The Uniform Solution
Session I – Mastering the Basics
Tips and Tricks
Connected Features
11:00 am to 12:00 pm

Today’s Objective
- Review the support and training resources for The Uniform Solution so you are informed and empowered
- Review The Uniform Solution’s features so you feel comfortable performing routine tasks
- Provide some tips and tricks so you are faster and more efficient
- Provide a review of the Connected Features that are transforming how you are able to interact with your vendors

Support Resources
- On-Line Help
  - Help > What’s New
  - Help > Contents
  - F1 from any active screen
- On-Screen Tutorials
  - Help > On-Screen Tutorials
- Manuals
  - C:\Usw\Docs
    - Getting Started Guide
    - Multi-Store Guide
Training and Technical Support

- Technical Support
  - 2 hours Free support each month with an Active WebStore Shopping Cart
  - Telephone 800–286–8929
  - Email support@theuniformsolution.com

- Training and Support
  - Desktop Sharing with a Support Representative
  - Help > Remote Support

- X-Charge Merchant Portal
  - Help > X-Charge Merchant Portal

Mastering the Basics

- Vendors and Items
- Creating Model Stock Plans
- Reordering Stock and Fashion Merchandise
- Receiving Merchandise
- Working with Customers
- Using Contracts
- Sales and Special Orders
- The Cash Flow Report

Vendors and Items*

- The Vendor List
  - Pricing
  - Applying New Default Settings
- Inventory Standards
  - Sort Values
  - Size Groups
  - Codes
- The Item List
  - Copying Styles
  - Using Size Groups
- Using the Catalog List and Utility
  - Discontinuing Items
  - Updating Pricing
  - Adding new items and images

Creating Model Stock Plans

- Talk to Your Sales Representative
  (Landau, Peaches, Cherokee, etc.)
  - Develop a model stocking plan based on previous sales, floor space, and your goals
- Set the Max/Min values in The Uniform Solution
  - Enter the Max/Min values for each item
  - Import a plan into The Uniform Solution (from Cherokee, Landau, Peaches)
- Develop your own plan
  - Start with a high level approach and work down to the item level (Vendor, Department, and Product Comparisons)
  - Eliminate or reduce stock of poorly selling vendors or products
  - Inventory Aging
  - Determine the best selling styles, colors, and sizes (Top 40 Sales)
  - Compare sales levels to stocking levels (Detailed Item Sales)
Creating Model Stock Plans

- Classify Your Reorderable Items Using Inventory Codes
  - CORE - Items you must have
  - REORD - Items you want to have
  - FAL07, WIN08, SPR08, SUM08 (Fashion Merchandise Codes)

- Keep Best Sellers In-Stock
  - How long does it take to receive an item from the vendor
  - Determine Average Unit Sales/Month

- Possible Stocking Levels
  - Selling < 1 per month – keep 1 or none in stock
  - Selling 1–2 per month – set your minimum at 2 or higher
  - Selling 3–6 per month – set the minimum at the amount per month
  - Selling 7+ per month – set the minimum at the amount per month or up to 1/2 the amount per month depending on the vendor

Setting Reorder Points*

Creating Purchase Orders*

- The Auto–Create Feature
  - Reordering “CORE” Stock
  - Reordering Fashion Merchandise

- Advanced Purchase Order Features
  - Cancel All Back Orders
  - Ignore Minimums
  - Ship Complete

- Using EDI to Send Orders Electronically

Receiving Merchandise*

- Receiving Lists
  - Receiving Merchandise from a PO
  - Using the Advance Ship Notice
  - Printing Tags

- Transfers
Working With Customers*

- The Customer Form
  - Notes Review at POS and Order Entry
  - Classifications
  - Billing Information
  - Credit and Allowance Limits
- Customer History
  - Sales History
  - Payment History
  - Item History

Contracts*
Lists of Items at Specific Discounts or Prices

- Can be assigned to a store or a customer
- Have an “active” date range
- Track performance at the contract and item levels
- Group Sign-in Code for WebStore

Sales and Special Orders*

- Creating new Sales and Special Orders
  - Salesperson and Shipping
  - Special Orders** and Options
**Special Orders are NOT a “Sale” until the items are delivered and a “new” invoice is created
- Delivering Special Orders
  - Items are removed from Stock
  - The new invoice is counted in Daily Sales
  - Sales Tax is now due

The Cash Flow Report

- Polling Location
- Cash Flow Summary
- January 1, 2012 through September 30, 2012

