

*The Automated
Short-Buy:
A Supplement*

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Introduction

The automated short-buy lets you use your human resources more efficiently. It handles routine, repetitive purchases for you. This frees your purchasing agents to spend more time handling the exceptions. Exceptions are unusual purchases, those that require special handling.

When you set up the automated short-buy, 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 automated short-buy 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).

Components for Success

To implement the automated short-buy successfully, follow these steps:

Step 1: Understand the automated short-buy.

Step 2: Gain support.

Step 3: Plan.

Step 4: Practice.

Step 5: Implement.

All of these steps are crucial — skipping any of them can jeopardize your success.

Understanding the Automated Short-Buy

This handout will give you an overview of the automated short-buy, and help you form a picture of the basic concepts. It supplements the documentation you have on the automated short-buy, which you'll find in *Book V: Purchasing and Communications*. Please refer to this documentation for detailed information, such as descriptions of individual fields.

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You should read the conceptual information first, which can be found in the chapter about preparing to use the automated short-buy. After that, read about the individual fields you need to set up in chapters five, six, and seven.

Note: The three videos covering the automated short-buy are also an excellent learning tool. You can purchase these as a set for \$50. (They're also available individually for \$25 each.)

Gain Support

People are often skeptical of software that changes how they work or removes their usual methods of control. To gain support for the automated short-buy, you need to do two things:

Step 1: Make sure that purchasing agents understand that this does not threaten their jobs. Instead, it frees them from repetitive, routine tasks, so they can spend time on the exceptions, which can't be automated.

Step 2: Implement the changes successfully.

Plan

Implementing the automated short-buy requires careful planning. It often reveals problems in your purchasing process or inventory database that you didn't know were there. Your planning should include the following:

- Determine how the short-buy is currently done, and document it.
- Determine who currently does what tasks, when they do these tasks, and how they do them.
- Match the ASB flow to the manual short-buy flow. Don't try to change the process yet.
- Find any flaws in the manual short-buy process, and fix them. (This may take a couple of months.)
- Clean up your inventory database by doing the following:
 - Eliminate dead stock, and delete items that are no longer available.
 - Flag slow movers (items that haven't sold for 6–12 months).
 - Identify bad vendor ID numbers by printing a vendor report.
 - Identify items with unique requirements: items you'll want to handle manually. These may include large quantity purchases, print jobs, special school buys, purchases above a certain dollar amount or quantity, and uncataloged items.

Practice

You must practice using the automated short-buy before you can entrust it with actual purchasing. It includes a test function for this purpose. To use it, set up the parameters, print a copy of these parameters for review, and test a call number that's set up for your first call wholesaler.

Make sure you achieve the desired results before using the ASB for a real purchase.

For your first live test, launch the ASB manually. If this works well, you can automate the ASB further by setting it to launch itself at scheduled times.

Implement

After you implement the ASB, you need to handle the exceptions file consistently. Items that the system adds to the exceptions file (PO-EXCEPT) and that remain in a short-buy file (SHORT-AUTO) have not been placed on a P/O. You may intentionally place some items in these files: items that you don't purchase daily, or "lookup" items that are not readily available from your wholesaler. The ASB will review these items again each time it runs.

You should transfer the "lookup" items to a P/O for a DUMMY vendor. This prevents them from going through the ASB again. Run a backorder report for your salespeople, and inform them that items matched to the DUMMY vendor have not been placed on a P/O. They can then notify their customers. Items on DUMMY P/Os will not update the I-AUX (inventory usage) file with purchase quantities.

Examine the inventory database records of items that repeatedly show up in the exceptions file. You may want to change their stock class, for example, to prevent them from continually showing up in this file.

An Overview of the Automated Short-Buy Module

In this section, we'll help you understand the automated short-buy. Once you understand the concepts, the technical details will be easier to grasp, because you'll be able to fit them within a framework.

Compare the Auto Short-Buy to the Manual Short-Buy

The automated short-buy has many similarities with the manual short-buy process that you're already familiar with: The system tests each record in the order entry file 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.

