

# **Multi-Store Guide**

## **The Uniform Solution**

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Diamond Data Systems  
3209 Talon Drive  
Richardson, Texas 75082  
(972) 235-2800

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# 1. Introduction

## WELCOME!

Congratulations. If you are reading this manual, then you already have a successful multi-store operation or you are on your way to bringing one online. With **The Uniform Solution**, you can be assured that your multi-store operation will be as successful as you can possibly make it. **The Uniform Solution** brings unprecedented simplicity and power to the independent retailer with multiple locations. Multiple physical locations are easy to set up and the program will enable you to easily control your entire multi-store operation from one location if you wish.

### ***What you'll find in this book.***

This manual contains the information necessary to set up and configure **The Uniform Solution** in a multi-store environment. **The Uniform Solution** offers two program versions, Cloud or Desktop. With **The Uniform Solution Cloud**, there is no need to use the batching process because all store locations are already sharing their data in real time while connected to the Cloud. Sales that occur at remote stores appear in the system as they are completed. And updating your vendor catalogs is instantly applied to all locations on the Cloud. **The Uniform Solution Cloud** is the easiest way to manage multiple uniform retail locations. This guide also contains an overview of the special multi-store features and the daily activities required for the Desktop version of **The Uniform Solution**; including conducting the Batch operation. For general information about **The Uniform Solution** and its normal operations, you should refer to the QuickStart Guide.

### ***Where to find more information.***

The best place to find answers to questions regarding **The Uniform Solution** is right in the program itself. The online Help system is specifically designed to be comprehensive and available at your fingertips. Whenever you would like help on a particular section or screen, hit the F1 key to launch the internal Help system. For training, go to the **Help > Training Courses** menu item, find the course you would like to watch, select **Play**, and a tutorial will walk you through the topic you selected. You can also find more information on our website at [www.theuniformsolution.com/support](http://www.theuniformsolution.com/support).

## PRODUCT INFORMATION

### ***Multi-Store Features***

**The Uniform Solution** offers many features that continue to make it the best and easiest to use multi-store inventory control package for Windows.

- Customers, contracts, inventory quantities, purchase orders, receiving/transfers lists, sales, special orders, layaways, and quotes can be entered and maintained at each physical location.
- Any information created by any store can be shared with any other physical location.
- Purchase orders can be created for any store at any store. This feature enables a centralized purchase ordering capability or the option to create purchase orders at each physical location. Purchase orders created for other stores can be drop shipped and received at the remote location.
- Merchandise can be received from a purchase order at any location for any location.
- Transfers can be created for outgoing and incoming merchandise.
- A single location is responsible for maintaining items that remain consistent through all physical locations - making inventory set up and other maintenance requirements easy and very productive.
- Each individual store can have its own retail pricing level (5 available).
- Reports can be run for one store or all stores to easily view performance or the needs of the entire operation.
- Data between physical locations is consolidated and distributed during a daily polling operation.

- Only information changed during a batch period is sent during the polling operation - dramatically minimizing the time it takes for the process to complete.
- The polling operation can be conducted by modem transfer or a network connection.
- A batch log records all polling activities.

## DOCUMENTATION CONVENTIONS

### *Typeface Conventions*

*Italics* Indicates what to type at the keyboard, such as *Enter your store name here.*

SMALL CAPS Indicates keystrokes to enter at the keyboard such as ENTER or F1 and mouse operations such as RIGHT-CLICK.

**Boldface** Indicates commands or options from a menu. Using arrows indicates a submenu. For example, selecting the Account Statements Report would be written as **Reports > Customers > Account Statements.**

### *Keyboard Conventions*

F1 Indicates a single keystroke. In this case, press and release the F1 key.

ALT+X  
OR  
ALT+X, Y Indicates a combination of keystrokes. In this case, hold down the ALT key and press the X key, then release both keys. In the second example, hold down the ALT key, then press and release the X key, then press and release the Y key.

