



ECi USERS CONFERENCE
Empowerment 2008

Automated Short-Buy



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About the Automated Short-Buy

The automated short-buy (ASB) saves you time and improves the efficiency of your purchasing operation. Use ASB to automatically build, transmit, receive and flush purchase orders (P/Os) at specific times.

The ASB process automates:

- Creating the short-buy purchase orders
- Transmitting the purchase order to the wholesaler
- Performing the pre- and final-receiving procedures
- Transferring the wholesaler's backorders to another P/O
- Flushing backorders.

You do not have to manually transmit P/Os that go through the ASB process; they are automatically transmitted.

ASB is an excellent tool for repetitive purchases, for example, the things you buy the same way each time. ASB doesn't replace your complete purchasing process; you still buy the exceptions manually. However, ASB can greatly streamline the task.

You should start small by determining the items with which to start. Perhaps you can start with items from a particular vendor, or from a specific manufacturer. You can gradually add more items to the ASB.

You can set up global parameters to determine what items go through the ASB flow. You also can specify the time of day the purchase orders are created and transmitted, which vendor they go to, and in what order.

When you set up the ASB, you set limits. These limits become part of a filtering system. They indicate which items to include, and which items to exclude. You exclude items from the ASB for several reasons:

- You may always need to handle some items manually.
- You might exclude some items temporarily. You may have vendors that you only purchase from once a week, vendors for whom you must meet a minimum dollar requirement, or new lines that you've just begun to purchase.
- You may need to exclude an item for a particular order, or on a particular day.
- You may need to exclude a certain group of items (those within a certain stock class, for example).

How ASB Works

The ASB creates and transmits purchase orders for you automatically. It also pre- or final-receives the purchase orders and can transfer backorders to another P/O. To do this, it uses vendor call numbers and parameters.

Understanding Qualifiers

The ASB is similar to the manual short-buy process that you're already familiar with: each record in the order entry file is tested to determine if it *qualifies* as a backorder. If it qualifies, it *ends up* on a purchase order or remains in a short-buy file. See Figure 1.

The ASB uses a *filtering system* to determine which items are purchased. All backordered items go through a series of filters. Each filter eliminates some of the items, using criteria that are part of the program or limits that you set.

Filters are not the same as parameters. A group of parameters, acting together, works as a filter. Items either pass through one filter, moving on to the next one, or are eliminated. Items that pass through all of the filters are placed on purchase orders by the ASB program and are transmitted. Items that are eliminated are not placed on purchase orders.

**Figure 1:
Comparing the
ASB to a
Manual Short-
Buy**

Manual	ASB
Backorder Qualifiers	Backorder Qualifiers
<ul style="list-style-type: none"> • Status 6 or 7 • Not assigned to a P/O • Backordered 	<ul style="list-style-type: none"> • Status 6 • Not assigned to a P/O • Backordered
End Up Either SHORT-BUYS	End Up Either SHORT-AUTO/PO-EXCEPT
Items not purchased through the short-buy remain in the SHORT-BUYS file.	Items not purchased through the short-buy remain in the SHORT-AUTO file, a type of short-buy file. These items are also written to the PO-EXCEPT file, so you can print an exceptions report.
Or PO-MASTER	Or PO-MASTER/PO-AUTO
Items purchased through the short-buy are written to the PO-MASTER file.	Items purchased through the ASB are written to the PO-MASTER file; these P/Os are also written to the PO-AUTO file.

Think of the items you need to purchase as pebbles, some large and some small. Each filter acts like a sieve, letting the smaller pebbles through, but stopping the larger ones. After the pebbles pass through one filter, they move to the next, which has even smaller holes. This process continues until the pebbles pass through the last filter. The ones that make it through this last filter are purchased through the automated short-buy.

Hierarchy for the Automated Short-Buy

- The backorder qualifiers
- The AUTOSB special in order entry
- The safety nets for extended dollar amount or extended quantity (set using the Override Dollar Amount \$ and Override Quantity Amount parameters in the (LFAØ) Global Automated Short-Buy screen)
- The Always Put On P/O For First Call parameters in the (LFAØ) screen
- The exclusive parameters in the (LFAØ) screen
- The inclusive parameters in the (LFAØ) screen
- The exclusive parameters in the (LFA1) Vendor Call Number Master screen
- The inclusive parameters in the (LFA1) screen.

Using the Launcher

You use the launcher to schedule the ASB process so that you do not have to prompt the system manually. The launcher parameters determine when vendor call numbers are initiated. They also let you specify which vendor call numbers launch and when. You may launch vendor call numbers 1 and 2 at 10:00 a.m., for example, and launch vendor call numbers 1 and 3 at 2:00 p.m.

