The Uniform Solution
Session I – Getting Connected
8:30 am to 10:00 am

Everything is Connected
- Technology no longer operates independently
- Today companies are integrating systems and technology and gaining benefits and efficiency from that integration
- The Uniform Solution "connects" you to your vendors and to your customers!

Welcome to Orlando!

The Connected Uniform Retailer
- Uses the Vendor Catalog
  - The Catalog List and the Catalog Utility are indispensable for updating items, pricing, and marking items as discontinued
  - Automatically Creates Purchase Orders
  - Model stock plans are defined for each vendor
  - Re-orders seasonal merchandise based on items sold
- Utilizes EDI and ASN's
  - Electronic purchase orders are entered quickly and error free
  - Using an advance ship notice is the fastest way to receive merchandise – period.
  - Relies on Vendor Stock and Product Images
    - Knowing the stock status during order entry is empowering
    - Product images provide visual confirmation during order entry and are indispensable for the WebStore
  - Emails Invoices, Account Statements, etc.
What Do I Need to be a Connected Uniform Retailer?
- The Uniform Solution
- Broadband Internet Access
- Initiative

Connected Vendors

<table>
<thead>
<tr>
<th>Vendor</th>
<th>EDI</th>
<th>ASN</th>
<th>VStock</th>
<th>Images</th>
</tr>
</thead>
<tbody>
<tr>
<td>Barco</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
<td>Yes</td>
</tr>
<tr>
<td>IguanaMed</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Koi</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
<td>Yes</td>
</tr>
<tr>
<td>Landau</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Landau Brand</td>
</tr>
<tr>
<td>Peaches</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Prestige Medical</td>
<td>Yes</td>
<td>Yes</td>
<td>Some</td>
<td></td>
</tr>
<tr>
<td>Strategic Partners</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>(Cherokee, Littmann, Dickies Medical)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>White Swan</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>White Cross</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Workshop Outline
- Setting up the Connected Features
- Using the Catalog List and Utility
- Developing a Model Stocking Plan
- Auto-Creating Purchase Orders
- Sending an EDI Order
- Receiving by the Carton (ASN's)
- Real-time vendor stock status
- Vendor Provided Product Images
- Setting up and Using Email

Setting up the Connected Features for a Vendor
- For each “Connected” Vendor on the Vendor List, select the company in the Connected Options Company drop list
**Setting up the Connected Features for a Vendor**

- **Task 1**
  - Select Lists > Vendors and select to update White Swan
  - Select the Purchasing Tab
  - Select the General Tab
    - Set Account Number to "PDSTX"
  - Select the Connected Options Tab
    - Set the Company to White Swan Meta
    - Verify all connected features are set to true
    - Select OK to save the changes
  - On the Vendor List, what is the value in the "Connected" column for White Swan? ________

**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**

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

**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
The Catalog Utility

Task 1 – Copy ONLY the following items to the Inventory List for Peaches
- Select Lists > Catalog
- Select Peaches on the List (now all Peaches items are tagged)
- Select Peaches on the list again (now NO Peaches items are tagged)
- Select the Styles Tab for Peaches
- Use the Style field to quickly locate a style in the table
- Right-click the style or the style and color and make the proper selection
- Select F2-Copy/Sync > OK and complete the Wizard to add your selections

<table>
<thead>
<tr>
<th>Item</th>
<th>Colors</th>
</tr>
</thead>
<tbody>
<tr>
<td>4204</td>
<td>All Colors</td>
</tr>
<tr>
<td>4214</td>
<td>NAVY, ROYL</td>
</tr>
<tr>
<td>N6451</td>
<td>WHIT</td>
</tr>
</tbody>
</table>

Task 2 – Sync Landau Inventory with the Catalog
- Tag Landau on the Catalog List and select F2-Copy/Sync > OK
  - Why are there items that need the UPC removed?
  - Why are the items at the bottom selected to Match the catalog?
- Select: Update
- After the process restarts, continue on next page (i.e. slide)
- Why does the process restart sometimes?
  - Some operations (or steps) influence the utility, so if one of these steps is NOT skipped, the process must restart to make sure it considers the items that were just updated.

How to handle a vendor that has too many missing UPC’s
- Print the Current Reorder Points for the Vendor
- Select Reports > Inventory > Inventory with Max Levels to get the re-order points for the vendor
- Auto-Discontinue All Items for the Vendor
- Select Lists > Vendors > Vendor Button > Auto-Discontinue All Items to automatically discontinue all items
- Set all stock levels to zero for the vendor
- Select Activities > Physical Inventory
- F2-Clear List so there are no item quantities
- F5-Update the inventory for the vendor - all stock levels will be zero
- Use QuickLoad to Set the Current Stock Levels and Print New Tags
- Select Activities > QuickLoad and follow directions to scan the UPC barcode
- Re-enter the Max/Min Values for Vendor
- Don’t receive stock items using previously created PO’s. Use the option to “Add items not on a PO”. Do use the original PO for special order items.
Creating Model Stock Plans to Auto–Create Purchase Orders

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 provided plan into The Uniform Solution (Cherokee, Landau, Peaches)

