



*Customer
Specific
Item
Substitutions*



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About Customer Specific Item Substitutions

Item substitution lists let you set up a list of items to substitute with another item for specific customers. Each list you create can be assigned to individual customers or a group of customers, rather than for the entire customer database.

This feature is not included in all software packages and may require authorization. For more information, contact ECP Sales.


Item substitution lists also let you meet JWOD requirements. For Federal government customers, you can substitute a blue pen made by National Institute for the Blind (NIB) or National Institute for the Severely Handicapped (NISH) for company A's blue pen. The rest of your non-Federal customers receive company A's pen.

Item substitution lists can also be assigned to customers by shipping routes. This is helpful if, for example, all your Federal customers are assigned the same Route code. This is not commonly the case. Make sure it is right for you before putting it into practice.

You set up item substitutions in the graphical Item database. Once you've set it up, you can use it in both graphical Ensight Pro order entry and the text-based (G) Order Entry screen.

Setting Up an Item Substitution List

To set up item substitution lists:

- 1 From the Ensight Pro Master Menu, double-click  .
- 2 From the View menu, select Substitute List or **Ctrl + L**.
- 3 The Substitute List dialog box opens. You can now set up lists that indicate which items to substitute with new items. Complete the boxes according to the information below. See Figure 1.
 - **List:** Enter a unique list ID. You can enter up to ten alphanumeric characters.
 - **Ordered Item:** Enter all or part of the item number to replace with a substitute item. If you enter part of the number, press Enter. The item drop down list box opens. Select the item from the list. If you already know the item number, enter the number and press Tab. This is the item number entered when placing the order.

Notes: To use the drop down list box, you must set a parameter in the (LG5) Additional Order Entry Parameters screen. Set the Auto Query When There is No Exact Match on Y/N: Item field to Y. If you do not set this parameter, the item most closely matching the information you entered is selected.

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If you select the number using the drop down list box, the Description and Company boxes are automatically completed.

- **Ordered Company:** If not already completed, enter the manufacturer. You can also enter part of the name, and press Enter. Then select the item from the drop down list box.
- **Ordered Description:** If not already completed, enter the item description. You can also enter part of the description, and press Enter. Then select the item from the drop down list box.
- **Substitute Item:** Enter all or part of the item number to use as the substitute for the ordered item. If you enter part of the number and press Enter, the item drop down list box opens. Select the item from the list. If you already know the item number, enter it and press Tab.

Note: If you select the number using the drop down list box, the Description and Company boxes are automatically completed.

- **Substitute Company:** If not already completed, enter the manufacturer. You can also enter part of the name, and press Enter. Then select the item from the drop down list box.
- **Substitute Description:** If not already completed, enter the description. You can also enter part of the description, and press Enter. Then select the item from the drop down list box.