About Global Parameters

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

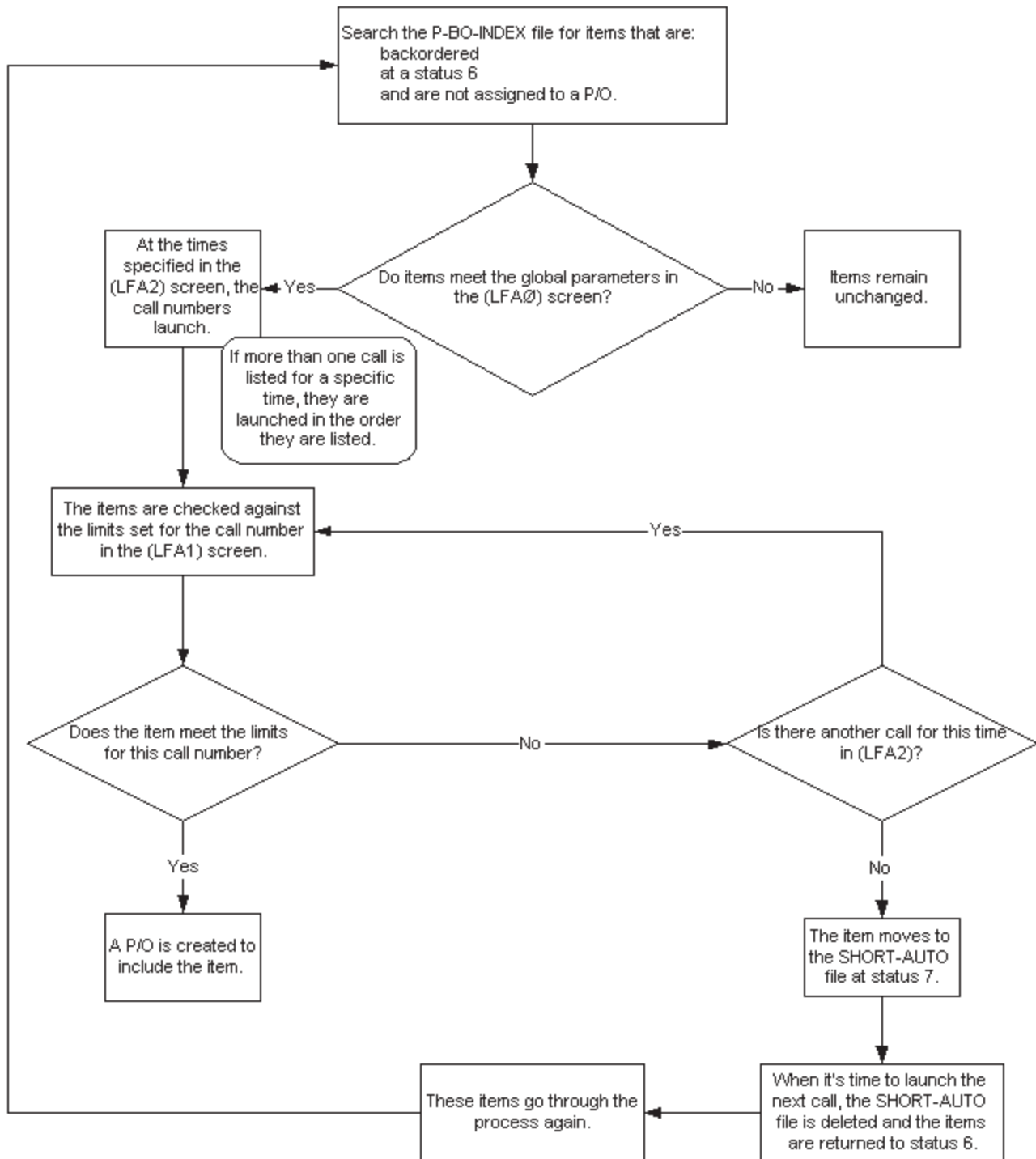
Understanding Vendor Call Numbers

The ASB is built around vendor call numbers. A vendor call number is a set of instructions for transmitting a purchase order to a particular vendor. Suppose you transmit a purchase order to Vendor 1 at 10:00 a.m. every day. You set up a vendor call number for transmitting to that wholesaler. The vendor call number's parameters control what items can be included on this purchase order and the vendor to which it's transmitted.

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Now suppose you also transmit to Vendor 1 at 2:00 p.m. You can use the same vendor call number, setting it to launch at 2:00 p.m. as well. Or you can create a new vendor call number for this later transmission. Perhaps you also transmit to Vendor 2 at 2:00 p.m. You must set up a different vendor call number for this transmission, since it's going to a different vendor. The two vendor call numbers set for 2:00 p.m. can include different items: the P/O for Vendor 1 may include items from stock class A, for example, and the P/O for Vendor 2 may include items from stock class B.

ASB Flow



Setting Up the Automated Short-Buy

The ASB can save you many hours. However, success requires some planning and practicing.

Checklist for Setting Up the ASB

This checklist can serve as a reminder as you implement the ASB.

Plan

- o Write down your current purchasing flow.
- o Determine who does what tasks, when, and how.
- o Write down how the ASB matches the manual short-buy flow.
- o Find any flaws in the manual process and correct them.
- o Determine how your inventory database is currently organized.
- o Determine your exceptions: items you don't want included on the automated short-buy.

Practice

- o Determine which limits to use, using your purchasing flow as a guide.
- o Set the parameters.
- o 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 automated short-buy program in the [E7] function in the (Z) screen is set to Inactive.
- o Print your parameters: [P] Print Parameters function in the (LFA) screen.
- o Test your calls: [T] Test Call Number function in the (LFA) screen.
- o Review the report for accuracy.
- o Correct any problems: change your limits or change the way your inventory database is organized.
- o Reprint the report until you're satisfied.

Implement

- o Set it to print: Set Print Options field in (LFA1) so that P/O status report and the exception report both print.
- o Test your automated short-buy by launching it manually.
- o Go live by setting Transmit P/O in (LFA1) to Y and setting the automated short-buy program in the [E7] function to Active.

Using the ASB

You control the ASB through parameters. There are three types of parameters to set:

- Global
- Vendor
- Launcher.

To access text-based parameters:

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

- 2 In the Keyop Menu, double-click  .

- 3 In the Parameter Editor window, double-click Text Base Parameters.

- 4 Enter the name of the screen to access, for example (LFAØ). You must have caps lock on.

Setting Up Global Parameters

The (LFAØ) screen contains the global parameters for the automated short-buy. See Figure 2. Remember that these parameters apply to every vendor 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 ASB.

**Figure 2:
Viewing Global
Parameters**

```

08:49:19                (LFA0) Global Automated Short-Buy                03/11/08
-----
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.)
Exceptions File Y/N ?
----- 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 [          ]

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)
-----

```

Determining 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

In general, an item is 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 are checked first: the Stock Classes and the 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 is 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 clicking the Exclude Item from Auto Short Buy checkbox in the Item Settings dialog box in the Order Entry window. You can also use the AUTOSB special in text-based order entry.

