

*An Introduction to
the Automated
Short-Buy*

An Introduction to the Automated Short-Buy

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INTRODUCTION TO THE AUTOMATED SHORT-BUY

The automated short-buy flow gives the system the ability to automatically build and transmit short-buy purchase orders at specified times.

The dealer can set up global parameters to determine what items will go through the automated short-buy flow.

The dealer also can specify the time of day the purchase orders will be created and transmitted, which vendor they go to, and in what order. For each time slot, the dealer can send P/Os to 10 vendors.

The automated short-buy process automates the following processes:

- Creating the short-buy purchase orders
- Transmitting the purchase order to the wholesaler
- Performing the pre-receiving procedure
- Transferring the wholesaler's backorders to another purchase order.

You do not have to manually transmit purchase orders that go through the automated short-buy process; the system automatically transmits them all.

The following files are used in the automated short-buy process:

C-MASTER	Customer records
I-AUX	Inventory usage records
I-MASTER	Inventory master records
I-WHL	Wholesaler records
LAN-SHORT	Launcher parameter information
LAUNCHFILE	Records for scheduled launches
P-BO-INDEX	Master file for the Short-Buy Report
P-MASTER	Order entry detail
PO-EXCEPT	Items not placed on a short-buy purchase order
PO-MASTER	Purchase order information
PO-SPECIAL	Text created through purchasing specials
PO-AUTO	All purchase orders created by the automated short-buy process
SHORT-AUTO	Items that were included in the global parameters, but did not meet the vendor parameters for a particular time.

To access the automated short-buy screens, go to the (LF) Purchase Order Parameters screen and select the [A] Auto-Short action code. The system displays the (LFA) Automated Short-Buy Menu. From this screen, you can access all the parameters and functions you need to run the automated short-buy.

CHAPTER 1: PREPARING TO USE THE AUTOMATED SHORT-BUY

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Introduction

The automated short-buy can save you many hours of work, and greatly improve the efficiency of your purchasing operation. However, it does require some careful planning and setup on your part. This chapter introduces some of the basic concepts, and explains how you set up the automated short-buy.

Section 1: How the Automated Short-Buy Works

The automated short-buy creates and transmits purchase orders for you automatically. It also pre-receives the purchase orders, and can transfer backorders to another P/O. To do this, it uses call numbers and parameters. This section describes call numbers, and briefly describes the parameters you use to set up the automated short-buy.

Understanding Call Numbers

The automated short-buy is built around call numbers. A call number is a set of instructions for transmitting a purchase order to a particular vendor. Suppose you transmit a purchase order to S. P. Richards at 10:00 a.m. every morning. You set up a call number for transmitting to that wholesaler. The call number's parameters control what items can be included on this purchase order and which vendor it's transmitted to.

Now suppose you also transmit to S.P. Richards at 2:00 p.m. You can use the same call number, setting it to launch at 2:00 p.m. as well. Or you can create a new call number for this later transmission. Perhaps you also transmit to United at 2:00 p.m. You must set up a different call number for this transmission, since it's going to a different vendor. The two call numbers set for 2:00 p.m. can include different items: the P/O for S.P. Richards may include items from stock class A, for example, and the P/O for United may include items from stock class B.

Parameters for the Automated Short-Buy

You control the automated short-buy through parameters. You gain access to these parameters through the (LFA) Automated Short-Buy Menu screen, which is shown in Figure 1.

```

10:54:11          (LFA) Automated Short-Buy Menu          09/06/96
-----
Selection Code [ ]
-----

0. Global
1. Vendor
2. Launch Parameters
P. Print Parameters
T. Test Call Number
  
```

Figure 1. The (LFA) Automated Short-Buy Menu Screen

An Introduction to the Automated Short-Buy

Three types of parameters need to be set:

- Global parameters
- Vendor parameters
- Launcher parameters.

Global parameters

These parameters determine which items can be purchased through the automated short-buy. Items that are excluded by the global parameters are not part of the automated short-buy process — you must purchase these items manually.

The (LFAØ) Global Automated Short-Buy screen contains the global parameters for the automated short-buy. (See Figure 2.) Remember that these parameters apply to every call number you set up. When you complete the fields in this screen, make sure that these parameters are appropriate for every purchase order you build through the automated short-buy. For instructions on completing the global parameters, refer to **Chapter 2: Global Parameters**.

Vendor parameters

Each call number has its own set of vendor parameters. These parameters let you define the P/O and determine which items it will include. You can also set custom communication parameters for each call number.

When the system launches a call number, the eligible items filter through the global parameters. The items that meet the global limits then go through the vendor parameters for the call number. The items that meet the vendor parameter limits will be placed on a P/O. The system then transmits the P/O, using the call number's communication parameters.

```
20:55:58                (LFA0) Global Automated Short-Buy                09/06/96
-----
Action [I] (C-Change, I-Inquiry)
-----
Always Put on P/O for First Call of Time Period.
  Stock Classes [ ] to [ ] [ , , , , ] Departments [ ] to [ ] [ , , , , ]
  (Note: Overrides All Limits Except AUTOSB Special And Override Dollar/Qty.)

----- Include/Exclude in Automated Short-Buy Flow -----
Classes to (I)nc./(E)xc. on P/O [ ]. [ ] to [ ] [ , , , , ]
Class to Include if cost Less Than $[          ] [ ] (E)xtended or (I)ndividual
  For Classes [ ] to [ ] [ , , , , ]
Departments (I)nc./(E)xc. on P/O [ ]. [ ] to [ ] [ , , , , ]
Assort Codes to (I)nc./(E)xc. [ ]. [ ] to [ ] [ , , , , ]
SIC Codes to (I)nc./(E)xc. [ ]. [ ] to [ ] [ , , , , ]

-----Additional Excluded from Automated Short-Buy Flow -----
Override Dollar Amount $[          ] Override Quantity Amount [          ]
UPSable Items ONLY Y/N ?
Use Due Date to Exclude From Short-Buy Y/N ?Y Days Before Including ?
Individual Item Weight to Exclude [          ] [ ] (M-Mfg.,W-Whl.,B-Both)
Order Entry Types to Exclude [ , , , , ] (D-Drop ship,E-Edi,F-Furn.,G-Gateway)
-----
```

Figure 2. The (LFAØ) Global Automated Short-Buy Screen

You create and change the call number parameters in the (LFA1) Vendor Call Number Master screen. The (LFA1) screen has several subscreens, which let you specify a wholesaler or manufacturer, and set limits and preferences to define the call number.

The first (LFA1) screen lists all the call numbers that you set up. From this screen, you can select the call number that you want to change, add, delete, or view. Create and customize a call number for each unique combination of vendor, limits, and preferences. For instructions, refer to **Chapter 3: Wholesaler Parameters**.

Launcher parameters

The launcher parameters determine when call numbers are initiated. They also let you specify which call numbers will be launched at each time. You may launch call numbers 1 and 2 at 10:00 a.m., for example, and launch call numbers 1 and 3 at 2:00 p.m.

When you have set all your global and call number parameters, you must schedule each call number in the (LFA2) Short-Buy Launcher screen. For each time you want to run the auto short-buy on each day, you specify which call numbers you want to use.

You can specify up to 10 call numbers to use at each time and day you run the auto short-buy. Call numbers do not have to be unique: You may have a single call number that you launch at 10:00, 2:00, and 4:00, for example.

Every 15 minutes, the Launcher screen searches for a call to launch and runs the calls that are due at that time. For example, if it is Thursday at 10:00, and you run the short-buy for United and Sparco at that time, the system will run them both in the order you enter their call numbers in the 10:00 Thursday line in the Launcher.

The system compares each item in the short-buy to the parameters for the first call number in that line of the Launcher. If an item meets all the limits set in that call number, the system puts the item on the purchase order for that wholesaler, and marks the item with that P/O number. When the system has compared every item to the first call number, it creates a purchase order with the accepted items, and transmits it to the specified wholesaler.

The system then compares the remaining items (those not included on the first wholesaler's P/O) to the next call number in that line of the Launcher, and transmits the accepted items on a purchase order for that wholesaler. It continues comparing items to call numbers and placing the items on purchase orders either until it has placed all the items, or until it has compared the items to all the call numbers in that line of the Launcher.

When the system has created purchase orders for each wholesaler set up for the specified time, it sends them to the wholesalers via modem.

For more information, refer to **Chapter 4: The Launcher**.

Scheduling Times

In today's market, DDMS recommends that you set call numbers to launch several times a day. At the end of each day, set up a call number for any additional items that you can transmit before the wholesaler's cutoff time for next-day delivery.

Suppose you purchase most of your items from Wholesaler A, but this wholesaler is in the Eastern Standard Time zone, and your company is in the Central Standard Time zone. With this one-hour time difference, you might want to transmit to Wholesaler A only until 3 p.m. CST. After that time, you might want the system to transmit to Wholesaler B, which is in the Central Standard Time zone. This allows you to fill orders that are entered at the end of the day.

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When purchase orders go through the automated short-buy process, you do not have to transmit them manually; the system automatically does this for you.

Limits and Exceptions

Items that are excluded from the automated short-buy process by the limits set in the (LFAØ) Global Automated Short-Buy screen, as shown in Figure 2, will remain at status 6; you will need to use the standard short-buy process for them.

Items that meet the limits set in the (LFAØ) screen, but do not meet the parameters for any of the call numbers in the current line of the launcher, are listed in an exceptions file, called PO-EXCEPT. The Automated Short-Buy Exceptions Report lists these items.

These items move to status 7, and are also placed in the SHORT-AUTO file. The SHORT-AUTO file is a short-buy file, and you can use it to produce purchase orders through the regular short-buy process (using the [S] Short-Buys action code in the (F) Purchase Order Entry screen).

Note: Each time the system launches an automated short-buy call, it deletes the SHORT-AUTO file. The items in this file return to status 6, and go back through the global parameters and the rest of the automated short-buy process.

Be careful not to put the SHORT-AUTO file through the regular short-buy process when a call is about to be launched.

You specify whether you want to print the Automated Short-Buy Exceptions Report in the PRINT OPTIONS field of the (LFA1) Vendor Call Number Parameters screen. If you specify Y in that field, the Automated Short-Buy Exceptions Report prints as soon as the system completes the launch for the corresponding call number. The system deletes the PO-EXCEPT file after this report prints.

Excluding Individual Items

You can prevent individual items from going through the automated short-buy process, even if they meet the limits in the (LFAØ) screen, and in the call number parameters.

To do this, use the AUTOSB order entry special. In the (G) Order Entry screen, place the item you want to exclude on the pick ticket. When the cursor returns to the ITEM field, type:

AUTOSB

The system displays the following prompt:

Exclude Item from Automated Short-Buy Y/N ?Y

If you change your mind, and do not want to exclude the item from the automated short-buy, type:

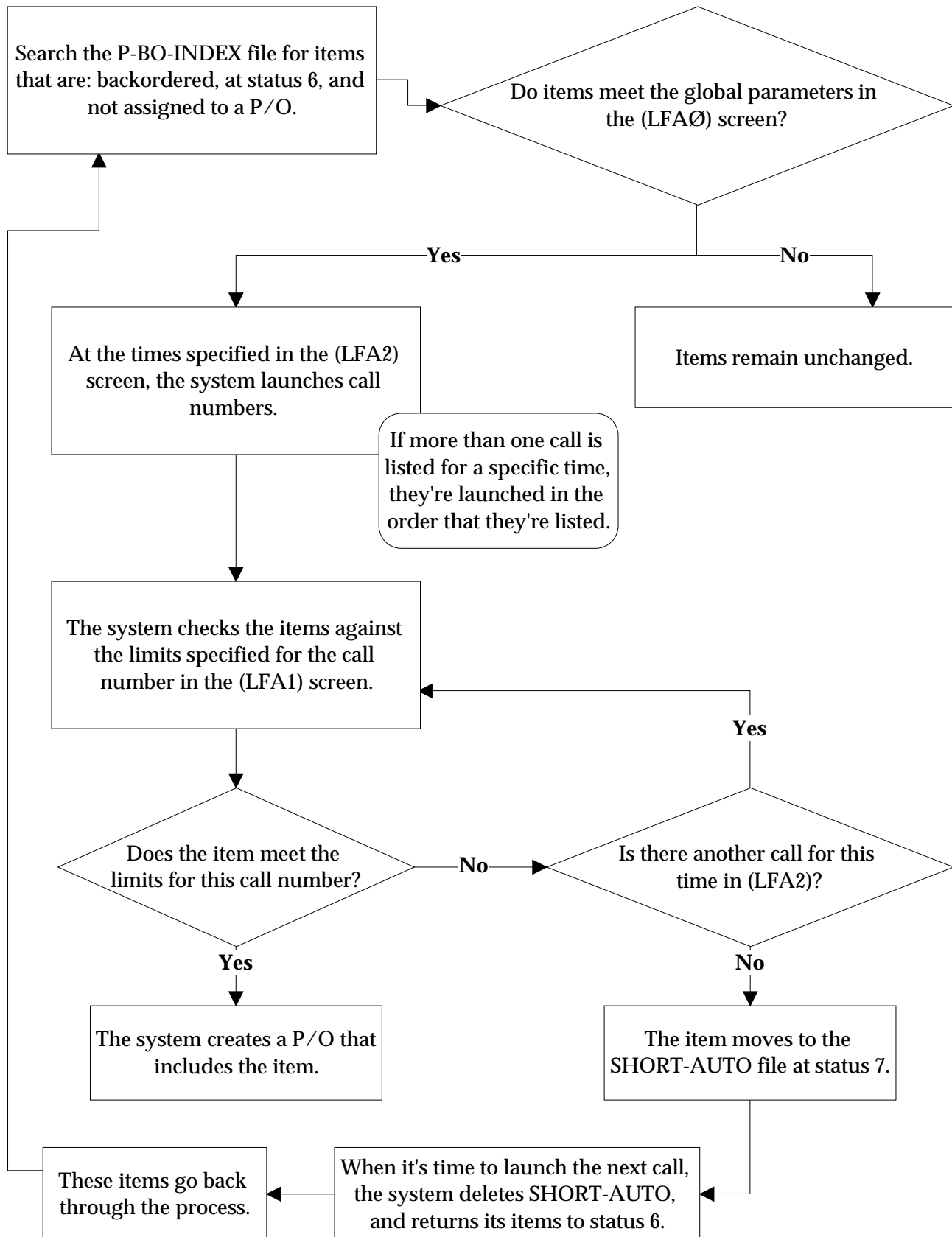
N

If you want to exclude the item from the automated short-buy, press RETURN or type:

Y

The Flow of the Automated Short-Buy

This flow chart summarizes the flow of the automated short-buy.



