

QuickStart 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

"**The Uniform Solution** has far exceeded my expectations. It is easy to use, and it saves me more than a hundred hours each month ordering inventory and printing tags." - *S. Land, Land Uniforms (Nashville, TN)*

"Where would we be without **The Uniform Solution**? In the river! We love it, we use it, and we can't do without it!" - *A. Seiders, Anchor Uniforms (Austin, TX)*

WELCOME!

Thank you for purchasing **The Uniform Solution**. Your decision to use the industry's premier point-of-sale (POS) and inventory-tracking software package puts you in good company. Uniform retailers around the country are already enjoying the benefits of having a system specifically designed with their unique needs in mind. With **The Uniform Solution** you can easily check out your customers, keep track of inventory, create purchase orders with a single button, generate clear and comprehensive reports, handle complicated special orders, print bar-coded price tags, take physical inventories, track accounts receivable, and much more. We're sure that you will find the ease, convenience, and time you save over any other conventional method of point-of-sale and inventory tracking so impressive, you'll wonder how you ever went without it!

What you'll find in this book.

This manual contains all the information necessary to install **The Uniform Solution**, to customize the settings for your store, to set up your inventory and print price tags for each item, to process your first customer checkout, and to order and receive merchandise from a vendor. While it is designed to take you step-by-step through the process of getting your store online, feel free to skip directly to the sections that you have questions about.

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.

PRODUCT INFORMATION

Features

The latest version of **The Uniform Solution** offers many new features that continue to make it the best and easiest to use software package for uniform stores.

- Audio (*.wav) files using professionally recorded voice prompts are played over the computer's speakers to provide audible confirmation for important actions. Voice responses such as "Invalid Scan" and "Quantity Updated" provide clear communication to the user about the actions they are executing – reducing user errors and improving efficiency of many operations.
- Tool tip help for all fields, buttons, and menu items is available when the mouse is held over a control.
- On-line tutorials can show you how to perform common tasks and provides a comprehensive training process.
- Comprehensive online Help is just an F1-KEY away for whichever screen you are on.
- Screens have been optimized for easy keyboard, mouse, and touch screen navigation.
- Hot Keys (Ctrl + Key) are defined for quickly accessing frequently used activities with the keyboard.
- The ability to "multi-task" will allow you to switch between purchase orders, sales entry, receiving entry, etc. without stopping the current task. You can even run reports while doing other things. Ring in a sale while working on a purchase order!

- Security options will allow you to customize each user's program access.
- Set up inventory items as a style with colors and sizes or as a "Product" without a size or color.
- A smart Auto-Create for purchase orders easily generates the purchase orders you want.
- Deliver items from a Special Order and add additional items to the delivery transaction.
- Connect to your vendors to order electronically, receive by Advance Ship Notice, automatically get product images, and see real-time stock levels at the vendor.
- And much, much more!

Registering this Product

All copies of **The Uniform Solution** must be registered with Diamond Data Systems within 10 days of your installation. When you receive your copy of **The Uniform Solution**, enter the license number that was provided with the software. Entering the license number will enable the software to function for 10 days. To Register the product, please call Diamond Data Systems between 8:30am - 5:00pm Central Time, at (800) 286-8929. You will be asked to provide your software license number and company information. Once your license number has been verified, you will be provided with a registration code.

Technical Support

Technical support is available between 8:30am - 5:00pm Central Time at (972) 235-2800. Your purchase of **The Uniform Solution** includes 180 minutes of technical support by phone and is valid for 2 years from your date of purchase. Additional support time may be purchased in hourly blocks.

Software Subscription – Software Updates and Connected Features

The Uniform Solution requires a monthly Software Subscription – entitling users to all software revisions to the program, updates made to the Vendor Catalog, the ability to use Direct EDI, Advance Ship Notice receiving, email, and real-time Vendor Stock Reporting. Please call our sales department to discuss the costs and benefits of a Software Subscription for your company. Software updates to the program and the Vendor Catalog are obtained by using the Maintenance menu option in the program to download updates.

My Account Page

Selecting **File > My Account (Subscription and Services)** in **The Uniform Solution** accesses a web page that has details about your software license and subscription. If you store a credit card in the encrypted vault, you will be able to purchase your software subscription in **The Uniform Solution** when the subscription expires.

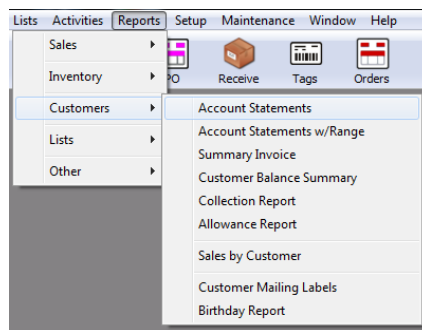
DOCUMENTATION CONVENTIONS

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.

INSTALLATION

System Requirements

Required:

- Server or Single Computer: Windows 7, Server 2008, or higher
- Workstations: Windows XP, Windows Vista, Windows 7, or higher
- 800 x 600 screen resolution
- 500MB hard drive space available
- Printer
- Router and cable
- Internet Connection

Optional:

- Barcode Scanners – Must translate barcodes into a number and carriage return - keyboard and serial interfaces supported
- Portable Scanners – Uploads must send a barcode and carriage return (quantity optional) - keyboard and serial interfaces supported
- Receipt Printer – 40 Column – serial, parallel, and USB interfaces supported
- Cash Drawer – Receipt (Epson, Star, Ithaca), serial, and parallel interfaces
- Tag Printer – Laser, Inkjet, Eltron/Zebra TLP Thermal Series
- Pole Display – 2 Line, 20-character display using Ultimate Technology's emulation – serial interface
- Touch Screen - Point-of-Sale operations support all standard touch screens
- Swipe Reader – Swipe credit and gift cards into XCharge
- Pin pad – Process Debit/ATM Card transactions with XCharge

Single User Installation

Installing the software is easy. Download the latest version of The Uniform Solution from <http://www.theuniformsolution.com/support/downloads/theuniformsolution> and select "Run" when prompted. Follow the on-screen instructions.

Network Installation

To install **The Uniform Solution** in a network environment, you must decide which machine you want to be the *Server* (the computer that will store the program and data files). Generally, it should be the fastest, most powerful computer within your network or it will be the one you have already designated as a Server. All other computers on the network will be considered *Workstations* and will access the data and program files installed on the *Server*. You will be prompted for this information during installation.

Before You Begin

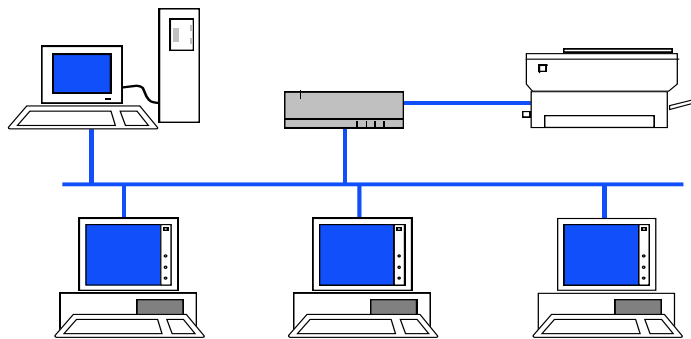
Map a drive letter from each *Workstation* to the *Server*.

Server Installation Summary

Installing the software is easy. Download the latest version of The Uniform Solution from <http://www.theuniformsolution.com/support/downloads/theuniformsolution> and select "Run" when prompted. Follow the on-screen instructions.

Workstation Installation Summary

Run the installation program "Set up Workstation Access USW.exe" on each Workstation. This program is found in the Server's installation folder (normally C:\Usw but will reference the mapped drive letter). The Workstation installation program will create a shortcut to the installation for the workstation. No files will be copied to the Workstation.



2. Fundamentals

NAVIGATING WITH WINDOWS

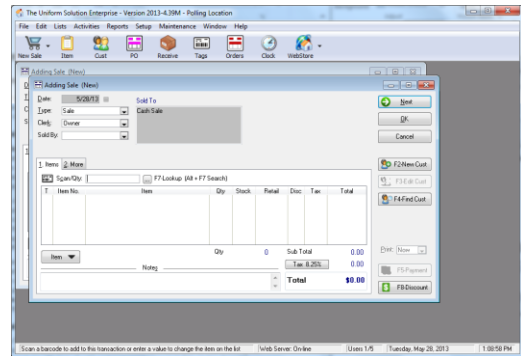
This section is provided to familiarize users who are unaccustomed to working with computers and the Windows operating system with some basic terms. If you are already familiar with the Windows operating system in general, you may wish to skip this section.