**Backorder
qualifiers:**

Manual Short-Buy

- _____
- _____
- _____

End up:

Either SHORT-BUYS

Items that will not be purchased through the short-buy remain in the SHORT-BUYS file.

Or PO-MASTER

Items that will be purchased through the short-buy are written to the PO-MASTER file.

Automated Short-Buy

- _____
- _____
- _____

Either SHORT-AUTO/PO-EXCEPT

Items that will not be purchased through the short-buy remain in the SHORT-AUTO file, which is a type of short-buy file. These items are also written to the PO-EXCEPT file, so that you can print an exceptions report.

Or PO-MASTER/PO-AUTO

Items that will be purchased through the automated short-buy are written to the PO-MASTER file; these P/Os are also written to the PO-AUTO file.

The automated short-buy uses a *filtering system* to determine which items will be 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 up.

Filters are not the same as parameters. A group of parameters, acting together, works as a filter. Items will either pass through one filter, moving on to the next one, or fall out. Items that pass through all of the filters will be placed on purchase orders by the automated short-buy program, and will then be transmitted. Items that fall out will not be placed on purchase orders.

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) 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) screen
- The inclusive parameters in the (LFA1) screen.

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New Terms, New Files, and a Flowchart

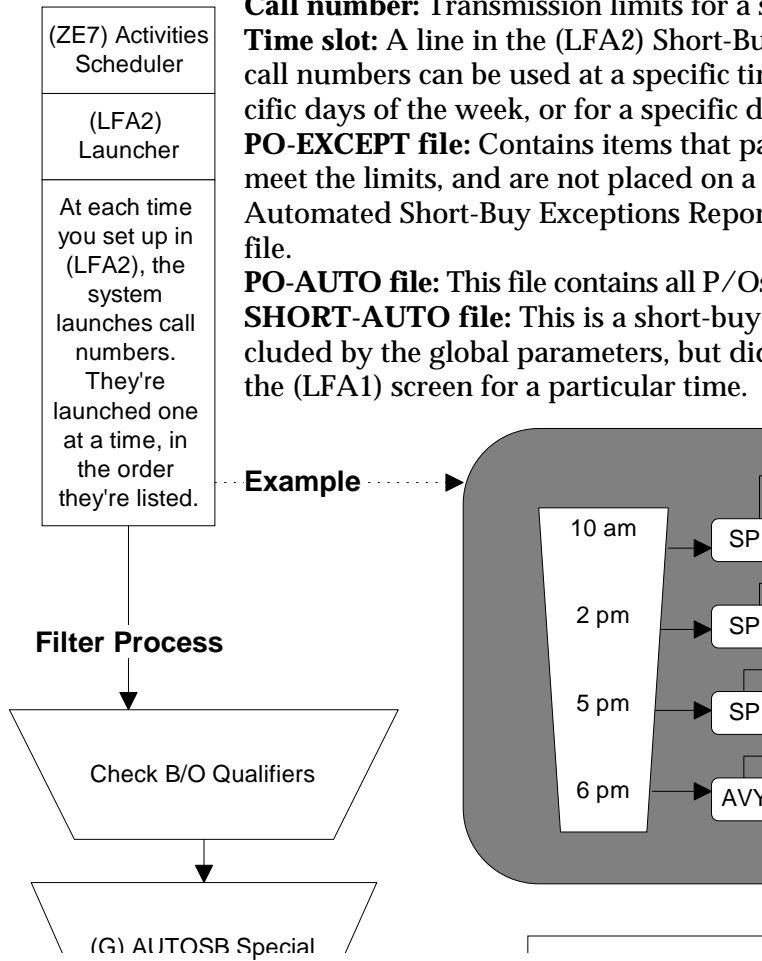
Call number: Transmission limits for a specific vendor. Also called a *call code*.

Time slot: A line in the (LFA2) Short-Buy Launcher screen specifying which call numbers can be used at a specific time. Time slots may be defined for specific days of the week, or for a specific date.