Section 2: Setting Up the Automated Short-Buy

Setting up the automated short-buy requires three basic steps:

- Creating a setup plan
- Practicing
- Going Live.

This section describes these steps, and includes a checklist for your convenience.

Creating a Setup Plan

Take time to plan your use of the automated short-buy. This is a vital step: devising a plan will help you implement this software quickly and efficiently.

To create a setup plan, do the following:

- **Write down your current purchasing flow:** Include the steps you actually take during a normal business day, *not* the flow as you would like it to be. This flow needs to include:
 - **Which** vendors you buy from
 - **What** you buy from each vendor
 - **When** you send orders to each vendor
 - **How** these orders are delivered (wrap-n-label, national drop ship, and so forth).
- **Determine your exceptions:** These are items you do not want to include on short-buys. They may include direct-buy items, special purchase items, uncataloged items, and items that are on special quotes.

Determine how you recognize these exceptions. When you review a short-buy report, how do you know which items are the exceptions? Do you use class, department, SIC code, specials?

- **Determine how your inventory database is currently organized:** How do you break down your database? Do you use stock classes, SIC codes, assort codes, inventory departments?

Once they begin working with the automated short-buy, many dealers find that their database is not as well organized as it needs to be. You may need to refine your database to get the results you want.

For example, you may want to automatically purchase items in stock class C, but you find that this stock class includes some items that can't go on an automated short-buy. You'll need to move those exceptions to another stock class.

- **List your expectations:** How much of your purchasing can you automate now? How much can you automate in the future?

The automated short-buy is an excellent tool for repetitive purchases, the things you tend to buy every day. You will still need to buy the exceptions manually, however; the automated short-buy cannot do all of your purchasing for you.

Determine which items you want to start with, perhaps those from a particular vendor, or from a specific manufacturer. DDMS recommends that you start small, and gradually add more items to your automated short-buy.

Practicing the Automated Short-Buy

After completing your setup plan, you're ready to begin practicing. To do this, follow these steps:

- **Determine which limits to use:** Using your purchasing flow as a guide, determine the limits you'll need. If you purchase items from Sparco at 10 a.m., for example, you need to determine which limits will produce a report listing the items you want to include. To identify the items you want to include, you can use stock classes, item departments, SIC codes, or assort codes.
- **Enter the password:** The first time you go to the (LFA) Automated Short-Buy Menu screen, the following message appears:

**You Are Not Currently Authorized for Auto-SB
Please Contact DDMS Support for Instructions.
Press Any Key**

When this message appears, contact DDMS Support for assistance. This feature helps DDMS track which customers are learning the automated short-buy module. Knowing this will help us provide the support you need as you learn this new software.

- **Set the parameters:** To get a basic understanding of the parameters involved, refer to the remaining chapters for details about individual parameters, and set those that you'll need.
- **Prevent automatic transmission:** While you're practicing, make sure that no purchase orders are actually transmitted by doing the following:
 - Set the TRANSMIT P/O field in the (LFA1) Vendor Call Number screen to N.
 - When you set up the automated short-buy program through the [E7] Activities Scheduler function in the (Z) screen, make sure that it's set to **INACTIVE**.
- **Print your parameters:** Print a copy of your parameters as a reference tool. As you refine your automated short-buy, you may need to change the parameters several times. Having a printed copy to look at will make this process easier.

To print the parameters, go to the (LFA) Automated Short-Buy Menu, and select the [P] Print Parameters action code. In the PRINTER field, specify the logical name of the printer you want to use. At the prompt ARE YOU SURE, type Y. The system will print your global parameters, and also the parameters for each call you set up.

- **Test your calls:** You can test your parameters by using the [T] Test Call Number action code in the (LFA) screen. This feature lets you see what would be ordered if you were actually using the automated short-buy. It produces the Auto Short-Buy Test Report, which lists the eligible items, and indicates whether they would be included or not. If an eligible item is not included, the reason is printed on the report. (For complete information on the test report, see **Section 3: Using the Automated Short-Buy Test Report**.)

You can print this report for each call number you have set up.

Note: To create an accurate simulation, print the report at the time when you would create the short buy. If you transmit an order to United at 10:00 a.m., for example, print the report at 10:00 a.m.

- **Review the report for accuracy:** Examine the report. Are there items on it that you don't want to include on a short-buy? Also look for items that should be there, but aren't.

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- **Correct any problems:** If you didn't get the desired results on your report, you can fix it in one of two ways: change the limits, or change the way your inventory database is organized (you may need to change your stock classes, for example).
- **Reprint the report until you're satisfied:** After changing the limits or the database, reprint the Automated Short-Buy Test Report until you get the desired results. (You may need to repeat this entire cycle of steps for different wholesalers, or for different times of the day.)

Going Live on the Automated Short-Buy

After your simulated reports produce the desired results, you'll have a good idea of the limits you need to set.

You can now set up the automated short-buy module, and try it manually to check your settings. To do this, follow these steps:

- **Set it to print:** Set the PRINT OPTIONS field in the (LFA1) Vendor Call Number screen so that P/O's and the Automated Short-Buy Exceptions Report both print. You can then examine the P/O's to see what items met your limits; the report will show you items that met the global limits in the (LFAØ) screen but did meet the limits for the current line in the launcher.
- **Test your automated short-buy:** To do this, you'll need to launch it manually, using the [L] LAUNCH Now action code in the [E7] Activities Scheduler. (For instructions on launching manually, see the chapter on viewing utilities in "Volume 2: Utilities" of *Book VII: System Maintenance and Utilities*.)

You may have to adjust your limits several times until you get the results you want.

- **Going live:** Once you're getting the items you want on the P/O's, you're ready to go live, and transmit to your wholesalers.

To do this, set the TRANSMIT P/O field in the (LFA1) screen to **Y**, and set the automated short-buy program in the [E7] function to **ACTIVE**.

Checklist for Setting Up the Automated Short-Buy

The following checklist can serve as a reminder as you begin to implement the automated short-buy. Details for each of these steps can be found earlier in this section.

Create a setup plan

- Write down your current purchasing flow.
- Determine your exceptions: items you don't want included on the automated short-buy.
- Determine how your inventory database is currently organized.
- List your expectations: how much of your purchasing can you realistically automate?

Practicing the automated short-buy

- Determine which limits to use, using your purchasing flow as a guide.
- Enter the password and set the parameters.
- Prevent the automatic transmission of your purchase orders: set the TRANSMIT P/O field in the (LFA1) screen to **N**, and make sure that the short-buy launch in the [E7] function in the (Z) screen is set to **INACTIVE**.
- Print your parameters: [P] Print Parameters function in the (LFA) screen.
- Test your calls: [T] Test Call Number function in the (LFA) screen.
- Review the report for accuracy.
- Correct any problems: change your limits or change the way your inventory database is organized.
- Reprint the report until you're satisfied.

Going live on the automated short-buy

- Set it to print: Set PRINT OPTIONS in (LFA1) so that P/O's and the exception report both print.
- Test your automated short-buy by launching it manually.
- Go live by setting TRANSMIT P/O in (LFA1) to **Y** and setting the automated short-buy program in the [E7] function to **ACTIVE**.

Section 3: Using the Automated Short-Buy Test Report

The Automated Short-Buy Test Report can be very helpful while you're testing and refining your parameters. It lists the eligible items, and indicates whether they would be included or not. If an eligible item is not included, the reason is printed on the report. This section explains how to print the Automated Short-Buy Test Report, and describes the information it provides.

PRINTING THE AUTOMATED SHORT-BUY TEST REPORT

Printing this report is a part of the setup process. After you set the parameters for a call number, you print the report to test it, and see if you get the desired results. (For more information on setting up the automated short-buy, see **Section 2: Setting Up the Automated Short-Buy**.)

Note: You must use wide paper or set your printer for compressed print (17 characters per inch) to print this report. To set your printer for compressed print, change the print setting manually (referring to your printer manual for instructions), or use the (@) Printer Setup Program screen (referring to the chapter on printer setup in "Volume 2: Utilities" of *Book VII: System Maintenance and Utilities*).

To print the Automated Short-Buy Test Report, go to the (LFA) Automated Short-Buy Menu screen, and select the [T] Test Call Number action code. The system displays the following prompt:

Enter Call Number to test []

Specify the number of the call you're testing. If it's a single-digit number, press TAB.

The system displays the following prompt:

Enter Printer to print report to []

Specify the logical name of the printer you want to use (P1, for example).

The system displays the following prompt:

ARE YOU SURE Y/N ?N

If you do not want to print the report, press RETURN or type:

N

If you specify N, the system redisplay the (LFA) screen.

To print the report, type:

Y

WHAT THE AUTOMATED SHORT-BUY TEST REPORT INCLUDES

The Automated Short-Buy Test Report includes the following information for each eligible item:

- Location number
- Time
- Item number and company
- Class and department

- Assort code
- SIC code
- Vendor
- Backordered quantity
- Route
- Ticket status
- Salesperson
- Pick ticket number
- Reason code.

The reason code lets you know whether an item would be included on an automated short-buy. If the item would not be included, it indicates which parameter prevented the item from being included.

Items that would be included have the reason code ACCEPTED. The table below shows the reason codes for items that would be excluded, along with an explanation.

Reason Code	Explanation	Parameter	Screen
DOLLAR	Over maximum dollar amount	OVERRIDE DOLLAR AMOUNT	(LFAØ)
ASSORT	Wrong assort code	(I)NC/(E)XC ASSORT CODES	(LFA1)
CLASS	Wrong stock class	(I)NC/(E)XC STOCK CLASSES	(LFA1)
DEPT	Wrong department	(I)NC/(E)XC DEPARTMENTS	(LFA1)
DUE DATE	Did not meet due date	DAYS BEFORE DUE DATE ...	(LFAØ)
EXCL.GO	Excluded by AUTOSB special during order entry	N/A	(G)
INCLUDE	Did not meet the global include/exclude limits	all global (I)nc/(E)xc fields	(LFAØ)
LOC	Wrong inventory or G/L location	(I)NC/(E)XC LOCATIONS	(LFA1)
P/O MIN	Below minimum dollar amount	P/O MINIMUM AMOUNT \$	(LFA1)
QTY	Over maximum order quantity	OVERRIDE QUANTITY ...	(LFAØ)
ROUTE	Wrong delivery route	(I)NC/(E)XC ROUTES	(LFA1)
SIC	Wrong SIC code	(I)NC/(E)XC SIC CODES	(LFA1)
TIME	After cutoff time or day	CUTOFF TIME/CUTOFF DAY...	(LFA1)
VENDOR	Wrong vendor number (when MATCH ON VENDOR = Y)	P/O VENDOR #	(LFA1)
WEIGHT	Exceeded weight limit	INDIVIDUAL ITEM WEIGHT...	(LFAØ)

CHAPTER 2: GLOBAL PARAMETERS

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Introduction

The global parameters govern the automated short-buy. These parameters apply to every time slot you set up, and determine which items go through the automated short-buy process, and which go through the manual short-buy process. When you complete the fields in this screen, make sure that these parameters are appropriate for every purchase order you build through the automated short-buy.

How the System Searches for Eligible Items

For an item to be eligible for the automated short-buy process, it must meet three conditions:

- It must be at status 6
- It must *not* be assigned to a purchase order
- It must be backordered.

If an item meets these three conditions, it must then meet the limits in the (LFAØ) screen to be included in the short-buy process.

How the Global Parameters Work Together

Before planning how to set the global parameters, you need to understand how they work together.

In general, an item will be included if it meets *any* of the limits you set in this screen. Suppose you set your parameters to include stock class A and department C. If an item is in stock class A, but *not* in department C, it can still be included in the automated short-buy. (Note that this is different from setting limits in report screens, where an item must meet all of the limits you set to be included.)

There are two exceptions to this general rule:

- **“Always Put on P/O for First Call of Time Period” fields:** There are two parameters that the system checks first: the STOCK CLASSES and DEPARTMENTS fields that are under the heading ALWAYS PUT ON P/O FOR FIRST CALL OF TIME PERIOD. These parameters let you specify a range of stock classes and departments. If an item is in one of the stock classes or departments you specify here, it will be included on the first call for the time period.

There are three exceptions, however:

- The dollar amount for the line item exceeds the amount in the OVERRIDE DOLLAR AMOUNT parameter.
- The quantity for the line item exceeds the quantity specified in the OVERRIDE QUANTITY AMOUNT parameter.
- You prevent a line item from being included in the automated short-buy by using the AUTOSB special in order entry.

Items included by the first call parameters will be included on the first call for a time period. The first call parameters override all other parameters (with the exceptions mentioned above).

- **Exclusion fields:** Four fields give you the option of including or excluding certain types of items. If you set any of these fields to exclude certain items, those items will be completely excluded, even if another parameter would have included them. The exclusion fields are:

CLASSES TO (I)NC./(E)XC. ON P/O

DEPARTMENTS (I)NC./(E)XC. ON P/O

ASSORT CODES TO (I)NC./(E)XC.