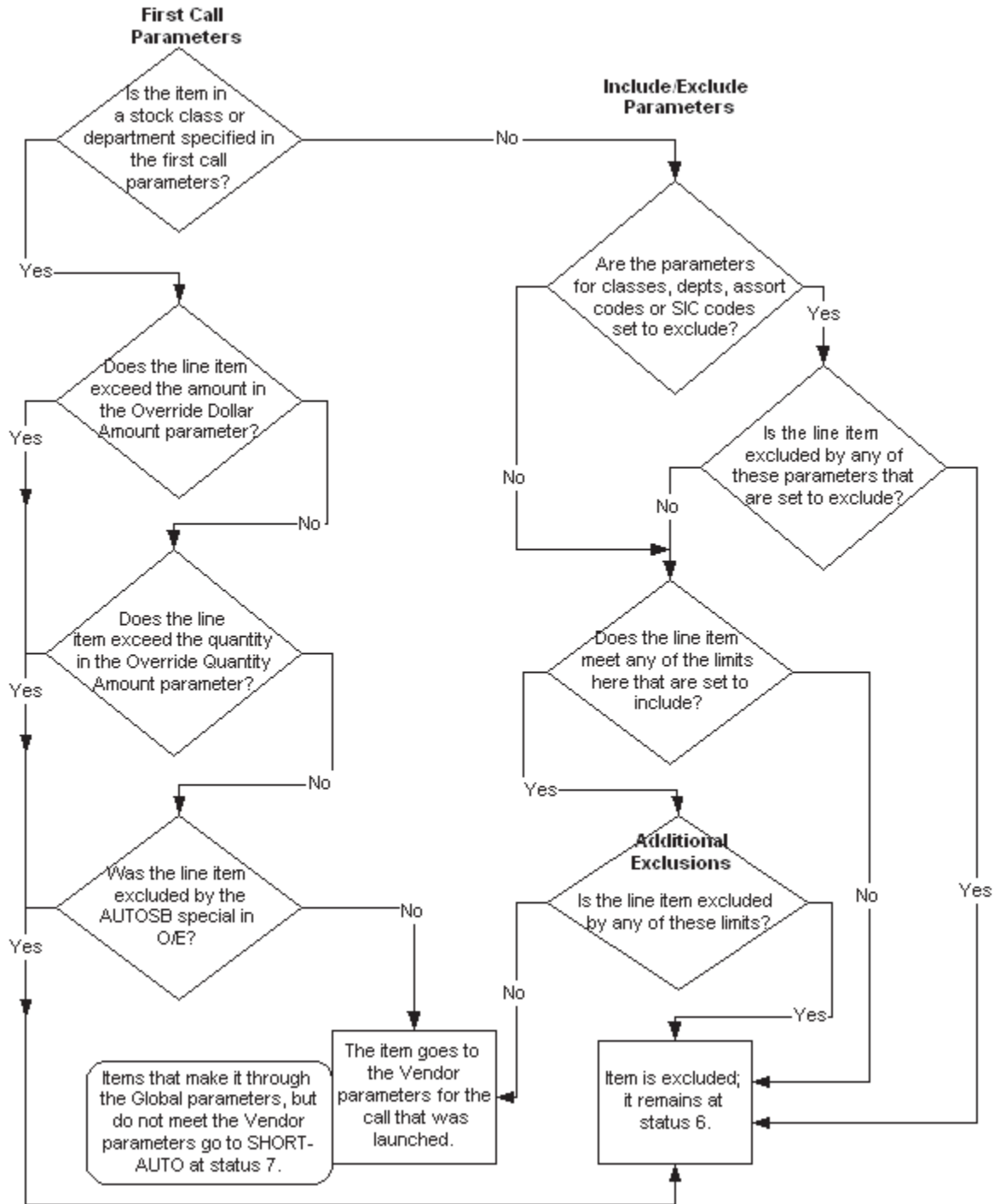
Items included by the first call parameters are included on the first call for a time period. The first call parameters override all other parameters (with the exceptions mentioned above).

- **Inclusion/Exclusion fields:** Four fields let you include or exclude certain types of items. If you set any of these fields to exclude certain items, those items are completely excluded, even if another parameter would have included them. The exclusion fields are:
 - Classes to (I)nc./ (E)xc. on P/O
 - Departments to (I)nc./ (E)xc. on P/O
 - Assort Codes to (I)nc./ (E)xc.
 - SIC Codes to (I)nc./ (E)xc.

Note: You must set at least one inclusion field in the (LFAØ) screen.

The Flow of Items through the Global Parameters

The procedure begins when a call launches.



Setting Up Vendor Parameters

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

The first (LFA1) screen lists all the vendor call numbers that you set up. From this screen, you can select the vendor call number to change, add, delete, or view. You can create and customize a vendor call number for each unique combination of vendor, limits, and preferences.

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

Creating and Changing Vendor Call Number Parameters

You must set parameters for each vendor call number to define the items included on a P/O.

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

- 1 In the (LFA1) screen, type C in the Action field.

Figure 3: The (LFA1) Screen

```

11:00:27                (LFA1) Vendor Call Number Master                06/08/04
=====
Action [C]  (C=Chg, D=Del, I=Inq, N=Next Page, P=Page 1)  Call Number [1 ]
=====
1 = UNITED
2 = SPARCO

```

Note: The fields in the (LFA0) 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 vendor call number, which is the second filter.

2 In the Call Number field, enter the number of the vendor call number to create or change. See Figure 3. If you enter a one-digit vendor call number, press Tab.

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

3 The first subscreen of the (LFA1) screen opens, with the cursor in the Parameter Screen field. See Figure 4. If you are creating a new vendor call number, the fields in the screen default to the responses for the last vendor call number listed in the (LFA1) screen. The Call Number field displays the vendor call number for which these parameters are set.

Set or change the fields for handling P/Os to this wholesaler at the specific time of this vendor call number.

Figure 4: The First (LFA1) Subscreen

```

10:57:58                (LFA1) Vendor Call Number                06/08/04
-----
                        Call Number [ 1 ]
-----
Parameter Screen :L6F      P/O Vendor # :UNITED      Desc: [UNITED      ]
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 (Y=Yes,N=No,F=Fax,E=Email)   End P/O's Created Y/N ?

How to Create P/O Number ?5 (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 ?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=Sls#,#=Item #,D=Dept,V=Ven.,X=Class)

P/O Minimum Amount $
      Combine P/O if Under Minimum Y/N ?N   Transmit P/O if Under Minimum Y/N ?N
Split P/O when Maximum Weight is Exceeded Y/N ?
Cutoff Time : 22:00      Cutoff Day of Week :
      Combine P/O if Under Minimum Y/N ?N   Transmit P/O if Under Minimum Y/N ?N
-----
<RET> for Next Screen, <Esc> for Previous Screen
  
```

- 4 When you complete or move past the first subscreen, the second subscreen opens. See Figure 5. If you are creating a new vendor call number, the fields in the screen default to the responses for the last vendor call number listed in the (LFA1) screen. The Call Number field displays the vendor call number for which these parameters are set.