<table>
<thead>
<tr>
<th>Item</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payments Received</td>
<td></td>
</tr>
<tr>
<td>Cash</td>
<td>1,185.75</td>
</tr>
<tr>
<td>Credit Card</td>
<td>980.32</td>
</tr>
<tr>
<td>Gift Certificate</td>
<td>10.00</td>
</tr>
<tr>
<td>Parent Invoice</td>
<td>193.94</td>
</tr>
<tr>
<td>Account Charge/Debit</td>
<td></td>
</tr>
<tr>
<td>Stock</td>
<td></td>
</tr>
<tr>
<td>Cash Flow</td>
<td></td>
</tr>
<tr>
<td>Cash and Check Received</td>
<td>1,185.75</td>
</tr>
<tr>
<td>Credit Card</td>
<td>980.32</td>
</tr>
<tr>
<td>Cash and Credit</td>
<td>305.07</td>
</tr>
<tr>
<td>Interbank Transfer</td>
<td>216.05</td>
</tr>
<tr>
<td>Total Cash and Credit</td>
<td>1,789.12</td>
</tr>
<tr>
<td>Accounts Receivable</td>
<td>380.38</td>
</tr>
<tr>
<td>Charge on Account</td>
<td></td>
</tr>
<tr>
<td>Accounts Receivable</td>
<td></td>
</tr>
<tr>
<td>Special Checks</td>
<td>1,977.20</td>
</tr>
<tr>
<td>Cash Discounts issued</td>
<td>461.00</td>
</tr>
<tr>
<td>Other</td>
<td></td>
</tr>
<tr>
<td>Sales Tax</td>
<td>1,229.14</td>
</tr>
<tr>
<td>Account Charge/Debit</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>1,229.14</td>
</tr>
<tr>
<td>Internal Liability</td>
<td></td>
</tr>
<tr>
<td>Internal Liability</td>
<td>1,229.14</td>
</tr>
</tbody>
</table>
Part II
Tips and Tricks Outline

- Keyboard Navigation
- Procedure Hot Keys
- Date Entry Fields
- The Scan/Qty Field
- Inventory Search
- Customer Search
- Work Order Forms
- Working with Images

Keyboard Navigation

- The Mouse is convenient
- The Keyboard is fast
- List Options
  Select Ctrl + U, then try out these Tips for Lists

<table>
<thead>
<tr>
<th>Key</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ctrl + L</td>
<td>Select the List box</td>
</tr>
<tr>
<td>Ctrl + Page Up</td>
<td>Go to the top of the List</td>
</tr>
<tr>
<td>Ctrl + Page Down</td>
<td>Go to the bottom of the List</td>
</tr>
<tr>
<td>Insert</td>
<td>Add a record the List</td>
</tr>
<tr>
<td>Enter</td>
<td>Change the highlighted record</td>
</tr>
<tr>
<td>Delete</td>
<td>Delete the highlighted record</td>
</tr>
<tr>
<td>Alt + Down</td>
<td>Display the List Popup Menu</td>
</tr>
<tr>
<td>Alt + #</td>
<td>Select the Tab with the #</td>
</tr>
</tbody>
</table>

Date Entry Fields

- Date entry fields use hot keys to set the date to frequently used values

<table>
<thead>
<tr>
<th>Key</th>
<th>Resulting Date</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>M</td>
<td>10/01/12</td>
<td>Date set to first day of month</td>
</tr>
<tr>
<td>H</td>
<td>10/31/12</td>
<td>Date set to last day of month</td>
</tr>
<tr>
<td>T</td>
<td>10/14/12</td>
<td>Date set to today</td>
</tr>
<tr>
<td>Y</td>
<td>1/1/12</td>
<td>Date set to first day and month of year</td>
</tr>
<tr>
<td>R</td>
<td>12/31/12</td>
<td>Date set to last day and month of year</td>
</tr>
<tr>
<td>Arrow Down</td>
<td>Pops Calendar</td>
<td>Calendar is popped up</td>
</tr>
</tbody>
</table>

Item Hot Key

<table>
<thead>
<tr>
<th>Item</th>
<th>Hot Key</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gift Card Balance</td>
<td>Ctrl + G</td>
</tr>
<tr>
<td>Create Invoices</td>
<td>Ctrl + I</td>
</tr>
<tr>
<td>Inventory List</td>
<td>Ctrl + N</td>
</tr>
<tr>
<td>Purchase Order List</td>
<td>Ctrl + P</td>
</tr>
<tr>
<td>Receiving List</td>
<td>Ctrl + R</td>
</tr>
<tr>
<td>Customer Search</td>
<td>Ctrl + A</td>
</tr>
<tr>
<td>Inventory Search</td>
<td>Ctrl + F</td>
</tr>
<tr>
<td>Open Special Orders</td>
<td>Ctrl + O</td>
</tr>
<tr>
<td>Clock In/Out</td>
<td>Ctrl + K</td>
</tr>
<tr>
<td>Log Off (Hint File Menu)</td>
<td>Ctrl + F10</td>
</tr>
<tr>
<td>On-Line Help</td>
<td>F1</td>
</tr>
</tbody>
</table>
Sales Entry Tips