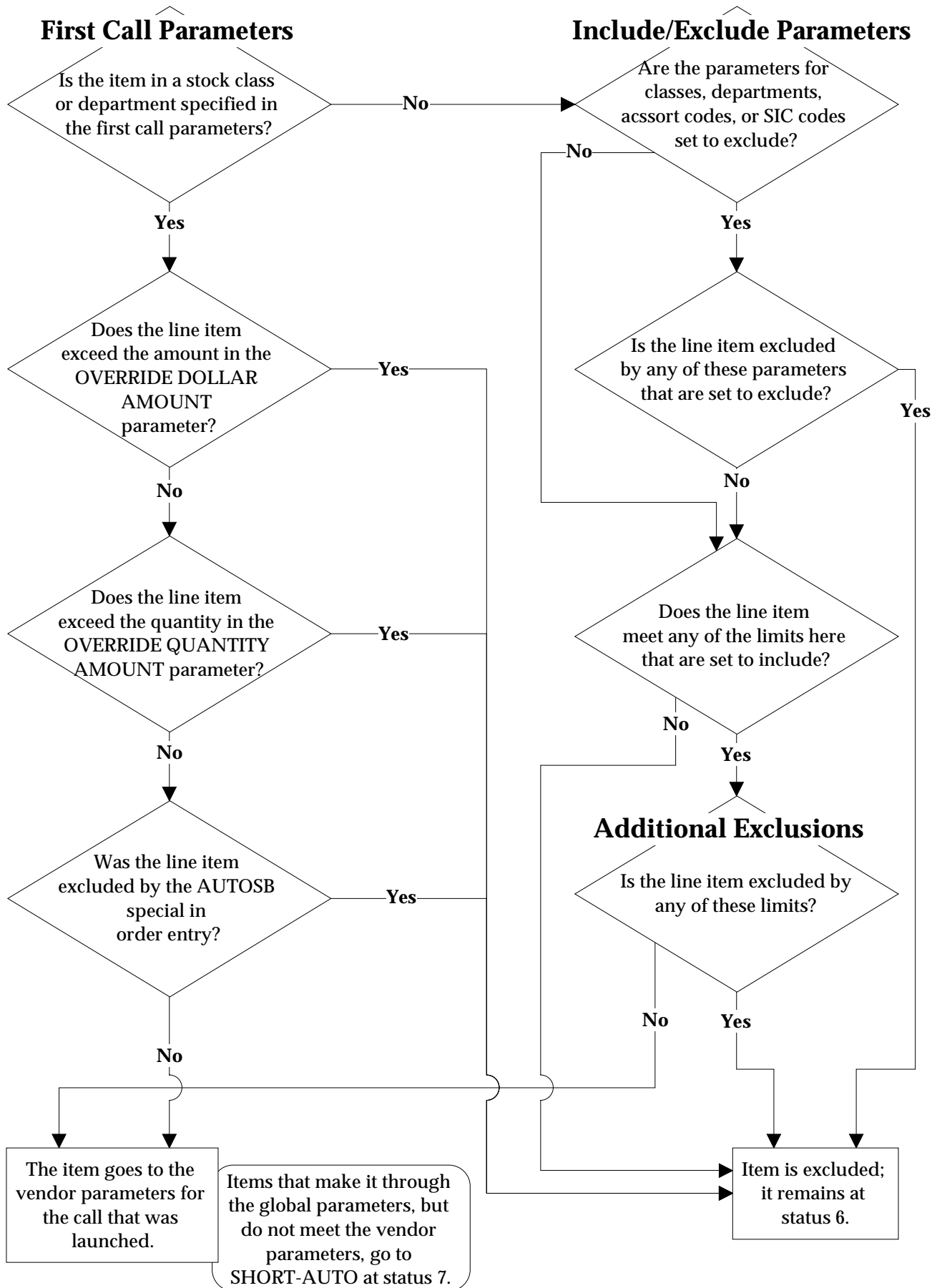
SIC CODES TO (I)NC./(E)XC.

Processing Excluded Items

When the system runs the automated short-buy, the items that are excluded from this process by the parameters in the (LFAØ) Global Automated Short-Buy screen will be not be processed. If you want these excluded items to go through the short-buy process, you'll need to use the manual short-buy method. For details, see **Chapter 2: The Short-Buy Process** in *Book V: Purchasing and Communications*.

The Flow of Items through the Global Parameters

The flowchart on the next page shows how each individual line item flows through the global parameters. The system begins this procedure when it launches a call.



Section 1: Setting and Changing Global Parameters

Remember that the global parameters govern the automated short-buy. These parameters apply to every call number you set up, and determine which items go through the automated short-buy process, and which go through the manual short-buy process.

To set or change the global parameters for the automated short-buy, go to the (LFAØ) Global Automated Short-Buy screen, as shown in Figure 3, and select the [C] Change action code.

The cursor moves to the STOCK CLASSES field. Set or change this and the following fields to accurately reflect the way you run your business.

To change specific fields in this screen, press TAB to move the cursor to the field you want to change. Enter the new information over the existing information. When you finish setting or changing the fields, press RETURN until the cursor returns to the action code field.

Note: If you do not press RETURN before pressing ESC to leave the screen, the system will not save your changes.

Following are descriptions for each of the fields in the (LFAØ) Global Automated Short-Buy screen.

FIRST CALL PARAMETERS

The parameters in this group are the first ones that the system checks. See Figure 3. If an item falls within the stock classes or departments you specify here, it will go on a P/O for the first call scheduled for a time period.

```

20:55:58                (LFA0) Global Automated Short-Buy                09/06/96
-----
Action [C] (C-Change, I-Inquiry)
-----
Always Put on P/O for First Call of Time Period.
  Stock Classes [ ] to [ ] [ , , , , ] Departments [ ] to [ ] [ , , , , ]
  (Note: Overrides All Limits Except AUTOSB Special And Override Dollar/Qty.)
-----
----- Include/Exclude in Automated Short-Buy Flow -----
Classes to (I)nc./(E)xc. on P/O [ ]. [ ] to [ ] [ , , , , ]
Class to Include if cost Less Than $[          ] [ ] (E)xtended or (I)ndividual
  For Classes [ ] to [ ] [ , , , , ]
Departments (I)nc./(E)xc. on P/O [ ]. [ ] to [ ] [ , , , , ]
Assort Codes to (I)nc./(E)xc. [ ]. [ ] to [ ] [ , , , , ]
SIC Codes to (I)nc./(E)xc. [ ]. [ ] to [ ] [ , , , , ]
-----
-----Additional Excludes from Automated Short-Buy Flow -----
Override Dollar Amount $[          ] Override Quantity Amount [          ]
UPSable Items ONLY Y/N ?
Use Due Date to Exclude From Short-Buy Y/N ? Days Before Including ?
Individual Item Weight to Exclude [          ] [ ] (M-Mfg.,W-Whl.,B-Both)
Order Entry Types to Exclude [ , , , , ] (D-Drop ship,E-Edi,F-Furn.,G-Gateway)
-----

```

Figure 3. The (LFAØ) Screen, Showing the First Call Parameters

There are three exceptions: the OVERRIDE DOLLAR AMOUNT and OVERRIDE QUANTITY AMOUNT parameters can prevent individual line items from being included. (These parameters are described later in this section.) Also, you can prevent a line item from being included by using the AUTOSB special in order entry.

Note: These three exceptions are the *only* exceptions. Most items must be included by both the global parameters and the vendor parameters to be included on a P/O. Items included by the first call parameters, however, will go on the P/O for the first call, even when the vendor parameters do not include them.

Always Put on P/O for First Call of Time Period / Stock Classes

In these fields, you can specify a range of items by stock class that you want to include on the first call when you run the automated short-buy.

In the STOCK CLASSES field, enter the first stock class in the range of classes you want to include.

In the TO field, enter the last stock class in the range of classes you want to include.

You can also specify up to five additional, non-sequential stock classes you always want to include on the first call, as shown in Figure 4. Enter the additional stock classes in the fields to the right of the TO field.

Always Put on P/O for First Call of Time Period / Departments

In these fields, you can specify a range of items by department that you want to include on the first call whenever you run the automated short-buy process. This allows you to specify certain items that you always want to automatically purchase, so that you never have to purchase them through the manual short-buy process.

In the DEPARTMENTS field, enter the first department in the range of departments you want to include.

In the TO field, enter the last department in the range of departments you want to include.

You can also specify up to five additional, non-sequential departments to always include on the first call. Enter the additional departments in the fields to the right of the TO field.

INCLUDE/EXCLUDE PARAMETERS

The fields in this group allow you to specify a range of items to exclude or include on the automated short-buy. In this group, items can be limited by stock class, departments, assort codes, and SIC codes.

If an item does not meet the first call parameters, which are described above, the system next checks the include/exclude parameters described here. The parameters in this group that you set to *exclude* items will override those that you set to *include* items. Suppose you set the DEPARTMENTS (I)NC / (E)XC ON P/O field to exclude department E. You set the CLASSES TO (I)NC / (E)XC ON P/O to include stock class C. Some of your items have both qualities: they're in department E and stock class C. All of these items will be excluded from the P/O, since the exclusion of department E overrides the inclusion of stock class C.

Classes to (I)nc/(E)xc on P/O / to

These fields work together. In the (I)NC/(E)XC ON P/O field, you can specify whether the stock classes you enter in the following TO fields are ones you want to include on the automated short-buy, or ones you want to exclude.

20:55:58

(LFA0) Global Automated Short-Buy

09/06/96

Action [C] (C-Change, I-Inquiry)

Always Put on P/O for First Call of Time Period.

Stock Classes [A] to [C] [3, , , ,] Departments [] to [] [, , , ,]

(Note: Overrides All Limits Except AUTOSB Special And Override Dollar/Qty.)

----- Include/Exclude in Automated Short-Buy Flow -----

Classes to (I)nc./(E)xc. on P/O []. [] to [] [, , , ,]

Class to Include if cost Less Than \$[] [] (E)xtended or (I)ndividual

For Classes [] to [] [, , , ,]

Departments (I)nc./(E)xc. on P/O []. [] to [] [, , , ,]

Assort Codes to (I)nc./(E)xc. []. [] to [] [, , , ,]

SIC Codes to (I)nc./(E)xc. []. [] to [] [, , , ,]

-----Additional Excludes from Automated Short-Buy Flow -----

Override Dollar Amount \$[] Override Quantity Amount []

UPSable Items ONLY Y/N ?

Use Due Date to Exclude From Short-Buy Y/N ? Days Before Including ?

Individual Item Weight to Exclude [] [] (M-Mfg.,W-Whl.,B-Both)

Order Entry Types to Exclude [, , , ,] (D-Drop ship,E-Edi,F-Furn.,G-Gateway)

Figure 4. Specifying Stock Classes that will Always Be Included

To include the specified stock classes on the automated short-buy, in the (I)NC/(E)XC ON P/O field type:

I

To exclude the specified range of stock classes from the automated short-buy, type:

E

Then, in the next field and the TO field, specify the range of stock classes you want to include or exclude. In the first field, enter the first stock class in the range; in the TO field, enter the last stock class in the range. In the next set of fields, specify up to five additional non-sequential stock classes that you want to include or exclude.

Classes to Include if Cost Less Than \$ / (E)xtended or (I)ndividual / For Classes / to

In these fields, you can specify a range of stock classes you want to include on the automated short-buy only if the cost of the items is less than a certain amount. You can set up this parameter using individual or extended costs.

In the INCLUDE IF COST LESS THAN field, specify the maximum cost of items within the specified stock classes to put on the automated short-buy.

In the (E)XTENDED OR (I)NDIVIDUAL field, indicate whether the cost you specified is the cost of the individual item, or the extended cost for the line item.

If the cost is for the individual item, type:

I

An Introduction to the Automated Short-Buy

If the cost is the extended cost (the individual cost multiplied by the quantity ordered), type:

E

Next, specify the range of stock classes that this cost applies to. In the FOR CLASSES field and the TO field, specify the range of stock classes your cost limit applies to. In the first field, enter the first stock class in the range; in the TO field, enter the last stock class in the range. In the next set of fields, specify up to five additional non-sequential stock classes that you want the cost limit to apply to.

Departments (I)nc/(E)xc on P/O / to

These fields work together. In the (I)NC/(E)XC ON P/O field, you can specify whether the departments you enter in the following TO field are ones you want to include on the automated short-buy, or ones you want to exclude.

To include the specified departments on the automated short-buy, in the (I)NC/(E)XC ON P/O field type:

I

To exclude the specified range of departments from the automated short-buy, type:

E

Then specify the range of departments you want to include or exclude, as well as up to five additional non-sequential departments you want to include or exclude.

Assort Codes to (I)nc/(E)xc / to

These fields work together. In the ASSORT CODE TO (I)NC/(E)XC ON P/O field, you can specify whether the assort codes you enter in the following fields are ones you want to include on the automated short-buy, or ones you want to exclude.

To include the specified assort codes on the automated short-buy, in the ASSORT CODE TO (I)NC/(E)XC ON P/O field type:

I

To exclude the specified range of assort codes from the automated short-buy, type:

E

Then specify the range of assort codes you want to include or exclude, as well as up to five additional non-sequential assort codes you want to include or exclude.

SIC Codes to (I)nc/(E)xc / to

These fields work together. In the SIC CODES TO (I)NC/(E)XC ON P/O field, you can specify whether the SIC codes you enter in the following fields are ones you want to include on the automated short-buy, or ones you want to exclude.

To include the specified SIC codes on the automated short-buy, in the SIC CODES TO (I)NC/(E)XC ON P/O field type:

I

To exclude the specified range of SIC codes from the automated short-buy, type:

E

```

20:55:58                (LFA0) Global Automated Short-Buy                09/06/96
-----
Action [C] (C-Change, I-Inquiry)
-----
Always Put on P/O for First Call of Time Period.
  Stock Classes [ ] to [ ] [ , , , , ] Departments [ ] to [ ] [ , , , , ]
  (Note: Overrides All Limits Except AUTOSB Special And Override Dollar/Qty.)

----- Include/Exclude in Automated Short-Buy Flow -----
Classes to (I)nc./(E)xc. on P/O [ ]. [ ] to [ ] [ , , , , ]
Class to Include if cost Less Than $[          ] [ ] (E)xtended or (I)ndividual
  For Classes [ ] to [ ] [ , , , , ]
Departments (I)nc./(E)xc. on P/O [ ]. [ ] to [ ] [ , , , , ]
Assort Codes to (I)nc./(E)xc. [ ]. [ ] to [ ] [ , , , , ]
SIC Codes to (I)nc./(E)xc. [ ]. [ ] to [ ] [ , , , , ]

-----Additional Excludes from Automated Short-Buy Flow -----
Override Dollar Amount $[10000.00] Override Quantity Amount [          ]
UPSable Items ONLY Y/N ?
Use Due Date to Exclude From Short-Buy Y/N ? Days Before Including ?
Individual Item Weight to Exclude [          ] [ ] (M-Mfg.,W-Whl.,B-Both)
Order Entry Types to Exclude [ , , , , ] (D-Drop ship,E-Edi,F-Furn.,G-Gateway)
-----

```

Figure 5. Specifying the Maximum Dollar Amount

Then specify the range of SIC codes you want to include or exclude, as well as up to five additional non-sequential SIC codes you want to include or exclude.