Multiple Windows

The Uniform Solution enables you to open a number of separate windows simultaneously once the program is started. This feature enables you to work on multiple tasks without completely stopping the current task first.

For example, you could be in the middle of checking out a customer in the Sales Entry screen when the customer decides to shop for another item. In this situation, you could start another sale, complete it, then pick up the first sale where you left it.

When multiple windows are open, the window that is currently active will usually be the top-most window in the application and the window's title bar will be shown with the active coloring scheme. You can switch between active windows by using the mouse and clicking the window, or by using the *Window* menu on the application's menu. If you select the *Window* option on the application's menu, you will see a listing of all open windows at the bottom of the menu. The "active" window will have a check mark next to the window's title.

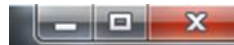


Resizing Windows

Some windows in **The Uniform Solution** can be resized by using the mouse. Placing the mouse at the edge of a resizable window (usually only Lists are resizable), enables you to click and drag the window to the desired size. There is also the option to maximize a resizable window from the application's menu by selecting **Window > Maximize All** or by pressing CTRL+F5.

Hint: If you prefer all resizable windows to always open to their maximum size, activate the option "**Always maximize screens on open**" from **Setup > This Computer > General Tab**.

Minimize, Maximize, and Close



Sometimes you may want to keep a window open, but shrink it down to an icon so that it is out of the way. To do this you would *Minimize* the window. To expand a window to the full size of your screen, you would *Maximize* the window. To shut down a window (or the entire application for that matter), you would *Close* the window. You may also close a window by pressing the ESC key. Look at the top right corner of the window and you will notice the buttons illustrated above. From left to right, they are *Minimize*, *Maximize*, and *Close* respectively. When a window is already maximized, in place of the *Maximize* button, you will instead see the *Restore Down* button (at right), in the middle. This returns a window to the size it was when it was neither minimized nor maximized.

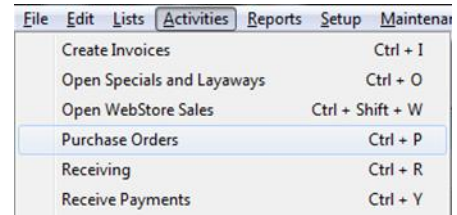
Menus, Accelerator Keys, and Hot Keys

While you may find that using a mouse with the program is straightforward and easy, you will find with practice that using the keyboard without the mouse is faster. Many keyboard shortcuts exist to make using the keyboard both fast and easy.



Like many Windows programs, **The Uniform Solution** has an application menu at the top. From the application menu, you can access all parts of the program, even if you don't have a mouse. This is accomplished by using what are known as "Accelerator Keys" and "Hot Keys".

Accelerator keys are indicated by the underlined letter on a menu option's name. You can select a menu option on the application's menu by holding down the ALT key, and then pressing the corresponding accelerator key. For instance, if you wanted to open the Purchase Order List window, you could use the following key combination: ALT+A, P. It is useful to note that accelerator keys are often, but not always, the first letter of your selection. Hot keys allow you to jump right to the option you want no matter where you are in the program, once you know their combination. As shown above, the hot key combination to go to purchase orders would be **Ctrl+P**. A feature's hot key combination will be displayed to the right of the menu item selection.



Tool Bar

If you prefer using a mouse, you may use the toolbar available below the application's menu. The tool bar contains the most commonly used menu items and makes it easy for new users to find the program item they want to use.



From left to right the buttons are: Create Invoice, Inventory Items, Customers, Purchase Order List, Receiving Lists, Tag Queue, Open Special Orders List, Clock In/Out Form, and WebStore.

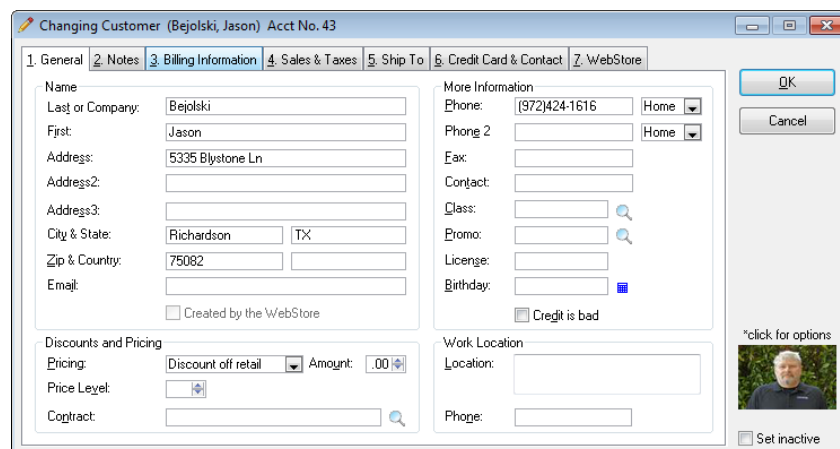
PROGRAM CONVENTIONS AND NAVIGATION

Great care has been spent designing **The Uniform Solution** to make both keyboard and mouse navigation simple and fast. Accelerator keys and hot keys on Menus, Forms, and Lists make program navigation with the keyboard very fast, while the toolbar and buttons with icons make using the mouse easy for users less comfortable with the keyboard. **The Uniform Solution** uses a very simple **Menu > List > Form** method for accessing, finding, and creating or modifying information in the program.

Forms

A Form is a window used to add or change data for a particular record. Just like a regular paper form, it will contain various fields with information, such as a name, address, or phone number. You can move from field to field by pressing the TAB key. Pressing SHIFT-TAB will go backwards in order.

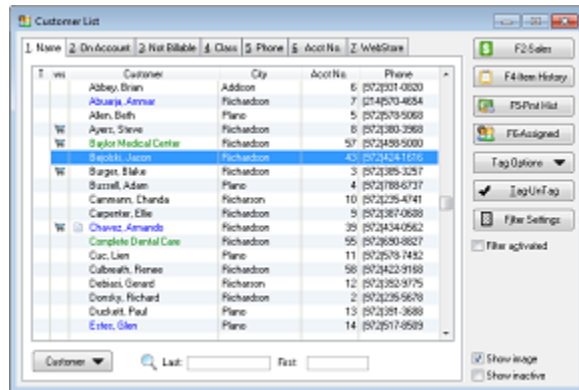
Forms usually have an **OK** and **Cancel** button. The **OK** button saves the information in the form, while the **CANCEL** button cancels any activity and closes the window.



LISTS

A List is a table of related records. Lists make finding and changing information in the program easy.

Lists can be quickly navigated by using both the keyboard and the mouse. On most Lists, records can be added, changed, and deleted. The keyboard hot keys are INSERT, ENTER, AND DELETE respectively. With the mouse, you can RIGHT-CLICK the list or LEFT-CLICK the button to the lower left of the list and a pop-up menu will provide a list of selections. These same selections are also available from the Edit menu option on the application's menu while the window has focus.



The keyboard hot keys for adding, changing, and deleting records are only active when the list box has focus. You can tell the list box has focus when the scroll bar is blue. When something other than the list box has focus, the scroll bar will be gray. To use the keyboard and move focus from any control to the list box, press CTRL+L.

Scroll Bars - Scroll bars allow you to move up and down a List. Click and drag the scroll bar button up or down, or click on the up or down arrows to move through the list. Alternatively, use the up or down keys on the keyboard. The PAGE UP and PAGE DOWN keys move one page at a time. The CTRL-PAGE UP and CTRL-PAGE DOWN keys move to the top and bottom of the list.

Locator Fields -Locator fields are used on Lists to make finding a record by key value fast and easy. When the list box has focus, you can simply begin typing a key value to locate. Press the Tab key when you are finished and the program will find the closest matching record.



Common Controls

The Uniform Solution uses a variety of screen controls throughout the program to make it easy to quickly enter and find new information.

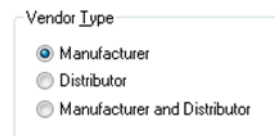
Entry Field - Most of your data will be typed into an entry field. Their lengths are usually just long enough to accommodate the type of information that belongs there. When an entry field is selected, its data will be highlighted. Beginning to type anything will erase the line that was there, and replace it with what you type. If instead you wish to change or append onto a field that already has information you wish to keep, hit the right arrow key before you begin typing the new information. The field will no longer have the line highlighted, and the cursor will show where the next character will be placed.

Date Field - Date fields are a special type of Entry field. The keywords: **Today**, **Month**, and **Year** have special meaning. While the cursor is in a date field, T sets the date to today, M sets the date backward to the first of the month, H sets the date forward to the end of the month, Y sets the date backward to the first of the year, and R sets the date forward to the end of the year. The gray + key moves the date forward one day, and the - key moves the date backward one day.

