

The Uniform Solution

Mastering the Basics (With Tips and Tricks Appendix) 1:00 pm to 2:30 pm Session I





Welcome to Charleston



Mastering the Basics

Objective

- Review The Uniform Solution's core features so you feel comfortable performing routine tasks
- Provide tips and tricks so you are faster and more efficient
- Topic Format
 - Presentation followed by Workshop Activities





10/05/2014 Diamond Data Systems, Inc. Mastering the Basics

THEUNIFORM SOLUTION

3

Mastering the Basics

- The Application Menu
- Setting Up Your Inventory
- Creating Sales, Returns, and using Gift Cards
- Using Reorder Points*
- Creating Purchase Orders and Sending them EDI
- Receiving Merchandise from PO's and ASN's
- Working with Customers
- Delivering and Canceling Special Orders
- Recording Customer Payments on Account
- Using Contracts for Customers, Store Sales, and Group Sales
- Clocking In/Out
- Using Email
- Physical Inventory vs QuickLoad
- Getting Software Updates and Support Resources



The Successful Uniform Retailer

- Knows what they are doing and what's going on <u>OR</u>
- Looks like they know what's going on <u>OR</u>
- Is trying to figure out what's going on
- In the movie Wild Hogs, 4 friends that like to ride motorcycles have different levels of knowing "what's going on"
- So the question is, are you ...
 - Doug the fraidy cat (Tim Allen)
 - Woody the Poser (John Travolta)
 - Bobby mr. hen pecked (Martin Lawrence)
 - Dudley the newbie (William H Macey)
- Wild Hogs Introduction

THEUNIFORM SOLUTION

5

The Application Menu

Presentation

- File Menu Program startup settings and options like Backup/Restore and Import/Export
- List Menu "Lists" of Information like Vendors, Inventory, and Customers
- Activities Menu Task oriented options like Sales Entry, Receiving Payments on Account, Clocking In/Out, Customer Search, and Inventory Search
- Reports Menu Over 75 reports for Sales, Inventory, A/R, and much more
- Setup Menu Setup options for the user, computer, store, system and more
- Window Menu Shows active windows, maximize all, close all
- Help Menu On-line help, training courses, and the X-Charge Portal





Understanding the Application Menu

Workshop

- What "Hot-Key" starts a new Sales Entry transaction? _____.
- What "Hot-Key" logs off the current User?_____.
- What two keystrokes will show me todays sales total?
 Menu Option is Lists > Sales by Date and a button on the Sales List.
 Menu Hot Key: _____ Button Hot Key: _____
- On the System Options Form (Setup > System Options > General Tab), what is the <u>most restrictive</u> option for "Close Accounting Period"?_____
- What Menu and Menu Item do you access to update your credit card on file for your Uniform Solution Subscription?
 Menu (Circle One): File Lists Activities Reports Setup Help
 Menu Item Name: ______ (Subscription and Services)



Setting Up Your Inventory

Presentation

- The Vendor List
 - Pricing formulas
 - Applying New Default Settings and Pricing
- 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

ws	Code	Company	Phone	Туре	Connected	Ordering	Entry		🥒 F6-Adiust Price
	511	5.11 Tactical	(866)451-1726	Mfg	Yes	Direct	Catalog		
	B4S	B4Scrubs-The Moor	(704)301-0713	Mfg		Direct	Catalog		F7-Apply
¥	BCO	Barco Uniforms	(310)323-7315	Mfg	Yes	Direct	Manual		
	BD	Banded	(615)628-8159	Mfg		Direct	Catalog		F9-Print Tag
W	CHE	Cherokee Uniforms	(800)283-7272	Mfg	Yes	Direct	Manual		
¥	CHM	Carhartt	(877)554-3306	Mfg	Yes	Direct	Catalog		9 F10-Get Image
	CS	Crocs, Inc	(501)851-0175	Mfg		Direct	Catalog		
¥	DKM	🔲 Dickies Medical Unif	(800)283-7272	Mfg	Yes	Direct	Catalog		
1	HS	Horace Small	(615)565-5000	Mfg	Yes	Direct	Catalog		Dickies
W	KOL	KOI	(800)828-4526	Mfg	Yes	Direct	Catalog		
7	LAN	📧 Landau Uniforms	(800)238-7513	Mfg	Yes	Direct	Catalog		MEDICAL UNIFORMS
	LMC	Littmann By Cheroke	(800)283-7272	Mfg	Yes	Direct	Catalog		
1	PCH	📧 Peaches Uniforms	(800)272-3224	Mfg	Yes	Direct	Catalog		
۶.	PRE	🔲 Prestige Medical	(800)762-3333	Mfg	Yes	Direct	Catalog		
1	RK	Red Kap	(615)565-5000	Mfg	Yes	Direct	Catalog	- 1	