ADDITIONAL EXCLUSION PARAMETERS

In these fields, you can set additional limits on the items you want to exclude from the automated short-buy. You can exclude items by dollar and quantity amount, item weight, shipment due date, and order entry type.

Override Dollar Amount \$

In this field, specify the cost limit for extended line items, as shown in Figure 5. If the extended line item cost for an individual item meets or exceeds the dollar amount specified here, those items do not go on the purchase order, regardless of the remaining parameters. When determining the extended line item cost, the system uses the pricing cost from order entry.

Enter the maximum dollar amount that items can cost and still go through the automated short-buy. Purchasing agents might be able to order items that exceed this amount directly from the manufacturer.

Note: Some dealers enter a high amount in this field, like \$10,000, to help catch errors.

Override Quantity Amount

If you purchase a certain quantity of an item, your purchasing agent might be able to purchase the item directly from the manufacturer. In this field, specify the maximum number of an item that you want to purchase from a wholesaler through the automated short-buy. Your purchasing agent can purchase items that exceed this number directly from the manufacturer.

```

20:55:58                (LFA0) Global Automated Short-Buy                09/06/96
-----
Action [C] (C-Change, I-Inquiry)
-----
Always Put on P/O for First Call of Time Period.
Stock Classes [ ] to [ ] [ , , , , ] Departments [ ] to [ ] [ , , , , ]
(Note: Overrides All Limits Except AUTOSB Special And Override Dollar/Qty.)

----- Include/Exclude in Automated Short-Buy Flow -----
Classes to (I)nc./(E)xc. on P/O [ ]. [ ] to [ ] [ , , , , ]
Class to Include if cost Less Than $[ ] [ ] (E)xtended or (I)ndividual
For Classes [ ] to [ ] [ , , , , ]
Departments (I)nc./(E)xc. on P/O [ ]. [ ] to [ ] [ , , , , ]
Assort Codes to (I)nc./(E)xc. [ ]. [ ] to [ ] [ , , , , ]
SIC Codes to (I)nc./(E)xc. [ ]. [ ] to [ ] [ , , , , ]

-----Additional Excludes from Automated Short-Buy Flow -----
Override Dollar Amount $[ ] Override Quantity Amount [ ]
UPSable Items ONLY Y/N ?
Use Due Date to Exclude From Short-Buy Y/N ?Y Days Before Including ?
Individual Item Weight to Exclude [ ] [ ] (M-Mfg.,W-Whl.,B-Both)
Order Entry Types to Exclude [ , , , , ] (D-Drop ship,E-Edi,F-Furn.,G-Gateway)
-----

```

Figure 6. Using the Due Date as an Exclusion

If you are ordering a quantity greater than or equal to the override quantity, this parameter will prevent the item from being included on the automated short-buy, even if it meets the limits set in the STOCK CLASSES and DEPARTMENTS parameters.

UPSable Items ONLY

This field is reserved for future use, and should be left blank.

Use Due Date to Exclude From Short-Buy

This field works in conjunction with the DAYS BEFORE INCLUDING field, below. Certain customers must receive their orders by specific dates, and some cannot receive their orders until a specified date. In this field, indicate whether the system should monitor the shipment due date specified in the DUE DATE special in the (G) Order Entry screen. See Figure 6.

To exclude items from the short-buy if they cannot be delivered on an appropriate date, type:

Y

If you do not want to exclude items from the short-buy by due date, leave the field blank or type:

N

Days Before Including

This field works in conjunction with the USE DUE DATE TO EXCLUDE FROM SHORT-BUY field. If you specified N in that field, this field does not apply. If you specified Y in that field, enter the number of days before the shipment due date that the system must place the order through the automated short-buy.

```

20:55:58                (LFA0) Global Automated Short-Buy                09/06/96
-----
Action [C] (C-Change, I-Inquiry)
-----
Always Put on P/O for First Call of Time Period.
Stock Classes [ ] to [ ] [ , , , , ] Departments [ ] to [ ] [ , , , , ]
(Note: Overrides All Limits Except AUTOSB Special And Override Dollar/Qty.)

----- Include/Exclude in Automated Short-Buy Flow -----
Classes to (I)nc./(E)xc. on P/O [ ]. [ ] to [ ] [ , , , , ]
Class to Include if cost Less Than $[          ] [ ] (E)xtended or (I)ndividual
For Classes [ ] to [ ] [ , , , , ]
Departments (I)nc./(E)xc. on P/O [ ]. [ ] to [ ] [ , , , , ]
Assort Codes to (I)nc./(E)xc. [ ]. [ ] to [ ] [ , , , , ]
SIC Codes to (I)nc./(E)xc. [ ]. [ ] to [ ] [ , , , , ]

-----Additional Excludes from Automated Short-Buy Flow -----
Override Dollar Amount $[          ] Override Quantity Amount [          ]
UPSable Items ONLY Y/N ?
Use Due Date to Exclude From Short-Buy Y/N ? Days Before Including ?
Individual Item Weight to Exclude [          ] [ ] (M-Mfg.,W-Whl.,B-Both)
Order Entry Types to Exclude [D,F, , , ] (D-Drop ship,E-Edi,F-Furn.,G-Gateway)
-----

```

Figure 7. Excluding Drop-Ships and Furniture Orders from the Automated Short-Buy

Individual Item Weight to Exclude

You can exclude items from the automated short-buy process by weight. In the first field, specify the weight (in pounds) above which you want to exclude individual items from the automated short-buy. Any single item weighing more than the specified amount will be excluded from the automated short-buy process.

In the next field, specify whether this weight is the weight according to the manufacturer (as recorded in the WEIGHT RATE field in the Direct Buy Record of the (E) Inventory Master screen), the weight according to the wholesaler (as recorded in the WEIGHT RATE field in the Wholesaler Record of the (E) screen), or whether the system should check both weights and only include the item if both weights meet the requirement specified in this field (if either the manufacturer's or the wholesaler's weight exceeds the weight limit, the item will be excluded from the purchase order).

Enter the appropriate code:

- M** Manufacturer's weight (from the Direct Buy Record)
- W** Wholesaler's weight (from the Wholesaler Record)
- B** Both weights.

Order Entry Types to Exclude

You can exclude items from the automated short-buy process by order entry type, as shown in Figure 7. Specify the code for each type you want to exclude from the automated short-buy:

- D** Drop ship items
- E** EDI items
- F** Furniture items
- G** Gateway items (remote orders)

Section 2: Viewing Global Parameters

To view the global parameters for the automated short-buy, go to the (LFAØ) Global Automated Short-Buy screen and select the [I] Inquiry action code.

The system displays the global parameters, along with the following prompt:

PRESS ANY KEY TO CONTINUE (P=PREVIOUS SCREEN)

as shown in Figure 8.

To view the next parameter screen, the (LFA1) Vendor Call Number Master screen, press RETURN.

To view the previous parameter screen, the (LF) Purchase Order Parameters screen, type:

P

To return to the action code field, press ESC.

```
20:55:58                (LFA0) Global Automated Short-Buy                09/06/96
-----
                        Action [C] (C-Change, I-Inquiry)
-----
Always Put on P/O for First Call of Time Period.
  Stock Classes [ ] to [ ] [ , , , , ] Departments [ ] to [ ] [ , , , , ]
  (Note: Overrides All Limits Except AUTOSB Special And Override Dollar/Qty.)

----- Include/Exclude in Automated Short-Buy Flow -----
Classes to (I)nc./(E)xc. on P/O [ ]. [ ] to [ ] [ , , , , ]
Class to Include if cost Less Than $[          ] [ ] (E)xtended or (I)ndividual
  For Classes [ ] to [ ] [ , , , , ]
Departments (I)nc./(E)xc. on P/O [ ]. [ ] to [ ] [ , , , , ]
Assort Codes to (I)nc./(E)xc. [ ]. [ ] to [ ] [ , , , , ]
SIC Codes to (I)nc./(E)xc. [ ]. [ ] to [ ] [ , , , , ]

-----Additional Excludes from Automated Short-Buy Flow -----
Override Dollar Amount $[          ] Override Quantity Amount [          ]
UPSable Items ONLY Y/N ?
Use Due Date to Exclude From Short-Buy Y/N ? Days Before Including ?
Individual Item Weight to Exclude [          ] [ ] (M-Mfg.,W-Whl.,B-Both)
Order Entry Types to Exclude [ , , , , ] (D-Drop ship,E-Edi,F-Furn.,G-Gateway)
-----
PRESS ANY KEY TO CONTINUE (P-PREVIOUS SCREEN)
```

Figure 8. The PRESS ANY KEY TO CONTINUE Message

CHAPTER 3: WHOLESALE PARAMETER

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Introduction

To change, delete, or view the parameters for each call number (the combination of a wholesaler and the time you want to transmit a P/O to that wholesaler), or to create a call number, you must go to the (LFA1) Vendor Call Number screen.

Note: An item must meet *all* of the limits you set in the (LFA1) screen to be included on a purchase order.

The (LFA1) screen has three subscreens. The first two subscreens let you set limits to define what the call number will include. The third subscreen lets you specify transmission parameters for each call. (The third subscreen appears only if your call number is for a wholesaler.)

The first (LFA1) screen lists the existing call numbers. You can create, change, delete, or view each by specifying the number of the appropriate call number.

This chapter also describes the two automated short-buy reports: the Automated Short-Buy Report and the Automated Short-Buy Exceptions Report.

Section 1: Creating and Changing Call Number Parameters

You must set parameters for each call number, so that the system knows which items to send on each purchase order.

Note: After you set the parameters for a call number, these settings become the defaults for the next call number you create.

To create a call number or change a call number's parameters, go to the (LFA1) Vendor Call Number Master screen, shown in Figure 9, and select the [C] Change action code.

Note: The fields in the (LFAØ) Global Automated Short-Buy screen determine which items go through the automated short-buy and proceed to the parameters set in the (LFA1) screen. It's like having two filters. The global parameters are the first filter. Items that make it through the first filter are then tested against the limits for the call number, which is the second filter.

The cursor moves to the CALL NUMBER field. Enter the number of the call number you want to create or change, or press TAB to accept the default, call number 1. If you enter a one-digit call number, press TAB.

Note: When you are creating a new call number, enter the number you want the call number to be. *Do not* enter the number of an existing call number.

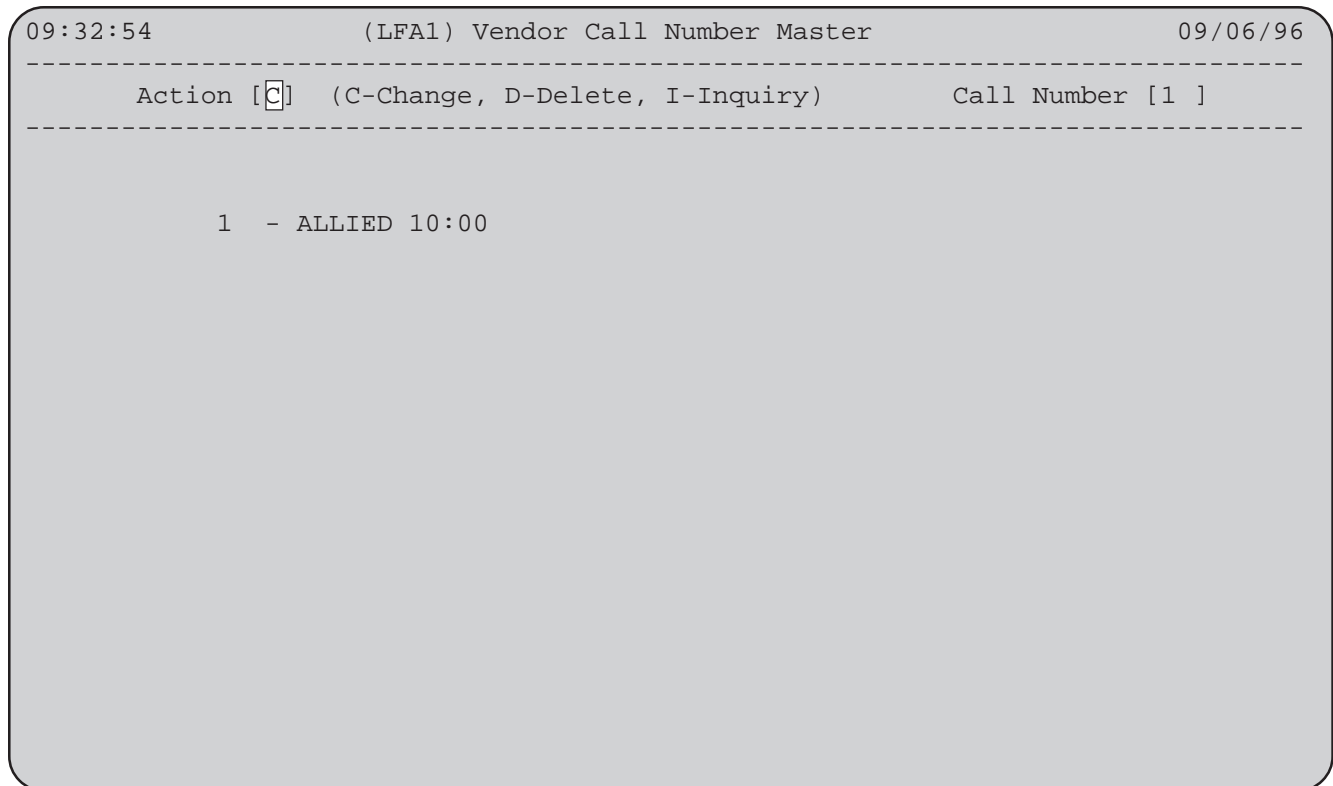


Figure 9. The (LFA1) Vendor Call Number Screen

DEFINING THE CALL NUMBER: COMPLETING FIELDS IN THE FIRST SUBSCREEN

The system displays the first subscreen of the (LFA1) screen, with the cursor in the PARAMETER SCREEN field. If you are creating a new call number, the fields in the screen default to the responses for the last call number listed in the (LFA1) Vendor Call Number Master screen. The CALL NUMBER field displays the call number that these parameters are for.