Check Box - A check box is toggled either 'on' or 'off', setting the value of the Check Box to true or false respectively. To toggle a check box with the mouse, just click on it. To toggle it with the keyboard, press the spacebar when the box is selected.



Radio Button - Radio buttons (or options boxes) allow a user to choose one of several mutually exclusive options. To choose a radio button with a mouse, simply click on it. To select a radio button with the keyboard, TAB to the first choice of buttons, and then use the arrow keys to select which one you want. When you have made your selection, hit



TAB to move on.

Drop List - An entry field whose value can be chosen from a list of valid selections. The field containing the list can be expanded or dropped to display more than the single selected entry. If you use a mouse, click on the down arrow, then click on your selection. To use the keyboard, use the up and down keys to find your selection, or press the first letter of your selection. Continue pressing the same letter will scroll through all items matching the first letter.



Drop Combo - An entry field which is a combination of an entry field and a drop list. All drop combos use intelligent filling to quickly locate an item in the list. To use the keyboard with a drop combo, begin typing a value and the program will locate the closest match. You can also press the down arrow key, or select the down arrow key to find the value you are looking for. Drop combos do not always require a value.



Button - Buttons execute an action when selected. Click a button or press ENTER while it is selected to perform the button's function. Buttons often have a function key reference to make selection with the keyboard fast.



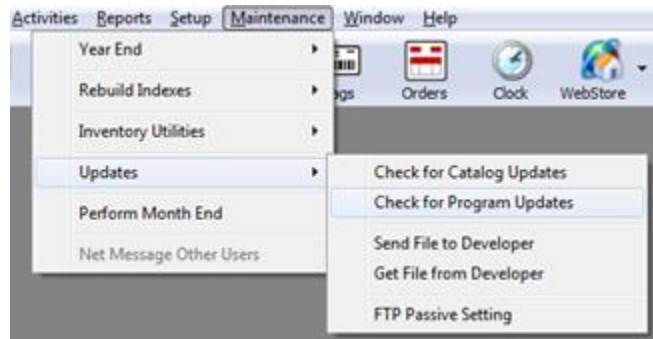
Spin Box - Certain numeric fields are kept in spin boxes. They allow you to 'spin' a number, up or down, by either clicking on the up or down arrow button, or hitting the up or down keys. If the field is highlighted, you may also just type your answer directly in.

Tabs - Tabs are used on Forms to enable more information to be kept on one screen. They also enable the information and controls to be organized into logical groupings. Tabs on Lists are often used to sort the information on a List by a different key value. Each Tab on a Form or List is numbered with an accelerator key, so a quick way to select a particular Tab is to use the keyboard and press ALT+TAB NUMBER (i.e. ALT+1).

3. Getting Started

UPDATING THE SOFTWARE

We are always working hard to improve **The Uniform Solution** and keep the Vendor Catalog up-to-date. **The Uniform Solution** is easy to update. To update **The Uniform Solution** software, select **Maintenance > Updates > Check for Program Updates**. To update the Vendor Catalog, select **Lists > Catalog** and select the Updates button.



SETTING UP THE SOFTWARE

Before you actually start using **The Uniform Solution** to checkout customers and order merchandise, you will first need to set up information about your computer and your store. If you have multiple computers on a network that will be running **The Uniform Solution**, you will need to set up each computer and its printers while running the program on that computer. After you register **The Uniform Solution**, a Setup Wizard runs the first time the program is started. The Setup Wizard guides you through all the options required for initial set up. You can re-run the Setup Wizard anytime by selecting **File > Setup Wizard**.

Printers

Each time you print information, the output will be directed to one of a number of possible printers. Printers for each type of output (i.e. Sales, Price Tags, Reports, etc.) must be set up in the program for each station or computer. Before you begin setting up your printers, you should set up each printer used by the computer in the Windows Control Panel. Printers can be set up in **The Uniform Solution** by selecting **File > Printer Setup**.

Your Computer

Each computer that uses **The Uniform Solution** can have different settings for controlling the program's operation. This is useful because different stations are used to perform different functions – often by different people. From **Setup > This Computer**, you will find that you are able to define options that control how the program functions for certain operations. On the **General Tab** you will find ease of use options, while the **Cash Drawer, Pole Display, Scanner, and Credit Card tabs** provide the settings required for interfacing this computer to a variety of point-of-sale hardware.

Your Store

To set up information about your store, select **Setup > Store**. Here you will find a Form that enables you to set your store name and address, a reference name for the store, a store name for price tags, receipt messages, default customer entries, pricing options, and the sales tax rate.

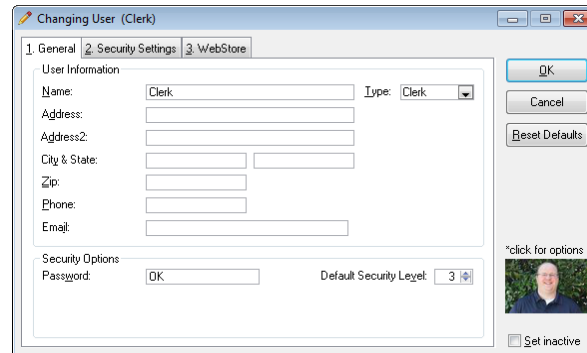
Special Note: If your store has individual sales tax rate components that are not always applied together, you will need to define an alternate sale tax rate using **Setup > Alternate Sale Tax Rates** before assigning the tax rate for your store.

Your System

Settings that apply to all computers and all stores are found in **Setup > System**. Here you can define information such as a "Remit To" address for Account Statements and whether or not to use the system security options.

Users

Users are individuals that you are going to allow to use the program. Your User List can be found by selecting **Setup > Users**. If you have activated system security, each user can be set to have program access limited to any part of the program you wish. Once you enter a user, set a starting security level of 1 to 5 - where one provides the lowest level of access. Then go to the Security Settings Tab and decide which operations you want to allow for each user.



Note: The store owner's profile should be set to access level 5. This will automatically provide full access to ALL features and functions throughout the program including the ability to add, change, or delete users and set their access levels.

SETTING UP YOUR INVENTORY

Setting up your inventory in **The Uniform Solution** is easy with our pre-loaded inventory listing in the Vendor Catalog. With the pre-loaded inventory listing, you can quickly: (1) copy the items you sell from our Vendor Catalog to your inventory, (2) set the retail prices for the items using a retail pricing formula for each vendor, and (3) set the in-stock quantities for your merchandise and print new retail price tags by scanning the vendor's UPC barcode.

Update the Vendor Catalog Listings

Since the styles and products listed in the Vendor Catalog change all the time, we recommend that you first update your Vendor Catalog. To update your Vendor Catalog, connect to the Internet, then select **Lists > Catalog** and select the **F10-Updates** button. The program will check to see if there are any revisions to the Vendor Catalog and will enable you to select the new listings to receive.

Copying Inventory Items from the Vendor Catalog

Items are copied from the Vendor Catalog to your inventory list by "tagging" the vendors, styles, or products you wish to copy, then selecting the **F2-Copy/Sync** button.

To begin, select **Lists > Catalog**. If you would like to copy a particular vendor's entire listing, tag the vendor using the **Tag-Untag** button. Should you change your mind, or tag a vendor by mistake, you can untag it by using the **Tag-Untag** button again. If you only wish to copy specific items or styles within a vendor's listing, select the **Styles** or **Products Tab** for the vendor and tag only the specific items you wish to copy. Once you have finished tagging the items you want to copy, select the **F5-Copy/Sync** button, and the program will copy the selected items to your inventory.

Setting Your Retail Prices

Once you have copied the inventory items from the Vendor Catalog, you will need to set the retail prices for each vendor by defining a retail pricing formula, then applying the formula to the inventory items.

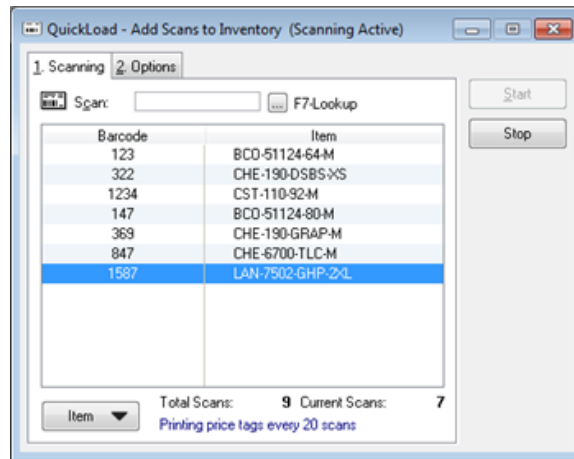
To begin, select **Lists > Vendors**. We will set the retail pricing formula for a vendor by highlighting a vendor on the list, selecting the **Vendor** button, then selecting **Change Vendor**. Go to the **Pricing Tab** and set the retail pricing formula for

the vendor. For more information about setting the pricing formula, press F1 for Help. Selecting the **OK** button saves your changes, then asks if you want to apply the retail pricing formula to the vendor's inventory items. Select **Yes**, then select the option to apply the retail pricing formula. Repeat this process for each vendor.