## 2. Multi-Location Overview

### INTRODUCTION

Since the cost of maintaining a Citrix or Windows Terminal Server can be cost prohibitive for some companies, **The Uniform Solution** offers two program versions, Cloud or Desktop. The Desktop version can consolidate and distribute data between locations once a day in a nightly polling operation that uses an inexpensive FTP site. The polling operation runs each evening and only sends data that is new or has been changed by a location. At the start of the day, each location will have information that was accurate at the close of the previous day for the other locations. The Cloud version supports a live connection from each location to the same cloud server; this allows all locations to see orders, and inventory changes as they happen in other locations.

Much of this guide will discuss the Desktop version, as mentioned previously, the Cloud version does not require the setup for Batching.

You can find the information describing the Cloud version in blue text boxes like this one. Be conscious that the Cloud version requires less steps because the batching process is not needed with the Cloud version, and all stores are setup as Local locations (excluding Mobile stores).

### TERMINOLOGY

#### *The Polling Location*

The polling location is the physical location that is usually the centerpiece of a multiple location operation. The polling location is usually either the largest store in the retail operation, a warehouse for ordering and distributing merchandise, or the corporate headquarters. It is the location determined to be the most central or the most strategic to the entire retail operation, and it is the location where operations only allowed by one location are best performed. The polling location is the location responsible for contacting each remote location in the nightly polling operation.

#### *Remote Locations (Locations that will be polled)*

Remote locations are locations physically located away from the polling location. They are contacted nightly by the polling location and send newly added or changed information.

#### *The Batch Process*

The Batch Process refers to the nightly polling operation conducted to consolidate and distribute data between the polling location and the remote locations. The polling operation is conducted by using a phone line and modem to connect the polling location with a remote location. Since the data being sent between locations contains only new or changed information, the polling operation is very fast.

### DUTIES OF THE POLLING LOCATION

Some information in **The Uniform Solution** can only be maintained (added or updated) at the polling location. New inventory items, the user list, customer standards, and inventory standards, are a few examples of information maintained at the polling location. Having this information maintained at the polling location simplifies the multi-store operation and provides a form of centralized control over critical items.

### A DETAILED EXPLANATION OF THE POLLING OPERATION

The polling operation in **The Uniform Solution** allows each remote location to share as much or as little data with the polling location as you like. It also allows you to choose what data from what locations you would like to see.

## ***Data Distribution***

The polling location is the centerpiece of the data collection and distribution process. The polling location is responsible for contacting remote locations to gather data then to give it back. The polling location simply collects any information provided by a remote location.

## ***Remote Locations***

Remote locations are responsible for defining what information to send to the polling location and what information to receive back from the polling location.

## ***Local and Remote Stores***

Each store defined in **The Uniform Solution** is assigned a unique store number. This store number is referenced at both the polling and remote locations. A store referenced in the program is either a "Local" store or a "Remote" store depending on the current physical location where the program is operating.

A "Local" store is a store that operates at the current physical location. A "Remote" store is a store that is at another physical location. Both the polling location and a remote location will have "Local" and "Remote" stores. However, the same store number can only be a "Local" store at only one location. New invoices, purchase orders, receiving lists, customers, etc., can only be created for "Local" stores.

## ***Batch Date***

Each file that can be included in the data distribution process keeps track of the last date any record was updated. When the Batch process is executed, only information that has changed during the Batch period is sent to the polling location or to the remote location requesting information from other locations.

## ***No Deletes***

Every record used in the distribution process has a unique auto-numbered value that never changes. This unique value makes it possible for the polling process to easily handle record updates and deletions. Deleting a record with a unique value in the program does not actually delete the record, it simply updates a status field to indicate that the record is deleted. When the status of a record is marked as deleted, any field in the record structure that is used for other unique keys are blanked of their values - allowing the same record to be added in the future if needed.

Items deleted from a file are automatically removed 60 days after the deletion date during the month-end process. Therefore, it is necessary to run the polling operation at least every 30 days to keep the information accurate at all locations.