Set or change the following fields to accurately reflect the way you want the system to handle the purchase orders to this wholesaler at the specific time this call number is for.

To change specific fields in this screen, press TAB to move the cursor to the field you want to change. Enter the new information over the existing information. When you finish setting or changing the fields in one subscreen, press RETURN until the next subscreen is displayed. You can also press ESC at any time to move back to a previous subscreen.

Note: For the system to save your changes, you must move the cursor past all three subscreens, so that the system redisplay the original (LFA1) Vendor Call Number Master screen

Following are descriptions of each of the fields in the first subscreen. The fields in this subscreen let you define the call number, and specify information about the P/O's it will be creating.

Parameter Screen

If you're setting up a call number for a manufacturer, enter the code for that manufacturer (HON, for example).

If you're setting up a call number for a wholesaler, enter the name of the wholesaler's communication parameter screen. The system can then use the appropriate communication parameter screen for the information necessary to transmit a purchase order to the specified wholesaler.

Note: You can customize the communication parameters for each call number, if necessary. This will be described later in this section.

All of the wholesaler parameter screens begin with L6. For example, the Sparco parameter screen is the (L6C) screen and the United parameter screen is the (L6F) screen.

Enter the name of the appropriate wholesaler parameter screen, but *do not include the parentheses*. For example, if this call number is for Sparco, you would enter **L6C**. If the screen name has fewer than four characters, press TAB.

Note: You *must* complete this field. If you do not, the automated short-buy cannot work correctly.

Valid entries for this field include:

L6C	Sparco
L6EA-L6EE	Wholesaler Group
L6F	United
L6J	Emco

Note: You must complete this field, or the system will not save this call number.

```
20:56:09 (LFA1) Vendor Call Number 09/06/96
-----
Call Number [ 1 ]
-----
Parameter Screen :L6F P/O Vendor # :UNITED Match on Vendor Y/N ?
Description: [UNITED 10:00 ] Transmit P/O ? (Y-Yes,N-No,F-Fax)

How to Create P/O Number ? (Last P/O Number Used : )
(1-MMDD##,2-V.DOY##,3-V.MM##,4-YYMM##,5-V.MMDD#,N-Next P/O Number)

If P/O Exists Use Next P/O Number Y/N/X ? (Y-LF P/O #,N-Same,X-Next Seq.#)

How to Sort P/O (1) (2) (3) Create NEW P/O When Sort ONE Changes Y/N ?
(I-Inv.,C-Customer,R-Route,S-Slsm,#-Item #,D-Dept,V-Ven.,X-Class)

P/O minimum Amount $
Combine P/O if Under Minimum Y/N ? Transmit P/O if Under Minimum Y/N ?

Cutoff Time : Cutoff Day of Week :
Combine P/O if Under Minimum Y/N ? Transmit P/O if Under Minimum Y/N ?
-----
<RET> for Next Screen, <Esc> for Previous Screen
```

Figure 10. Including Items from Only One Vendor

P/O Vendor #

In this field, specify the vendor number for the P/O's the system creates with this call number. The number you enter here must match the number specified for this vendor in the VENDOR# field in the (C) Vendor Master screen.

If you specified L6C or L6F in the PARAMETER SCREEN field, the P/O VENDOR # field will default to the corresponding wholesaler: If you specify L6C, it defaults to SPARCO, and if you specify L6F, it defaults to UNITED.

You must complete this field. If you try to tab past it, the system displays the following message:

MUST ENTER A VENDOR NUMBER - PRESS ANY KEY TO CONTINUE

Press the TAB or RETURN key, and enter the correct vendor number.

Match on Vendor

This parameter, shown in Figure 10, lets you limit orders to the vendor so that they include only that vendor's items. If you're building a purchase order for Sparco, for example, this parameter lets you limit the P/O to Sparco's items.

If you specify Y, the system will compare the vendor number you specified in the P/O VENDOR # field, above, with the vendor number specified in the VENDOR # field of the Wholesaler Record in the (E) Inventory Master screen for an item. (To be considered a match, the entire number must be the same.) This feature can help ensure that you order items from the correct vendor.

Note: If you set up vendor aliases in the (CV) Vendor Alias screen, the system will also match on those aliases.

Vendor aliases are additional names that a vendor may use to identify their items. For example, United's regular items may have a vendor name of UNITED, but the items on their Micro flyer have a vendor name of MICRO. In the (CV) screen, you can specify MICRO as a vendor alias for UNITED. If you transmit an automated short-buy order to United, and have MATCH ON VENDOR set to **Y**, it will include the MICRO items.

You use this field to limit the items you send to a particular wholesaler. For example, if you want to order only United items from United and order only Sparco items from Sparco, you might want to use this field.

However, most wholesalers will fill purchase orders to the best of their ability, regardless of whether the item originally came from that wholesaler. For example, if you try to order all the items on a purchase order from United, it will fill as much of the order as its stock allows. You can then order the items United cannot fill from another wholesaler.

If you want the system to compare the vendor name corresponding to the specified parameter screen with the vendor number specified in the Wholesaler Record for each item, type:

Y

If you do not want the system to match the item's vendor number with the vendor corresponding to the specified parameter screen, leave this field blank or type:

N

Description

Enter a description of the call number in this field. This description will appear next to the call number in the first (LFA1) screen. DDMS recommends that you enter the name of the wholesaler and the times the P/O will be sent for this call number. For example, if the purchase order is for United and it is to be sent at 10 A.M., 2 P.M. and 4 P.M., you might enter UNITED 10,14,16 in this field.

Transmit P/O

In this field, specify whether you want the system to automatically transmit or fax this purchase to the vendor.

To automatically transmit this purchase order electronically, type:

Y

To automatically fax this purchase order to the vendor, type:

F

To prevent purchase orders from being transmitted, leave this field blank or type:

N

Notes: To fax purchase orders automatically, you must have the DDMS faxing program. For more information on this program, contact DDMS' Support Department.

If you specify anything other than **Y** or **F** in this field, the system will *not* transmit the purchase orders.

How to Create P/O Number

In this field, you can specify how you want the system to build purchase order numbers for P/Os sent through the automated short-buy for this call number.

```

20:56:09                (LFA1) Vendor Call Number                09/06/96
-----
                        Call Number [ 1 ]
-----
Parameter Screen :L6C      P/O Vendor # :SPARCO      Match on Vendor Y/N ?Y
Description: [SPARCO 10:00 ]      Transmit P/O ? (Y-Yes,N-No,F-Fax)

How to Create P/O Number ?2 (Last P/O Number Used :      )
(1-MMDD##,2-V.DOY##,3-V.MM##,4-YYMM##,5-V.MMDD#,N-Next P/O Number)

If P/O Exists Use Next P/O Number Y/N/X ? (Y-LF P/O #,N-Same,X-Next Seq.#)

How to Sort P/O (1) (2) (3) Create NEW P/O When Sort ONE Changes Y/N ?
(I-Inv.,C-Customer,R-Route,S-Slsm,#-Item #,D-Dept,V-Ven.,X-Class)

P/O minimum Amount $
Combine P/O if Under Minimum Y/N ? Transmit P/O if Under Minimum Y/N ?

Cutoff Time :                Cutoff Day of Week :
Combine P/O if Under Minimum Y/N ? Transmit P/O if Under Minimum Y/N ?
-----
<RET> for Next Screen, <Esc> for Previous Screen

```

Figure 11. Building P/O Numbers with the Vendor and the Julian Date

You can select from six ways to build the purchase order number. You can include a combination of the month, day, year, vendor, Julian date (the numeric day of the year), and a system-assigned variable. You can also use the system’s next P/O number.

Note: The Julian date is the numeric day of the year, and is a number between 1 and 365 during regular years, or between 1 and 366 in leap years. For example, January 1 would be 1, and December 31 (during a non-leap year) would be 365. August 21 would be 233.

Each purchase order number has six characters. Following are descriptions of the types of purchase order numbers you can choose. The parts for each P/O number are shown in the order they will appear in the number. The number of characters for each part of the P/O number is shown in parentheses next to the part description.

- 1 MMDD## Month (2), day (2), system-assigned variable (2)
- 2 V.DOY## Vendor (1), Julian date (3), system-assigned variable (2)
- 3 V.MM## Vendor (2), month (2), system-assigned variable (2)
- 4 YYMM## Year (2), month (2), system-assigned variable (2)
- 5 V.MMDD# Vendor (1), month (2), day (2), system-assigned variable (1)
- N Use the current number in the NEXT P/O# field in the (LF) Purchase Order Parameters screen. (This is the default setting: the method that will be used if you leave the field blank.)

Specify the number of the purchase order type you want to use, as shown in Figure 11.

Note: Some wholesalers have certain requirements for purchase order numbers. For example, many do not recognize leading zeros in purchase order numbers. Therefore, you should make sure that no purchase order numbers begin with Ø.

Last P/O Number Used

This is a system-generated field that shows the last purchase order number used for this call number.

If P/O Exists Use Next P/O Number

In this field, indicate what the system will do when a P/O number it builds already exists. (The system builds the P/O number using the HOW TO CREATE P/O NUMBER parameter, which is described earlier in this section.) Enter one of the following codes:

- Y** Create a new P/O, using the number in the NEXT P/O # field in the (LF) Purchase Order Parameters screen.
- N** Use the same P/O number, adding the new items to it.
- X** Use the method specified in the HOW TO CREATE P/O NUMBER field to create a new P/O number. (The system-assigned variable will increase by one: from Ø1 to Ø2, for example.)

How to Sort P/O (1)/(2)/(3)

This field lets you specify how you want to sort your purchase orders.

To do this, enter the code for the sort you want to use in the (1) field.

Note: The (2) and (3) fields are reserved for future use.

Choose the sort codes from the following list, as shown in Figure 12:

I	Invoice number	C	Customer	R	Route
S	Salesperson number #		Item number	D	Department
V	Vendor number	X	Stock class		

Create NEW P/O When Sort ONE Changes

In this field, specify whether you want each group created by sort one (see above) to be a different purchase order. If you want to do this, type:

Y

If you do not want different P/Os for each sort one group, leave the field blank or type:

N

P/O Minimum Amount \$

In this field, enter the minimum purchase order amount you want transmitted to this wholesaler. If the total dollar amount of a P/O is less than the specified amount, the P/O will not be sent.

If you do not want to specify a minimum amount, leave this field blank.

You'll need to decide how you want to handle P/Os that are below the minimum dollar amount. You can handle these P/Os in three ways, which are described below.

Allowing all P/Os to be sent

You can allow all P/Os, regardless of the amount. If you specify **Y** in the TRANSMIT P/O IF UNDER MINIMUM field, all P/Os will be sent, regardless of dollar amount.

There is another TRANSMIT P/O IF UNDER MINIMUM field under the CUTOFF TIME field. This second field gives you the option of sending P/Os under the minimum when you send the last

```

20:56:09                (LFA1) Vendor Call Number                09/06/96
-----
                        Call Number [ 1 ]
-----
Parameter Screen :L6F      P/O Vendor # :UNITED      Match on Vendor Y/N ?Y
Description: [UNITED 10:00  ]      Transmit P/O ? (Y-Yes,N-No,F-Fax)

How to Create P/O Number ? (Last P/O Number Used :      )
(1-MMDD##,2-V.DOY##,3-V.MM##,4-YYMM##,5-V.MMDD#,N-Next P/O Number)

If P/O Exists Use Next P/O Number Y/N/X ? (Y-LF P/O #,N-Same,X-Next Seq.#)

How to Sort P/O (1)C (2) (3) Create NEW P/O When Sort ONE Changes Y/N ?
(I-Inv.,C-Customer,R-Route,S-Slsm,#-Item #,D-Dept,V-Ven.,X-Class)

P/O minimum Amount $
Combine P/O if Under Minimum Y/N ? Transmit P/O if Under Minimum Y/N ?

Cutoff Time :              Cutoff Day of Week :
Combine P/O if Under Minimum Y/N ? Transmit P/O if Under Minimum Y/N ?
-----
<RET> for Next Screen, <Esc> for Previous Screen

```

Figure 12. Sorting P/O's by Customer Account

transmission of the day. (For details, see the description of the CUTOFF TIME field and the corresponding TRANSMIT P/O IF UNDER MINIMUM field, below.)

Parameters for calls that take place earlier in the day can be set to combine, as described below. You can then set the parameters for the cutoff call to send any remaining P/Os regardless of size.

Combining P/Os

Another option for handling P/Os below the minimum is to combine several small P/Os that are going to the same vendor. You set this option through the COMBINE P/O IF UNDER minimum field, described below. If you choose this option, the system can add to a P/O until it's over the minimum amount.

Sending P/Os manually

You can look at the P/Os that are below the minimum, and manually transmit those that need to be sent. To determine which P/Os are below the minimum, check the Automated Short-Buy Report. The STATUS OF P/O column prints UNDER MINIMUM if the P/O's dollar amount is too low. (For more information about this report, see **Section 4: The Automated Short-Buy Report.**)

Note: *Timing is critical when you use this method.* You must not transmit these P/Os manually on the day they're created. Doing so can cause errors in the automated short-buy.