Develop your own plan
- Start with a high level approach and work down to the item level
- 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)

Importing a Vendor Provided Model Stock Plan

Task 1 – Review the max/min settings for Peaches
- Select Reports > Inventory > Inventory with Max Levels
  - Vendors to Include: One
  - Vendor: Peaches
  - Select OK, then Preview
  - How many pages are on the report? ________

Task 2 – Import the model stock plan
- Select Maintenance > Inventory Utilities > Import Max/Min Values
  - Vendors to Include: PCH
  - Departments to Include: All
  - Style and Products to Include: File (this limits items updated to just items in the file)
  - Select OK and Pick c:\uswworkshop2010\import\Peaches_Fall_2010.csv
  - How many items for Peaches were updated with Max/Min values? ________

Task 3 – Review max/min settings for Peaches
- How many pages are on the report? ________

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

Developing a Model Stock

Task 1 – Create the Max/Min Values below for the following items:

<table>
<thead>
<tr>
<th>Item</th>
<th>Sales per Month</th>
<th>Max</th>
<th>Min</th>
</tr>
</thead>
<tbody>
<tr>
<td>190–CIEL–XS</td>
<td>0.3</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>190–CIEL–S</td>
<td>2</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>190–CIEL–M</td>
<td>12</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>190–CIEL–L</td>
<td>6</td>
<td>6</td>
<td>5</td>
</tr>
<tr>
<td>190–CIEL–XL</td>
<td>3</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>190–CIEL–2XL</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
</tbody>
</table>
Auto-Creating Purchase Orders

- Task 1 – Create Purchase Orders for all Vendors
  - Activities > Purchase Orders > F2–Auto–Create
    - Check: Inventory below desired stock levels
    - Check: Special Orders that need fulfillment
    - Check: Drop shipments
    - Vendors to include: All
    - How many purchase orders were Created? ______

- Task 2 – Create a PO of Items Sold for Barco
  - Activities > Purchase Orders > F2–Auto–Create
    - Check: Items sold within a date range
    - Uncheck the other options in Include
    - Vendors to include: One
    - Vendor: Barco
    - Start Date: 10/01/10 End Date: 10/31/10
    - How many items were ordered for Barco? ______

Using the EDI Feature

- Sending a Purchase Order using EDI
  - Task 1
    - Select a PO on the PO List
    - Select F11–EDI PO
    - Since we do not have a valid purchase order and do not have Internet access, Select No
    - Is that hard to do? __________

- Checking the Status of an EDI Order
  - Task 1
    - Once a PO has been sent using EDI, you can verify the vendor has processed the order
    - Select F12–EDI Status

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

- Task 1
  - Select Lists > Receiving > List Button > New List
  - Type: Purchase Order Receipt
  - Vendor: LAN (Landau)
  - Select F3 – Add ASN
    - Check Add each item to the tag queue – at the bottom
    - Select Carton number ending in ...8013
    - Select Add
    - Select OK to Save the cartons to the List, then Select OK to save the List.
    - How many tags are in the Tag Queue? ______
  - Note: A tag is printed for each carton number – hence the extra label
  - Select OK to save the Receiving list
  - Could there be an easier way to receive?
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

Real-Time Vendor Stock Reporting

- Task 1
  - Use the Inventory List to determine the stock level for the following items
    
    Note: When you use vendor stock reporting in your store, make sure “Show vendor stock” is checked on the “Stock for Color” Tab.

<table>
<thead>
<tr>
<th>Item</th>
<th>Vendor Stock Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>CHE-2074-ALOB-XS</td>
<td></td>
</tr>
<tr>
<td>CHE-2074-ALOB-XL</td>
<td></td>
</tr>
<tr>
<td>CHE-2074-ALOB-2XL</td>
<td></td>
</tr>
</tbody>
</table>

Vendor Provided Product Images

- Task 1
  - Use the Inventory List to determine the image color for the items below
  - Select Lists > Inventory
  - Use the Inventory Standards List to view the color swatches for the Cherokee colors below
  - Select Lists > Inventory Standards > Colors > Cherokee

<table>
<thead>
<tr>
<th>Item</th>
<th>Image Color</th>
</tr>
</thead>
<tbody>
<tr>
<td>CHE-2074-ALOB</td>
<td></td>
</tr>
<tr>
<td>CHE-2074-CHOB</td>
<td></td>
</tr>
<tr>
<td>CHE-2074-CIEB</td>
<td></td>
</tr>
</tbody>
</table>
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

Task 1 – Set up Email
- Select Setup > System Options > Email Tab
- Check “Enable outgoing email features”
- Check “Use SSL for secure email”
- Outgoing Mail Server Port (SMTP): smtp.gmail.com
- Email Port: 465
- User Name: mygooglename
- Password: mygooglepassword
- Select the OK button

Task 2 – Email an Open Order
- Select the “Orders” button on the application toolbar
- Highlight an order and select F9-Print
- Select the Email button on the Printer and Output Selection window
- Select OK on the “Enter the Name of the PDF File to Email” dialog
- Review the options on the “Creating Email” form
- See, it’s that easy

Questions