OPUS® Toolbox

Updated October 2023

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Report Programs
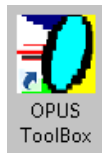
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Accessing the OPUS Toolbox
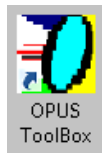
If you are using DDMSPLUS®, double-click [OPUS ToolBox icon] on your desktop. The OPUS Toolbox opens.

If you are using DDMS®:

1. From the Master Menu, double-click [Keyop Menu icon].

2. Double-click [Specials icon].

3. In the Enter Program Request field, type **I**. The OPUS Toolbox opens. You can only use this function if you have OPUS loaded.

continue to next page
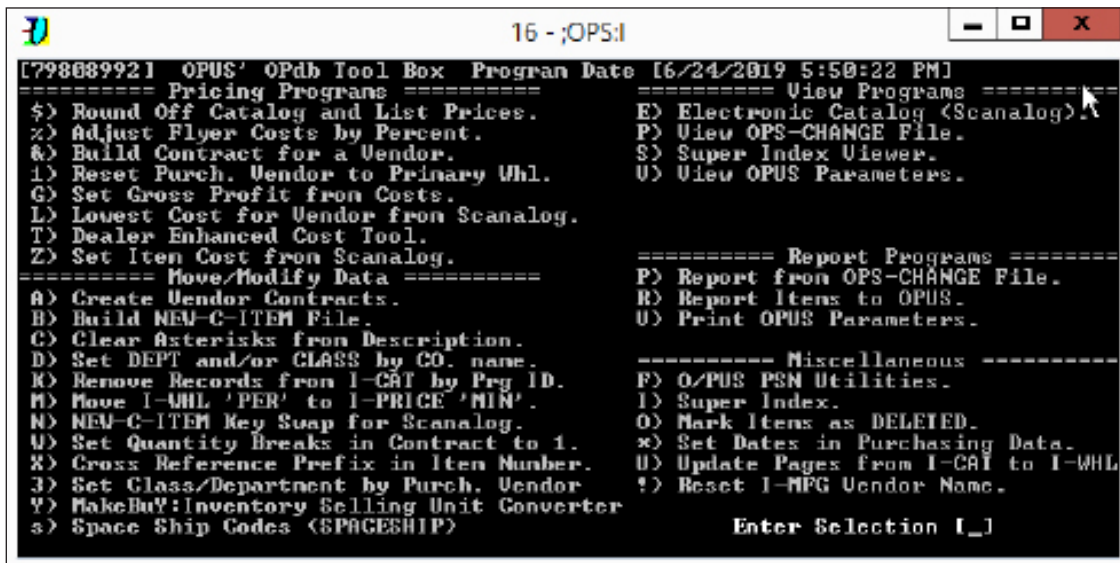
(+I)[$] Round Off Catalog and List Prices

You can have three positions to the right of the decimal in the List and Catalog price fields. Pricing from an update may use the three positions, instead of two. This depends on how you specify to load the pricing, increasing the price by a percentage, for example.

To round off the third digit, use this tool. Standard rounding procedures used by the system remove the third digit. This eliminates invoice confusion when the third digit does not print, but is used for extended calculations. The list price of the I-PRICE file and the catalog price of the I-WHL file for all your items are rounded to the nearest penny.

1. Go to the (+I) screen and select the [$] Round Off Catalog and List Prices action code.

2. At the OK to Begin prompt, type **Y**.

(+I)[%] Increase or Decrease Quarterly Flyer/Catalog Program Cost by Percent

You can increase your quarterly flyer/catalog program cost by a percentage amount to cover overhead expenses. This program also lets you lower your quarterly flyer/catalog program cost if the wholesaler gives you a better price on the already discounted item cost. You can:

• Run the program for one quarterly flyer/catalog program or for all.

• Limit by vendor.

• Limit by the wholesaler's manufacturer prefix.

Note: This program also has a reset cost option. If you increased or decreased your cost by using this program, you can use the Reset Cost option to set the quarterly flyer/catalog program cost back to the original cost. If you run the (+I)[Y] multiple times, it resets the cost back to the last calculated cost.