<u>оп</u> .	Dy	vendor	- 2	endor: UKM	UICKIES MEDICAI UNIFOR	ns				§ F4-Sales
Sty	les	2. Stock fo	or Color	3. Products						F5-Item Histo
/eni	dor:	DKM Style	c 8070	OC Color: HAH						
ws		Style		Color	Description	Code	Depart	Cost	Retail 🔺	🖉 F6-Adjust Pric
8		80700C	FWP	(Flower Parade)	WRAP	REORD	SCRUB	7.50	15.00	
¥		80700C	HAH	(Harmony Of Hope)	WRAP	REORD	SCRUB	6.50	13.00	F8-Show P0
8		80700C	HHP	(Hearts Of Hope)	WRAP	REORD	SCRUB	7.50	15.00	
8	-	80700C	IHY	(I Heart You)	WRAP	REORD	SCRUB	7.50	15.00	iiii: F9-Print Tag
Ä	8.8	80700C	LGF	(Leaping Frogs)	WRAP	REORD	SCRUB	6.50	13.00	
8	-	80700C	OPU	(Opulence)	WRAP	REORD	SCRUB	7.50	15.00	Q F10-Search
ä		80700C	PIX	(Pink Pixie)	WRAP	REORD	SCRUB	6.50	13.00	-
8	848	80700C	POF	(Pop Floral)	WRAP	REORD	SCRUB	6.50	13.00	and the second second
¥		80700C	SWC	(Sweet Circles)	WRAP	REORD	SCRUB	6.50	13.00	
8		80702	ALS	(Alpha Star)	WRAP	REORD	SCRUB	7.50	15.00	and all all all all all all a
8	-	80702	AWD	(Ancient Wisdom)	WRAP	REORD	SCRUB	7.50	15.00	an all and a second
¥		80702	MBH	(Mariah)	WRAP	REORD	SCRUB	7.50	15.00	
¥		80702	NVV	(Navy Vibrance)	WRAP	REORD	SCRUB	7.50	15.00	
¥	-	80702	ORB	(Orbitz)	WRAP	REORD	SCRUB	7.50	15.00	Store Number:
¥	848	80702	OSK	(Osaka)	WRAP	REORD	SCRUB	7.50	15.00	Store Manuel.
8		80702	SBB	(Spiral Burst Black)	WRAP	REORD	SCRUB	6.50	13.00	Price Level:
¥		810106	CBLZ	2 (Ceil Blue)	V-NECK	REORD	SCRUB	6.15	12.30 🛫	Show inactive



Setting Up Your Inventory

Workshop

- Set up Cherokee to use a pricing formula that multiplies the cost by 2 and adds 2. Round that number to a "Fixed" .95 cents. After saving the changes, apply the pricing formula when prompted. What is the price of a CHE-2074-ALOB-M? _____
- Go to the Catalog List and Update Barco using F2-Copy Sync. On Step 2 – Discontinued Styles or Products Step, how many colors are discontinued for the style 41101? _____ If you print the list, how many pages are there? _____.
 You can cancel the rest of the Catalog Utility if you wish
- Activate the Connected Features for Healing Hands. Circle the features they provide: Product Images EDI ASN's VStock Hint (some are disabled)



Creating Sales, Returns, Special Orders, and Using Gift Cards

Presentation

- Creating new Sales and Returns
- Modifying transactions and voiding sales
- Using the Scan/Qty field (this very important)
- Adding Customers to Sales Entry transactions
- Creating Special Orders and using Vendor Stock Levels (VStock)
- Selling and redeeming Gift Cards
- End-of-Day Reconciliation and Monthly Cash Flow Reporting





iearch		Options						
ast Name: Johnson	0	Search <u>By</u> :	Name	•				
irst Name:		V Show partia	al <u>m</u> atches					
Results								
Customer		City		Acct No.	Phone			
🗎 Johnson, Cade		Parker		63-1	(972)578-8089			
Johnson, Jack		Parker		62-1	(972)578-8088			
Johnson, Luke		Parker		61-1	(972)578-8090			
Johnson, Sam		Parker		64-1	(972)578-8091			
Johnson, Thomas		Richardson		23-1	(972)964-1453			



10

Creating Sales, Returns, Special Orders, and Using Gift Cards

Workshop

- Start a new Sales Entry transaction (Ctrl + I) to handle a Purchase, Return, and Special Order
- Add the Barcode "4145" to the transaction (a new purchase)
- Lookup item "BCO-0619-10-34" and set the item as a "Return" The balance should be Zero
- Add the Barcode "4145" to the transaction and indicate it's a "Special Order Item" by pressing "S <Enter>" in the Scan/Qty field. How many items does the Vendor have in-stock? _____
- Enter "578-5068" to lookup a customer by phone number. The customer had a discount assigned to their profile.
 What % that has been applied to the items? _____
- Press F5 to complete the Sale. 20% of the Order Total is recommended as the Deposit Amount. Complete the Sale by Tendering \$80.
 How much change is given back? _____
- Cancel when prompted to print