Using QuickLoad

QuickLoad is a program utility that makes setting up your initial inventory quantities and printing price tags very easy. QuickLoad does two things: (1) it adds one item to stock for each inventory item you scan, and (2) it prints a price tag for each item in the order it was scanned (if desired).

Before you begin, you should make sure your tag printer is set up and functioning properly. You should also make sure that you have copied the items you will be scanning from the vendor catalog.



To begin, select **Activities > QuickLoad**. A message is displayed providing an overview of the process. Select *Continue* and QuickLoad starts with default settings for saving and printing price tags (every 20 tags). If you want to change the settings, select **Stop**, make your revisions, then select **Start** to begin. If you are using a portable scanner, make sure you set the option for using a portable scanner.

TRAINING MODE

The Uniform Solution makes it easy to train new users without any impact to your "real" data. By selecting **Activities > Enter Training/Demo Mode**, the program will load a demonstration set of data. The program's background will display the word "Demonstration". It is then possible to perform any activity without worrying about affecting your actual data. When you are done training, either exit the program or select **Activities > Leave Training/Demo Mode**.

4. Quick Tour

Now that your system is set up, you can begin to ring up sales, modify or add new inventory items, create purchase orders, receive merchandise, and generate reports. The purpose of the Quick Tour is to provide an overview to the main functions provided in **The Uniform Solution**.

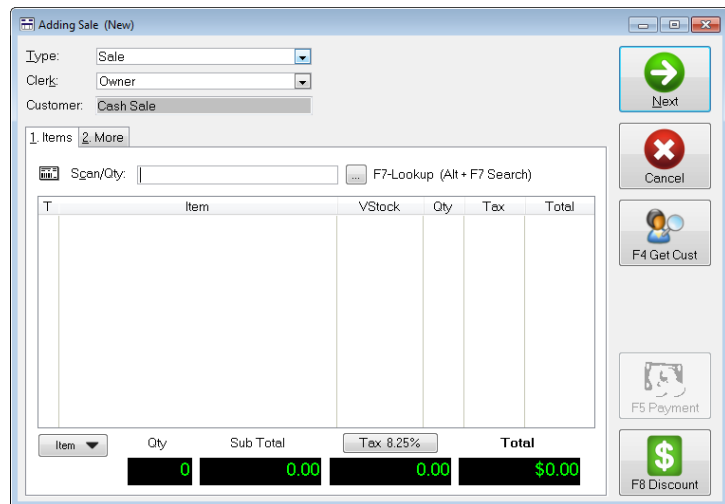
If you need more information about a program function or option, the best place to find answers to questions regarding **The Uniform Solution** is right in the program itself. The online Help system is specifically designed to be comprehensive and available at your fingertips. Whenever you would like help on a particular section or screen, hit the F1 KEY to launch the internal Help system. For program training, go to the **Help > On-Screen Tutorials** menu item, find the Lotus ScreenCam tutorial you would like to view, select **Play**, and a tutorial will walk you through the topic you selected.

SALES ENTRY

The Sales Entry screen is used to checkout customers, enter Special Orders, Layaways, Gift Certificates and Quotes. After entering a Sales Entry transaction, **The Uniform Solution** updates inventory and customer information automatically – keeping your stock levels and sales history accurate.

Starting a New Sale

To begin a new Sale, select **Activities > Create Invoices** or select the **Invoice** button on the application's toolbar. As soon as the Sales Entry screen appears, you will hear the words "Ready to Scan" played over the computer's speakers. This is your indication that you can begin scanning valid barcodes.



The Scan/Qty Field



The Scan/Qty field is a versatile field that makes Sales Entry fast and easy. To add a new item to the transaction, simply scan a valid barcode. The Scan/Qty field can be used to perform the following actions:

Action

- Add a new inventory item
- Add a miscellaneous item
- Update a selected item's quantity
- Discount a selected item off the retail price
- Set a selected item's selling price
- Change a selected item to a Special Order
- Change a selected item to a Return
- Do not return a selected item to stock
- Toggle a selected item's taxable status

- Find a Customer by Name
- Find a Customer by Phone

How

- Scan a valid barcode
- Enter *price (i.e. *15.00)
- Enter a value between 1 and 99 or Q100+
- Enter a value between 0.00 and 0.99
- Enter a value with a decimal place between 1.00 and 1000.00
- Enter the letter S
- Enter a negative quantity, or enter the letter R
- Enter the letter R on an item set as a Return
- Enter the letter T (no sub-rates). Enter the letter TA, TB, or TC to toggle an individual's sub rates taxable status.
- Type 3 or more letters of the person's last name
- Enter a 7 or 10 digit phone number with a "-" between the area code and local exchange

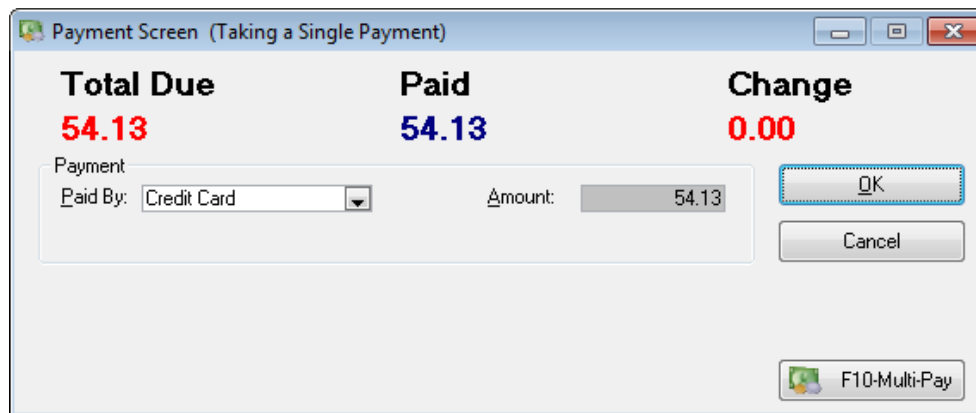
Adding a Customer

It is always recommended to add a customer to a Sales Entry transaction whenever you can. A new customer can be added to the transaction by using the **F2-New Cust** button, or you can add an existing customer by selecting the **F4-Find Cust** button.

Taking a Payment

After you have entered the items on the Sales Entry screen, select the **F5-Payment** button. The payment screen shows the amount due and enables you to enter the method and amount of payment. If you are taking only one form of payment, select the payment method and enter the amount received. If you are taking more than one form of payment, select the **F10-Multi-Pay** button and start taking payments until the amount due is zero.

After taking a payment and selecting the **OK** button, the program will save the current transaction, print a receipt, and leave you ready to start a new sales entry transaction.



The screenshot shows a dialog box titled "Payment Screen (Taking a Single Payment)". It displays the following information:

Total Due	Paid	Change
54.13	54.13	0.00

Below the table, there is a "Payment" section with a "Paid By:" dropdown menu set to "Credit Card" and an "Amount:" text box containing "54.13". To the right of these fields are "OK" and "Cancel" buttons. At the bottom right, there is a button labeled "F10-Multi-Pay".

YOUR CUSTOMERS

Customers are the lifeblood of a retailer. Building an extensive customer database is essential to a successful store. In **The Uniform Solution** you are able to run customer related reports, track what each customer has purchased, and print mailing labels for your store's promotional campaigns and sales. Whenever you create a sale, always try to add the customer to the transaction if time permits.

The screenshot shows the 'Changing Customer' window for 'Estes, Glen' (Acct No. 14, Billed To: Baylor Medical Center). The window has several tabs: 1. General, 2. Notes, 3. Billing Information, 4. Sales & Taxes, 5. Ship To, 6. Credit Card & Contact, 7. WebStore. The 'General' tab is active. The form is divided into several sections: 'Name' (Last or Company: Estes, First: Glen, Address: 5947 Parker Rd, City & State: Plano TX, Zip & Country: 75063, Email: glen@verizon.net), 'More Information' (Phone: (972)517-8509, Mobile, Home, Fax, Contact, Class: WALK, Promo: MAIL, License, Birthday), 'Discounts and Pricing' (Pricing: Discount off retail, Amount: .10, Price Level, Contract: Baylor Health System), and 'Work Location' (Location, Phone). There are also checkboxes for 'Created by the WebStore' and 'Credit is bad'. On the right side, there are 'OK' and 'Cancel' buttons, a small photo of a man, and a 'Set inactive' checkbox.