1. Go to the (+I) screen and select the [%] Adjust Flyer Costs by Percent action code.

2. At the Select [D]ecrease, [I]ncrease or [R]eset from Last Cost, enter the appropriate response.

3. At the Enter for Report prompt, enter the printer to use.

4. The Enter Program ID to Figure prompt appears.

   If you specify to decrease the cost, you have three options.

   • To decrease a single price plan/program cost, enter the catalog's program ID that you loaded into the I-CAT file.

   • To decrease all items, including price plans and the default dealer cost by vendor, leave this field blank.

   • To decrease the dealer cost from a vendor, without affecting price plan/program costs, type **XXX**.

If you specify to increase or reset the cost, choose from the following:

- To increase the cost, type **XXX** to select no flyers or leave the field blank to increase the cost for all flyers.

- To reset the cost, type **XXX** to select no flyers or leave the field blank to increase the cost for all flyers.

5. The Enter Vendor to Select prompt appears. You have three options.

- To decrease the cost for a specific vendor's price plan/program cost, enter the first four characters of the vendor's name provided by the price plan/program.

- To increase the cost, enter the vendor account number.

- To reset the cost, leave the field blank.

6. The Enter Prefix to Select prompt appears. You have three options.

- To decrease the cost, enter the wholesaler's prefix for the items for which you are decreasing the cost. Or you can leave this box blank to include all wholesalers.

- To increase the cost, enter the wholesaler's prefix or leave the box blank to include all wholesalers.

- To reset the cost, enter the wholesaler's prefix or leave the box blank to include all wholesalers.

7. The Enter Percent to Decrease/Increase prompt appears. Enter the percentage to decrease or increase the cost for the line items.

8. At the OK to Proceed prompt, type **Y**.

(+I)[&] Build Contract for a Vendor

This program builds a contract from the I-WHL and I-CAT files for specific vendors.

1. Go to the (+I) screen and select the [&] Build Contract for a Vendor action code.

2. At the Enter Vendor Selection prompt, type the characters of the vendor's name assigned to the items for which you are building a contract.

3. At the Enter Contract Number prompt, enter the consumer contract number from the (ET) screen.

4. At the Enter Contract Description prompt, enter a description for the contract you are building.

5. At the Enter Percent to Increase/Decrease Cost prompt, enter a percentage by which the vendor's cost is increased or decreased. For example, to increase the cost by 2%, enter 2.0. If you choose not to change the cost, type **.0**.

6. At the Enter Customer Number for Contract prompt, enter the customer account number to which this contract is assigned.

7. At the OK to Proceed prompt, type **Y**.

(+I)[1] Reset Purchasing Vendor to Primary Wholesaler

If you make a mistake trying to set your purchasing vendor, you can use this feature to set the purchasing vendor for the item back to your primary wholesaler record. This means you can start over without having to restore.

1. Go to the (+I) screen and select the [1] Reset Purch Vendor to Primary Whl action code.

2. At the OK to Proceed prompt, type **Y**.

(+I)[G] Set Gross Profit from Costs

With this tool, you can define and change the list price (in the I-PRICE record) and/or the catalog price (in the I-WHL record) as the gross profit percentage. This gross profit percentage is based on the average cost, set in the I-PRICE record, or the replacement cost set in the I-WHL record.

1. Make sure you have a complete backup of your system before performing this procedure. Since it affects the I-PRICE and/or I-WHL files, use this tool after business hours.

2. Go to the (+I) screen and select the [G] Set Gross Profit from Costs action code.

3. At the OK to Begin prompt, type **Y**.

4. At the Enter printer prompt, enter the logical name of the print to use.

5. At the Enter Gross Profit Percent prompt, enter the gross profit percentage to use for the calculations. You can enter two characters before the decimal and one after. Be sure to enter the decimal point. You must specify a percentage in this field.

6. At the Enter up to 10 Stock Classes to Exclude prompt, enter the stock classes of the items to exclude from this procedure. The remaining stock class prices are changed according to your specifications. The program views the stock class set in the I-MASTER file, not the I-PRICE file.