10/05/2014 Diamond Data Systems, Inc. Mastering the Basics

THEUNIFORM SOLUTION

11

Using Reorder Points

Presentation

- Overview
- Reports
 - Vendor Comparison
 - Top 40 by Vendor
 - Max/Min Sales Analysis
- Settings Max/Mins



Using Reorder Points

Workshop

- On the Inventory List, set the Max/Min values for CHE-190 (All colors and sizes) to the values of Max=4 Min =2
 Hint: Highlight CHE-190-CIEL and Go to the Stock for Color Tab, press Enter on a Size and use the option "All colors and sizes for this style"
- Set the Max/Min values for all XS, 4XL, and 5XL sizes in 190 to: Max = 0 and Min = 0 Hint: use "All colors for this size"
- Set the Max/Min values for all S sizes in 190 to: Max = 2 and Min = 1 Hint: use "All colors for this size"
- Check CHE-190-NAVY to see if it matches the above values



Creating Purchase Orders and Sending them EDI

Presentation

- Special Orders not Placed
- Using Auto-Create
- Using EDI to Send Orders Electronically

📅 Auto-Create Purchase Order Options 🕘 Store# 1	
1. Options 2. Advanced Include Inventory below desired stock levels Special orders that need fulfillment Drop shipments Items sold within a date range Items had been had	<u>O</u> K Cancel
Vendors to Include	



Creating Purchase Orders

Workshop

- 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: 10/01/14 End Date: 10/05/14
 - How many items were ordered for Cherokee this time? _____



Receiving Merchandise from PO's and ASN's

Presentation

- Receiving Merchandise from a PO and Advance Ship Notice (ASN)
- Adding Items not on a PO (scanning or ASN)
- Printing Tags (Carton or List)
- Matching Items to Special Orders

🧐 Receiving and	l Transfer Lists									
Sho <u>w</u> : By Numbe	Show: By Number 🗨 Lists to Show: Purchase Order Receipts 🗨 Store: 1 🖶									
<u>1</u> . Working On	1. Working On 2. Completed									
Ref No.	Received From	Date	Qty	Total	E7.Print Specials					
110-1	Landau Unirolms	3725714	735	061696	F3-Print F3-Print F10-Get ASN's					
List 🔻	Ref <u>No</u> .				Show deleted					





Receiving Merchandise

Workshop

- 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
 Note: tags are printed by carton and included a carton number tag
- Select OK to save the Receiving list



Failure is a Prelude to Success

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



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

General <u>2</u> . Notes 🕃	Billing Information 4. Sales & Taxes 5. Ship T.	o <u>6</u> . Credit Card & Contact <u>7</u> . WebStore	
Name		More Information	<u>0</u> K
Las <u>t</u> or Company:	Cade	Phone: Home 🖵	
Fjrst:	Johnson	Phone 2 Home 💌	Lanc
Addre <u>s</u> s:	5216 Edgewater Court	<u>F</u> ax:	
Addre <u>s</u> s2:		Contact:	
Addre <u>s</u> s3:		Class: WALK Q	
City & State:	Parker TX	Promo: YELL	
Zip & Country:	75094	License:	
Emajl:	cade@verizon.net	Birthday:	
	Created by the WebStore	Cre <u>d</u> it is bad	
Discounts and Pricin	g	Work Location	*click for a
<u>P</u> ricing:	Discount off retail 📮 Amo <u>u</u> nt: .10 🖈	Location:	5
Price Le <u>v</u> el:			
Cashaali		Phone	100

📋 Item Sales History for Blake Burger				- • •
Sho <u>w</u> : By Item 💌 🔲 Show Detail				👌 F9-Print List
1. Sales				1
Item	Item No.	Qty Price	Total	
BC0-619-10-36	4,14	7 1 26.10	26.10	
LAN-0298-BKT-ONE	1,50	7 4 6.50	26.00	
LAN-7502-BNP-L	1,54	9 4 15.00	60.00	
	Total Qty: 9	Total:	\$112.10	
				I Hide ∠ero Uty's



Working With Customers

Workshop

- Task 1
 - Select "Ayers, Steve" from the Customer List
 - Add the following to the "Notes" for the customer:
 "Please call and verify all purchases use a valid purchase order number"
 - Check the box below the notes:
 "Review Customer Notes when selected in Sales Entry"
 - On the "Billing Information Tab", select "Allow Sales on Account" and set a "Credit Limit of\$500.
 - Save the Record
- Task 2
 - Start a new invoice (Crtl + I)
 - Enter "Ayers" in the Scan/Qty field and press Enter
 - What did you hear? ______
 - What is the "Credit Available" shown in the Title Bar? _____