The time when you can send these P/Os manually depends on how you set the HOW TO CREATE P/O NUMBER parameter.

If you selected any of the methods where the P/O numbers change daily (setting the parameter to 1, 2, 5, or N), you need to manually send the P/Os the next day.

If you selected one of the methods where the P/O numbers change monthly (setting the parameter to 3 or 4), you need to manually send the P/Os before the end of the month.

Combine P/O if Under Minimum

Sorting the items to go on P/Os can reduce the size of each purchase order and increase the number of P/Os. In some cases, though, you might have so few items on a purchase order that the dollar amount is too low to send to the wholesaler. In this field, specify whether you want to wait to transmit this purchase order if its dollar amount is lower than the minimum amount specified in the P/O MINIMUM AMOUNT field, then combine it with the items from the next purchase order to be sent to this wholesaler. The system will continue holding the purchase order and adding to it until it meets the minimum requirement specified in the P/O MINIMUM AMOUNT field.

To combine purchase orders, type:

Y

Note: If the system does not transmit the purchase order at the specified time (such as when it combines the P/O with the next P/O for this wholesaler), the system prints a report specifying what didn't transmit and why.

If you do not want to combine purchase orders, even if a P/O total is too low to send to the wholesaler, type:

N

Transmit P/O if Under Minimum

If a purchase order's total dollar amount is less than the amount specified in the P/O MINIMUM AMOUNT field, and if you specified N in the COMBINE P/O IF UNDER MINIMUM field, above, you can specify whether you want to send the P/O to the wholesaler anyway.

Note: If you specify Y in the COMBINE P/O IF UNDER MIN field, this field is not valid. Press TAB.

To transmit a purchase order with less than the minimum dollar amount specified in the P/O MIN AMOUNT field, type:

Y

If you do not want to transmit a P/O with less than the minimum dollar amount, type:

N

Note: If the system does not transmit the purchase order at the specified time (such as when it does not meet the minimum dollar requirements), the system prints a report specifying what didn't transmit and why.

Cutoff Time

In these fields, specify the time of day when the system uses the last set of parameters for the end-of-day transmission. For example, if you do not want to send purchase orders later than 3:00 because the wholesaler is one hour ahead of you, you would enter 15:00.

Note: You must enter the time in military time; you must also enter the colons between hours and minutes.

```

(LFA1) Vendor Call Number
-----
Call Number [1 ]
-----
Limits:
(I)nc/(E)xc Stock Classes ? [ ] to [ ] [ , , , , ]
(I)nc/(E)xc Departments ? [ ] to [ ] [ , , , , ]
(I)nc/(E)xc Locations ? [ ] to [ ] [ , , , , , ] (I)nv/(G)/L ?
(I)nc/(E)xc Sic Codes ? [ ] to [ ] [ , , , , , ]
(I)nc/(E)xc Assort Codes ? [ ] to [ ] [ , , , , , ]
(I)nc/(E)xc Routes ? [ ] to [ ] [ , , , , , ]

Specials To Put On P/O. [ , , , , , , , ]
(AA-AAAA, ZZ-ZZZZ, SH-Shipto, SB-Short-Buy, BO-Back Order, SP-Item, PO-Spec. P/O)

Exceptions From Vendors:
Transfer Exceptions ? (N-Next Call, T-Time Slot, D-Dummy P/O) P/O #
Stop Process for Time Slot if P/Os Not Transmitted Y/N ?
Print Options: P/O's Y/N ? Printer [ ] Exceptions Y/N ? Printer [ ]
-----
<RET> for Next Screen, <Esc> for Previous Screen

```

Figure 13. The Second Subscreen

To transmit an order at the cutoff time, you must also set it up in the Launcher at that time.

Cutoff Day of Week

In this field, specify the last day of the working week on which the system should automatically send purchase orders to wholesalers, assuming that the working week begins on Monday. Enter the first three letters of the appropriate day of the week. For example, if you want the system to send purchase orders automatically Monday through Saturday, but not Sunday, you would enter SAT.

Combine P/O if Under Minimum

The system transmits its final purchase order to the wholesaler at the time specified in the CUTOFF TIME fields, if that time is also set up in the Launcher for this wholesaler. In the COMBINE P/O IF UNDER MINIMUM field, specify whether you want to combine purchase orders for the last transmission of the day, when the total dollar amounts for one or more of these P/Os is less than the amount specified in the P/O MINIMUM AMOUNT field.

Note: This field and the following fields do not apply if no time is specified in the CUTOFF TIME fields.

To combine P/Os for the last transmission of the day if one or more has less than the minimum dollar amount, type:

Y

To keep P/Os separate, regardless of their total dollar amount, type:

N

Transmit P/O if Under Minimum

If a purchase order's total dollar amount is less than the amount specified in the P/O MINIMUM AMOUNT field, you can specify whether you want to send the P/O to the wholesaler for the last transmission anyway.

Note: This field does not apply if you specify **Y** in the COMBINE P/O IF UNDER MINIMUM field, above.

To transmit a purchase order in the final transmission of the day, even if the P/O has less than the minimum dollar amount specified in the P/O MINIMUM AMOUNT field, type:

Y

If you do not want to transmit a P/O with less than the minimum dollar amount, type:

N

SETTING LIMITS AND EXCEPTIONS: COMPLETING FIELDS IN THE SECOND SUBSCREEN

When you complete or move past the first subscreen, the system displays the second subscreen of the (LFA1) screen, as shown in Figure 13. If you are creating a new call number, the fields in the screen default to the responses for the last call number listed in the (LFA1) Vendor Call Number Master screen. The CALL NUMBER field displays the call number that these parameters are for.

The fields in this subscreen let you set limits for a call number. These limits are similar to those you set when printing reports: an item must meet all of the limits you set to be included. (Remember that an item must first meet the global limits, which are set in the (LFAØ) screen, before it can be considered for a call number.)

(I)nc/(E)xc Stock Classes / to

Using these fields together, you can select a range of items by stock class to include or exclude when transmitting with this call number. In the (I)NC/(E)XC field, indicate whether you want to include or exclude the stock classes you specify. To include them, type:

I

To exclude the stock classes you specify, type:

E

In the TO fields, specify the range of stock classes you are including or excluding. In the first field, enter the first stock class in the range. In the TO field, enter the last stock class in the range.

In the five fields to the right of the TO field, you can specify five additional, non-sequential stock classes that you want to include or exclude.

(I)nc/(E)xc Departments / to

Using these fields together, you can select a range of items by department to include or exclude when transmitting with this call number. In the (I)NC/(E)XC field, indicate whether you want to include or exclude the departments you specify. To include them, type:

I

```

(LFA1) Vendor Call Number
-----
Call Number [ 1 ]
-----
Limits:
(I)nc/(E)xc Stock Classes ? [ ] to [ ] [ , , , , ]
(I)nc/(E)xc Departments ? [ ] to [ ] [ , , , , ]
(I)nc/(E)xc Locations I ? [01] to [03] [ , , , , ] (I)nv/(G)/L ?G
(I)nc/(E)xc Sic Codes ? [ ] to [ ] [ , , , , ]
(I)nc/(E)xc Assort Codes ? [ ] to [ ] [ , , , , ]
(I)nc/(E)xc Routes ? [ ] to [ ] [ , , , , ]

Specials To Put On P/O. [ , , , , , ]
(AA-AAAA,ZZ-ZZZZ,SH-Shipto,SB-Short-Buy,BO-Back Order,SP-Item,PO-Spec. P/O)

Exceptions From Vendors:
Transfer Exceptions ? (N-Next Call,T-Time Slot,D-Dummy P/O) P/O #
Stop Process for Time Slot if P/Os Not Transmitted Y/N ?
Print Options: P/O's Y/N ? Printer [ ] Exceptions Y/N ? Printer [ ]
-----
<RET> for Next Screen, <Esc> for Previous Screen

```

Figure 14. Including G/L Locations 1 - 3

To exclude the departments you specify, type:

E

In the TO fields, specify the range of departments you are including or excluding. In the first field, enter the first department in the range. In the TO field, enter the last department in the range.

In the five fields to the right of the TO field, you can specify five additional, non-sequential departments that you want to include or exclude.

(I)nc/(E)xc Locations / to / (I)nv/(G)/L

Using these fields together, you can select a range of inventory or general ledger locations to include or exclude when transmitting with this call number. You might want to use these fields to exclude some of your locations, such as small or remote ones, that you only want to receive a purchase order from once a day. This can prevent making multiple, daily deliveries to locations that do not warrant that kind of activity.

Note: If you leave these fields blank, the system will include items from all locations.

In the (I)NC/(E)XC field, indicate whether you want to include or exclude the locations you specify. To include them, in the (I)NC/(E)XC field, type:

I

as shown in Figure 14.

To exclude the locations you specify, type:

E

In the TO fields, specify the range of locations you are including or excluding. In the field to the left of the TO field, enter the first location in the range. In the TO field, enter the last location in the range.

In the five fields to the right of the TO field, you can specify five additional, non-sequential locations that you want to include or exclude.

In the (I)NV/(G)/L field, indicate whether the locations you specified were inventory or general ledger locations.

To indicate that they're inventory locations, type:

I

To indicate that they're general ledger locations, type:

G

(I)nc/(E)xc Sic Codes / to

Using these fields together, you can select a range of items by SIC code to include or exclude when transmitting with this call number. In the (I)NC/(E)XC field, indicate whether you want to include or exclude the SIC codes you specify. To include them, type:

I

To exclude the SIC codes you specify, type:

E

In the TO fields, specify the range of SIC codes you are including or excluding. In the first field, enter the first SIC code in the range. In the TO field, enter the last SIC code in the range.

In the five fields to the right of the TO field, you can specify five additional, non-sequential SIC codes that you want to include or exclude.

(I)nc/(E)xc Assort Codes / to

Using these fields together, you can select a range of items by assort code to include or exclude when transmitting with this call number. In the (I)NC/(E)XC field, indicate whether you want to include or exclude the assort codes you specify. To include them, type:

I

To exclude the assort codes you specify, type:

E

In the TO fields, specify the range of assort codes you are including or excluding. In the first field, enter the first assort code in the range. In the TO field, enter the last assort code in the range.

In the five fields to the right of the TO field, you can specify five additional, non-sequential assort codes that you want to include or exclude.

(I)nc/(E)xc Routes / to

Using these fields together, you can select a range of delivery routes to include or exclude when transmitting with this call number. In the (I)NC/(E)XC field, indicate whether you want to include or exclude the routes you specify. To include them, type:

I

```

(LFA1) Vendor Call Number
-----
Call Number [ 1 ]
-----
Limits:
(I)nc/(E)xc Stock Classes ? [ ] to [ ] [ , , , , ]
(I)nc/(E)xc Departments ? [ ] to [ ] [ , , , , ]
(I)nc/(E)xc Locations ? [01] to [03] [ , , , , ] (I)nv/(G)/L ?G
(I)nc/(E)xc Sic Codes ? [ ] to [ ] [ , , , , ]
(I)nc/(E)xc Assort Codes ? [ ] to [ ] [ , , , , ]
(I)nc/(E)xc Routes ? [ ] to [ ] [ , , , , ]

Specials To Put On P/O. [ , , , , , , ]
(AA-AAAA,ZZ-ZZZZ,SH-Shipto,SB-Short-Buy,BO-Back Order,SP-Item,PO-Spec. P/O)

Exceptions From Vendors:
Transfer Exceptions ?D (N-Next Call,T-Time Slot,D-Dummy P/O) P/O #DUMMY
Stop Process for Time Slot if P/Os Not Transmitted Y/N ?
Print Options: P/O's Y/N ? Printer [ ] Exceptions Y/N ? Printer [ ]
-----
<RET> for Next Screen, <Esc> for Previous Screen

```

Figure 15. Transferring Exceptions to a Dummy P/O

To exclude the routes you specify, type:

E

In the TO fields, specify the range of routes you are including or excluding. In the first field, enter the first route in the range. In the TO field, enter the last route in the range.

In the five fields to the right of the TO field, you can specify five additional, non-sequential routes that you want to include or exclude.

Specials to Put On P/O

In these fields, specify which specials entered in the (G) Order Entry screen you want to include on the purchase orders. You can include up to seven specials.

Enter the code for each of the specials you want to include on the purchase orders. If you do not fill all the fields, press TAB until you pass the last one.

Choose the special codes from the following:

- AA** AAAA special (messages before items)
- BO** SPECIAL BO (item messages for backorders)
- PO** SPECIAL PO (item messages for purchase orders)
- SB** SPECIAL SB (item messages for short-buys)
- SP** SPECIAL (item special messages)
- ST** SHIPTO (shipto addresses)
- ZZ** ZZZZ special (messages after items).

Transfer Exceptions/PO#

In the TRANSFER EXCEPTIONS field, specify what you want to do with items that the wholesaler cannot fill or doesn't stock. You can transfer the items to the next call number for this time slot (or, if this is the last call number for this time slot, to the first call number for the next time slot), to the next time slot, or to a dummy P/O.

To transfer the items to the next call number in this time slot, type:

N

To transfer the items to the next time slot, type:

T

To transfer the items to a dummy P/O, as shown in Figure 15, type:

D

If you specify **D** in the TRANSFER EXCEPTIONS field, you must complete the PO# field. In this field, enter a P/O number for the dummy purchase order that you want excluded items to be transferred to. DDMS recommends that you enter DUMMY as the purchase order number for the dummy P/O.

If you specify **N** or **T** in the TRANSFER EXCEPTIONS field, press TAB to leave the PO# field blank.

Stop Process for Time Slot if P/Os Not Transmitted

This field can determine whether to cancel the remaining transmissions from a particular time in the Launcher, if one call number has failed to be transmitted.

If a call number is started but not sent to the wholesaler, you can prevent the system from initiating the subsequent call numbers for that time. You might want to use this feature to keep the system from trying to initiate all call numbers for a time slot once the cutoff time has been reached, since the purchase orders will not be sent anyway.

