Strategic Partners Sales Meeting
Getting to Know The Uniform Solution
December 18, 2013
8:30 am to 10:00 am

The Successful Uniform Retailer

- Looks like they know what’s going on OR
- Actually knows what’s going on
- In the movie, Wild Hogs, parallels exist
- So the question is, which of your customers is a
  - Doug (Tim Allen)
  - Woody (John Travolta)
  - Bobby (Martin Lawrence)
  - Dudley (William H Macey)
- Wild Hogs Introduction

What is The Uniform Solution?

- Complete system designed to run a uniform retailers day-to-day operation
  - Point-of-Sale with Special Order Entry and Tracking
  - Purchasing and Receiving
  - Accounts Receivable, Payroll Deduct, and Allowance Tracking
  - Time Clock
  - eCommerce

Getting to Know The Uniform Solution

- Part I - Overview
- Part II - Vendor Integration Workshop
Supported Business Models

- **Retail (with Multi-Store integration)**
- **On-Site** (Hospitals, Nursing homes, etc.)
- **eCommerce**
  - **Individuals** (with access to retail and eCommerce purchases)
  - **Groups** (with specific items, discounts, and work order details)

Background

- **1993**
  - The Uniform Solution for DOS is the result of a vision to create a simple, easy-to-use software program that would make retail uniform stores more productive, informed, and profitable.

- **1996**
  - The Uniform Solution implemented the Vendor Catalog—a complete inventory listing from major medical uniform suppliers that made getting started incredibly easy.

- **1998**
  - On-site selling aided by The Uniform Solution takes off. Today on-site selling is a key element of product delivery to the medical apparel consumer.

- **2001**
  - The Uniform Solution for Windows is released making installation, set up, and ease of use unparalleled in the point-of-sale world.
  - Training tutorials and improved reliability reduce Technical Support to ½ the previous level.

- **2003**
  - The Uniform Solution began to use the internet to connect the uniform retailer with their vendors. Today The Uniform Solution can send Purchase Orders directly to a vendor using EDI, receive advance shipment information (ASN) to make the receiving process productive and efficient, display real-time vendor stock information right next to an item to be ordered, and show images of products listed in inventory.

- **2007**
  - The Uniform Solution enhances the retailers knowledge of product availability with real-time vendor stock reporting.

- **2011**
  - The Uniform Solution WebStore is released. Retailers can now easily setup and provide an eCommerce site for their customers to order products 24 hours a day, check stock status in the store, review order information, and much more!
The Numbers

- The Uniform Solution Installations
  - 621 Companies
  - 1,096 Locations
  - 2,508 Stations
- Release Dates
  - DOS – 1993
  - Catalog – 1996
  - Windows – 2001
  - WebStore – 2011
  - SQL Server and iOS Android Support – 2014
- Direct EDI Orders in 2012
  - 134,631

The Keys to Our Success

- Designed for Uniform Retailers and Dealers
- Easy-to-Use, Reliable Software
- Innovation
  - Vendor Catalog
  - Connected Features (i.e. EDI, ASN Receiving, Real-time Stock, etc.)
  - Integrated WebStore
- Great Partners
- Easy to Get Started – Preloaded Inventory
- Affordable
  - The Uniform Solution is $250/month
  - Includes The Uniform Solution, the WebStore and Technical Support

The Uniform Solution Quick Tour

- The Inventory List
- Customers
- Sales Entry
- Purchase Orders
- Receiving
- The WebStore

Vendor Integration Workshop
Hands on Workshop and Presentation
Workshop Outline

- The Inventory List, the Catalog List and the Catalog Utility
- Activating the Connected Features for Strategic Partner’s Brands
- Developing a Model Stock Plan
- Auto-Creating Purchase Orders
- Sending an EDI Order
- Receiving by the Carton (ASN’s)
- Real-time vendor stock status review
- Vendor Provided Product Images

The Inventory List

- Contains the current products being sold, ordered, and received in The Uniform Solution
- Lists > Inventory

The Catalog List

- Contains the current products offered from uniform vendors (Lists > Catalog)
- Can be easily updated by selecting the F10-Updates button
- Is used by the Catalog Utility to update existing items and copy new products to the Inventory List

The Catalog Utility

- Copies New Products to the Inventory List
  - Product images are automatically downloaded after copying new items to the Inventory List
- Updates Existing Products in the Inventory List
  - Update prices, discontinue items, and copy new items to the Inventory List
The Catalog Utility

- Task – Synchronize Cherokee Products in the Inventory List with the Catalog
  - Select Lists > Catalog
  - “Tag” Cherokee Uniforms on the Catalog List
  - Select F2-Copy/Sync, read the screen, and then OK to continue

  Read Each Window Title in the Wizard

- Step 1 of 4 – Cost Price Changes
  - Go to the Settings Tab
  - Check: Update the retail price based on the markup formula for the vendor
  - Check: Print a tag for each in-stock item with a retail price change
  - Check: I have reviewed the retail pricing update settings
  - Select: Update

- Step 2 of 4 – Discontinued Styles
  - Select: Print List > Preview. How many pages of discontinued items are there? ___
  - Close the Preview Window
  - Select: Update

- Step 3 of 4 – Inventory Standard Not Matching the Catalog
  - Select: Update

- Step 4 of 4 – Copy New Items
  - Select: Print List > Preview. How many pages of new items are there? ______
  - Close the Preview Window
  - Expand the selections and you will see the styles that will be copied
  - Select: Update

Cherokee is now completely up-to-date and matching the Catalog
You can close the Catalog List now

Failure is a Prelude to Success

- If at first you don’t succeed, try, try, try again!
- Check out Dudley’s attitude!