The fields in this subscreen let you set limits for a vendor 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 vendor call number.)

- 4.1 Using the (I)nc/(E)xc Stock Classes/To fields together, you can select a range of items by stock class to include or exclude on the purchase order. In the (I)nc/(E)xc field, indicate whether to include or exclude the stock classes you specify.

- To include them, type **I**.
- To exclude them, type **E**.

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

Figure 5: The Second (LFA1) Subscreen

```

(LFA1) Vendor Call Number
-----
Call Number [ 1 ]
-----
Limits: (Line Item MUST Match ALL Limits To Go On P/O)
(I)nc/(E)xc Stock Classes ?I [1] to [Z] [ , , , , ]
(I)nc/(E)xc Departments ? [ ] to [ ] [ , , , , ]
(I)nc/(E)xc Locations ? [ ] to [ ] [ , , , , ] (I)nv/(G)/L ?
(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 [ ] [ , , , , ]
(I)nc/(E)xc Contracts ?I [MC] to [MC] [ , , , , ]

Include UPSable Items Only Y/N ?
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 P/O #
(D=Dummy P/O, N=Next Call, S=Short-Auto, T=Next Time Slot)
Stop Process for Time Slot if P/Os Not Transmitted Y/N ?N
Print Options: P/O's Y/N ?N Printer [P1] Exceptions Y/N ?Y Printer [P1]
-----
<RET> for Next Screen, <Esc> for Previous Screen

```

4.2 Using the (I)nc/(E)xc Departments/To fields together, you can select a range of items by department to include or exclude on the purchase order. In the (I)nc/(E)xc field, indicate whether to include or exclude the departments you specify.

- To include them, type **I**.
- To exclude them, type **E**.

In the To fields, specify the range of departments to include or exclude. 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 to include or exclude.

4.3 Using the (I)nc/(E)xc Locations/To/(I)nv/(G)/L fields together, you can select a range of inventory or general ledger locations to include or exclude on the purchase order. You might 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, items from all locations are included.

In the (I)nc/(E)xc field, indicate whether to include or exclude the locations you specify.

- To include them, type **I**.
- To exclude them, type **E**.

In the To fields, specify the range of locations to include or exclude. 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 to include or exclude.

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

- For inventory locations, type **I**.
- For general ledger locations, type **G**.

4.4 Using the (I)nc/(E)xc Sic Codes/To fields together, you can select a range of items by SIC code to include or exclude on the purchase order. In the (I)nc/(E)xc field:

- To include them, type **I**.
- To exclude them, type **E**.

In the To fields, specify the range of SIC codes to include or exclude. 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 to include or exclude.

4.5 Using the (I)nc/(E)xc Assort Codes/To fields together, you can select a range of items by assort code to include or exclude on the purchase order. In the (I)nc/(E)xc field, indicate whether to include or exclude the assort codes you specify.

- To include them, type **I**.
- To exclude them, type **E**.

In the To fields, specify the range of assort codes to include or exclude. 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 to include or exclude.

4.6 Using the (I)nc/(E)xc Routes/To fields together, you can select a range of delivery routes to include or exclude on the purchase order. In the (I)nc/(E)xc field, indicate whether to include or exclude the routes you specify.

- To include them, type **I**.
- To exclude them, type **E**.

In the To fields, specify the range of routes to include or exclude. 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 to include or exclude.

4.7 Using the (I)nc/(E)xc Contracts/To fields together, you can select a range of contracts to include or exclude.

- To include them, type **I**.
- To exclude them, type **E**.

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In the To fields, specify the range of contract codes to include or exclude. In the first field, enter the first two-digit contract code in the range. In the To field, enter the last code in the range.

In the five fields to the right of the To field, you can specify five additional, non-sequential contract codes to include or exclude.

4.8 To limit this call to items that can be shipped by UPS, type **Y** in the Include Upsable Items Only field. (Use this field for items that meet the UPS size and weight requirements.)

4.9 In the Specials to Put On P/O fields, specify which specials entered in the Order Entry module to include on the purchase orders. You can include up to seven specials.

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

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

4.10 In the Transfer Exceptions field, specify what to do with items that the wholesaler cannot fill or doesn't stock. You can transfer the items to the next vendor call number for this time slot (or, if this is the last vendor call number for this time slot, to the first vendor call number for the next time slot), to the next time slot, to a dummy P/O or to the SHORT-AUTO file.

- To transfer the items to the next vendor call number in this time slot, type **N** and press Tab.
- To transfer the items to the next time slot, type **T** and press Tab.

- To transfer the items to a dummy P/O, type **D**. The vendor ID of Dummy must exist in the vendor database. If you specify **D**, you must complete the PO# field. In this field, enter a P/O number for the dummy purchase order to exclude items to be transferred to. ECI recommends that you enter Dummy as the purchase order number for the dummy P/O.
- To transfer the items to the SHORT-AUTO file, type **S**. The ASB checks the SHORT-AUTO file every time it runs for items that meet the limits of the current call.

4.11 The Stop Process for Time Slot if P/Os Not Transmitted field lets you cancel the remaining transmissions from a particular time in the Launcher, if one vendor call number has failed to be transmitted.

If a vendor call number is started but not sent to the wholesaler, you can cancel the subsequent vendor call numbers for that time. This prevents vendor call numbers from initiating for a time slot once the cutoff time has been reached, since the purchase orders will not be sent anyway.

- To cancel vendor call numbers for a time slot once one vendor call number has failed to transmit, type **Y**.
- To continue initiating vendor call numbers after one code has failed to transmit, type **N**.

4.12 In the Print Options field, specify whether to print the report of purchase orders created through the ASB. (The full P/O is not printed.)

- To print the report of purchase orders created through the ASB in the report, type **Y**. In the corresponding Printer field, specify the logical name of the printer to use.
- If you do not want to print this report, type **N** and press Tab.

4.13 The Exceptions/Printer fields work together. In the Exceptions field, specify whether to print a list of items that are not placed on a purchase order because they do not meet the limits set for the vendor call number. This list also includes the reason each item was not included on a purchase order.

