Unit !
Y C) Convert to Primary Vendor ? (Y/N)
Y D) Reset Changed Item Numbers ? (Y/N)
Y E) Set CO: field to MAC ? (Y/N)
N F) Set Exceptions Keys as Ref.? (Y/N)
G) Create O/PUScanalog ? (Y/N)
Y H) Create I-UOM File ? (Y/N/I)
Press any key for next page !

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vendor's data will update existing inventory items. The options and their consequences are as follows:

Y OPUS will try to use the data of the wholesaler vendor that already exists in your file. If that vendor is not on the update, or that vendor does not have that item on the update, OPUS uses the data of the primary vendor. If the primary vendor does not have that item on the update, OPUS uses the data of the first exceptions vendor that does have that item on the update.

If you switch to a new vendor, but set this option to Y, OPUS will not update item pricing according to the new primary vendor. This is the source of many cost errors.

N OPUS will use the data of the primary vendor. If the primary vendor does not have that item on the update, OPUS uses the data of the first exceptions vendor that does have that item on the update.

If you have changed your primary vendor, OPUS will use the newly selected primary vendor to update items whenever possible. When you switch, select N.

X OPUS will try to use the data of the wholesaler vendor that already exists in your file. If that vendor is not on the update, or that vendor does not have that item on the update, OPUS does not update the item.

If OPUS can't match an item with your old primary wholesaler, it won't update the item at all. The item will appear on your OPUS Exceptions Report with the message "No Update."

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Understanding SIMPLE Graphical Parameters

When using the Smart Inventory Maintenance Plan Limit and Execute (SIMPLE) Graphical program to complete the OPUS quarterly update, the Global Inventory Parameters Wizard offers the option **Update Items to my Primary Vendor Whenever Possible**, as shown below. *If you have changed your primary vendor, select this option.*

The screenshot shows a dialog box titled "Simple - Step 2" with the main heading "Global Inventory Parameters". It contains several settings:

- Printer for Exceptions: P1
- Add New Items to my Inventory.
 - Retail List Buy Unit of Measure should be used for New Items.
 - W is the Stock Class for New Items Added to my Inventory.
- Print the New records added to my Inventory.
- Print the New records NOT added to my Inventory.
- Print the Items that are being Updated.
- Update Items to my Primary Vendor whenever possible. (This option is highlighted with a red box.)
- Update Items Numbers with Changes from Vendor.
- Use the OPUS MAC Code for Item CD Field.

At the bottom, there are buttons for "Help", "Cancel", "< Back", "Next >", and "Finish".

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How to Do It

To change primary vendors for an OPUS update, follow the instructions below. We'll explain how to do this using either method of loading the update:

- Text-based OPUS Updates
- SIMPLE Graphical Updates

Although we will discuss steps that will bring you to the appropriate screen and set the appropriate options, the rest of the procedure is up to you.

Note: It's very important to complete a backup of your system files before beginning OPUS Updates.

Switching Vendors in Text-Based OPUS Updates

If you are using the text-based version of OPUS, follow these steps to switch primary vendors:

- 1 Insert the OPUS update on the DDMS server and copy the software as usual.
- 2 At the OPdb Update Options Menu, select [1] to access All Parameter Prompts.
- 3 In the OP-db Vendor Selection and Print Parameters screen, the Space Availability Message appears. If you do not have a disk space problem, press ESC.

- 4 At printer prompts 1-4, press RETURN to accept existing options or set new options.
- 5 At A) Select the number of your PRIMARY choice for loading or updating items, type the number that matches the desired vendor, as listed on the bottom left of the screen.
- 6 At Load EXCEPTIONS from the following Vendors, type the numbers for the exception vendors in the order you wish OPUS to prioritize them.
- 7 At B) Match on Wholesale Vendor?(Y/N/X), type N
- 8 At Item Keys prompts C-F, press RETURN to accept existing options or set new options.
- 9 Continue with your OPUS Parameters as usual.

Note: Although you can set text-based OPUS Parameters while other people are using the DDMS system, the actual OPUS Update is a dedicated procedure. Before you continue with step 10, make sure no one else is using the system, and place the system in Maintenance Mode.

- 10 When the OPdb Update Options Menu reappears, select [3] to execute the OPUS Update.

Note: For more details on text-based OPUS param-

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eters, see **Match on Vendor: Determining the Selected Vendor** of “Chapter 1: Advance Considerations” in *OPUS Complete Multi-Vendor Documentation*, available online at <http://www.ddms.com/Resources/Support/faq/opus/opusdoc.pdf>. Also see “Chapter 3: OP-db Master Parameters” for instructions.

Switching Vendors in SIMPLE Graphical Updates

If you are using the SIMPLE Graphical version of OPUS, follow these steps to switch primary vendor parameters:

Note: Using SIMPLE is a dedicated procedure. Make sure no one else is using the system, and place the system in Maintenance Mode.

- 1 Insert the SIMPLE CD-ROM on the DDMS server and copy the software as usual.
- 2 Once the Welcome to OPUS Inventory Menu opens, click Next.
- 3 At Simple - Step 1, click the **I Want to See All Options Available to Me** option and then click the **Next** button.
- 4 At Simple- Step 2, click Select Vendors.
- 5 At First Call (Primary) Vendor, select your desired vendor from the list.

- 6 At Second Call Vendor and so forth, select your desired exception vendors from the lists, and then click the **Next** button.
- 7 Click **Global Update Options**.
- 8 At Global Inventory Parameters, check or uncheck your Print options as desired.
- 9 **Important!** Place a checkmark in the box beside the **Update Items to my Primary Vendor Whenever Possible** option.
- 10 Set the remaining options as desired, clicking **Next** to go through the remaining Wizard windows for Global Inventory Parameters, Vendor Specific settings, and Reindexing.
- 11 Click **Finish**.
- 12 Click **Begin Update**.

Note: For more detailed instructions on setting SIMPLE parameters, please see “Viewing All Available Options” of *OPUS Made SIMPLE*, available online at http://www.ddms.com/Resources/Support/faq/opus/opus_SIMPLE.pdf.