## ***Ownership***

Information specific to a store can only be entered and maintained (updated) when the store is "Local" to the physical location. This means that if Store 2 created an invoice, only Store 2 can modify it, or deliver items from it. That is, until ownership is transferred to another store at another location. During the polling operation, ownership of a special order or invoice can be transferred to another store. Essentially, the newly assigned store has the ability to perform the same operations with which only the "Local" store usually has available.

## ***Log Files***

Each physical location that has a "Local" store is the absolute keeper of the data created by the store. Other locations may be allowed to perform activities that affect a "Remote" store's data, but records at a location where a store is "Local" store are only updated using log files. Log Files are used as a means of controlling record updates. A major principal behind the Batch process is that it is not possible to directly update records for a store "Remote" to the current location. Each time an update to a remote store's information occurs, the actual record is updated on the local system, and a log of the update is recorded. The log of the record update is sent to the location where the record (i.e. the store) is "Local", and the transaction log is processed which actually performs the necessary updates to the "Local" records.



## Activities

Many of the activities in a multi-location environment are limited to being performed by either the polling location, or the location that created a particular item. The table below provides a listing of the different activities and their limitations. The item, "For a Local Store" can also mean where the owner is "Local".

Activity	At the Polling Location	For a Local Store	For Any Store
Create and Modify Inventory Items (Styles and Products)	X		
Create and Modify Inventory and Customer Standards	X		
Create and Modify Alternate Sales Taxes and Tax Rules, Payment Methods, Shipping Options, Users, and WebStore Configurations and Content Pages	X		
Create and Modify Invoices (Sales, Special Orders, Layaways, Gift Certificates, and Quotes)		X	
Create and Modify Contracts		X	
Create and Modify Payments for Invoices		X	
Take a Physical Inventory		X	
Update Accounts Payable		X	
Create and Modify Purchase Orders		X	X
Create and Modify Receiving and Transfer Lists		X	X
Create and Modify Customers			X
Update Inventory Quantities and Max/Min values			X

All features and activities are available at all locations with the Cloud version. You are able to limit access based on the user login. This way you can prevent a clerk from modifying styles or inventory counts in any (or all) of your retail locations. You the owner can have the user permission to update and modify styles and inventory counts at all locations. If you work in one store today and in another location tomorrow, your access and features will be the exact same in each location based on your user account.

### 3. Getting Started

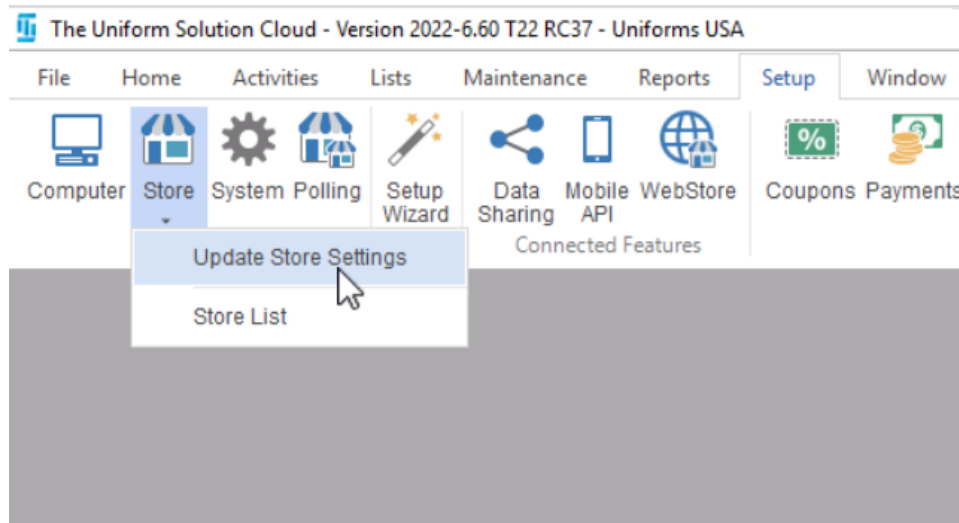
#### SETTING UP THE SOFTWARE AT EACH LOCATION

The multi-store version of **The Uniform Solution** runs on an independently maintained set of data at each physical location. In order for the polling process to work properly, each physical location must be carefully configured. The process is not difficult, but it must be accurately defined for proper operation.