Delivering and Canceling Special Orders

Presentation

- Special Orders are NOT a Sale until Delivered
- How to Deliver Special Orders
- How to Cancel a Special Order

S All	Special Or	ders								
Sho <u>w</u> Limit	: By Numb	er 💌								5 F4-Total
	Delivery r	equired	<u>P</u> ast due date							🔯 F5-Payment
	ltems with	n a balance								
	Show all	stores	Store No. 1 🗧 📃 Show locally owned							F6-Notes
<u>1</u> . Sa	les <u>2</u> . Spe	cial Orders	3. Layaways 4. Gift Cert 5. Quotes 6. WebStore							F7-Order Detail
					n Proces	s	0	pen		18-Deliver/Adj
U	Irder No.	Date	Sold To	Need	PO	Work	Qty	Ready		E9-Print
	1-1	9/09/13	Glen Estes (Baylor Medical Center) - Pickup				3	3		
	3-1	9/09/13	Thomas Johnson (Complete Dental Care) - Pickup		6		10	4		S F10-Fax
	5-1	9/10/13	Christine St George - Pickup		10		14	4		
	9-1	9/11/13	James Harrington - Pickup		3		3			
	15-1	9/12/13	August Keeler - Pickup		8		8			
	19-1	9/16/13	Ammar Abuarja (Plano Surgery Center) - Pickup				12	12		
	21-1	9/17/13	Paul Duckett - Pickup				5	5		
	100-1	9/18/13	Blake Burger - Pickup				3	3		
	101-1	9/18/13	Blake Burger - Pickup				2	2		
	106-1	9/20/13	Armando Chavez (Baylor Medical Center) - Pickup				2	2		
	109-1	9/26/13	Renee Culbreath - Pickup		2		3	1		
	110-1	9/26/13	Blake Burger - Pickup		3		3			
	111-1	9/26/13	Glen Estes (Baylor Medical Center) - Pickup		1		6	5		
	112-1	9/26/13	Cade Johnson - Pickup		3		4	1		
9	114-1	10/02/13	Brian Abbey - Pickup				1	1	-	
	Order 🔻		Ref No.							Show deleted
										Show quantities



Delivering and Canceling Special Orders

Workshop

- Task 1 Delivering a Special Order
 - Select the "Orders" button on the Toolbar or press Ctrl + 0
 - Find Order #21, highlight it on the list, and Press F8-Deliver/Adjust
 - Select OK to Deliver all received items
 - Add the Barcode 4145 to the transaction as another purchase today
 - Select F5-Payment
 - Tender **\$90** Cash to complete the transaction
 - Cancel Sales Entry
- Task 2 Canceling a Special Order with a Deposit
 - Find Order # 1, highlight it, and press Enter to Edit the Special Order
 - Delete each line item off the special order by right-clicking each line item or by pressing the Delete key while highlighted
 - Press F5 to Refund the original Deposit made in Cash. How much refund is due to the customer? _____



Recording Customer Payments on Account

Presentation

- How To Enter a Payment
- Sorting Options for Unpaid Invoices
- Using Auto-Apply and Clear

💽 Adding Pay	yment (Ne	ew) Store#	1 - Acct No. 57-1				- • •
Payment Acti	ion						Nevt
Payment	💿 Paid	Out 💿 Ap	ply Credits		<u>D</u> ate:	9/17/14 🔳	
<u>C</u> ustomer:	Baylor Me	edical Center		Q	<u>A</u> mount:	75.78	<u>0</u> K
	☑ Only lookup billed accounts lotes:		accounts		Paid By: Check	-	
Notes:					Bef No I		Cancel
110003.							
Transactions	with <u>B</u> aland	ces to Show					
Sales	Special	Orders 🔘	Layaways 🔘 Gift Certificates 🔘 All Ite	ms			F2-Auto Apply
(Payment to	o apply to th	e selected tr	ansaction)	100	Pavment:		E4 Clear All
				-99			F4-Cleal All
Date	Туре	Ref No.	Sold To	Total	Amt Due	Payment	
9/12/13	Invoice	14-1	Chavez, Armando	224.6	8 224.68	0.00	
9/20/13	Invoice	104-1	Chaves, Armando	119.0	8 119.08	0.00	
9/20/13	Invoice	105-1	Chavez, Armando	/5./	8 /5./8	/5./8	
10/02/13	Invoice	124.1	Baylor Medical Center	19.4	9 19.49	0.00	
10/02/13	Invoice	124-1	Estes, Gien	33.0	5 33.56	0.00	
1/02/13	Invoice	120-1	Chavez, Armando	67.1	2 67.12	0.00	
1/0//14	Invoice	107.1	Chavez, Armando	108.2	0 108.20	0.00	
4/2//14	Invoice	1471	Baylor Medical Center	57.1	2 67.12	0.00	
3/16/14	Invoice	147-1	Baylor Medical Center	100.0	100.00	0.00	
				Totals	815.08	75.78	
Item 🔻	•		Search By		2		
					Unapplied Amount	0.00	📝 Print receipt