- To print these exceptions, type **Y**. In the corresponding Printer field, specify the logical name of the printer to use.
- If you are not printing the exceptions, type **N** and press Tab.

- When you complete or move past the second subscreen, the third subscreen opens. See Figure 6.

Note: The third subscreen does not open if you specified a manufacturer's code in the Parameter Screen field; it only opens if you specified a wholesaler.

This subscreen includes the applicable communication parameters for this vendor call number's wholesaler. It corresponds to the communication parameter screen you specified in the Parameter Screen field in the first subscreen.

It includes fields from the (L6) Vendor Communication Parameter screens, depending on which you specified.

You can use this screen to customize the communication parameters for each vendor call number.

- If you are not customizing the parameters, go to **Step 6**.
- To customize the communication parameters for a vendor call number, tab to each parameter, and enter the appropriate response.

- When you finish, press Enter. The original (LFA1) screen opens, and your changes are saved.

Figure 6: The Third (LFA1) Subscreen

```

United Stationers Inc.
=====
Acct# :          Password :          P/O Comments
Fac Code  [  ]   Consumer Text ? , , , , ,   [          ]
Wrap-N-Label ?   Barcode Type ?           [          ]
Order Taker ?   ASI Label Format ?
Adot          ?   Multiple Drop Ship ?           Label Text
Backorders    ?   Ignore NDS ?           [DDMS TEST ORDER!!! ]
Printer       ?   Excluded Manufacturers   [DO NOT SHIP!!! ]
Will Call     ?   [  ] [  ] [  ] [  ]
United's Parameter Loc ?   Label Format [          ]
Pre-Receive Purchase Order ?
(Y=Pre-Receive, F=Final Receive, G=Final Receive & available for Auto Flush)

Note : If left blank will use default parameters from L6F.

=====
<RET> for Next Screen, <Esc> for Previous Screen
    
```

Deleting Vendor Call Number Parameters

- 1 In the (LFA1) screen, type **D** in the Action field.
- 2 In the Call Number field, enter the number of the vendor call number to delete. If you enter a one-digit vendor call number, press Tab.
- 3 At the Are You Sure prompt, type **Y**.
- 4 The vendor call number is deleted, and the cursor returns to the Action field.

Viewing Vendor Call Number Parameters

- 1 In the (LFA1) screen, type **I** in the Action field.
- 2 In the Call Number field, enter the number of the vendor call number to view. If you enter a one-digit vendor call number, press Tab.
- 3 The first subscreen opens, with the parameters for the specified vendor call number. (The vendor call number you are viewing is shown in the Call Number field at the top of the screen.)
- 4 At the Press Any Key prompt, press Enter. You can view each subscreen in turn.

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

- 5 To return to the Action field, press Esc.

Using Additional Features

Besides the standard features discussed earlier, there are some extra ASB tools you can implement to streamline your process further.

- Auto Receive
- Auto Flush

Using Auto Receive

Auto receive allows you to skip the pre-receiving process and automatically final receive purchase orders using wholesaler acknowledgments. Auto Receive is free but requires authorization. Some of the advantages of this feature include:

- Auto receiving saves you time during the purchasing process.
- Auto receiving helps eliminate flushing errors.

Automated Short-Buy

This feature works with automated short-buy (ASB) as well as manual purchasing. If you have this feature set up, manual and automated short-buy transmissions only final receive items with a shipped quantity. This allows you to transfer any outstanding items so that they can be filled by another wholesaler either manually or using ASB.

You can use this feature with S.P. Richards, United Stationers, Action/Emco, O Henry, and PPI.

To turn on Auto Receive, change the Pre-Receive parameter in the (L6) screen from Y to F.

Using Auto Flush

Completed purchase orders flush automatically as part of your ASB flow. For example, you can auto flush a P/O after transmitting it to a certain vendor. Previously, you could pre-receive a P/O or final-receive a P/O. In addition to these two options, now you can use Final Receive & Available for Auto Flush to make a P/O eligible for auto flushing.

- You can turn the auto flush on or off by individual call or by vendor. Only final-received P/Os can be auto flushed.
 - You set up call codes for the flush in the (LFA4) Auto Flush Call List screen.
 - Auto flush calls begin with an ampersand (&). For example, one auto flush vendor call number might be &1.
 - The (LFA4) screen lets you set ticket limits; specify to include/exclude/only Furniture orders; specify sort order; specify inventory location; set ticket status; specify ticket printer and format; specify label printer and format; and specify terminal ticket print options.
- All eligible P/Os created since the last flush are available for auto flushing.
- You can have multiple flushes in a single time slot.
- The ASB status displays as Flushing while the pick is updated. The ASB status is cleared after all orders are updated with the ship quantities. It is not held while printing.
- Auto flush is free but requires authorization.
- You can use auto flush with these trading partners:
 - Sparco
 - United
 - Emco
 - Azerty
 - Horizon.

Setting Auto Flush Parameters

To use auto flush, you must set parameters in these screens:

- (LFA4) screen
- Third (LFA1) subscreen
- (LF1) Purchase Order Flushing Parameters screen
- (LFA2) Short-Buy Launcher screen.

Setting Up the (LFA4) Screen

Use the (LFA4) screen to specify which calls to flush.

- 1 In the (LF) screen, type **A** in the Action field.
- 2 The (LFA) Automated Short-Buy Menu opens. Type **4** in the Selection Code field.
- 3 The (LFA4) screen opens. If you do not have any flushes already set up, the screen is blank. To add or change a flush group, type **C** in the Action field.
- 4 The cursor moves to the Call Number field. The system adds the & (ampersand) as the first character of the auto flush code. Specify the flush code to change, or press Tab to accept the default, for example, &1, &2, &A, and so on.
- 5 In the Description field, enter a description for this auto flush. See Figure 7. To use Auto Flush, you *must* enter a description.