Note: Once you have properly set up each physical location, you won't have to do it again, and the settings should not be modified unless you talk with technical support.

#### **Program Installation**

For specific information about program installation, please refer to the QuickStart Guide. After installing and registering the software, it is imperative that you immediately perform the following setup procedures.



#### **Define All Stores - Both Local and Remote**

After installing the software, the first step is to define each store that is local to the physical location, and each store that has information that this location would like to view. You must set up at least two stores (one local and one remote). In most cases, if you have a total of 4 stores (both remote and local), you would setup 4 stores.

To add new stores, select **Setup > Store > Add a New Store**. While adding a new store, you will have the option set the store number for the store you are adding. However, once a store's information has been saved, the only way to change a store number is to delete the store, then add it back. Setting up the first store is important because each subsequent store, which is added, uses the settings from the first store.

Once you have the polling location set up with all stores, the best way to set up a remote location is to take a backup of the polling location data to the remote location where it will be restored. Once the backup is restored, the local and remote stores must be updated and the new software license for the remote location must be registered.

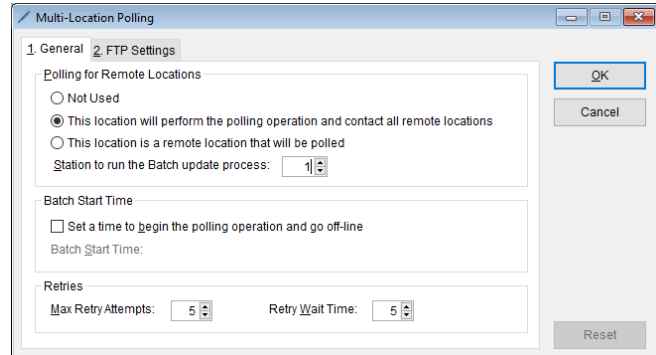
With the Cloud version of **The Uniform Solution**, you just need to call our Support team to add a store license and get assistance setting up your workstations at the new location. Once you setup the workstations and the new store profile you are ready to start scanning in your inventory counts. There is no need to mess with data backups or Polling settings on **The Uniform Solution Cloud**.

## Define the Location Type - The Polling Location or a Location to be Polled

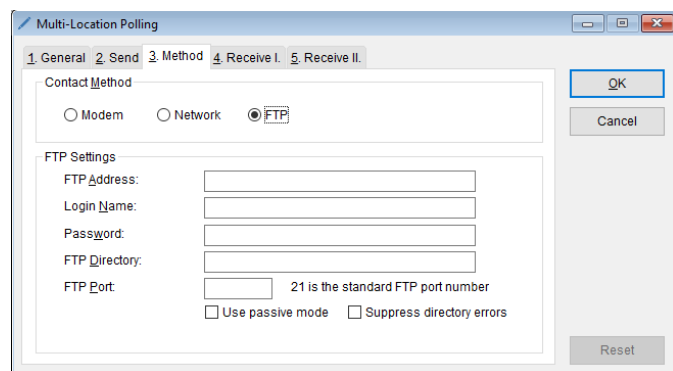
There are two types of potential locations in a multi-location environment: the polling location, and a location that will be polled. There is only one polling location, but there may be many locations that will be polled.

To set the type of location, select **Setup > Multi-Location Polling**. Once you have set the location type, you need to set the available options. If the location is the polling location, set the station number that will perform the actual polling. The other options may be left at their defaults.

If the location will be polled, there are a number of options that can be set, but most items will be left at their default settings. The most important item is found on the **Method Tab**. The items on the **Method Tab** define how the location will be contacted. For FTP connections, make sure the login name and password you enter matches the setting for the FTP server. For modem connections, make sure the login name and password match the values for the store at the polling location. Network connections default to a standard transfer directory. For more information about selecting the information to send and receive, press F1 and use the on-line Help system. If you are unsure what to set, leave the settings at their defaults.