7. At the Enter OPUS Wholesale Vendor abbreviation to Select prompt, you can limit the procedure to a specific vendor's items by entering the first four characters of the vendor's name. Enter the name as it appears in the Vendor Name field in the I-WHL record, UNIT or SPAR, for example. To process all records, leave this field blank.

8. At the Cost to Figure Gross Profit prompt, type **W** to calculate based on the replacement cost of the I-WHL record. Type **P** to calculate based on the average cost of the I-PRICE record. Type **V** to calculate based on the Purchasing Vendor.

9. At the Update Wholesale Catalog Price prompt, type **Y** to change the catalog price of the I-WHL record with the new price based on the gross profit percentage and cost field.

Setting and Modifying Your Purchasing Vendor Information

There are several approaches to purchasing. Deciding which is right for you is an important factor to your company's success.

(+I)[L] Lowest Cost for Vendor from Scanalog

When you load OPUS, you choose your primary and exception vendors. Some dealers choose to maximize purchasing power with a primary vendor. You buy everything you can from that vendor, although you may be able to find an item at a better price somewhere else. In return, your primary vendor may offer rebates and incentives, as well as special pricing dependent on the amount of business you do with him.

In this situation, protecting your costing position is important. The (+I)[L] program is the best choice for this. The Purchasing Vendor Record defaults to the first-call wholesaler, if they carry the correct item. However, the Purchasing Record does not reflect the lowest cost available; it reflects the column cost. The (+I)[L] program searches I-CAT or Scanalog for flyers or programs that have a lesser cost than the column cost for the primary vendor. It sets the Purchase Cost field to the best cost available to the dealer from that primary vendor.

1. Go to the (+I) screen and select the [L] Lowest Cost for Vendor from Scanalog action code.

2. At the Enter Printer for Parameters prompt, enter the printer to use.

3. At the Enter Stock Classes to Exclude prompt, you can exclude items within certain stock classes from cost updates. To include all stock classes, leave this prompt blank. You can exclude up to 10 individual stock classes or a range of stock classes. To specify a range, enter the first class in the first field, type a dash in the second field and enter the last class in the third field. For example, [A] [-] [D] excludes stock classes A through D.

4. At the Enter Item Departments to Exclude prompt, you can exclude items in certain departments from cost updates. To include all departments, leave this prompt blank. You can exclude up to 10 individual departments.

5. At the Do Not Update the Following Vendors prompt, you can exclude vendors from having their costs updated. You can use this prompt to update only your primary vendors by specifying the others here.

    *   To include all vendors, leave this prompt blank.

    *   To exclude vendors, specify the first four characters of each vendor's name. Make sure you use the first four characters from each vendor's name as it appears in the OPUS documentation.

6. At the OK to Proceed prompt, type **Y**.

(+I)[T] Dealer Enhanced Cost Tool

The (+I)[T] Dealer Enhanced Cost tool lets you calculate the Dealer Enhanced Cost, or the eCost. The eCost value can be based on discounts, rebates and so forth that are applied as an increased or decreased percentage on individual vendor price plans.

Note: The (+I)[T] tool is intended to replace the (+I)[L], (+I)[Z], and (+I)[%] programs. You should run this tool after you load costs into the Scanalog with the OPUS database file or downloaded price plans.

The (+I)[T] tool has the following features to help you determine who is the purchasing vendor for items during a single processing run:

*   Calculate eCost values (determine the Dealer Enhanced Cost of your items).

    Increase/Decrease the Item Cost by a Percentage of up to 20 Price Plans: The percentage is determined by the total net of all known discounts, rebates, fees, and so forth that are offered for each price plan. The resulting eCost is used when determining the purchasing vendor.

*   Use the (+I)[L] tool to find the lowest cost of the primary vendor.

- Use the (+I)[Z] tool to find the lowest cost between vendors.

    Percentage and/or Dollar Amount that your Exception Vendors Must Overcome to Become the Purchasing Vendor: Using the concept of the (+I)[Z] tool, (do not update with less than [ ]% difference), you can enter the percentage and dollar amount by vendor that is used to determine whether one vendor's overall best cost is better than your primary vendor's overall best cost.

Note: You can view an item's eCosts after the (+I)[T] tool is performed. Go to the (+I)[E] screen and type **ECOST** in the Item # field.