To view your Customer List, select **Lists > Customers**, or select the **Cust** button on the toolbar. Your Customer List can be used to quickly provide access to both your customer's sales history and their payment history.

Payroll Deduction and Assigning Billing to another Customer

The Uniform Solution enables you to set up a customer so that amounts unpaid at the point-of-sale are billed to another account. This ability facilitates payroll deduction as well as the ability to track spending allowances for individuals.

To set up a customer so their billing is sent to a store account customer, go to the **Billing Information Tab** on the Customer Form for the individual customer, select **Bill invoices to a store account customer**, enter the account to be billed, and enter an employee ID if possible. Whenever new sales are created for the customer, the program will ask if you want to assign the billing to the billed account or the individual.

The screenshot shows the 'Billing Information' tab in the 'Changing Customer' window. The window title is 'Changing Customer (Estes, Glen) Acct No. 14 Billed To (Baylor Medical Center)'. The 'Billing Information' tab is selected. The form contains the following sections: 'Always keep sales entry transactions with sales and ordered items together (i.e. do not split sales with special order items)' (checkbox), 'Billing Options' (radio buttons: None, Allow sales on account, Bill invoices to a store account customer - selected), 'Billed Account' (text field: Baylor Medical Center, Last/First), 'Employee ID' (text field), 'Credit Restrictions' (radio buttons: None, Credit Limit - selected, Allowance, No Credit), 'Amount' (text field: 300.00), and 'Terms Limit' (text field). On the right side, there are 'OK' and 'Cancel' buttons, a small photo of a man, and a 'Set inactive' checkbox.

INVENTORY

Everything in **The Uniform Solution** revolves around your inventory. You order it, receive it, stock it, and sell it. **The Uniform Solution** makes managing all of your inventory needs simple.

Vendors

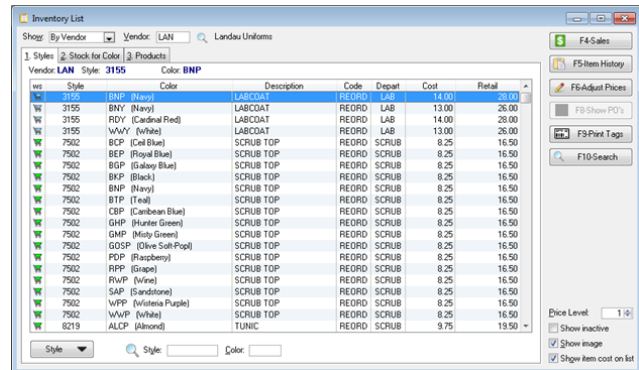
A vendor is a company that either sells you merchandise or manufacturers an item you sell. Before you can order, stock, or sell merchandise in **The Uniform Solution**, you have to set up the vendor for an item. To access your Vendor List, select **Lists > Vendors**. Select the **Vendor** button for options on the **Vendor List**.

Note: When you copy inventory items from the vendor catalog, the vendor will automatically be copied.

Inventory Items

To access your Inventory List, select **Lists > Inventory** or press the **Item** button on the toolbar.

Before you start entering inventory items, you need to understand how to arrange your inventory items with your vendors. Inventory items should be listed for the vendor that actually manufactures an item. If you buy the merchandise directly from a manufacturer, just set up the manufacturer in the Vendor List and enter the inventory items for that vendor.



However, if you sell an item that you purchase from a distributor, you will set up two vendors. The first vendor is the manufacturer. The second vendor is the distributor that you buy the item from. When you enter the item into inventory, you would enter it under the vendor that is the manufacturer of the item. To facilitate automatic purchase order creation for items in this scenario, go to the **Purchasing Tab** on the vendor form when you set up the manufacturer and set the ordering method to *Distributor* instead of *Direct*.

Styles

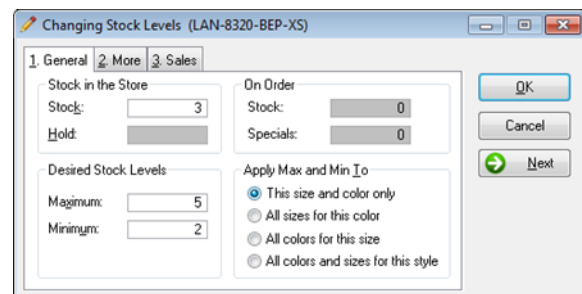
The Uniform Solution makes inventory entry and maintenance for apparel items easy. It uses a matrix format that allows each style to have unlimited colors, sizes, and pricing. You are also able to copy an existing style – making set up simple for items that use the same color and size scales. You can also set up size groups (see **Lists > Inventory Standards > Sizes > Groups**) to expedite the entry process. To add, change, or delete styles, go to **Style Tab** on your Inventory List, then select the **Style** button for your options.

Products

Products are inventory items or services that you sell that do not require a color and size. To add, change, or delete products, go to the **Product Tab** on your Inventory List, then select the **Product** button for your options.

Setting Max/Min Levels

In most retail businesses there are certain inventory items that need to be kept in stock at all times. In **The Uniform Solution**, setting the Max/Min levels for an item and using the purchase ordering functionality help you do it easily. Each inventory item can be set up to have both a maximum and minimum stock level (i.e. Max/Min). Whenever the in-stock quantity for an item with a Max/Min level falls to the minimum level, the next time a purchase order is created for the vendor, the item will be placed on the purchase order



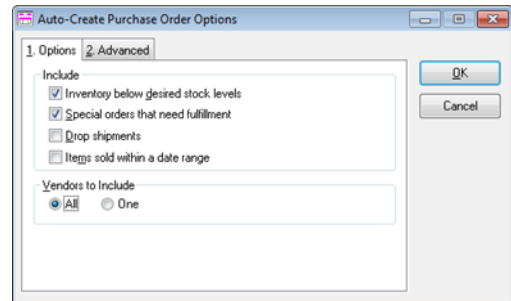
with the quantity required to bring the current stock level to the maximum quantity.

To setup a Max/Min level for a style and color, select **Lists > Inventory > Style Tab > Stock for Color Tab**. Use the **Inventory** button to update a size's maximum and minimum quantities. For Products, just select a Product for update and enter the desired Max/Min quantities.

ORDERING MERCHANDISE FROM A VENDOR

Auto-Creating Purchase Orders

Once you have set up Max/Min levels for your core stock items, you will be able to create purchase orders for your inventory automatically. To create a purchase order for items at or below desired stock levels and specials orders, select **Activities > Purchase Orders** or select the **PO** button from the toolbar. This displays the Purchase Order List containing all your outstanding and completed purchase orders. Select the **F2-AutoCreate** button, enter the parameters for the purchase orders you would like to create, and press the **OK** button.



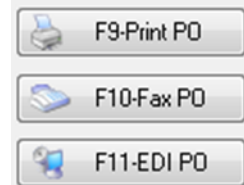
After the AutoCreate process is complete, you can revise, cancel, or delete any of the purchase orders that were created. When you are finished working on a newly created purchase order, highlight it and select the **F8-Working Off** button. This will move the purchase order to the **In-Process Tab**.

Creating a Single Purchase Order

If you want to create a single purchase order by manually adding items to order, select the **Purchase Order** button on the Purchase Order List and select **Insert Purchase Order**.

Using Direct EDI

Sending your purchase orders in an electronic format to a vendor is as easy as printing, and it enables your purchase order to be entered directly into the vendor's systems immediately and without error. To send a purchase order using Direct EDI, highlight the purchase order on the Purchase Order List and select **F11-EDI PO**.



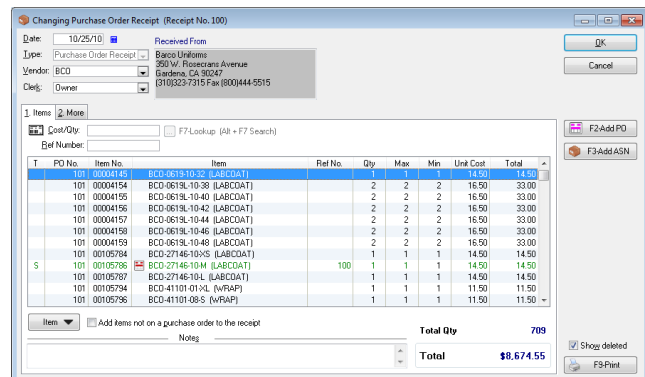
Direct EDI only works with connected vendors that have developed a Direct EDI interface with **The Uniform Solution**. See the Getting Connected section in this guide.