The screenshot shows the 'Multi-Location Polling' dialog box with the 'General' tab selected. It features three radio buttons under 'Polling for Remote Locations': 'Not Used', 'This location will perform the polling operation and contact all remote locations' (which is selected), and 'This location is a remote location that will be polled'. Below these is a 'Station to run the Batch update process:' dropdown menu. There are also fields for 'Batch Start Time' with a checkbox 'Set a time to begin the polling operation and go off-line', and 'Retries' with 'Max Retry Attempts:' and 'Retry Wait Time:' spinners.



The screenshot shows the 'Multi-Location Polling' dialog box with the 'Method' tab selected. It has three radio buttons for 'Contact Method': 'Modem', 'Network', and 'FTP' (which is selected). Below this is the 'FTP Settings' section with fields for 'FTP Address:', 'Login Name:', 'Password:', 'FTP Directory:', and 'FTP Port:'. There are also checkboxes for 'Use passive mode' and 'Suppress directory errors'.

## Complete Store Setup

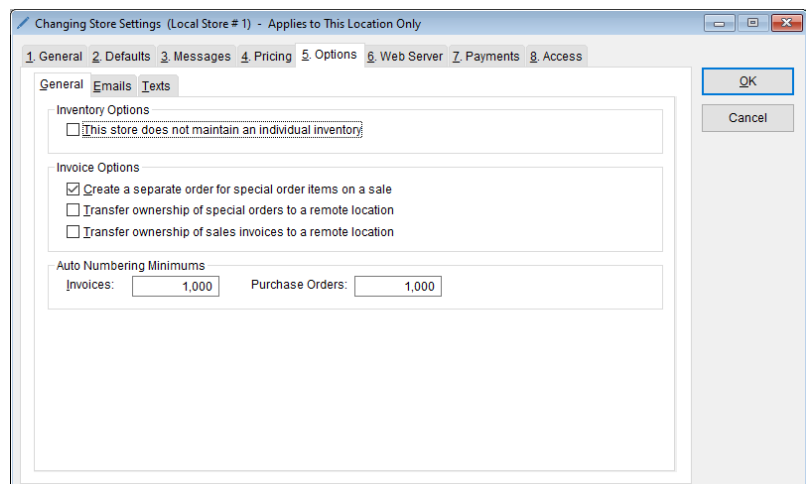
After defining the type of location, you can complete the setup by properly defining each store as either a "Local" or "Remote" store and setting the options on the **Options and Polling Tabs**. A "Local" store is the store that operates at the current physical location. A "Remote" store is a store that is at another physical location.

To complete the store setup process, select **Setup > Stores** and select each store for updating. On the **General Tab**, set the type of store to either "Local" or "Remote".

If you are setting up the polling location, the **Polling Tab** for each remote store contains settings for the contact method. For modem connections, the user name and password must match user name and password defined by store at the remote location. For network connections, the incoming and outgoing directories must be the same "logical" directories defined by the store at the remote location.

The **Options Tab** has settings, which must be carefully set for each store. Press F1 for Help while on this tab for information about each option.

**Note: Purchase orders for special orders for a store should not be created at more than one location. This could potentially**



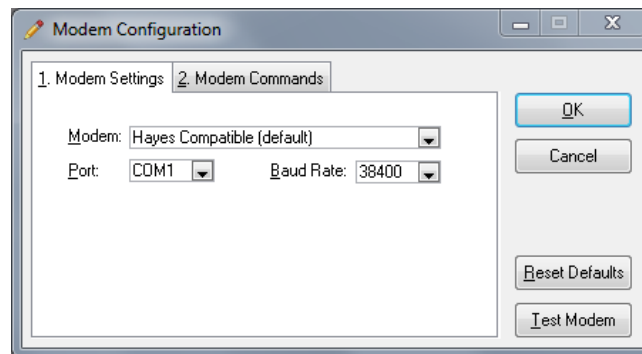
The screenshot shows the 'Changing Store Settings (Local Store # 1) - Applies to This Location Only' dialog box with the 'General' tab selected. It has sections for 'Inventory Options' with a checkbox 'This store does not maintain an individual inventory:', 'Invoice Options' with checkboxes 'Create a separate order for special order items on a sale', 'Transfer ownership of special orders to a remote location', and 'Transfer ownership of sales invoices to a remote location', and 'Auto Numbering Minimums' with spinners for 'Invoices:' and 'Purchase Orders:'.