PO-EXCEPT file: Contains items that pass the backorder qualifiers but don't meet the limits, and are not placed on a purchase order. When you print the Automated Short-Buy Exceptions Report, the system prints and deletes this file.

PO-AUTO file: This file contains all P/Os created by the automated short-buy.

SHORT-AUTO file: This is a short-buy file containing items that were included by the global parameters, but did not meet the vendor parameters in the (LFA1) screen for a particular time.



Flow: A Written Description

The system does the following:

- 1) Reads the SHORT-AUTO file. For each item in this file, the system finds the corresponding item record in the P-MASTER file. In P-MASTER, these items are reset to status 6. The system then deletes these items from the SHORT-AUTO file.
- 2) Reads the P-BO-INDEX file for item/ticket numbers that qualify (To qualify, an item must have a backordered quantity, be at status 6, and must not have a vendor P/O number in the P-MASTER file.)
- 3) Reads the P-LINE file to check for the AUTOSB exclusion flag
- 4) Reads the P-MASTER file for details about the items in the P-BO-INDEX file
- 5) Writes each qualified item to a temporary file
- 6) Reads the parameters in the (LFAØ) screen, and checks each record in the temporary file to see if the item passes the global filters
- 7) Reads all records for the (LFA1) screen that are set up for this time slot, and checks each record in the temporary file to see if the item passes the filter for the appropriate call code
- 8) Builds the P/O. Each item that is placed on the P/O is deleted from the temporary file. The system places the number for the newly built P/O in the PO-AUTO file.
- 9) Transmits or faxes the P/O
- 10) If the P/O was transmitted, the system pre-receives the P/O
- 11) If the P/O was transmitted, the system transfers all items that were not received, using the TRANSFER EXCEPTIONS parameter in the (LFA1) screen:
 - N** Next call code, same time slot
 - T** Next time slot
 - D** Dummy P/O
- 12) If additional call codes exist for this time slot, the system goes back to step 7. If no more call codes exist for this time slot, the system deletes the item from the temporary file, and creates a record for it in the SHORT-AUTO file.
- 13) The system prints the acknowledgement. It also prints the Automated Short-Buy and Automated Short-Buy Exception reports, if your parameters indicate that they should be printed.

Chunking Parameters

Chunking is a method of grouping parameters. We group them by type and by level (item or ticket). This helps you understand them, and makes it easier to set them up and troubleshoot.

Files that the Parameters Will Read

P-MASTER

Item #/Co	Stock	Inv	Sic	Asst	Inv	G/L	Cost	Ord	Shp	B/O	Vendor	O/E	
	Class	Dept			Dept	Dept		Qty		Qty	Qty	PO#	Status
	Normal 4 Limiters				Locations		Safety Net			B/O Qualifiers			

P-BO-INDEX

Item/Pick Ticket#

P-LINE

AUTOSB Flag

P-SPECIAL

Route

Limits

(G) AUTOSB Special

- By Line - Omit This Time

(LFAØ) Global (You Must Complete At Least One Limit in this Screen)

- Safety Net Limiters: Override Dollar Amount/Qty [Ignore (LFA1)]
- ALWAYS PUT ON P/O FOR FIRST CALL OF TIME PERIOD [Ignore (LFA1)]
- Include/Exclude With ANY ONE of Normal 4 Limiters
- Unique Limiters

(LFA1) Call Code (Vendor Specific Transmission)

- Limit to Vendor [Name] Match
- Include wild cards [Add. Ways to Match]
- Specify which vendor ID to match on [Match on]
- How to Assign Number and Sort for the P/O
- How to Build P/Os for Minimum \$
- Include/Exclude 4 Normal Limiters
- How to Transfer [Acknowledged] No Fills
- Toggle On/Off Secondary [Wholesaler] Transmission Screen

Note: The figures on the following pages show chunking for the (LFAØ) and (LFA1) screens.

(LFA2) Auto Short-Buy Launcher

- What Time to Transmit/Fax
- To Whom and in What Order to Transmit/Fax

(Z) [E7] Activity Scheduler

- Whether the program, which is ;SPC:BEGPO, is active or inactive.