Recording Customer Payments on Account

- Workshop
 - Select Activities > Receive Payments or Press Ctrl + Y
 - Enter "Baylor Medical Center" as the customer
 - Enter a Check payment in the amount of \$419.54
 - Enter the Ref Number as the Check No. 219471
 - How many invoices does that payment get applied to? _____
 - Select Ok to save the payment



Using Contracts for Customers, Store Sales, and Group Sales

Presentation

- Contracts contain lists of items with a preset price or discount
- Can be assigned to a customer, the store, or a Group in the WebStore
- Have an "active" date range

Name: Spring Category: SALE Start Date: 10 End Date: 10 1. Items 2. More	Sale	Contract Purch Quantity: Amount: Retail: Cost:	ases 0.00 0.00 0.00	<u>D</u> K Cancel
Scan/Amt:	F7-Lookup (Alt + F7 Search)	🔽 Always <u>u</u> se	e the contract price	
Discount	Item	Sold	Pricing	
Item	CH-190 (All Colors and Sizes)		20% off retail	
Item	DKM-810106 (All Colors and Sizes)		10% off retail	
Item	LAN-7502 (All Colors and Sizes)		20% off retail	
Item	LAN-8320 (All Colors and Sizes)		25% off retail	
Item	PCH-0248W (All Colors and Sizes)		20% off retail	
Item 🔻	Note <u>s</u> —	eview contract note	s at the point of sale	_
			*	Show delete



THEUNIFORM SOLUTION

Using Contracts

Workshop

- Select Lists > Contracts and Edit the "Fall Sale" Contract
- Add a new item by pressing "F7" and enter the item WKS (Vendor) and 6016A (Style). Leave the color and size blank. Set the discount to 20% off Retail
- Save the Contract
- Select Setup > Store > Update Store Setting > Pricing Tab. Set "Fall Sale" in the Contract field.
- Start a new Sale (Ctrl + I). Notice next to the item button it says "Store Contract Active"
- Enter 113340 in the Scan/Qty field
- What is the price of the item? _____



Clocking In/Out

Presentation

The Time Clock tracks employee time

- Clock In/Out records "Work" time
- Time Clock List can record "Holiday", "Sick", "Vacation" and "Personal" time that can be set to "Unpaid" if desired
- Time Clock Summary and Detail Reports
 - Calculate Overtime for you

09/17/14		Ui	niforms USA				Page 1
9:57 AM		Time	Clock D	Detail			
	September 14	- 20, 2014 - All S	tores - Overt	ime > 40 Hours	Per Week		
		Date	•	Time	e	He	ours
Employee	Туре	In	Out	In	Out	Unpaid	Paid
Clerk	Work	9/14/14	9/14/14	9:48 AM	5:00 PM		7.20
Clerk	Sick	9/15/14	9/15/14				8.00
Clerk	Vacation	9/17/14	9/17/14				8.00
Clerk	Holiday	9/17/14	9/18/14				16.00
Clerk	Personal	9/18/14	9/19/14				16.00
Total Hours forClerk					Total		55.20
					Regular		40.00
					Overtime		15.20
Grand Total Hours					Total Hours		55.20
					Regular		40.00
					Overtime		15.20





🥸 Clock Ir	/Out	- • ×
Please ente	er your username and password	
Employee:	Clerk 🗨	
Password:		Cancel
Action:	Clock In @ 9:50:12 AM	

Clocking In/Out

Workshop

- Task 1
 - Select Activities > Clock In/Out or Press Ctrl + K
 - Set the user to "Clerk" and enter the Password "OK"
 - What "Action" is displayed? ______
 - Select the OK button

Task 2

- Select Activities > Clock In/Out or Press Ctrl + K
- Set the user to "Clerk" and enter the Password "OK"
- What "Action" is displayed? ______

• Task 3

• Select Lists > Time Clock to view the entry you just made





Using Email

Presentation

- The Uniform Solution
 - Email Invoices, Account Statements, and Reports
- The WebStore

Mastering the Basics

• Used to create new accounts, receive order notification, and more..