To prevent the system from initiating any call numbers for a time slot once one call number has failed to be transmitted, type:

Y

To allow the system to continue initiating call numbers after one code has failed to be transmitted, type:

N

Print Options: P/O's/Printer

In the PRINT OPTIONS field, specify whether you want to print the purchase orders created through the automated short-buy as well as automatically sending them to the vendor.

To print the purchase orders created through the automated short-buy, type:

Y

If you do not want to print these purchase orders, type:

N

In the corresponding PRINTER field, specify the logical name of the printer you want to use to print the purchase orders. If you specify **N** in the PRINT OPTIONS field, press TAB to pass this field.

SPARCO Ez-Order Parameters

Acct# :	Password :	P/O Comments
Backorders ?	SPARCO Subs ?	[]
Like Item Subs ?	Convert Units ?	[]
Print Cost ?	Print Shorts ?	
Ship Partial ?	1 Order/Inv. ?	
Printer ?		
Shorts ?	Loc. ?	
List on Pick ?	Wrap-N-Pack ?	
Multiple Drop Ships ?	Ignore NDS ?	

Note : If left blank will use default parameters from L6C.

<RET> for Next Screen, <ESC> for Previous Screen

Figure 16. The Third Subscreen — Sparco’s Version

Note: For more information about the printing the purchase orders on the Automated Short-Buy Report, see **Section 4: The Automated Short-Buy Report**.

Exceptions/Printer

These two fields work together. In the EXCEPTIONS field, specify whether you want to print a list of items that are not placed on a purchase order because they do not meet the limits set for the call number. This list also includes the reason each item was not included on a purchase order.

To print these exceptions, in the EXCEPTIONS field type:

Y

If you do not want to print the exceptions, type:

N

In the corresponding PRINTER field, specify the logical name of the printer you want to use to print the exceptions.

Exceptions can include the items that were not included on P/Os, the purchase orders that were not sent because they did not meet minimum requirements, and items that could not be filled by wholesalers.

Note: For more information about the Automated Short-Buy Exceptions Report, see **Section 5: The Automated Short-Buy Exceptions Report**.

If you specified N in the EXCEPTIONS field, press TAB to pass the PRINTER field.

SETTING COMMUNICATION PARAMETERS: COMPLETING FIELDS IN THE THIRD SUBSCREEN

When you complete or move past the second subscreen, the system displays the third subscreen of the (LFA1) screen.

Note: The third subscreen does not appear if you specified a manufacturer's code in the PARAMETER SCREEN field; it only appears if you specified a wholesaler.

The third subscreen includes the applicable communication parameters for the wholesaler that this call number will be sent to.

The third subscreen that you see corresponds to the communication parameter screen you specified in the PARAMETER SCREEN field in the first subscreen.

The third subscreen will contain fields from the (L6C), (L6E), (L6F) or (L6J) screens, depending on which of these you specified. The Sparco version of the third subscreen appears in Figure 16; it contains fields like those in the (L6C) screen.

The third subscreen gives you the option of customizing the communication parameters for each call number.

If you do not need to customize the communication parameters for a call number, press RETURN. The system will redisplay the original (LFA1) screen, and save the changes you made to this call number.

If you need to customize the communication parameters for a call number, tab to each parameter you want to change, and enter the appropriate response. For detailed information about the fields in this subscreen, see the chapter about the appropriate wholesaler in "Part G: Wholesaler Parameters" of *Book V: Purchasing and Communications*. If you finish setting parameters before reaching the last field, press RETURN. The system will redisplay the original (LFA1) screen, and save the changes you made to this call number.

Section 2: Deleting Call Number Parameters

To delete a call number, go to the (LFA1) Vendor Call Number Master screen and select the [D] Delete action code.

The cursor moves to the CALL NUMBER field. Enter the number of the call number you want to delete, or press TAB to accept the default, call number 1. If you enter a one-digit call number, press TAB.

The system displays the following prompt, as shown in Figure 17:

Are You Sure Y/N ?N

If you do not want to delete the specified call number, press RETURN or type:

N

The cursor returns to the action code field so that you can start again.

If you are ready to delete the specified call number, type:

Y

The system deletes the call number, and the cursor returns to the action code field.

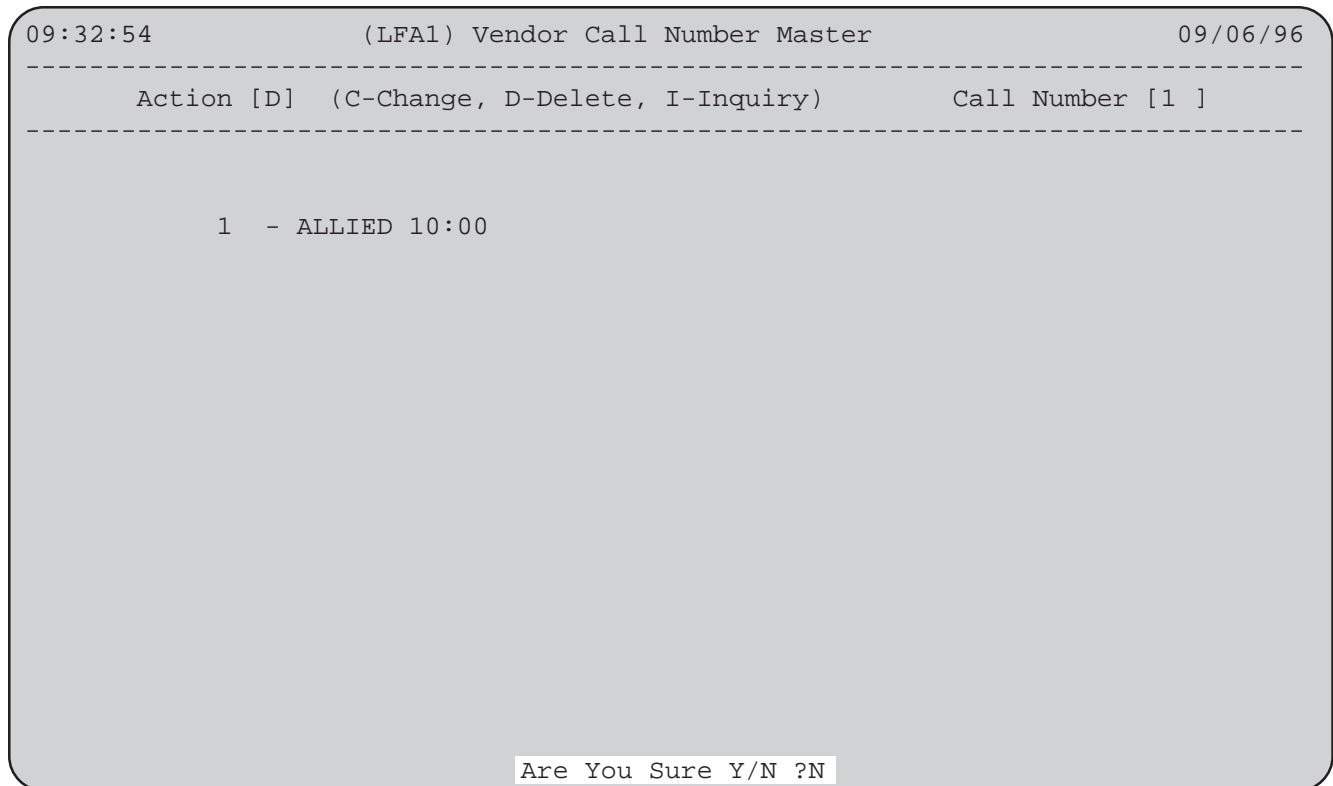


Figure 17. The ARE YOU SURE Prompt

Section 3: Viewing Call Number Parameters

To view a call number, go to the (LFA1) Vendor Call Number Master screen and select the [I] Inquiry action code.

The cursor moves to the CALL NUMBER field. Enter the number of the call number you want to view, or press TAB to accept the default, call number 1. If you enter a one-digit call number, press TAB.

The system displays the first subscreen, with the parameters for the specified call number. (The call number you are viewing is shown in the CALL NUMBER field at the top of the screen.) The following prompt also appears, as shown in Figure 18:

PRESS ANY KEY TO CONTINUE (P=PREVIOUS SCREEN)

To view the next subscreen, press RETURN. You can view each subscreen in turn.

Note: After displaying the third subscreen for the call number you specified, the system displays the first subscreen for the next call number. After displaying the third subscreen for the last call number, the system will display the (LFA2) Short-Buy Launcher screen.

To view the previous screen, the first (LFA1) screen, type:

P

To return to the action code field, press ESC.

```

13:20:42                (LFA1) Vendor Call Number                05/14/98
-----
                        Call Number [ 1 ]
-----
Parameter Screen :L6      P/O Vendor # :ABC CO      Desc: [ABC CO      ]
Match On Vendor Y/N ?Y  Add. Ways To Match on Vendor [      ] [      ]
Match on ? W-Primary Vendor Id, P-Pur. Vendor Program, V-Pur. Vendor Id
Transmit P/O ? (Y-Yes,N-No,F-Fax) End P/O's Created Y/N ?

How to Create P/O Number ? (Last P/O Number Used :      )
(1-MMDD##,2-V.DOY##,3-V.MM##,4-YYMM##,5-V.MMDD#,N-Next P/O Number)

If P/O Exists Use Next P/O Number Y/N/X ? (Y-LF P/O #,N-Same,X-Next Seq.#)

How to Sort P/O (1) (2) (3) Create NEW P/O When Sort ONE Changes Y/N ?
(I-Inv.,C-Customer,R-Route,S-Slsm,#-Item #,D-Dept,V-Ven.,X-Class)

P/O Minimum Amount $
Combine P/O if Under Minimum Y/N ? Transmit P/O if Under Minimum Y/N ?

Cutoff Time :          Cutoff Day of Week :
Combine P/O if Under Minimum Y/N ? Transmit P/O if Under Minimum Y/N ?
-----
<RET> for Next Screen, <Esc> for Previous Screen

```

Figure 18. The PRESS ANY KEY TO CONTINUE Prompt

Section 4: The Automated Short-Buy Report

The Automated Short-Buy Report lists the purchase orders and indicates whether they were transmitted or not. In addition, this report also indicates whether items that the vendor cannot fill or doesn't stock were transferred to another P/O. This section explains how to print the Automated Short-Buy Report, and describes the information it provides.

AUTOMATICALLY PRINTING THE AUTOMATED SHORT-BUY REPORT

Automatically printing this report depends upon how your parameters have been set. When you set the parameters for a call number, in the PRINT OPTIONS/P/O'S field of the (LFA1) Vendor Call Number screen, you can specify whether you want the system to automatically print the Automated Short-Buy Report each time the call number is launched by the system.

If the PRINT OPTIONS/P/O'S field is set to Y in the (LFA1) screen, each time the system launches the call number, the Automated Short-Buy Report will automatically print on the printer specified in the P/O'S/PRINTER field in the (LFA1) screen. (For more information on setting or changing these parameters, see **Section 1: Creating and Changing Call Number Parameters.**)

Note: You must use wide paper or set your printer for compressed print (17 characters per inch) to print this report. To set your printer for compressed print, change the print setting manually (referring to your printer manual for instructions), or use the (@) Printer Setup Program screen (referring to the chapter on printer setup in "Volume 2: Utilities" of *Book VII: System Maintenance and Utilities*).

WHAT THE AUTOMATED SHORT-BUY REPORT INCLUDES

The Automated Short-Buy Report includes the following information for each purchase order:

- Time
- Purchase Order number
- Purchase Order vendor
- Purchase Order status
- Total Purchase Order Dollar Amount
- Transferred purchase order number

The status code of the purchase order lets you know whether a purchase order was transmitted to the vendor on the automated short-buy.

Purchase Orders that were transmitted have the status code TRANSMITTED. If the purchase order was transmitted, the transferred P/O # indicates whether there were items that were transferred to another P/O, (for example, a dummy P/O). You can specify where you want the system to transfer the items that the wholesaler cannot fill or doesn't stock in the TRANSFER EXCEPTIONS/PO # field in the (LFA1) screen. You can specify to transfer the items to the next call number in this time slot, to transfer the items to the next time slot, or to transfer the items to a dummy P/O. (For instructions on setting or changing this parameter, see **Section 1: Creating and Changing Call Number Parameters.**)

The table below shows the status codes for purchase orders that were not transmitted, along with an explanation and suitable response.

Status of P/O	Explanation	Response
Not Transmitted	The P/O was not transmitted to the vendor. This status appears when the TRANSMIT P/O field in the (LFA1) screen is set to N.	The P/O should be transmitted manually.
Error Transmitting	This status appears when the acknowledgment from the vendor does not print.	Contact the vendor to see if the P/O was transmitted. If not, you must transmit the P/O manually.
Under Minimum	This status appears when the P/O did not contain the minimum dollar amount specified in the P/O MINIMUM AMOUNT \$ field in the (LFA1) screen.	Check the acknowledgment to see if the P/O has been transmitted. The P/O may have been transmitted depending upon the COMBINE P/O IF UNDER MINIMUM and the TRANSMIT P/O IF UNDER MINIMUM parameters in the (LFA1) screen.
Needs Transmitting	This status appears when the system created the P/O, but did not transmit it to the vendor with this call number.	The P/O should be left with this status. The next time the system launches the auto short-buy to the specified vendor, the P/O will be transmitted
P/O's Being Faxed	This status appears if you specify to fax the P/O in the TRANSMIT P/O field in the (LFA1) screen.	Check the acknowledgment to see if the P/O was successfully transmitted. You can also print a Fax Exceptions Report to see which faxes were not successfully transmitted. (For more information

Section 5: The Automated Short-Buy Exceptions Report

The Automated Short-Buy Exceptions Report lists the eligible items, and indicates whether they were included or not. If an eligible item is not included, the reason is printed on the report. This section explains how to print the Automated Short-Buy Exceptions Report, and describes the information it provides.