Figure 1: The (LFA0) Screen, Showing the Normal Four Limiters

```

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 2: The Unique Limiters

```

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)
-----

```

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Figure 3: The (LFA1) Vendor Call Number Master Screen

```
13:19:58 (LFA1) Vendor Call Number Master 05/14/98
-----
Action [I] (C-Chg, D-Del, I-Inq, N-Next Page, P-Page 1) Call Number [1 ]
-----
1 - ABC CO
2 - AZERTY
3 - ACTION
4 - DAISYTEK
5 - S.P. RICHARDS
6 - UNITED
```

Figure 4: The (LFA1) First Subscreen, Showing the Matching Parameters

```
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 5:
Parameters for
Assigning P/O
Numbers and
Building
Minimum
Dollar P/Os**

```

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 6: The
(LFA1) Second
Subscreen,
Showing the 4
Normal
Limiters**

```

(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 ? [ ] 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 [ ] [ , , , , ]

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-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
    
```

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**Figure 7:
Parameters for
Transferring No
Fills**

```

(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 ? [ ] 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 [ ] [ , , , , ]

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-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 8: The
(LFA1) Third
Subscreen**

```

ABC CO
-----
Acct# : Password : P/O Comments
Wrap-N-Pack ? Priority Ship : (Y/N) [ ]
Printer ? Multi D/S : (Y/N) [ ]

-----
PRESS ANY KEY TO CONTINUE (P-PREVIOUS SCREEN)

```

This screen shows a fictitious vendor. Your third subscreen will display the (L6) parameters that are available for your wholesaler.

Conclusion

The automated short-buy can bring tremendous benefits to your company, making your purchasing more efficient, and having a real impact on the bottom line.

Remember to plan carefully as you begin to implement this software. To guide you, we've prepared a checklist, which is printed on the next page. This checklist is based on the experience of a number of dealers who have begun using the automated short-buy, and should help make implementing it a little easier.

Please complete the review questions that follow the checklist. Use them to test your understanding of the automated short buy. (You should have a solid understanding of this module before you begin to implement it.) If you find that you can't answer some of these questions, review this supplement and the documentation for the automated short-buy in *Book V: Purchasing and Communications*.

Thank you for attending the Automated Short-Buy session: we hope you found it helpful. Please complete the survey for this session; your opinions can help us present these classes more effectively.

Checklist for Setting Up the Automated Short-Buy

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

Plan

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

Practice

- 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.

Implement

- Set it to print: Set PRINT OPTIONS in (LFA1) so that P/Os 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**.

Questions

- 1) List the screens associated with the automated short-buy: _____, _____, _____.
- 2) Which screen do you use to set up call numbers (codes)? _____
- 3) What's the purpose of the (LFA2) screen?

- 4) What step do you take to completely exclude a particular line item from the automated short-buy *permanently*?

- 5) What step do you take to completely exclude a particular line item from the automated short-buy *temporarily*?

- 6) What does the ALWAYS PUT ON P/O FOR FIRST CALL OF TIME PERIOD parameter do?

- 7) Which two parameters in the (LFAØ) screen will prevent a line item from being placed on a P/O, even if the ALWAYS PUT ON P/O FOR FIRST CALL OF TIME PERIOD parameter includes that line item?

- 8) Explain how you would set up a call number and launcher to handle the following scenario: United is your first call, and you have two G/L locations with different account numbers.

- 9) Explain how you would set up a call number and launcher to handle the following scenario: S.P. Richards is your first call, you build and transmit P/Os by route, and you use routes ROU1, ROU2, ROU3, and ROU4.

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- 10) Explain how you would set up a call number and launcher to handle the following scenario: S.P. Richards is your first call, you build and transmit P/Os by route, and you use routes ROU1, ROU2, ROU3, and ROU4. You also have ROU5, which you only deliver on Fridays.