RECEIVING MERCHANDISE FROM A VENDOR

Creating a Purchase Order Receipt

When merchandise is received from a vendor, creating a Purchase Order Receipt will update the original purchase order and inventory with the items received. To create a Purchase Order Receipt, select **Activities > Receiving** or select the **Receive** button from the toolbar. Select the **List** button to add a new list. Enter the vendor you are receiving merchandise from and the reference number the vendor will use when they invoice you.

To add items from a purchase order you issued to the



vendor, select the **F2-Add PO** button and select the correct purchase order. On the Select Items Screen, use the Scan/Qty field to scan the vendor's UPC barcode to update the quantity being received for each item remaining on the original purchase order, or update the quantity manually. Select **OK** and the quantities received will be transferred to the Purchase Order Receipt. Save the receipt by selecting the **OK** button.

Printing Price Tags



Once you have created a Purchase Order Receipt, you can print price tags for the items on the receipt by selecting the **F5-Print Tags** button. If the Purchase Order Receipt is complete and doesn't require further attention, select the **F8-Working Off** button. This will move the receipt to the **Completed Tab**.

DELIVERING SPECIAL ORDERS AND LAYAWAYS

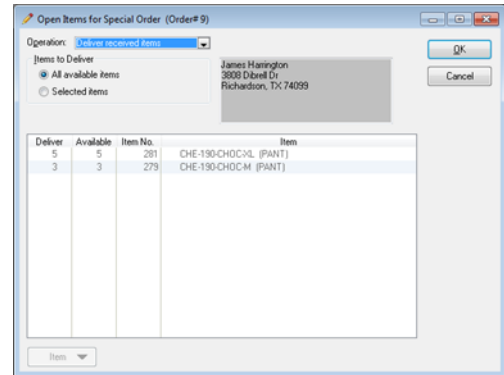
Special Orders and Layaways are not an actual sale. They are merely a request for items to be sold at some future date (i.e. when the items are actually delivered to the customer). Any money that you receive for a Special Order or Layaway is considered a deposit.

When you deliver merchandise from a Special Order or Layaway to a customer, the program does three things: (1) it creates a new sales invoice for the items being delivered, (2) it transfers the deposit to the new sale, and (3) it subtracts the items delivered to the customer from your inventory.

Find the Special Order or Layaway

When you are ready to deliver merchandise to a customer from an open Special Order or Layaway, the process is the same. You can view a list of your undelivered Special Orders by selecting **Activities > Open Special Orders**, or by selecting the **Orders** button on the toolbar. To view your Layaways, perform the previous operation, but select the **Layaways Tab** on the Sales List.

You can also locate an open Special Order or Layaway by starting with your Customer List. **Select Lists > Customers**, or select the **Cust** button on the toolbar to open your Customer List. Locate the desired customer and select the **F2-Sales** button. Now you will see a listing of all invoices for that customer.



Deliver the Available Items

Once you have located the Special Order or Layaway that you want to deliver to the customer, select the **F8-Deliver\Adj** button, set the Operation to **Deliver received items**, and select **OK**. The program will transfer the items you selected for delivery to the Sales Entry screen. You can now add any other items the customer wishes to purchase. When you are ready to complete the transaction, select the **F5-Payment** button to record the method of payment for any balance due and save the transaction.

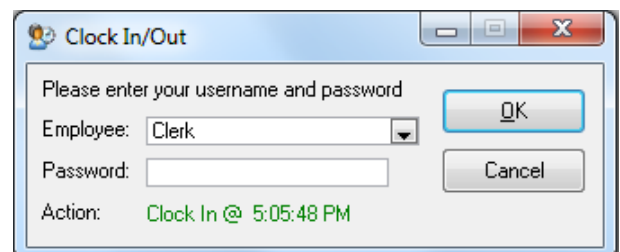
TAKING PAYMENTS

Whenever an invoice has a balance, it's considered an Accounts Receivable. When you receive payments for these invoices from your customer, you need to enter the payment in the program.

To enter a customer payment, select **Activities > Receive Payments**. Enter the customer by typing their last name, forward slash, first name (i.e. Johnson/David), or select the customer using the lookup button. Enter the amount of the payment, the payment method, and the reference number. After entering the amount, the program searches for an open balance matching the payment. If one is found, the payment is applied to that invoice. If a match is not found, the payment is applied to the oldest invoice first. You can manually apply the payment to individual invoices by selecting the **F4-Clear** button (to clear any currently applied amounts), then use the Payment field to apply a portion of the payment to a selected invoice. When you are finished, select the **OK** button.

TRACKING EMPLOYEE TIME

Tracking the regular and overtime hours your employees work on a weekly, biweekly, semimonthly, or monthly basis is easy when your employees use the time clock features in **The Uniform Solution**. At the start of each shift, have your employees "Clock-In" by selecting the **Clock** button on the toolbar, or by selecting **Activities > Clock In/Out**. At the end of their shift, clock out using the same procedure.



If one of your employees forgets to clock-in, you can use the Time Clock List to create an entry with a start time and date, but without an end time. To access the Time Clock List, select **Lists > Time Clock**. To manage Time Clock entries, select the **Time Clock** button. Time Clock entries have the option as being designated as "Work", "Sick", "Holiday", and "Vacation" time and can be set to a status of "Paid" or "Unpaid".

Time Clock Reports can be run by selecting **Reports > Other > Time Clock Summary or Time Clock Detail**. When you select to run a Time Clock report, use the **Options Tab** to set how often you pay your employees, if and when overtime starts, and the day payroll starts for weekly and biweekly pay periods.

ACCOUNTS PAYABLE

An Accounts Payable is created each time you enter a Purchase Order Receipt for a vendor. The Purchase Order Receipt tracks both the total quantity and the total cost of all the items received. The Accounts Payable functionality in **The Uniform Solution** enables you to easily reconcile the invoices you receive from a vendor with what you have actually received.

To access your Accounts Payable List, select **Lists > Accounts Payable**. The List can show all payables or the payables for one vendor. Whenever you pay an invoice, update the payable in the program. Updating your payables allows you to quickly see what your current liabilities to your vendors are at any time.

To update a payable, highlight the payable on the list and select the **Payable** button. Enter the invoice number, payment date, freight, discount, and amount paid. If you are not interested in tracking the actual amount paid to the vendor, you can use the **F8-Fast Pay** button to update the payables status to "paid" for the current date.

CONTRACT PRICING (ENTERPRISE VERSION)

Contracts can be set up in **The Uniform Solution** to provide an easy-to-manage and powerful approach for providing special pricing to your customers. A contract is simply a list of items to be sold at certain fixed price, or a discount off the retail price. Once you establish a contract, it can be assigned to a customer, or to the store's pricing scheme during a sale.

Setting Up a New Contract

To access your Contract List, select **Lists > Contracts**. To add a new contract, select the **Contract** button, then select **Insert Contract**. When the Contract Entry form appears, enter a unique name for the contract, the valid dates, and set up a category for the contract if you wish.

You can set up four different types of contract items: a style, a product, a department, or a description. If you discount by style, you must enter the vendor, but the style, color, and size fields are optional. Having the style, color, and size fields optional makes setting up a contract powerful. For instance, if you were going to price all Landau 8320 pants, any color, but XS at \$18.50, you would enter the vendor, style, and size with a price of \$18.50 - leaving the color blank.

When you are finished with the contract, select the **OK** button to save it.

Assigning a Contract to a Customer

To assign a contract to a customer, go to your Customer List by selecting **Lists > Customers**, or select the **Cust** button on the toolbar. Find the customer to update and press **ENTER**. On the **General Tab**, enter the name of the Contract in the Contract drop combo field.

Taking a Physical Inventory

One of the greatest rewards for a retailer with **The Uniform Solution** comes when it's time to take an accurate physical inventory. Unlike the traditional method of hand counting, using a barcode scanner to scan each item in the store is both fast and accurate. To begin taking a physical inventory count, select **Activities > Physical Inventory**.

How it Works

There are two completely separate inventories that are kept in **The Uniform Solution**. One is your current inventory count, the other is the current physical inventory count. **Clearing the current physical inventory count has absolutely no impact on your current inventory levels found in inventory**, but it is required before you start a new physical count because you want the physical inventory count to start at zero. Once the physical inventory count is complete, you may run a Physical Inventory Report to compare the current inventory count to the physical inventory count you just performed. The final step is to update the inventory count with the physical inventory count.

Note: You should not take a physical inventory count while you are open for business and continuing to sell items. Items that are scanned into physical inventory are considered the accurate count and are not updated when an item is sold.

Before you Begin

Before you take a new physical inventory count, you need to clear any entries that exist in your current physical inventory count. Select the **F2-Clear List** button. This operation does not affect your current inventory levels.