AUTOMATICALLY PRINTING THE AUTOMATED SHORT-BUY EXCEPTIONS REPORT

Automatically printing this report depends upon how your parameters have been set. When you set the parameters for a call number, in the PRINT OPTIONS/EXCEPTIONS field of the (LFA1) Vendor Call Number screen, you can specify whether you want the system to automatically print the Automated Short-Buy Exceptions Report each time the call number is launched by the system.

If the PRINT OPTIONS/EXCEPTIONS field is set to Y in the (LFA1) screen, each time the system launches the call number, the Automated Short-Buy Exceptions Report will automatically print on the printer specified in the EXCEPTIONS/PRINTER field in the (LFA1) screen. (For more information on setting or changing these parameters, see **Section 1: Creating and Changing Call Number Parameters.**)

Note: You must use wide paper or set your printer for compressed print (17 characters per inch) to print this report. To set your printer for compressed print, change the print setting manually (referring to your printer manual for instructions), or use the (@) Printer Setup Program screen (referring to the chapter on printer setup in “Volume 2: Utilities” of *Book VII: System Maintenance and Utilities*).

WHAT THE AUTOMATED SHORT-BUY EXCEPTIONS REPORT INCLUDES

The Automated Short-Buy Exceptions Report includes the following information for each eligible item:

- Time
- Item number and company
- Class and department
- Assort code
- SIC code
- Vendor
- Backordered quantity
- Route
- Ticket status
- Salesperson
- Pick ticket number
- Location number
- Reason code.

The reason code lets you know whether an item was included on the automated short-buy. If the item was not included, it indicates which parameter prevented the item from being included.

Items that were included have the reason code ACCEPTED. The table below shows the reason codes for items that were excluded, along with an explanation.

Reason Code	Explanation	Parameter	Screen
DOLLAR	Over maximum dollar amount	OVERRIDE DOLLAR AMOUNT	(LFAØ)
ASSORT	Wrong assort code	(I)NC/(E)XC ASSORT CODES	(LFA1)
CLASS	Wrong stock class	(I)NC/(E)XC STOCK CLASSES	(LFA1)
DEPT	Wrong department	(I)NC/(E)XC DEPARTMENTS	(LFA1)
DUE DATE	Did not meet due date	DAYS BEFORE DUE DATE ...	(LFAØ)
EXCL.GO	Excluded by AUTOSB special during order entry	N/A	(G)
INCLUDE	Did not meet the global include/exclude limits	all global (I)nc/(E)xc fields	(LFAØ)
LOC	Wrong inventory or G/L location	(I)NC/(E)XC LOCATIONS	(LFA1)
P/O MIN	Below minimum dollar amount	P/O MINIMUM AMOUNT \$	(LFA1)
QTY	Over maximum order quantity	OVERRIDE QUANTITY ...	(LFAØ)
ROUTE	Wrong delivery route	(I)NC/(E)XC ROUTES	(LFA1)
SIC	Wrong SIC code	(I)NC/(E)XC SIC CODES	(LFA1)
TIME	After cutoff time or day	CUTOFF TIME/CUTOFF DAY...	(LFA1)
VENDOR	Wrong vendor number (when MATCH ON VENDOR = Y)	P/O VENDOR #	(LFA1)
WEIGHT	Exceeded weight limit	INDIVIDUAL ITEM WEIGHT...	(LFAØ)

CHAPTER 4: THE LAUNCHER

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Introduction

You launch the automated short-buy through the (LFA2) Short-Buy Launcher screen. In this screen, you can specify the days and times at which you want the auto short-buy to launch. You can set, change, view, or delete the specified days, times, and call numbers (the combination of wholesaler and time) that this screen launches. This chapter describes each of these functions.

This chapter also explains how to set up the [E7] Activities Scheduler function in the (Z) Master Utilities screen for use with the automatic short-buy.

Note: To test your automated short-buy, you'll need to launch it manually, using the [L] LAUNCH Now action code in the [E7] Activities Scheduler. (For instructions on launching manually, see the chapter on viewing utilities in "Volume 2: Utilities" of *Book VII: System Maintenance and Utilities*.)

When you're ready to go live, change this setting to active by specifying **A**. It must be set to **A** before you can actually transmit to a wholesaler.

When the Day of Week Window appears, select **MON-FRI**. To do this, press TAB until the brackets move to this selection, and press RETURN.

In the Hour Window, indicate that you want the system to check every hour. To do this, type:

?

In the Minute Window, indicate that you want the system to check every 15 minutes. To do this, type:

?

In the A.M. or P.M. Window, select A.M. by typing:

A

In the DEVICE field, accept the default, **DY**, by pressing TAB.

In the PROGRAM/PROC NAME field, type:

;SPC:BEGPO

In the UNIT/VOLUME field, type:

SR????

Press TAB.

In the Type of File Window, select **PROGRAM**. To do this, type:

R

In the DESCRIPTION field, you can enter a description of this program (AUTO SHORT-BUY PROGRAM, for example). Press TAB if you do not fill the entire field.

Leave the START PARAMETERS field blank by pressing RETURN.

In the Save This Event Window, type:

Y

The system redisplay the Active Window. Press ESC. The system will display the completed entry for the automated short-buy program.

Section 2: Setting and Changing Launches

To set or change the days, times, and call numbers that the system launches, go to the (LFA2) Short-Buy Launcher screen. To do this, go to the (LFA) Automated Short-Buy Menu and select the [2] Launch Parameters selection code. The system displays the (LFA2) screen, as shown in Figure 20.

Select the [C] Change action code. The cursor moves to the LOCATION field. This field defaults to the general ledger location you specified for this terminal in the Master Menu. The system will use the location to determine which parameters to read. (The parameters in the (LØ) screen, which determine which volume serials to use, and the purchasing parameters in the (LF) screen, can both be set differently for each location.)

You can set up different launches for each general ledger location. Begin by setting launches for location 1. Then set parameters for each location you want to run differently. If you do not set launches for a particular location, it will use the parameters for location 1.

The system displays the following prompt:

Enter Number To Change

Enter the line number that you want to set or change. Line numbers are located in the # column in the launcher table. You can specify line numbers 1 through 9.

When you enter the line number, the system displays a separate bar with only that line at the bottom of the screen. The cursor is in the A field.

```

03:56:05                (LFA2) Short-Buy Launcher(08/12/96)                09/06/96
-----
Action  [C]  (I-Inquire, C-Change, D-Delete)                Location [ 1 ]
-----
| # | A | Day | Date | Time | Vendor Call Number | Status |
-----
| 1 |  |   | /   | :   | , , , , , , , , , |   |
| 2 |  |   | /   | :   | , , , , , , , , , |   |
| 3 |  |   | /   | :   | , , , , , , , , , |   |
| 4 |  |   | /   | :   | , , , , , , , , , |   |
| 5 |  |   | /   | :   | , , , , , , , , , |   |
| 6 |  |   | /   | :   | , , , , , , , , , |   |
| 7 |  |   | /   | :   | , , , , , , , , , |   |
| 8 |  |   | /   | :   | , , , , , , , , , |   |
| 9 |  |   | /   | :   | , , , , , , , , , |   |
-----
    
```

Figure 20. The (LFA2) Short-Buy Launcher Screen

Note: If you are changing this line, press TAB to move the cursor to each field you want to change. You can enter the new information over the existing information. When you finish, press RETURN to save your changes.

Following are descriptions of each of the user-specified fields in the (LFA2) screen.

A

In this field, specify whether this line is active or inactive.

If the line is active, and you want the system to read this line every time it checks for a program to launch, type:

A

If the line is inactive, and you do not want the system to execute the program on this line, type:

I

Day

Enter the day of the week that you want the system to run the specified call numbers (you specify the call numbers in the CALL NUMBER field, described below).

If you want a call number to run Monday through Friday, you can specify **MON-FRI** as the day rather than making the same entry in the Launcher once for each day.

If you do not completely fill the field, press TAB.

Note: You *must* spell the day correctly. However, the word WEDNESDAY does not completely fit in the space provided. For that day, you must enter **WEDNESDA**.

For example, if you want these call numbers to run on Monday, you would type **MONDAY**.

If you want a call number to run on only one occasion, you can enter the date that you want this code to run. To do so, leave the DAY field blank by pressing TAB.

Date

The cursor moves to this field only if you leave the DAY field blank. To run a call number on only one specific date, enter the number corresponding to the month in the first field, and the day in the second field. If you do not completely fill a field, press TAB.

Time

In the TIME fields, shown in Figure 21, enter the time at which you want the system to run the specified call numbers.

Notes: You *must* enter the time in military time

The system searches the launcher for programs that are due every 15 minutes. Therefore, you should only use times at the quarter hour, such as 13:00, 13:15, 13:30, and 13:45.

For example, if you want the short-buy to run at 10:00 a.m., enter **10** in the first field, and **00** in the second field. If you want it to run at 2:15 p.m., enter **14** in the first field, and **15** in the second field.

```

03:56:05                (LFA2) Short-Buy Launcher(08/12/96)                09/06/96
-----
Action  [I]  (I-Inquire, C-Change, D-Delete)                Location [__]
-----
| # | A | Day | Date | Time | Vendor Call Number | Status |
-----
| 1 |  |   | /   | :   | , , , , , , , , , |   |
| 2 |  |   | /   | :   | , , , , , , , , , |   |
| 3 |  |   | /   | :   | , , , , , , , , , |   |
| 4 |  |   | /   | :   | , , , , , , , , , |   |
| 5 |  |   | /   | :   | , , , , , , , , , |   |
| 6 |  |   | /   | :   | , , , , , , , , , |   |
| 7 |  |   | /   | :   | , , , , , , , , , |   |
| 8 |  |   | /   | :   | , , , , , , , , , |   |
| 9 |  |   | /   | :   | , , , , , , , , , |   |
-----

```

Figure 21. The Time Fields

Call Number

In these fields, you can enter up to 10 call numbers from the (LFA1) Vendor Call Number Master screen that you want the system to run at this time on this day. If you enter a one-digit call code, press TAB to move the cursor to the next CALL NUMBER field.

When you finish entering call numbers, press RETURN.

Note: If you do not press RETURN or TAB through all the fields in the line, the system will not save your changes.

The system displays the changed line in the launcher table, and the cursor returns to the action code field.

Status

The STATUS field is for your reference only; the system completes this field when it is launching the call numbers in a particular line. The system messages in this field will specify what part of the automated short-buy the system is performing. If the system has not started the short-buy process, the STATUS field will be blank.

During the transmission of a P/O, the STATUS field displays the word **XMIT**.

When the system completes the short-buy for the call numbers in a particular line, the following message appears in the STATUS field:

**** DONE ****

Note: If the transmission cannot be completed successfully, the STATUS field displays the following message:

*** ERROR ***

The system clears the STATUS field for all line numbers at midnight each night if the automated short-buy program in the [E7] Activities Scheduler is active.

Note: While you're practicing, this program will be inactive, and the STATUS field will *not* clear at midnight. You'll need to clear the STATUS field manually before you can launch a line number again.

To do this , you must delete the line and add it back in again. (Instructions for deleting lines can be found in **Section 3: Deleting Launches.**)

Section 3: Deleting Launches

To delete one line from the automated short-buy launcher (a specific day, time, and list of call numbers), go to the (LFA2) Short-Buy Launcher screen and select the [D] Delete action code. The cursor moves to the LOCATION field. Specify the general ledger location, or press TAB to accept the default.

The system displays the following prompt, as shown in Figure 22:

Enter Number To Delete

Enter the line number that you want to delete. Line numbers are located in the # column in the launcher table. You can specify line numbers 1 through 9. When you enter the line number, the system displays a separate bar with only that line at the bottom of the screen, along with the following prompt:

Are You Sure Y/N ?N

If you do not want to delete the displayed line, press RETURN or type:

N

The cursor returns to the action code field so that you can start again.

If you want to delete the displayed line, type:

Y

The system deletes the line and the cursor returns to the action code field.

```

03:56:05          (LFA2) Short-Buy Launcher(08/12/96)          09/06/96
-----
Action  [I]  (I-Inquire, C-Change, D-Delete)          Location [__]
-----
| # | A | Day | Date | Time | Vendor Call Number | Status |
-----
| 1 |  |  | / | : | , , , , , , , , , |  |
| 2 |  |  | / | : | , , , , , , , , , |  |
| 3 |  |  | / | : | , , , , , , , , , |  |
| 4 |  |  | / | : | , , , , , , , , , |  |
| 5 |  |  | / | : | , , , , , , , , , |  |
| 6 |  |  | / | : | , , , , , , , , , |  |
| 7 |  |  | / | : | , , , , , , , , , |  |
| 8 |  |  | / | : | , , , , , , , , , |  |
| 9 |  |  | / | : | , , , , , , , , , |  |
-----
Enter Number To Delete
    
```

Figure 22. The Enter Number to Delete Prompt

Section 4: Viewing Launches

To view the settings in the launcher, go to the (LFA2) Short-Buy Launcher screen and select the [I] Inquire action code, as shown in Figure 23.

The system updates the screen and displays the current launcher settings.

The screenshot displays a terminal-style interface for the (LFA2) Short-Buy Launcher. At the top left, the time is 03:56:05. The title is (LFA2) Short-Buy Launcher(08/12/96). At the top right, the date is 09/06/96. Below the title bar, there are two fields: 'Action [I]' and 'Location [__]'. The 'Action' field contains the letter 'I', and the text '(I-Inquire, C-Change, D-Delete)' is shown to its right. Below these fields is a table with the following columns: '#', 'A', 'Day', 'Date', 'Time', 'Vendor Call Number', and 'Status'. The table contains 9 rows of data, with the first column containing numbers 1 through 9, and the other columns containing slashes, colons, and asterisks. The 'Action' field is highlighted with a cursor.

#	A	Day	Date	Time	Vendor Call Number	Status
1	/	/	/	:	*	*
2	/	/	/	:	*	*
3	/	/	/	:	*	*
4	/	/	/	:	*	*
5	/	/	/	:	*	*
6	/	/	/	:	*	*
7	/	/	/	:	*	*
8	/	/	/	:	*	*
9	/	/	/	:	*	*

Figure 23. Selecting the [I] Inquire Action Code