Figure 7: The (LFA4)Screen

```

11:43:29                (LFA4) Auto Flush Call                06/28/04
-----
                        Call Number [&1]
-----
Description :10:00 FLUSH
Include, Exclude, or Only Furniture Orders I/E/O ?I
Include All Receipts in Flush (not just Auto Flush Items) Y/N ?
Ticket Limits:
  Zip # - To # -
  Vendor # To #
  Route : To : Route or Manifest R/M ?
  Writer : To :
Sort Order 1: 2: (default is Ticket Number)
              (C=Cust Name, M=Shipping Route, R=Route,D=Date, S=SlsM, T=Taker, Z=Zip)
Inventory Location [ ] (blank for all)
Ticket Upto Status [8] (6, 8, or B)
Ticket Printer [1] Format [4T ]
Label Printer [ ] Format [ ] Copies [ ]
Terminal Ticket Print Options [ ]
-----

```

Automated Short-Buy

- 6** Use the Include, Exclude or Only Furniture Orders field to specify which types of P/Os to automatically flush in your ASB flow.
 - Type **I** to include furniture P/Os.
 - Type **E** to exclude furniture P/Os.
 - Type **O** to include furniture P/Os only.
- 7** Use the Include All Receipts in Flush (Not Just Auto Flush Items) field to include all items in the RECEIPTS file or limit the flush to auto flush items.
 - Type **Y** to include all items in the RECEIPTS file.
 - Type **N (default)** to include auto flush items only.
- 8** Use the Zip # and To # fields to limit the auto flush by a range of zip codes. In the Zip # field, enter the beginning zip code number to include. In the To # field, enter the last zip code to include.
- 9** Use the Vendor # and To # fields to limit by a range of vendor numbers. In the Vendor # field, enter the beginning vendor number to include. In the To # field, enter the last vendor number to include.
- 10** Use the Writer and To fields to limit by a range of order-writer numbers. In the Writer field, enter the beginning order-writer number to include. In the To field, enter the last order-writer number to include.
- 11** The Route or Manifest field works with the Route/To fields. After you enter a route number by which to limit, you can specify whether to limit by route number or shipping route.
 - Type **R** to limit the flush by route.
 - Type **M** to limit the flush by shipping route.
- 12** Use the Sort Order fields to specify the sort order for automatically flushing purchase orders as part of your automated short-buy. You can select customer name, shipping route, route number, date, salesman, order taker number or zip code.

Enter the first sort order in the 1: field. Use the codes shown on the screen.

Enter the second sort order in the 2: field. Use the codes shown on the screen.
- 13** In the Inventory Location field, enter the inventory location to use to limit the flush.
- 14** In the Ticket Upto Status field, specify the status of the ticket after the auto flush. You can enter 6, 8, or B in this field. To use auto flush, you *must* enter a status.

- 15** In the Ticket Printer/Format field, enter the number of the printer to print tickets. Use one-digit only. For example, if your printer is P1, enter 1 in this field. To use auto flush, you *must* enter a printer number.

In the Format field, enter the ticket format, for example, 4T.

- 16** In the Label Printer field, enter the printer to print labels. Use one-digit only. For example, if your printer is P1, enter 1 in this field.

In the Format field, enter the label format, SMLB1, for example.

In the Copies field, enter the number of copies to print.

- 17** In the Terminal Ticket Print Options field, enter terminal information. Enter the information from the Option field in the (L1) Terminal and Ticket Parameters screen. To use auto flush, you must enter a terminal option.

- 18** Press Enter to return to the Action field. If you press Esc before doing so, your changes are not saved.

Completing the Third (LFA1) Subscreen

You *must* set a parameter in the third (LFA1) subscreen if you are going to include auto flush items.

- 1** In the (LF) screen, type **A** in the Action field.
- 2** The (LFA) Automated Short-Buy Menu opens. Type **1** in the Selection Code field.
- 3** The (LFA1) Vendor Call Number Master screen opens. Type **C** in the Action field.

Figure 8: The (LFA1) Screen

```

16:24:51                (LFA1) Vendor Call Number Master                06/28/04
=====
Action [C]  (C=Chg, D=Del, I=Inq, N=Next Page, P=Page 1)  Call Number [1 ]
=====

      1 = UNITED
      2 = SPARCO

```

Automated Short-Buy

- 4 In the Call Number field, enter the number of the vendor to auto flush. See Figure 8.
- 5 In the first and second subscreens, make any changes necessary. Press Enter when you finish.
- 6 In the third subscreen, tab to the Pre-Receive Purchase Order field and type G. See Figure 9.

Note: Previously, to pre-receive a purchase order, you set the Pre-Receive P/Os field in your vendor's (L6) Communications Parameters screen to Y or F to final receive. (The actual field name varies by trading partner. For example, it is the Pre-Recv field in the (L6C) Sparco Ez-Order/Interactive Parameters screen.) Do not set the Pre-Receive P/Os field in your vendor's (L6) screen to G. You must set it in the third subscreen of the (LFA1) as described here.

- 7 When you finish, press Enter to return to the Action field in the (LFA1) screen. If you press Esc before doing so, your changes are not saved.

Setting Up the (LF1) Screen

- 1 In the (LF) screen, type 1 in the Action field.
- 2 In the (LF1) screen, type C in the Action field.
- 3 In the G/L Loc field, enter the location for which to set or change parameters. (This field defaults to the location entered for your terminal in the (L1) screen.) You can enter a new location or accept the default location:

Figure 9: The Third (LFA1) Subscreen

```
United Stationers Inc.
=====
Acct# : Password : P/O Comments
Fac Code [ ] Consumer Text ? , , , , [ ]
Wrap-N-Label ? Barcode Type ? [ ]
Order Taker ? ASI Label Format ?
Adot ? Multiple Drop Ship ? Label Text
Backorders ? Ignore NDS ? [DDMS TEST ORDER!!! ]
Printer ? Excluded Manufacturers [DO NOT SHIP!!! ]
Will Call ? [ ] [ ] [ ] [ ]
United's Parameter Loc ? Label Format [ ]
Pre-Receive Purchase Order G
(Y=Pre-Receive, F=Final Receive, G=Final Receive & available for Auto Flush)

Note : If left blank will use default parameters from L6F.

=====
PRESS ANY KEY TO CONTINUE (P=PREVIOUS SCREEN)
```

- To accept the default location, press Tab.
 - To set parameters for a different location, enter the number. If you enter fewer than two characters, press Tab.
- 4 Tab to the Prompt to Flush & Release to On-Hand, Auto Flush Items Separately field. See Figure 10. Use this field to specify whether to include auto flush items when printing a report. This field applies to two functions in the (TR) Order Entry Reports screen:
- [G] Flush Backorders
 - [H] Stock Receipts Reports /Release to On-Hand.
- If you turn this option on, when you select one of the above functions in the (TR) screen, you can include auto flush items in the RECEIPTS file, exclude them, or include only auto flush items.
- To enable the prompt, type Y.
 - To disable the prompt and automatically perform the specified function for all orders, type N.
- 5 Press Enter to return to the Action field. If you press Esc before doing so, your changes are not saved.