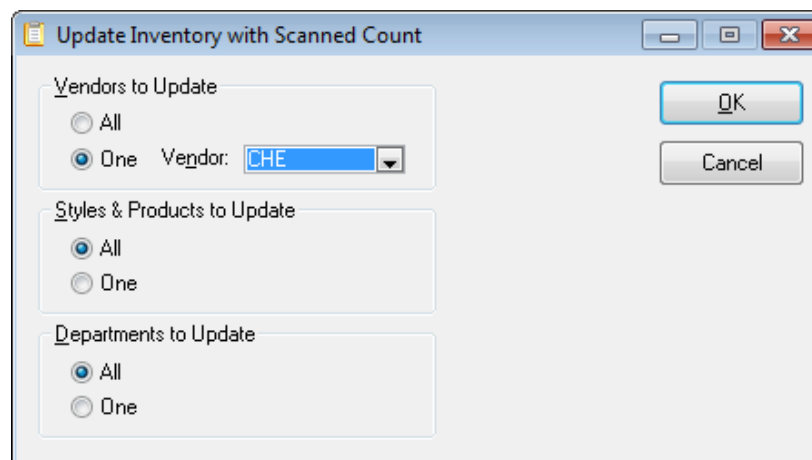
Ready to Scan

Once you have cleared your physical inventory count, you are ready to begin. If your barcode scanner is attached to an extension cord, just begin scanning. The program will alert you to any invalid scans as they occur by playing a voice response to each scan over the computer's speakers.

If you are uploading barcodes from a portable barcode scanner, select the **F8-Upload** button. Use the options on the portable scanner to send the barcodes to the program.

Update Your Inventory

Before you update your inventory count with the physical inventory count, you may want to run a Physical Inventory Report. Select **Reports > Inventory > Physical Inventory** and run the desired report. To update your current inventory count with your physical inventory count, select the **F5-Update** button.



REPORTS

The Uniform Solution contains a variety of reports that can not only help you run your business day-to-day, but can help you grow your business by providing solid statistical information about your inventory, your vendors, and your best selling items. Which reports you run, and when you run them are a matter of personal choice and preference. It depends upon what information you need and when you need it. Some reports are designed for comparison and analysis, while others are good for bookkeeping.

Daily Checkout

At the end of each day, you will need to reconcile the payments you received with the totals that were recorded in the program. Count the cash and check payments you received, then run the Daily Checkout report by selecting **Reports > Sales > Daily Checkout**. Enter the information requested and the report will list your total sales, payments received, and any shortage or overage. If more detail is required to determine a discrepancy, run the sales manifest by selecting **Reports > Sales > Sales Manifest**, or a payment manifest by selecting **Reports > Sales > Payment Manifest**.

Sales Reports

- **Cash Flow** - Provides a detailed listing of your sales, deposits, and payments. The report is organized in an easy-to-read table format.
- **Daily Manifest** - Lists all the invoices for a range of dates.
- **Payment Manifest** - Lists all payments received for a range of dates.
- **Sales by Department** - Lists total sales sorted by department.
- **Detailed Item Sales** - Lists the items from which vendors have been sold within a range of dates.
- **Top 40 Sales Report** - Lists your best 40 selling styles, colors, and sizes.
- **Vendor Comparison** - An excellent high-level report that illustrates which vendors are your best sellers.

Inventory Reports

- **Inventory Listing and Value** - Lists each inventory item with the current stock level, on order quantity, and max/min values.
- **Inventory Summary** - Lists the total inventory quantities and value by vendor.
- **Open Items on PO's** - Lists all items that are on-order, but not received.
- **Physical Inventory Comparison** - This report is run after taking a physical inventory count. It compares the inventory levels you have in your inventory count with the new physical inventory count.

Customer Reports

- **Account Statements** - Create Account Statements for all or selected customers.
- **Summary Invoice** - Create a single invoice for a customer based on the current balance of invoices within a date range.
- **Customer Balance Summary** - Lists each customer with their outstanding balance.

5. Maintenance

BACKING UP YOUR DATA

Data loss due to fire, theft, or a computer problem can happen anytime. If you use a computer regularly, it's not a question of IF you will ever experience data loss, it's a question of WHEN. Regularly backing up the data in **The Uniform Solution** safeguards against a future problem.

USB and On-Line Backups

The best back up procedure is to back up your data every night to a USB device or to use an on-line backup service. If you use a USB device, you'll want to have 2 or 3 devices you rotate off-site. If you use an on-line backup service, make sure you back up the entire installation folder. This will give you multiple backups because of the Auto-Backup procedure.

Using File > Backup

If you don't use an automated data backup process, the **File > Backup** option enables you to easily back up your data in **The Uniform Solution** to a USB or external device.

Auto-Backup

The Uniform Solution has an automatic backup feature that provides minimal protection against data loss due to a power failure or abnormal termination. By default, the auto-backup feature keeps 10 of the most recent backups. The auto-backup feature is activated when the program is started at the beginning of the day.

THE MONTH-END PROCESS

In order to keep your system fast and efficient, **The Uniform Solution** runs a procedure called the Month-End Process. This process is run at the start of each month to check the integrity of your program data, to delete older data, and to archive data contained in larger data files. The parameters that are used by the Month-End process for archiving and deleting are set by selecting **Setup > Month-End**. The Month-End process itself can be run by selecting **Maintenance > Perform Month-End**.

TROUBLESHOOTING

Problem	Possible Solutions
<i>All Problems</i>	Reboot the computer and try the operation again.
<i>Printer Not Printing</i>	When a printer stops printing in the program, it's often the result of something simple - such as being out of paper or ribbon. However, if a printer that was functioning won't start printing again after fixing a problem, reboot the computer to reset the Windows Spooler.

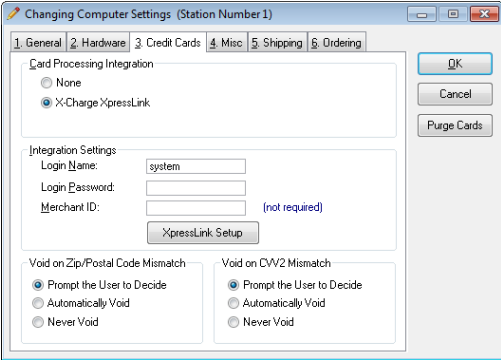
6. Payment Processing with X-Charge

OVERVIEW

When your customers pay for the merchandise they purchase, **The Uniform Solution** keeps track of how much they paid and the method of the payment. However, **The Uniform Solution** can make taking credit and debit cards easier than using a separate terminal. After integrating **The Uniform Solution** with X-Charge (a payment processing software), **The Uniform Solution** enables you to simply swipe the customer's credit or debit card to process the transaction. At the end of each day, the transactions you processed will automatically close and deposit to your business checking account within 2 to 4 days. X-Charge processes the payments using the Global Payments network and requires a merchant account with Global Payments. Establishing an account with Global Payments is easy and they offer competitive processing rates.

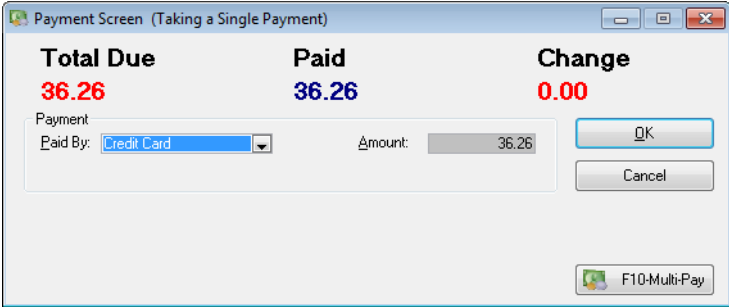
X-CHARGE SETUP

After installing and configuring X-Charge to work properly, X-Charge must be activated in **The Uniform Solution** for each computer. To activate credit card processing in **The Uniform Solution**, select **Setup > This Computer** from the application's main menu, select the **Credit Cards** tab, and set the Credit Card Processing Integration to **XCharge**. If you are going to process debit cards using X-Charge, you will need to connect a XCharge compatible pin pad to an available serial port and activate the pin pad in **The Uniform Solution**.



PROCESSING CREDIT AND DEBIT CARDS

Once X-Charge has been activated, all you have to do is swipe the customer's credit card when prompted by **The Uniform Solution**. If the card is a debit card, the customer will be prompted to use the pin pad to enter their PIN.