**cause special orders to be placed onto more than one purchase order. The same is true for ordering inventory below desired stock levels.**

### ***Set Up the Modem***

The polling location always requires the modem to be properly configured for the Batch to start, and a remote location requires the modem to be configured if it will be contacted by modem. To setup the modem for the Batch process, select **Setup > Modem** from the application's main menu.

Always set the Modem to "Hayes Compatible (default), and make sure you set the proper COM port. Do not change the settings on the other tabs unless instructed to do so. If the modem does not appear to function properly, try the "Hayes Compatible (alternate)" option in the modem listing.



## **4. Running the Daily Batch Process**

### **OVERVIEW**

The Batch process is typically run once a day at the end of the day. The whole process is controlled by the polling location, but the remote locations must be ready to be contacted by the polling location.

Remote locations enter the date range that will be transmitted to the polling location. That date range will also be used by the polling location to determine what information is sent back to the remote location. The polling location processes all information sent, and it sends back information that the remote location requested. Batches can be re-run for the same date range if needed.

Once the Batch process is started, the polling location will need to make a total of four file transfers between each remote location for the process to complete. Although the number of transfers may seem excessive, it is required to handle the complexities of the distributed databases. The file transfers are also very fast since only information changed during the batch dates is sent. The first file transfer sends a log of record modifications to the polling location for any store "Remote" to the current location. Once all logs are received by the polling location, they are distributed to each remote location and processed. The third file transfer is used to send records to the polling location that are "Local" to the current location and have been updated within the Batch dates. The fourth file transfer is to a remote location and includes any information requested by a remote location for stores "Remote" to the current location.

When the Batch is complete, a message box will display a message noting the completion.

### ***Batch Start Times***

The Batch process must be started at the end of each day by selecting **Activities > Daily Batch Update Process**. At remote locations, the process will begin after selecting the **Start** button and will wait for contact by the polling location. At the polling location, the process will begin after selecting the **Start** button, but it will wait to start contacting the remote locations if a wait time was specified in the Multi-Location Polling Setup screen. However, once a Batch has been started but not completed, the Batch process will resume immediately after selecting **Restart**.

### ***Failed Connections***

If an attempt to connect to a remote location fails, the Batch Process will move on to the next location requiring contact for the current step (if one exists), or it will wait the specified time to retry the current location. After a certain number of failed contact attempts on a given step, the Batch process will "exclude" the problem location from the process and continue with the other locations. Any location excluded from the current Batch can be re-run for the failed dates the next time the Batch is run.

### ***Resetting the Batch***

Once a Batch is started, the program sets a status flag that helps ensure that the Batch is properly completed at both a remote location and the polling location. Closing the Batch Update Process screen after a Batch has been started will require you to either close the entire program or return to the Batch process screen. In order to be able to use the program for normal activities, the Batch process must complete or manually reset by selecting the **Reset** button on the Batch Update Process screen. Resetting the Batch causes the entire process to start over from the beginning. There is no problem resetting a Batch in process, the Batch will just need to be re-run for the same days the next time the Batch is executed.