Figure 10: The (LF1) Screen

```

16:51:29          (LF1) Purchase Order Flushing Parameters          06/29/04
=====
ACTION [C] (C=Change, I=Inquiry)  G/L Location [ 1]
=====
Flush Pick Tickets in a Batch or Printer B/P ?B
Skip Printing of Tickets when Flushing Y/N ?      (Premium)

Last Working Day of Week for Flushing Old Shipped Orders 5=Fri,6=Sat,7=Sun ?

When Flushing Pick Tickets, Hold Transfers at Status 7 Y/N ?N

When Flushing Cash Backorders From P.O.S., Hold at Status 7 Y/N ?Y

On Flushes, Only Print All Shipped Y/N/S=Serial B/O W/O Only ?N or
Minimum Dollar Shipped $

When Flushing, Reset Price on Cost Plus Line Items with P/O Cost for
Customer OE Status Range : [G] To [G] + [ , , , , ]

When Flushing, If Item Cannot be Filled From Receipts, Fill From O/H Y/N ?N
On Flushes, Print Ship Complete Orders when 100% of Line Items Filled
Prompt to Flush & Release to On-Hand, Auto Flush Items Separately Y/N ?
=====
    
```


To set or change the days, times, and vendor call numbers that launch:

- 1 In the (LFA2) screen, type **C** in the Action field.
- 2 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 location determines which parameters are used. (The parameters in the (LØ) Global Master Parameters screen, which determine the 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 that runs differently. If you do not set launches for a particular location, the parameters for location 1 are used.

- 3 At the Enter Number To Change prompt, enter the line number to set or change. Line numbers are located in the # column in the launcher table. You can specify line numbers 1 through 9.
- 4 When you enter the line number, a separate bar at the bottom of the screen displays only that line. The cursor is in the A field.

If you are changing this line, tab to each field to change. You can enter the new information over the existing information.

Note: When setting up this screen, ECi recommends that you make the auto flush call code the last one in the Vendor Call Number fields. For example, in Figure 11, &1 is the last call listed.

- 5 When you finish, press Enter to save your changes.

To delete one line from the automated short-buy launcher (a specific day, time, and list of vendor call numbers):

- 1 In the (LFA2) screen, type **D** in the Action field.
- 2 In the Location field, enter the general ledger location.
- 3 At the Enter Number To Delete prompt, enter the line number to delete. Line numbers are located in the # column in the launcher table. You can specify line numbers 1 through 9.
- 4 At the Are You Sure prompt, type **Y**.
- 5 The line is deleted and the cursor returns to the Action field.

To view the settings in the launcher:

- 1 In the (LFA2) screen, type **I** in the Action field.
- 2 The screen is updated and displays the current launcher settings.

Note: To test your automated short-buy, you need to launch it manually, using the [L] Launch Now action code in the [E7] Activities Scheduler.

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.

- 5 In the Day of Week window, tab to Mon-Fri and press Enter.
- 6 In the Hour window, type ? to check every hour.
- 7 In the Minute window, type ? to check every 15 minutes.
- 8 In the A.M. or P.M. window, type **A** to select A.M.
- 9 In the Device field, press Tab.
- 10 In the Program/Proc Name field, type **;SPC:BEGPO**
- 11 In the Unit/Volume field, type **SR????** and press Tab.
- 12 In the Type of File window, type **R** to select Program.
- 13 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.
- 14 In the Start Parameters field, press Enter.
- 15 In the Save This Event window, type **Y**.
- 16 The Active window opens again. Press Esc.
- 17 The completed entry for the automated short-buy program displays.

Using Call Groups

You can use the (LFA3) Vendor Call Groups screen to add vendor call codes. This screen gives you more in-depth control of purchasing on one launcher. You can take information that is spread on several short-buy launchers and maintain it on one launcher. This feature allows you to create vendor call codes in the (LFA1) Vendor screen, and then group these codes in the (LFA3) screen. You can set up to 100 codes in each group, which means you can have up to 1,000 codes in a time slot. The system checks the (LFA2) screen to view the order of the call codes or groups. Not all call codes must be put in a group. A single code can still be used in a time slot.

The vendor call codes must be created first in the (LFA1) screen and then put into a group in the new (LFA3) screen. An @ symbol followed by a single alpha or numeric character denotes a **call group**. For example, @1 means Call Group 1.

Automated Short-Buy

- 1 In the (LFA3) screen, type **C** in the Action field.
- 2 In the Group Number field, enter the call group number to set, change, or delete. You can specify group numbers 1 through 9, and alpha characters A through Z. For example, you could specify @1, @1, @A, @B, and so forth. See Figure 13.
- 3 In the Group Description field, press Tab or enter a new description to assign this group over the existing description.
- 4 The (LFA1) screen displays the vendor call codes you have set up in numeric order. In the Nbr field, assign vendor codes to the group in the order to call them, then press Tab. For example, if you enter 1 in this field, vendor assigned call code 1 from the (LFA1) screen displays.
- 5 When you specify a call group number in the Nbr field and press Tab, the vendor's description from the Desc field in the (LFA1) screen automatically displays. For example, if Sparco is set as your first call code in the (LFA1) screen and you set the Nbr field to 1, the description for Sparco set in the Desc field in the (LFA1) screen appears in the Description field. You can only change the description in the (LFA1) screen.
- 6 When you finish setting or changing parameters in this screen, press Enter until the cursor returns to the action code field. If you press Esc before doing so, your changes are not saved.