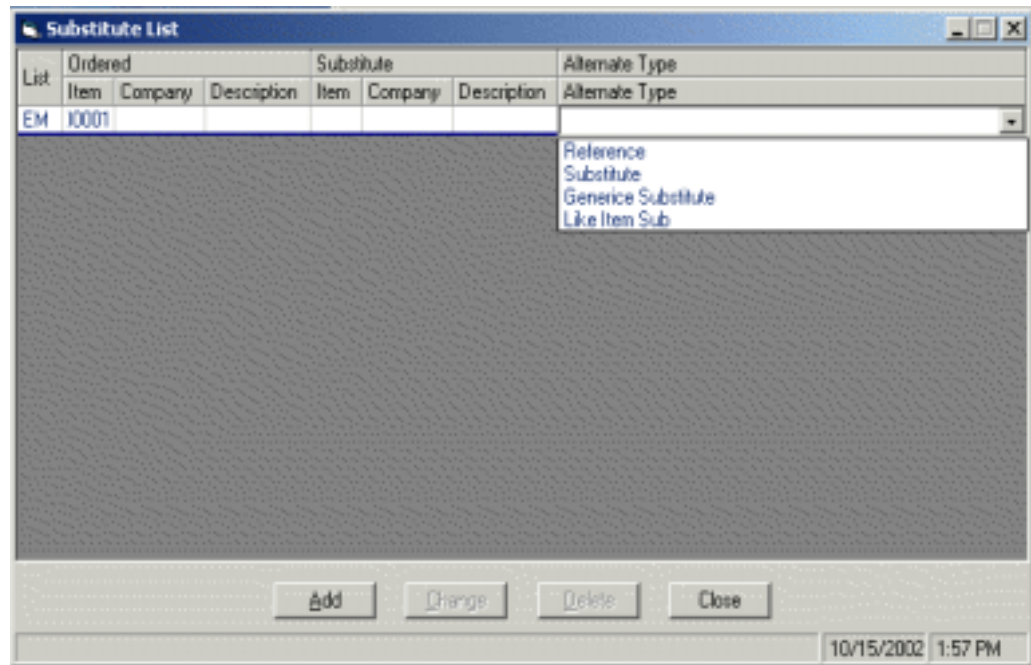


Figure 1: Setting Up an Item Substitution List in the Item Database

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- 4 Select an alternate type from the Alternate Types drop down list box. Each type is described below.
 - **Reference** automatically places the substitute item on the customer's order.
 - **Substitute** allows the order taker to select either the original item or the substitute item.
 - **Generic Substitute** fills the order with the alternate (substitute) item, but uses the price of the original item. If a customer accepts the alternate, the system uses the price from the original record but uses the cost of, and updates the item quantities for, the alternate.
 - **Like Item Sub** automatically displays a list of all the substitutions when an item is set up with one or more substitutions. It shows the selling price, gross profit percentage and on-hand quantities for each. For comparison purposes, this information displays for the original item also.

Note: For more information about substitute types see **Items** in your online documentation.

- 5 When you complete the boxes, click Add. The substitute item is added.

Changing an Existing Item Substitution List

To change a list you have already set up:

- 1 From the Ensite Pro Master Menu, double-click  .
- 2 From the View menu, select Substitute List or **Ctrl + L**.
- 3 The Substitute List dialog box opens.
- 4 Click the item you want to change to highlight it. Click the Change button or right-click on the item and select Change.
- 5 The item you want to modify moves to the top line. You can now make the appropriate changes.
- 6 When you are finished making changes, click Accept.

Deleting an Item Substitution List

You can delete a substitution list at any time. Use the following instructions:



- 1 From the Ensite Pro Master Menu, double-click  .

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- 2 From the View menu, select Substitute List or **Ctrl + L**.
- 3 The Substitute List dialog box opens.
- 4 Click the item you want to delete to highlight it. Click Delete or right-click on the item and select Delete.
- 5 The item is automatically deleted.

Assigning an Item Substitution List to a Customer

Note: When you assign a list to a customer, it only applies to that specific customer. You must individually set up customers with substitution lists.

- 1 From the Ensite Pro Master Menu, double-click  Customer.
- 2 Select the customer to assign a substitution list.
- 3 In the List box, enter the list ID for the substitution list to assign the customer. This is the first number you entered when creating a substitution list. See Figure 2.
- 4 Click  to save the changes made to this customer.

Assigning an Item Substitution List to a Shipping Route

Unless the group of customers you're assigning an item substitution list is under a single route code, you should not assign the list by shipping route. Assign the list by customer instead. See **Assigning an Item Substitution List to a Customer**.