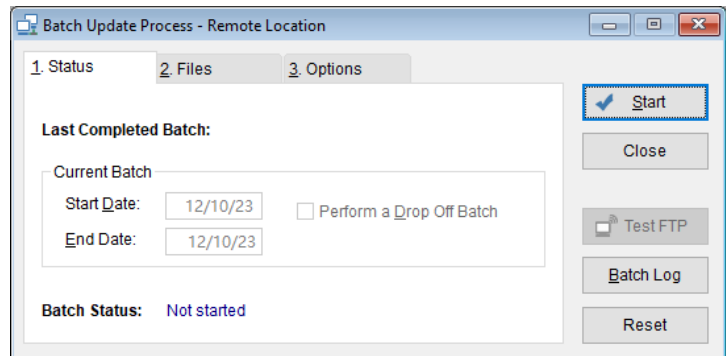
### ***Sending Changed Data or Complete Files***

The Batch process normally only sends information changed during batch dates. This keeps transmission times very small. However, there is an option to send a complete listing for selected files. This option is found on the Files Tab of the Batch Update Process screen.

At a remote location, you can send all customers and inventory quantities for any local store. At the polling location you have the same options, plus the ability to send any information that is maintained by the polling location such as inventory items, users, sales tax rates, etc. If you wish to send all sales information, just run a Batch for the desired time-period. Just keep in mind, the more information you send, the longer the transmission will take. The need to send complete file listings should be very limited. An example of when you would want to send complete file listings from the polling location is for new locations coming on-line and running a Batch for the first time.

## RUNNING THE BATCH AT A REMOTE LOCATION

To start the Batch update process, select **Activities > Daily Batch Update Process** from the application's main menu. The batch start date defaults to the day after the last successful batch date, and the end date defaults to the current date. Normally you will not change these dates. Select **Start** to begin the Batch process.



## RUNNING THE BATCH AT THE POLLING LOCATION

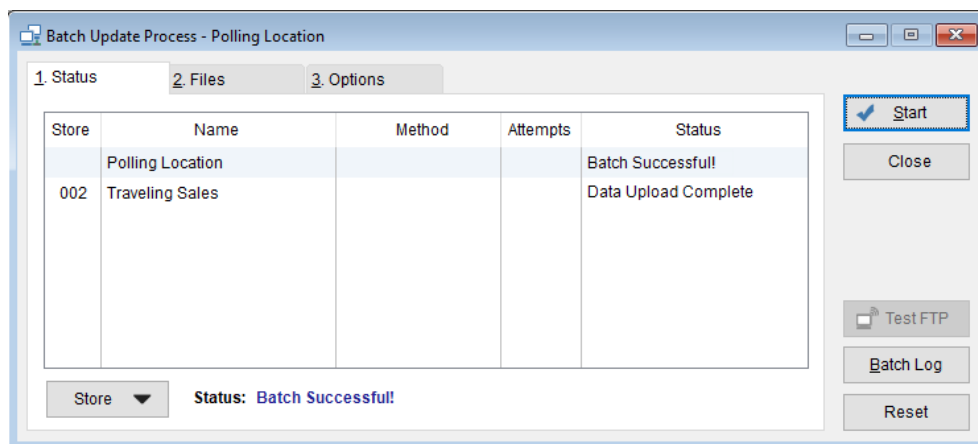
To start the Batch update process, select **Activities > Daily Batch Update Process** from the application's main menu. Select **Start** to begin the Batch process.

### Omitting a Store from the Current Batch

It is possible to exclude one or more stores from the current Batch process. Highlight a store in the list, right-click and select **Exclude**. Stores excluded from the current Batch are not re-activated until you right-click and select **Include**.

### Sending Entire Files to the Remotes

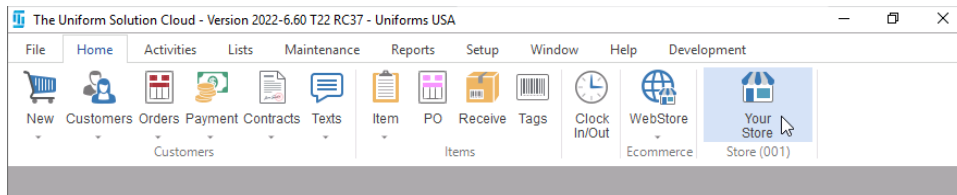
Select the **File Tab**, and check the files you would like to send as complete. If you are bringing a new remote location on-line, you should check all the files so the remote location gets a complete copy of all the data maintained by the central location.