General 2. Inventory 3. More 4. Cor Options	untry <u>5</u> . Professi	onal		<u>0</u> K		
Enable multiple retail pricing levels	3			Cancel	j	
Email Enable outgoing email features	Use SSL for S	Gecure Email (r	ormally off)			
Outgoing <u>M</u> ail Server (SMTP) :	smtp.gmail.com					
<u>U</u> ser Name * : Pass <u>w</u> ord * :	david.johnson testemail	Printer an <u>1</u> . General	d Output Select	tion - Special Ore	lers	
*Some SMTP servers do not require settings blank if this is the case (or if ;	a user name or you cannot get	Pri <u>n</u> ter: <u>T</u> ype: Mo <u>d</u> el:	HP LaserJet 405 Receipt Epson	0 Series	 <td>Can</td>	Can
		Note: To in assig	stall additional printe nments, use the Wir	ers or to change port indows Control Panel.		Pr
		Print on:	Receipt Paper (C	Continuous) e printing <u>C</u> opies: [e printing from Sales B	1 🐼	PI

Creating Ema	il (Invoice) for Customer (Blake Burger)		
<u>1</u> . General <u>2</u> . Mo	ne		
Erom:	David Johnson		Send
<u>Τ</u> ο:	blake@verizon.net		Cancel
S <u>u</u> bject: Attachments:	(1) Special Order #101-1 - October 22, 2009.pdf (attachment_1_0001.pdf)		Save as <u>D</u> raft
Forma <u>t</u> Settings Font: Arial	▼ 10 ▼ Regular ▼ Black ▼ Background: White		
Your order i	s attached. Please call with any questions.		
		~	
David Johns Uniforms US	on SA		
			Save as Default



Physical Inventory and QuickLoad

Presentation

- Use QuickLoad to print tags and add stock
- Use Physical Inventory to Take a Physical Inventory
 - Clear any existing count
 - Scan the store or a vendor
 - Run Physical Inventory Comparison/Exception reports
 - What is a "Cycle Count"? It only updates what you enter.

🖬 QuickLoad - Add Scans	to Inventory (Scanning Active)	- • ×
1. Scanning 2. Options		
iiii. S <u>c</u> an:	F7-Lookup	<u>S</u> tart
Barcode	Item	Stop
4145	BCO-0619-10-32	
4190	BCO-51124-108-L	
6541	🔺 **Invalid Scan**	
3265		
Total Sr	cans: 3 Current Scans:	3
Item Printing	price tags every 20 scans	-





Software Updates and Support Resources

Update Your Software Monthly

- Maintenance > Updates > Check for Program Updates
- X-Charge Merchant Portal
 - Access X-Charge transaction history
 - Help > X-Charge Merchant Portal
- On-Line Help in The Uniform Solution
 - Help > Contents
 - Help > Training Courses
 - F1 from any active screen

On-Line Documentation

- <u>www.theuniformsolution.com</u>
- Support > Documentation
 - Getting Started Guide
 - Multi–Store Guide
 - WebStore Guide

• Keyboard Shortcut Guide 10/05/2014 Diamond Data Systems, Inc. Mastering the Basics

	Login Please enter your User ID and Password to continue.
	User ID:
P The Uniform Solution	Password:
Hide Back Print Options	
Lonrense Index Search	Vinativew Overview Each year we make The Uniform Solution an even better product by adding new features that you will find useful and empowering. To see what was added during each major release, just select one of the links below. What's New for 2009/2011/2012 Summary 2019/2011/2012 Detailed Feature Listing What's New for 2009 Summary 2008 Detailed Feature Listing What's New for 2007 Summary 2008 Detailed Feature Listing What's New for 2007 Summary 2007 Detailed Feature Listing What's New for 2007 Summary 2008 Detailed Feature Listing What's New for 2007 Summary 2007 Detailed Feature Listing What's New for 2007 Summary 2007 Detailed Feature Listing What's New for 2007 Summary 2007 Detailed Feature Listing

MERCHANTPOPTAL

The Uniform Solution

Document Name	Date Updated	File
QuickStart Guide The QuickStart Guide is essential for new users. It provides a detailed review of concepts and program navigation plus a "Quick Tour" of the major store operations.	June 2013	The Uniform Solution QuickStart .pdf
Multi-Store Guide The Multi-Store Guide is essential for companies with multiple stores. It explains the concepts and functionality for multi-store operations and the data synchronization process.	June 2013	The Uniform Solution Multi- Store.pdf
WebStore Guide The WebStore Guide provides an in-depth review of concepts, setup, and deployment of the seamlessly integrated WebStore component of The Uniform Solution.	June 2013	The Uniform Solution WebStore.pdf
Keyboard Shortcut Guide The Keyboard Shortcut Guide provides a quick reference of different keyboard shortcuts designed to enhance speed when using The Uniform Solution.	June 2013	Keyboard Shortcut Guide.pdf



Conclusion

- I hope you have learned quite a bit today
- Maybe you have "got it" more than you did when we started (like Dudley seems to in this next clip)
- The Wild Hogs conclusion as they reach the West Coast