Strategic Partner’s Integrated Features

- Product Images
- Direct EDI (electronic ordering)
- Advance Ship Notice Receiving
- Real-time stock reporting
Activating the Connected Features for Cherokee Uniforms, Dickies Medical, and Littman by Cherokee

Task 1
- Select Lists > Vendors, right-click Cherokee Uniforms and select Edit.
- Select the Purchasing Tab
- Select the General Tab
- Set Account Number to "DDS750"
- Select the Connected Options Tab
- Set the Company to Strategic Partners
- 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 Cherokee? _________

Task 2
- Repeat these steps for Dickies Medical

Developing a Model Stock Plan

- Determine the best selling styles, colors, and sizes
  - Top 40 Items, Department Comparison, Detailed Item Sales, Max–Min Sales Analysis (reports)
- Establish goals for new and complimentary products
- Determine max–min values keeping stock levels as low as possible
  - Reordering frequently is key to success (i.e. multiple times per week)
- Set the Max/Min values in The Uniform Solution
  - Enter the Max/Min values for each item
  - Import max–min values into The Uniform Solution

Model Stock Plans

- Maximize sell through and floor space
- Enable Automatic Purchase Order Generation
  - Items are included when they fall below a minimum stock level
- Requires smaller stock levels at the store to maximize sales with a partner that ships quickly

Developing a Model Stock

- Task – Determine 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–NAVY–XS</td>
<td>0.3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>190–NAVY–S</td>
<td>2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>190–NAVY–M</td>
<td>12</td>
<td></td>
<td></td>
</tr>
<tr>
<td>190–NAVY–L</td>
<td>6</td>
<td></td>
<td></td>
</tr>
<tr>
<td>190–NAVY–XL</td>
<td>3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>190–NAVY–2XL</td>
<td>1</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Task Guidelines
- Selling Zero or less
  Keep none in stock
- Selling < 1 per month
  Max = 1 Min = 1
- Selling 1–2 per month
  Max = 1 or 2 Min 1
- Selling 3–4 per month
  Max = 3 or 4 Min = ½ Max
- Selling > 5 per month
  Max = Greater of 4 or ½ Sales Min = ½ Max
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

Auto–Creating Purchase Orders

- Task 1 – Create Purchase Orders for all Vendors
  - Select 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
  - Open the Cherokee PO and take a look
  - How many purchase orders were Created? ______
- Task 2 – Create a PO of Items Sold for Cherokee
  - Select Activities > Purchase Orders > F2–Auto–Create
  - Check: Items sold within a date range
  - Uncheck the other options in Include
  - Vendors to Include: One
  - Vendor: CHE
  - Start Date: 12/01/13 End Date: 12/18/13
  - How many items were ordered for Cherokee? ______

Using the EDI Feature

- Sending a Purchase Order using EDI
  - Task
    - Select a PO on the PO List
    - Select F11– EDI PO
    - Select No because we do not have a real purchase order and do not have Internet access
    - Is sending an EDI order difficult? ____________
- Checking the Status of an EDI Order
  - How to Check EDI Status
    - 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 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
Receiving by the Carton

- **Task**
  - Select Activities > Receiving > List Button > New List
  - In the Top Left Entry Fields
    - Type: Purchase Order Receipt
    - Vendor: CHE (Cherokee)
  - Select F3 – Add ASN
    - Check Add each item to the tag queue – at the bottom of the window
    - Select Carton number ending in 3974 and select Add
    - Select Carton number ending in 3975 and 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? ________.
    - Select Cancel on the Tag Queue Options window
    - Select OK to save the Receiving list
  - Could there be an easier way to receive?

Real–Time Vendor Stock Reporting

- **Task 1**
  - Use the Inventory List to determine the stock level for the following items
  - Select Lists > Inventory
  - In the Style Locator at the bottom of the list
    - Type 2074 then Enter
    - Type ALOB then Enter
    - Select the Stock for Color Tab
    - Repeat for 2074 CHOB

<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–CHOB–2XL</td>
<td></td>
</tr>
</tbody>
</table>

Vendor Provided Product Images

- **Automatically Downloaded**
  - Anytime new items are added to the Inventory List
- **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
Vendor Provided Product Images

- Task 1
  - Use the **Inventory List** to determine the image color for the items below
  - Select Lists > Inventory
  - In the **Style** field below the list type: 2074 and press Enter, then type ALOB then Enter.
  - Repeat for the other colors or just highlight them.
  - 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>

Conclusion

- I hope you have learned quite a bit today
- Maybe you have “got it” more than you did when we started – like Dudley
- **The Wild Hogs conclusion as they reach the West Coast**

Questions