Figure 13: The Group Number Field in the (LFA3) Call Group Screen

```
14:09:34 (LFA3) Call Group Screen 03/30/05
-----
Group Number [@1] Group Description :
-----
Nbr Description Nbr Description Nbr Description
Q = ** NOT ON FILE
1 = UNITED
2 = SPARCO
3 = ** NOT ON FILE
```

Printing & Using Reports

Items that are excluded from the automated short-buy process by the limits set in the (LFAØ) screen remain at status 6; you 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 vendor 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 you can use to produce purchase orders through the regular short-buy process (using the Short-Buy action code in the Purchase Order Entry module).

Note: Each time an automated short-buy call launches, the SHORT-AUTO file is deleted. The items in this file return to status 6, and go back through the global parameters and the rest of the ASB 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 to print the Automated Short-Buy Exceptions Report in the Print Options field of the (LFA1) screen. If you specify Y in that field, the Automated Short-Buy Exceptions Report prints as soon as the launch for the corresponding vendor call number is complete. The PO-EXCEPT file is deleted after this report prints.

Printing the ASB Report

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 are currently being transmitted have an I (In Progress) status code. These P/Os are not included since they are already being sent.



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 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 transfer the items to the next vendor call number in this time slot, transfer the items to the next time slot, or transfer the items to a dummy P/O.

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

P/O Status	Explanation	Response
Not Transmitted	The P/O was not transmitted to the vendor. Appears when the Transmit P/O field in the (LFA1) screen = N.	Transmit P/O manually.
Error Transmitting	Acknowledgement from the vendor did not print.	Contact the vendor to see if P/O transmitted. If not, transmit P/O manually.
Under Minimum	P/O does not have the minimum dollar amount specified in the P/O Minimum Amount \$ field in the (LFA1) screen.	Check the acknowledgement to see if P/O transmitted. P/O may have transmitted depending on setting in the Combine P/O If Under Minimum and the Transmit P/O If Under Minimum parameters in the (LFA1) screen.
Needs Transmitting	P/O is created but not transmitted to the vendor with this call number.	Leave P/O at this status. Next time ASB launches to this vendor, the P/O is transmitted.
P/Os Being Faxed	Transmit P/O field in the (LFA1) screen is set to fax.	Check acknowledgement to see if P/O transmitted successfully.

Printing a P/O Status Report

- 1 In the Ensite Pro Master Menu, double-click  .
- 2 In the Keyop Menu, double-click  .
- 3 In the Parameter Editor window, double-click Text Base Parameters.

- 4 In the (L) Parameters screen, type **F** in the Selection Code field. The (LF) Purchase Order Parameters screen opens.
- 5 Type **A** in the Action field. The (LFA) screen opens.
- 6 In the Selection Code field, type **S**. The (LFAS) screen opens.
- 7 In the Printer field, enter the name of the printer to use. See Figure 14.
- 8 At the Are You Sure prompt, type **Y**.
- 9 The report prints. The cursor returns to the Selection field in the (LFA) screen.

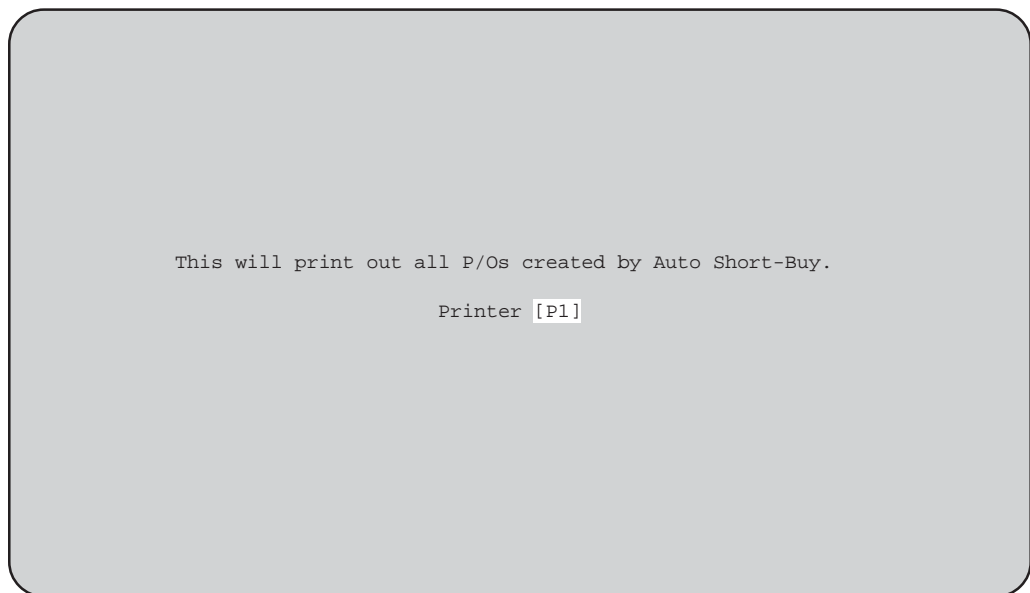
Status Codes for POs

Automatically printing this report depends upon how your parameters have been set. When you set the parameters for a vendor call number, in the Print Options/P/Os field of the (LFA1) screen, you can specify whether to automatically print the Automated Short-Buy Report each time the vendor call number launches.

If the Print Options/P/Os field is set to Y, each time the vendor call number launches, the report automatically prints on the printer specified in the P/Os/Printer field in the (LFA1) screen.

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).

Figure 14: The (LFAS) Screen



Automated Short-Buy

Printing the ASB Exceptions Report

The Automated Short-Buy Exceptions Report includes the following 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 following table shows the reason codes for items that were excluded, along with an explanation.

Understanding Reason Codes for Excluded Items

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 ASB special during O/E	N/A	(G)
Include	Did not meet the global inc/exc 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)

Automatically printing this report depends on how your parameters are set. When you set the parameters for a vendor call number, in the Print Options/Exceptions field of the (LFA1) screen, you can specify whether to automatically print the Automated Short-Buy Exceptions Report each time the vendor call number launches.

If the Print Options/Exceptions field is set to Y, each time the vendor call number launches, the report prints on the printer specified in the Exceptions/Printer field in the (LFA1) screen.

Note: You must use wide paper or set your printer for compressed print (17 cpi) to print this report. To set your printer for compressed print, change the print setting manually (refer to your printer manual for instructions).