Tips and Tricks Appendix

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





Keyboard Navigation

- The Mouse is convenient
- The Keyboard is fast
- List Options

Кеу	Action		
Ctrl + L	Select the List box		
Ctrl + Page Up	Go to the top of the List		
Ctrl + Page Down	Go to the bottom of the List		
Insert	Add a record the List		
Enter	Change the highlighted record		
Delete	Delete the highlighted record		
Alt+ Down	Display the List Popup Menu		
Alt+ #	Select the Tab with the #		

10/05/2014 Diamond Data Systems, Inc. Mastering the Basics

THEUNIFORM SOLUTION

Procedure Hot Keys

ltem	Hot Key
Gift Card Balance	Ctrl + G
Create Invoices	Ctrl + I
Inventory List	Ctrl + N
Purchase Order List	Ctrl + P
Receiving List	Ctrl + R
Customer Search	Ctrl + A
Inventory Search	Ctrl + F
Open Special Orders	Ctrl + O
Clock In/Out	Ctrl + K
Log Off (Hint File Menu)	Ctrl + F10
On-Line Help	F1



Date Entry Fields

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

<u>D</u>ate: 10/14/12 🧰

Кеу	Resulting Date	Purpose
М	10/01/12	Date set to first day of month
Н	10/31/12	Date set to last day of month
Т	10/14/12	Date set to today
Numeric Keypad+	10/15/12	Date incremented 1 day
Numeric Keypad -	10/14/12	
Y	1/1/12	Date set to first day and moth of year
R	12/31/12	Date set to last day and month of year
Arrow Down	Pops Calendar	Calendar is popped up



Sales Entry Tips

🗄 Adding Sale (New) Store# 2		
Iype: Sale Clerk: Owner Customer: Cash Sale 1. Items 2. More II. Items 2. More III. Scan/Oty:	-Lookup (Alt + F7 Search)	Next Cancel
T Item Qty P MISC (MISCELLANEOUS) 1	Action/Key	Result
P LABCOAT (BCO-0619-10-32) 1 P LABCOAT (BCO-0619-10-34) 1	Ctrl+ Up	Move an item on a transaction up
	Ctrl+ Down	Move an item on a transaction down
Qty Sub Total Tax 8.25% 3 70.00 5.78	Ctrl+ Arrow Right	Copy the billing address to the shipping address
	F6	View or enter item notes
	F7	Lookup an Item
	Alt+ F7	Use Inventory Search to find an item or items on a Contract





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

🔲 Inventory Search		_ 🗆 🔀
Inventory Search Quick Search / Price Lookup Barcode: Search Criteria I. General 2. More 3. Pricing 4. Contract Yendor: Color: Color:	Search Besults Tems Found Tems Found Tems Found Tems Found Tems Found Tems Found Tems 1031 (PANT) Tems 1031 (PANT) Tems 2074 (PAN	F4-Go To Expand All Contract All
Show stock levels (increases search time)		
Only list items with stock		
Clear Q F2-Search		Show image



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

🐮 Customer Search				_ 🗆 🔀
1. Search 2. Quick Add				
Search	Options			_
Last Name: Johnson	🤍 🧧 Search <u>B</u> y:	Name	~	_
<u>F</u> irst Name:	Show pa	rtial <u>m</u> atches		
Results				
	Lity Plano	Acct No.	Phone (21 / 1922, 2292	
Johnson II, Paul	Bichardson	62-1	(214)923-3283	
Johnson, Big E		78-1	(2.1.)020 0200	
Johnson, Cade	Parker	71-1	(972)235-2800	
Johnson, Charles		79-1		
Johnson, Christopher		75-1		
Johnson, David	Parker	66-1	(972)578-8048	
Johnson, Erica	Plano	72-1	(214)923-3283	~
	😒 F2-New	🥂 🕺 F3	-Edit	Clear



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

	PANT 2074 bv Cherokee Color: Aloe (ALOB) Size: L Item # 000100003	Modif Discount: Item: Item Total:	y Remove \$2.00 1 × \$18.00 \$18.00
Continue Sho	pping Checkout	Total:	\$18.00

🗄 Previewing Work Order Entry					
Work Order Form:	Embroidery - Std	×	Close		
Details and Specifications					
*****	*** Standard Embroidery *********				
	🔜 <u>R</u> ush Order				
<u>R</u> ush Due Date:					
Location:	Right Chest	~			
<u>F</u> ont:	Block	~			
<u>T</u> hread Color:	Navy				
<u>T</u> ext:	Dr. David Johnson				
Additional Comments:		<u> </u>			
<u>S</u> ignature:					



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)





Activating Connected Features for a Vendor

 For each "Connected" Vendor on the Vendor List, select the company in the Connected Options
 Company drop list