Figure 2:
Assigning a
Customer a
Substitute Item
List ID



The screenshot shows a software window titled "Customer: 71947 () MILANO'S ITALIAN KITCHEN". The window has a menu bar (File, View, Help) and a toolbar with various icons. Below the toolbar are several tabs: Master, Ship/Attention, Buyers/Manifest, Order Entry, Credit, and Machines. The "Master" tab is active, displaying a form with the following fields:

- Acct #: 71947 Deot: Deot. Name:
- Billing Address:
 - Name: MILANO'S ITALIAN KITCHEN
 - Address: ROOM 309
 - 47 NEWBURY STREET
 - City: BOSTON
 - St: TX Zip: 02116 Route: 6
- Entry Date: 05/17/93 Status: G Sic:
- Phone: 617-267-6150 Fax:
- E-Mail:
- Category 1: 2: 3: 4:
- Salesperson 1: 153 NOT ON FILE
- Salesperson 2:
- Additional Name and Contact:
 - Name:
 - Contact: Type ?
 - Region: Area:
 - Group: List: OPUS/JWDD
- Remarks:

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To assign a list by shipping route, use the following instructions:

- 1 In the (L8R) Route Parameters Screen, select the [C] Change action code. See Figure 3.
- 2 Tab to the Route field. Enter the route to assign to a substitution list.
- 3 Tab to the Substitute List ID field. Enter the substitution list ID to assign to the shipping route.
- 4 Press Enter to return to the action field.

Overriding Standard Item Substitutions

You can override standard item substitutions with customer specific substitutions. You can limit which customers the override affects by:

- Customer status
- SIC code
- Category

To override standard item subs for certain customers:

- 1 Go to the (LGF) Order Entry General Parameters screen and select the [C] Change action.
- 2 In the G/L Location field, enter the G/L location to use.
- 3 To limit by customer status, tab to the Cust Status field. (See Figure 4.) Enter the beginning status in the Cust Status field. Enter the ending status in the To field.

Figure 3:
Assigning an
Item
Substitution
List to a
Shipping Route

```
13:50:30                (L8R) Route Parameters                10/17/02
=====
Action [C] (C=Change, I=Inquiry)  G/L Location [ 2] Route [____]
=====
Route Desc [_____]
Driver      [_____]

Delivery Days [_____]
Maximum Number of Stops [_____]

Last Manifest #_____
When Releasing Manifest, Build Third Party External Source Table Y/N ?_

          Format  Printer
Label    [_____]  [__]
Loading  [_____]  [__]
Delivery [_____]  [__]

Substitute List ID [_____]
=====
```

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- 4 To limit by SIC code, tab to the SIC field and enter the code.
- 5 To limit by category, tab to the Categories 1 field. Enter the first category by which to limit. You can enter up to four categories.
- 6 When you finish, press Enter to save your changes.

**Figure 4:
Overriding
Standard Item
Substitutes in
the (LGF)
Screen**

```

17:26:18 (LGF) GENERAL CONTINUED 03/04/03
=====
ACTION [I] (C=Change, I=Inquiry) G/L Location [ 1 ]
=====
Blanket Discount : Default 10% Maximum 15% Apply % to L/S ?L (List / Sell)
                    Only Apply Blanket Discount if Results in Lower Price Y/N ?Y

Force "Attention" Special for Customer Status TM1 : [ ] to [ ] + [ , , , , ]

Prompt Serial Number For Uncataloged Items Y/N/Z=Serial O/E Only ? Class :

Line Item Drop Ship : Enable Y/N ? Password [ ] Use Pick Cost Y/N ?
                    Update P.Cost Y/N ? Use Item Up Cost % Y/N ?
Auto Display Customer Item History in Graphical O/E Y/N ?
Auto Display Customer Item Usage in Graphical O/E Y/N ?
Rebate Time Period # (months) Rebate is % of New Sales
Rebate Item # Company :
Ticket/Invoice Printer to always Save to a File ? [PR] Volume ? [SR ]
Skip National Drop Ship Orders when Batch Printing Tickets Y/N ?
Customer Specific Subs Overrides Standard Item Subs for :
    Cust Status : To : , Sic :SUB , Categories 1: 2: 3: 4:
TR-B Invoices Password [ ]
=====

```