



# The Uniform Solution

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



# Welcome to Session I



## Today's Objective

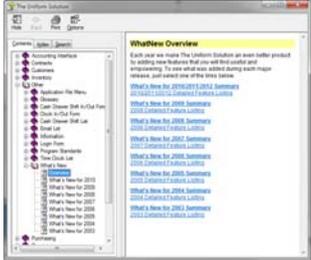
- ▶ Review the support and training resources for The Uniform Solution so you are informed and empowered
- ▶ Review The Uniform Solution's features so you feel comfortable performing routine tasks
- ▶ Provide some tips and tricks so you are faster and more efficient
- ▶ Provide a review of the Connected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

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## 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

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## 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](mailto:support@theuniformsolution.com)
- ▶ **Training and Support**
  - Desktop Sharing with a Support Representative
  - Help > Remote Support
- ▶ **X-Charge Merchant Portal**
  - Help > X-Charge Merchant Portal



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## 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

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## 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

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## 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)



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## 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

Item	Item No.	Qty	Price	Total
107218100-00	4147	1	20.00	20.00
107218100-00	1541	6	15.00	90.00
Total Qty				7
Total				110.00

## 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, 2005 through September 24, 2012

Item	Amount
<b>Payments Received</b>	
Cash	1,195.76
Credit Card	989.22
Gift Certificate	50.00
Payroll Deduct	419.54
Store Charge/Credit	83.85
<b>Cash Flow</b>	
Cash and Check Received	1,195.76
Credit and Debit Cards	
Credit Card	960.97
Visa/Mastercard	28.29
Total	989.22
Total Cash and Credit	2,184.98
Accounts Receivable	
Charges on Account	503.39
Deposits Received	
Special Orders Layaways	1,177.24
Gift Certificates Issued	400.00
Total	1,577.24
Deposit Credits	
Gift Certificate Payment	50.00
Total	50.00
Deposit Liability	1,527.24

## 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

Key	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 #

## Procedure Hot Keys



Item	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

Date:

Key	Resulting Date	Purpose
M	10/01/12	Date set to first day of month
H	10/31/12	Date set to last day of month
T	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



Action/Key	Result
Ctrl+ Up	Move an item on a transaction up
Ctrl+ Down	Move an item on a transaction down
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 <b>items on a Contract</b>



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## 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 between 1 and 99)
Q125 + Enter	Item quantity set to 125 (i.e. 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

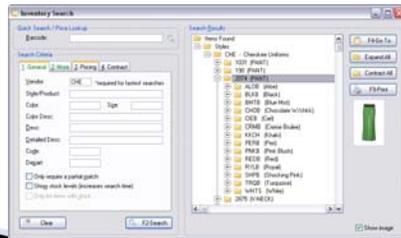
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## Inventory Search



- ▶ 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



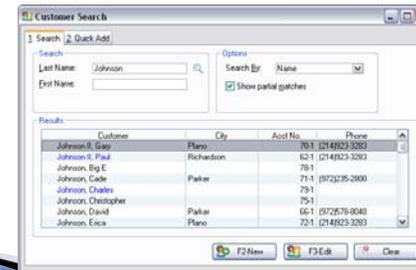
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## Customer Search



- ▶ 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



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## 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



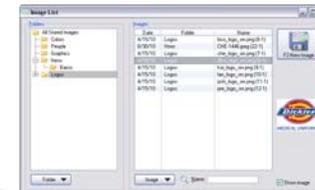
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## Working with Images



- ▶ 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)



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## 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

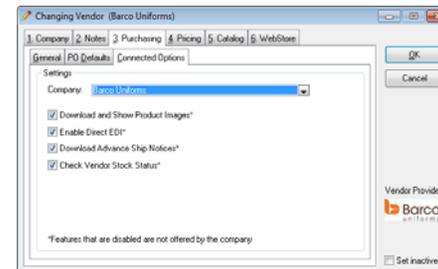
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## Activating Connected Features for a Vendor



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



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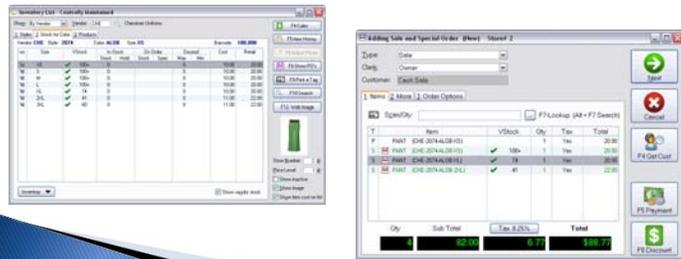
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## Real-Time Vendor Stock Reporting



- Automatically displays the current stock level reported by the Vendor's system
- Available in Sales Entry, Purchase Order Entry, and the Inventory List

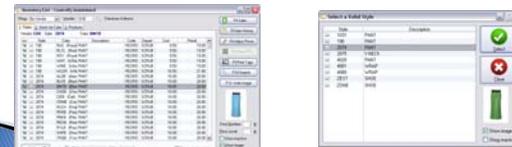


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## Vendor Provided Product Images



- 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

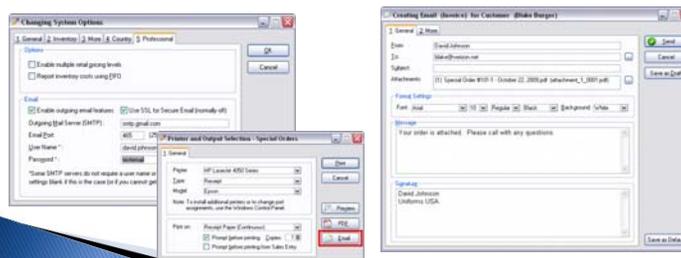


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## Email



- 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



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## Questions



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