- 11) Explain how you would set up a call number and launcher to handle the following scenario: United is your first call, and Emco is your second call. You purchase at 10:00, 2:00, and 5:00. You want to ADOT at 5:00, but not at the earlier times. You do not want to transmit P/Os to Emco at 10:00 and 2:00, unless you meet your minimum of \$250.00. However, you do want to transmit to Emco at 5:00, even if you're under the minimum.

- 12) What are the three backorder qualifiers for the automated short-buy?

- 13) What are the three backorder qualifiers for the manual short-buy?

- 14) A line item meets the backorder qualifiers and is not excluded by the AUTOSB special. However, it does not meet the global parameters. Which file will contain a record of this line item? (Circle the correct answer.)

PO-EXCEPT SHORT-AUTO PO-MASTER

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15) A line item meets the backorder qualifiers, and is not excluded by the AUTOSB special. It meets the global parameters, but does not meet the requirements of a specific call number. Which two files will contain a record of this line item? (Circle the correct answer.)

PO-AUTO & PO-MASTER PO-EXCEPT & SHORT-AUTO
C-MASTER & C-DISC

16) A line item meets the backorder qualifiers and is not excluded by the AUTOSB special. If it meets the global parameters, which order entry status does it move to? _____

17) After you run the automated short-buy, you can print the Automated Short-Buy Report. What does this report include, which parameter causes it to print, and which file does this information come from?

18) What information does the Automated Short-Buy Exceptions Report include, which parameter causes it to print, and which file does it pull from?

19) Two responses for the TRANSMIT field in the (LFA1) screen let you automatically transmit your purchase orders to a vendor. What are they?

20) DDMS recommends three basic components for successfully using the automated short-buy. Name them.

Appendix: What's New for Version 3.G

DDMS continually adds new features to the system, in an effort to give you the best tools for success in today's market. Normally we release these new features once a year, when the next version of software is released. However, when there is an immediate need for a new feature, we will sometimes add it to an interim release of the current software.

Several new automated short-buy features have been added to the current software, Version 3. For your convenience, each of these features is described below. All of these features are available in Version 3.G, and in any later version.

Limiting a Call to Items that Can Be Shipped by UPS

You can now limit a call so it includes only items that can be shipped by UPS. (These items meet the size and weight requirements.)

To indicate that an item meets these requirements, you set the UPSABLE field in the Direct Buy Record or the UPS field in the Primary Wholesaler Record in the (E) Inventory Master screen to Y. (Both of these fields are in the Item Detail screen.)

Note: The system can set and update these fields when you load your O/PUS tape.

To limit a particular call to items that can be shipped by UPS, follow these steps:

- Step 1:** Go to the (LFA1) Vendor Call Number Master screen, and select the [C] Chg action code.
- Step 2:** In the CALL NUMBER field, select the number of the call you're limiting.
- Step 3:** Press RETURN until the second subscreen appears, and tab to the field INCLUDE UPSABLE ITEMS ONLY.
Type Y.
- Step 4:** Save your change by pressing RETURN until the first (LFA1) screen appears, listing your calls.

Increasing the Maximum Dollar Amount for P/Os

The system now lets you transmit a P/O for as much as \$999,999.00. Previously, the largest P/O you could transmit was \$99,999.00.

Transferring Exceptions to the SHORT-AUTO File

You can now transfer call exceptions to the SHORT-AUTO file. Call exceptions are items that the vendor cannot fill or does not stock. The SHORT-AUTO file is a short-buy file that contains items that meet the global limits, but do not meet the limits for a particular call. The automated short-buy will check these items each time it runs, to see if they meet the limits of the current call.

You specify how exceptions will be handled for each call you set up.

To transfer call exceptions to the SHORT-AUTO file, follow these steps:

- Step 1:** Go to the (LFA1) Vendor Call Number Master screen, and select the [C] Chg action code.
- Step 2:** In the CALL NUMBER field, select the number of the call you want to change.
- Step 3:** Press RETURN until the second subscreen appears, and tab to the field TRANSFER EXCEPTIONS.
Type S.
- Step 4:** Save your change by pressing RETURN until the first (LFA1) screen appears, listing your calls.