<table>
<thead>
<tr>
<th>Action/Key</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ctrl+ Up</td>
<td>Move an item on a transaction up</td>
</tr>
<tr>
<td>Ctrl+ Down</td>
<td>Move an item on a transaction down</td>
</tr>
<tr>
<td>Ctrl+ Arrow Right</td>
<td>Copy the billing address to the shipping address</td>
</tr>
<tr>
<td>F6</td>
<td>View or enter item notes</td>
</tr>
<tr>
<td>F7</td>
<td>Lookup an item</td>
</tr>
<tr>
<td>Alt+ F7</td>
<td>Use Inventory Search to find an item or Items on a Contract</td>
</tr>
</tbody>
</table>

The Scan/Qty Field

Quick Entry Actions and Results

<table>
<thead>
<tr>
<th>Scan/Qty</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>*10.00 + Enter</td>
<td>Misc item added to transaction (i.e. * + number)</td>
</tr>
<tr>
<td>100004 + Enter</td>
<td>Barcode entered and item added to transaction</td>
</tr>
<tr>
<td>2 + Enter</td>
<td>Item set to “Special Order”</td>
</tr>
<tr>
<td>Q125 + Enter</td>
<td>Item quantity set to 125 (i.e. a value greater than 100)</td>
</tr>
<tr>
<td>.25 + Enter</td>
<td>Item discount set to 25% off retail (i.e. number 0 to 1)</td>
</tr>
<tr>
<td>.10 + Enter</td>
<td>Item discounted an additional 10% off the current price</td>
</tr>
<tr>
<td>18.00 + Enter</td>
<td>Item price set to $18.00 (number with decimal)</td>
</tr>
<tr>
<td>T + Enter</td>
<td>Item set to non-taxable</td>
</tr>
<tr>
<td>578-7492 + Enter</td>
<td>Customer lookup by phone number</td>
</tr>
<tr>
<td>Johnson + Enter</td>
<td>Customer lookup by last name</td>
</tr>
</tbody>
</table>

Inventory Search

This utility may be the one of the most valuable and under-utilized options in the program
- Performs Price and Stock level checks (for all stores)
- Finds items matching styles descriptions and sizes
- Enables item selection from Sales, PO, and Receiving Entry

Customer Search

Quickly locates customers by name, account number, alternate account number, employee id, and phone number
- Partial matches and auto-select
- Activities > Customer Search or Ctrl + A
Work Order Forms

- Collect Information about work required for items on sales and orders
- Are User Definable with Customizable Options
  - Entry, Date, Notes, Drop Lists, Check boxes Headings and Signature Lines
- Added to Sales Entry and Contract Items
- Work Order Details are printed below the item on the Sales Entry transaction
- Work orders can be added to WebStore purchases and automatically have a fee added to the item

Working with Images

- The Image List is used to store images in the program
- Images are automatically resized to a maximum resolution – keeping file sizes smaller
- Images in the Image List can be assigned to Items, Vendors, Departments, Colors, Customers, Contracts, and Users
- Images are displayed throughout the program and in the WebStore
- Images are saved in data backups
  (automatically downloaded vendor images are not saved in the backup)

Part III
Connected Features

- Activating Connected Features
- Using the Catalog List and Utility
- Sending an EDI Order
- Receiving by the Carton (ASN's)
- Real-time vendor stock status
- Vendor Provided Product Images
- Setting up and Using Email

Activating Connected Features for a Vendor

- For each “Connected” Vendor on the Vendor List, select the company in the Connected Options Company drop list
The Catalog List and Utility

- In order to use the “Connected” features, you have to use the Catalog
- Why?

The UPC Barcode

- Definition
  - Universal Product Code
  - A universally unique number issued by GS1.org
  - 12 or 13 digits (8 is common in grocery industry)
- Why it matters
  - This number is used in EDI, ASN, and Vendor Stock reporting and is key because it provides an exact match between an item in The Uniform Solution and the vendor’s system

The Catalog List and Utility

- Features
  - New Catalogs can be downloaded in just seconds
  - Update prices, discontinue items, and copy new items to your inventory list
  - Product images are automatically downloaded after copying new items to inventory

Receiving by the Carton

- There is no easier way to receive than using the ASN
- Get new ASN's for all vendors on the Receiving List or on the Receive Cartons Window
- Receive a Box at a time
- Print tags by box with a carton number tag
- Missing or extra tags indicate a box was incorrectly packed
Real-Time Vendor Stock Reporting
- Automatically displays the current stock level reported by the Vendor’s system
- Available in Sales Entry, Purchase Order Entry, and the Inventory List

Vendor Provided Product Images
- Automatically Downloaded
  - Anytime new items are added to the Inventory List
  - Anytime new items are received at a remote location from the polling location
- Automatically Displayed
  - Inventory List, Inventory Search, Item Entry for Sales Entry, Selection Lists, and the WebStore
- The Web Server
  - Receives request to download images from The Uniform Solution

Email
- The Uniform Solution
  - Email Invoices, Account Statements, and Reports
- The WebStore
  - Email is used as the source of communication between the WebStore and your customer

Questions