7. Getting Connected

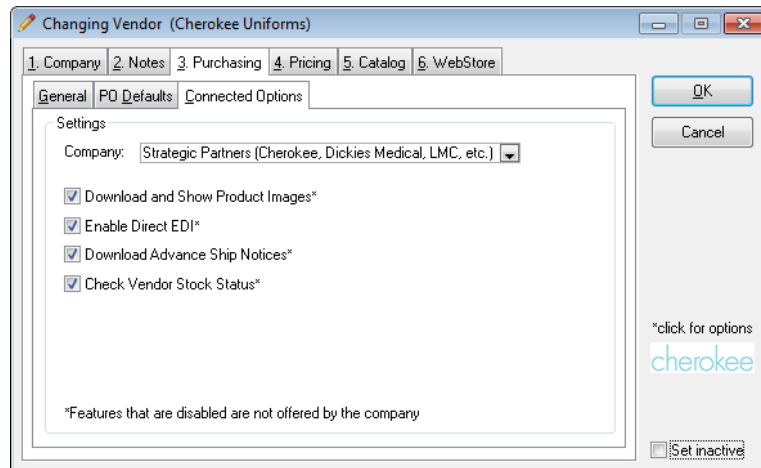
The Uniform Solution provides the uniform retailer with unprecedented capabilities by connecting your company to your vendors so you can become efficient and informed. **The Uniform Solution** embraces the connected world and provides features to the uniform retailer and dealer that no other software can. For a list of vendors that are connected with **The Uniform Solution** and which connected features they provide, you can find out by going to www.theuniformsolution.com/info/vendors.

SETTING UP YOUR CONNECTED VENDORS

To use the connected features, you will need to set up each vendor in your Vendor List. Select **Lists > Vendors** to **Edit** a vendor on the Vendor List. Once on the Vendor Form, select the **Purchasing Tab**. In the **Settings** section, select the appropriate vendor from the drop list.

Setting Up Vendor Account Numbers

While on the Vendor Form, select the **Purchasing Tab** then the **General Tab**. In the account number field, make sure your account number is correct. If you have multiple stores, you have to setup an account number for each store by selecting the **Additional Account Numbers** button.



CONNECTED FEATURES

Direct EDI

Direct EDI is used to send a purchase order directly to the vendor's system. All you have to do is select a purchase order for a connected vendor and press the **F11-EDI PO** Button from the Purchase Order List. After the vendor has processed the order, the **F12-Status** Button will return the status of the PO you sent.

PO No.	Company	Date	Qty	Open	Balance	Total
2	Cherokee Uniforms	10/06/10	39	27	265.25	399.25
3	Landau Uniforms	10/11/10	13	8	69.00	106.50
4	Landau Uniforms	10/04/10	7	7	52.50	52.50
100	Barco Uniforms	10/22/10	22	22	319.00	319.00

Purchase Order: PO No.
Total: 705.75 877.25

Real-Time Vendor Stock Levels

Vendor stock levels are displayed right next to items you have on a special order, on a purchase order, and in the inventory list if you are looking up an item. There is nothing to do. **The Uniform Solution** will contact the vendor's system, get the current stock level, and display the result. Just make sure you select the checkbox on each window to "Show vendor stock" and the "VStock" column will be present.

Inventory List

Show: By Vendor Vendor: DKM Dickies Medical Uniforms

1. Styles 2. Stock for Color 3. Products

Vendor: DKM Style: 854706 Color: BLKZ Size: XS Barcode: 111,110

ws	Size	VStock	In Stock		On Order		Desired		Cost	Retail
			Stock	Hold	Stock	Spec	Max	Min		
	XS	06/06/2013	0				0		7.75	15.50
	S	100+	0				0		7.75	15.50
	M	100+	0				0		7.75	15.50
	L	100+	0				0		7.75	15.50
	XL	100+	0				0		7.75	15.50
	2XL	100+	0				0		9.25	18.50
	3XL	92	0				0		9.25	18.50
	4XL	61	0				0		9.25	18.50
	5XL	24	0				0		9.25	18.50

Inventory Show vendor stock

Price Level: 1

Show inactive
 Show image
 Show item cost on list

Product Images

Vendor provided images are automatically downloaded when you add new items in the Vendor Catalog. They are displayed when looking up items in Sales Entry, the Inventory List, and in the WebStore.

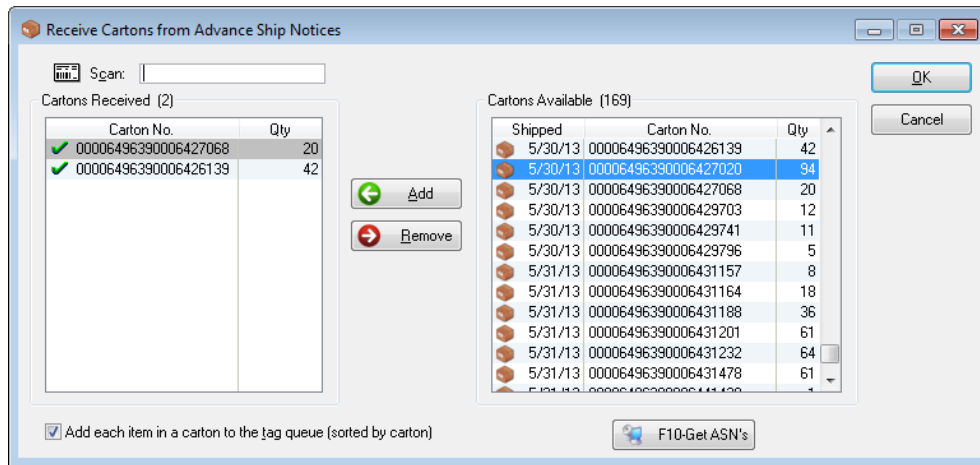
Select a Valid Style

Style	Description
190	PANT
1909	V-NECK
2074	PANT
25003	PANT
26809	TOP
2875	V-NECK
4000	PANT
4020	PANT
4725	V-NECK
4801	WRAP
4880	WRAP
ZEST	SHOE
ZONE	SHOE

Show image
 Show inactive

Advance Ship Notice Receiving

Advance Ship Notices (ASNs) can be used to receive merchandise quickly and accurately because the ASN has all the information required to receive the contents of each box/carton of merchandise the vendor ships to you.



To download ASN's, select **F10-Get ASN's** from the Receiving List or the window shown. To receive merchandise using an ASN, create a new **Purchase Order Receipt** and select the **F3-Add ASN** button. On the Receive Cartons from Advance Ship Notices window, either scan the vendor's ASN barcode on the box, or select it in the **Cartons Available** List and **Add** it to the list of **Cartons Received**. If you want to print tags sorted by carton, select the checkbox at the bottom of the window.

8. Accounting Interface and QuickBooks™ Export

OVERVIEW

With **The Uniform Solution** accounting interface and QuickBooks™ export, you will be able to maintain a complete financial picture of your business in your accounting software. **The Uniform Solution** was designed to handle the day-to-day needs of retail operations with speed and efficiency - not to handle all of your accounting needs (although some are included). Since your business has accounting needs that are beyond the intentions of **The Uniform Solution**, but inclusive of the information created and maintained in the program, the accounting interfaces provided will enable you to easily input a summary of the important financial information created in **The Uniform Solution** into an accounting package.

The Uniform Solution creates and tracks your sales, customer deposits, inventory, accounts receivable, and other important information - making **The Uniform Solution** your detail ledger in accounting terms. **The Uniform Solution** interfaces with an accounting package by summarizing the information created in the program and creating a journal entry report or export file that can be entered into an accounting package. Therefore, if you want to see a complete listing of your inventory, print one of the inventory reports in **The Uniform Solution** because your accounting package won't track the individual items, just the total value.

THE JOURNAL ENTRY REPORT

The Uniform Solution can create a journal entry report that lists the accounts and amounts to credit or debit in a typical accounting package. For a complete listing of the accounts used by **The Uniform Solution** and their definitions, please see the online Help. To run the Journal Entry Report, select **Reports > Sales > Journal Entry/Accounting Export**.

EXPORTING TO QUICKBOOKS™

The Uniform Solution can create a QuickBooks™ compatible *.iif export file that can be used to import journal entries directly into QuickBooks™ - eliminating the need to enter a journal entry by hand. There is also an option to create Bills in QuickBooks™ from Purchase Order Receipts created in **The Uniform Solution**.

To create a QuickBooks™ *.iif compatible file, select **Reports > Sales > Journal Entry/Accounting Export** and make sure you select one of the options to create an export file.

9. Multiple Location Support *(Enterprise Version)*

OVERVIEW

Since the cost of maintaining a Citrix or Windows Terminal Server can be cost prohibitive for some companies, **The Uniform Solution** 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.

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

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 remotes 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 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. Requiring this information to be maintained at the polling location simplifies the polling process as well as the entire inventory control operation.

SHARING DATA

The polling operation in **The Uniform Solution** enables 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.