🧷 Changing Vendor (Barco Uniforms)	- • •
1. Company 2. Notes 3. Purchasing 4. Pricing 5. Catalog 6. WebStore General PO Defaults Connected Options	
Company: Barco Uniforms	Cancel
 Download and Show Product Images* Enable Direct EDI* Download Advance Ship Notices* Check Vendor Stock Status* 	
	Vendor Provided
	Barco
*Features that are disabled are not offered by the company	
	🔲 Set inactive



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

1. General 2. More Sige: 32 Sort: 320 Settings for color 10 UPC: 014302774248 Alt No: Vendor No: Barcode: 4,145 Vendor Provided Vendor No: UPC. 1. General 2. More Settings for color 10 UPC: 014302774248 Alt No: Vendor No: Barcode: 4,145 Vendor No: UPC. 1. General 2. More Vendor No: UPC: 014302774248 Alt No: Vendor No: UPC: 1. General 2. More Vendor No: UPC: 1. General 2. More Vendor No: UPC: 014302774248 Alt No: Vendor No: UPC: 1. General 2. More UPC:



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

Vei	ndor: BCI	D					
ΤI	Code	Company	Inv	Category	Updated	~	✓ <u>I</u> ag-UnT
	BCO	Barco Of California		Medical	10/05/10		
	BMW	Best Medical Wear		Medical	7/19/10	west	T ag Uptions
	CHE	Cherokee Uniforms		Medical	10/07/10		0.0
	CR	Classroom By Cherokee		Other	10/07/10		F10-Upda
	DK	Williamson-Dickies		Industrial	7/26/10		
	DKM	Dickies Medical Uniforms		Medical	10/07/10		F12-Show Ima
	HEH	Healing Hands		Medical	10/05/10		
	HS	Horace Small		Blue Goods	3/15/10		
	KOI	KOI		Medical	9/09/10		(m
	LAN	Landau Uniforms		Medical	8/19/10		Standar
	LAR	Los Angeles Rose		Medical	9/22/10		
	LFT	Loft		Medical	9/09/10		
	LMC	Littmann By Cherokee		Medical	10/07/10		
	MDF	MDF Instruments Direct, Inc.		Medical	8/27/10		
	MDL	Medical Instruments By Landau		Medical	5/05/10		
	NBM	New Balance		Medical	7/22/10		
	NMS	Sofft Shoe (Nursemates)		Medical	10/07/10		
	NUD	Nu Dimension Healthcare		Medical	8/03/10		
	PCH	Peaches Uniforms		Medical	10/01/10		
	PGF	Peppergate Footwear Inc		Other	5/14/10		
	PRE	Prestige Medical		Medical	10/05/10		
	RK	Red Kap		Industrial	3/15/10		
	SPT	Spectrum Uniforms		Medical	12/10/09		

Catalog	; Utility	
Catalog L	Itility Processing Options	
-	You have selected to copy tagged vendors or items from the Catalog List to your	
i	Inventory List. This utility can also be used to update the items in your Inventory List	Cancel
V	that have changed in the Catalog List. Please select the options for proceeding:	
urrent S	elections	
	Preview new catalog items before copying them to inventory	
	Check inventory for items that need to be updated (i.e. pricing, discontinued, etc)	
	Update Options to Skip (leave unchecked in most circumstances)	
	Do not check for items with a price change	
	Do not check for discontinued (or re-activated) items	
	Do not check for items not <u>m</u> atching the catalog	
	Do not check for updated inventory standards	



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

🗇 Advance Ship Notices	_ 🗆 🛛
Show: Available Yer: 1 (a) Image: New ASN's (7) Image: New ASN's (7) Image: New ASN's (7) Image: New ASN's (7) Image: New ASN's (7)	Expand All
	Remove
Details	

🦻 Receive Cartons from Advance Ship Notices 📃 🗆 🔀						
Cartons Received			✓ Sho <u>w</u> cartons I - Cartons Available -	for all stores		
Carton No. Qty		Add Bernove	Shipped	Carton No.	Qty	Cancel
Add each item in a carton to the tag queue (sorted by carton)						



The Scan/Qty Field

Quick Entry Actions and Results

Scan/Qty	Result
*10.00 + Enter	Misc item added to transaction (i.e. * + number)
100004 + Enter	Barcode entered and item added to transaction
S + Enter	Item set to "Special Order"
2 + Enter	Item quantity set to 2 (i.e. numeric value betwee 1 and 99)
Q125 + Enter	Item quantity set to 125 (ie. a value greater than 100)
.25 + Enter	Item discount set to 25% off retail (i.e. number 0 to 1)
10 + Enter	Item discounted an additional 10% off the current price
18.00 + Enter	Item price set to \$18.00 (number with decimal)
T + Enter	Item set to non-taxable
578-7492 + Enter	Customer lookup by phone number
Johnson + Enter	Customer lookup by last name