## 5. Special Multi-Store Features

### SETTING THE CURRENT "LOCAL" STORE

If more than one "Local" store is defined at the current location, it is possible to create invoices for any of the "Local" stores. Which store you are creating an invoice for is determined by the store selected in the application's toolbar. To change the store, use the mouse and select the store you want.



Application Toolbar - Local store selection

### TRANSFERRING MERCHANDISE BETWEEN STORES

#### *Creating an Inventory Transfer*

The Enterprise version has the ability to transfer merchandise between any two stores. You can transfer merchandise into a store, out of a store, or out of and into a store - the latter making adjustments to the inventories of both stores. To create an inventory transfer, select **Activities > Receiving/Transfers** or select the **Receive** button from the toolbar. Select the **List** button to add a new list. Set the type of list to a **Transfer**.

To add items to the transfer, simply scan the barcodes of the items you wish to transfer after setting the incoming and outgoing stores. Select **OK** and, depending on the transfer type you selected, the items on the list will be subtracted from inventory, added to inventory, or both.

#### *Transferring Stock for Special Order Items*

It is possible to transfer items from stock at one store to a particular special order line item - provided the special order item requires fulfillment and the special order is viewable at the current location. When creating a new transfer, set list type to **Transfer Out and In**. You can then use the **F2-Add Spec** button to select the special order items needed by the store receiving the transfer. Transfers for special order items move the item out of stock from sending store and into hold at the receiving store.

## **6. Known Issues**

### **OVERVIEW**

From a data management perspective, the Batch Process is a very sophisticated and complex operation which accurately distributes the information that is created and revised between locations. Overall, the polling operation is simple and works exactly as you would expect - distributing changes and updates while receiving the information you have selected. However, if you run an operation that creates Purchase Orders for Special Orders that were not created (or "Owned") at the same physical location, there are certain scenarios that can produce invalid on order quantities for a particular inventory item. Although a discrepancy can occur, the Month-End Process (at the location with an on order discrepancy in their inventory) can be used to verify and update each inventory item's order quantities to match the quantities currently on your Purchase Orders.

### **RECEIVING ITEMS**

Whenever you receive items on a Purchase Order Receipt or Transfer, the items will always be added to your stock. If an item was received for a special order item that was deleted at another location, the quantity will be automatically added to the stock for the store.

### **SPECIAL ORDERS**

All known issues that can arise in the Batch Process result in incorrect on order quantities for stock or special orders. Although the on order quantity for an inventory item could be incorrectly reflected in inventory, it will not cause a special order item requiring ordering or fulfillment to be skipped.

The on order quantities can become incorrect because of the nature of the operations that can be performed on an individual special order item (i.e. Purchase Orders can be created at a location that does not own the Special Order, and Purchase Order Receipts can be created at a location that did not create the Special Order or the Purchase Order). All three items, a Special Order, Purchase Order, and Purchase Order Receipt, affect the on order quantities for an item, and all three could be created or revised at a different location at the same time. In most cases, the Batch Process can handle the revisions and will keep all inventory values accurate.

### **SCENARIOS TO AVOID**

Don't delete or revise a Purchase Order on the same day the Purchase Order is received at a remote location. Try to avoid revising or deleting Purchase Order Receipts with items received for special order items for another location after the Batch has been run. The special order items could have been delivered before the revisions are received in the Batch and would result in negative inventory values for the delivered items. Don't create a Purchase Order Receipt for the same Purchase Order at different locations on the same day.

### **RECOMMENDATIONS**

Don't create Purchase Orders for special order items for a store at more than one location. Avoid creating Purchase Orders for inventory items below reorder points at more than one location. You could create a double order if the Purchase Orders are done on the same day. There is no need to remove an item on a Purchase Order for a Special Order item which was removed from a Special Order at a remote location. The Batch Process will automatically set the item to an item on order for stock. The item on the Purchase Order could be revised once the Batch has performed the revision.