Printing the SHORT-AUTO Report

The SHORT-AUTO Report lists all the items in the SHORT-AUTO file.

The SHORT-AUTO file is a short-buy file that contains items that meet the global limits, but do not meet the limits for a particular call. The automated short-buy will check these items each time it runs, to see if they meet the limits of the current call.

You can print this report to see what items are currently at this level. If necessary, you can put these items through the manual short-buy process, specifying the SHORT-AUTO file in place of the SHORT-BUYS file. (For details about the manual short-buy, see the chapter about the short buy process in *Book V: Purchasing and Communications*.)

The SHORT-AUTO Report prints the same information about each item as the Short-Buy Report does. (For a picture of the Short-Buy Report and an explanation of its headings, see the purchasing reports chapter in *Book IX: Common Reports*.)

To print the SHORT-AUTO Report, follow these steps:

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- 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” in *Book VII: System Maintenance and Utilities* for instructions).

Step 1: From the (LFA) Automated Short-Buy Menu, select the [A] Print SHORT-AUTO Report function.

Step 2: In the PRINTER field, specify the logical name of the printer you'll use for this report.

Step 3: At the ARE YOU SURE prompt, type Y.

Printing the Automated Short-Buy Report Manually

You can speed up your automated short-buy process by printing the Automated Short-Buy Report only when needed. This report lists the P/Os created by the short-buy, and indicates their current status. It prints automatically after each call if you specify Y in the PRINT OPTIONS: P/O'S field in the second subscreen of the (LFA1) Vendor Call Number screen. Now you can set the PRINT OPTIONS: P/O'S field to N, and still print the report manually whenever necessary.

Note: For details about the Automated Short-Buy Report and the PRINT OPTIONS: P/O'S field, see the chapter about wholesaler parameters in *Book V: Purchasing and Communications*.

To print the Automated Short-Buy Report manually, follow these steps:

Step 1: From the (LFA) Automated Short-Buy Menu, select the [S] Print P/O Status function.

Step 2: In the PRINTER field, specify the logical name of the printer you'll use.

Step 3: At the ARE YOU SURE prompt, type Y.

Improved Handling of Exceptions

The system can print the Automated Short-Buy Exceptions Report automatically after completing each call. (To print it automatically, you set the EXCEPTIONS field in the second subscreen of the (LFA1) screen to Y.) This report lists eligible items, and indicates whether they were included on the automated short-buy. If an item is not included, it lists the reason.

Note: For more information about the Automated Short-Buy Exceptions Report, see the chapter on wholesaler parameters in *Book V: Purchasing and Communications*.

The Automated Short-Buy: A Supplement

To make the automated short-buy more efficient, the process of printing this report has been enhanced in three ways:

- The system now marks items in the PO-EXCEPT file once they have been included on the report, so they won't print again for the next call. (The system stores information about exceptions for the automated short-buy in the PO-EXCEPT file.)
- The automated short-buy process no longer waits for the Automated Short-Buy Exceptions Report to print before continuing. This makes the process of executing a call faster. To accomplish this, instead of deleting the PO-EXCEPT file after each call, it's now deleted once a day, between midnight and 12:30.
- If you set the EXCEPTIONS field in the (LFA1) screen to N for a particular call, exceptions are not recorded in the PO-EXCEPT file for that call. This keeps the file smaller, and makes the automated short-buy process faster.

Overlapping Calls No Longer Duplicate P/Os

The system now marks each P/O it creates through the automated short-buy, to prevent a P/O from being sent twice. Before, if you had two calls for the same vendor, and the second call began before the first one was complete, the system might transmit the same P/O on both calls.

Now the system marks P/Os in the PO-AUTO file with a status code to prevent this. It uses the following status codes:

- Y** Yes. Transmit this P/O on this call.
- I** In progress. This P/O is currently being transmitted on a call, so it will not be included.
- T** Transmitted. This P/O has been transmitted.