The percent and dollar values that you choose for the eCost calculations are automatically saved, so you can run the same calculations next time you do an item update. The (+I)[T] tool only needs to be executed a single time to achieve the same outcome as multiple passes of the (+I)[L] and (+I)[Z] tools.

In addition to using the (+I)[T] tool to calculate which vendor record should be used as the purchasing vendor, you can also use the eCosts that you calculated as the actual costs of your items. If you type **Y** at the Set the Enhanced Cost as Purchasing Vendor/Multi-vendor Cost prompt, the calculated cost is written back to your inventory database. Be sure this is a viable business model before you choose this option in the (+I)[T] tool.

1. Go to the (+I) screen and select the [T] Dealer Enhanced Cost Tool action code.

2. At the Set the Enhanced Cost as Purchasing Vendor Cost/Multivender Cost From prompt, enter your response according to the following:

    - Type **Y** to set the enhanced cost as the purchasing vendor or multi-vendor cost. The calculated cost is written back to your inventory database and used in order entry and purchasing.

    - Type **N** to use the calculation to determine the purchasing vendor but NOT write the enhanced cost back to your inventory. This is the most common response. Once the (+I)[T] tool has been run, you can view the eCosts using the (+I)[E] tool by entering ecost in the Item field and then inquiring on the item number.

3. At the Do You Want to Reset Enhanced Cost if One Exists prompt, enter your response according to the following:

    - Type **Y** to reset enhanced cost. This response is most commonly used. It overwrites any existing eCosts for items manually added or updated from a previous (+I)[T] function.

    - Type **N** to not reset enhanced cost.

4. At the Enter Printer for Parameters prompt, enter the printer to use.

5. At the Enter Stock Classes to Exclude prompt, you can exclude items within certain stock classes from eCost updates.

    - To include all stock classes, leave this prompt blank.

    - To exclude some stock classes, specify up to 10 individual stock classes or specify a range of stock classes. To specify a range, enter the first class in the first field, type a dash in the second field and enter the last class in the third field. For example, [A] [-] [D] excludes stock classes A through D.

6. At the Enter Item Departments to Exclude prompt, you can exclude items in certain departments from eCost updates.

    - To include all departments, leave this prompt blank.

    - To exclude some departments, specify up to 10 individual departments.

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7. A series of columns display. Use them to specify the vendors to whom costs are compared. Enter your response according to the following:

    *   **Vendor**: Use these fields to enter the vendors to whom costs are compared. Only the vendors specified in this screen are used in the calculations.

    *   **#**: After you enter vendor information, you can change or delete vendor data. Enter the number corresponding to the vendor whose information needs to be changed or deleted.

    *   **I/D**: Use these fields to increase or decrease the vendor's column cost by the percentage you specify in the Calc % field. To increase the cost, type **I**. To decrease the cost, type **D**.

    *   **Calc %**: Use these fields to enter the percentage to increase or decrease the cost. This percentage is used to calculate the dealer enhanced cost. The dealer enhanced cost for all vendors are compared. However, the exception vendors must beat the dealer enhanced cost of the primary vendor by at least the percentage or amount you specify in the Diff % and Diff $ fields to become the purchasing vendor.

    *   **Diff %**: Use these fields to enter the minimum percentage the cost must be to use as the purchasing cost.

    *   **Diff $**: Use these fields to enter the minimum amount the cost must be to use as the purchasing cost.

8. All programs for the vendors specified in the first screen are automatically compared at face value without requiring them to be added into this screen. However, if you need to increase or decrease the cost of a price plan before it is compared, list the program and calculation in the next screen. You can use the series of columns on the next screen to compare these vendors' programs at a different percentage or dollar amount.

    Enter your responses according to the following:

    *   **Vendor**: Use these fields to enter the price plan's vendor to whom costs are increased or decreased.

    *   **#**: After you enter vendor information, you can change or delete vendor data. Enter the number corresponding to the vendor whose information needs to be changed or deleted.

    *   **Program ID**: Use these fields to specify the program ID of the vendors to whom costs are compared.

    *   **I/D**: Use these fields to specify whether to increase or decrease the cost by the percentage you specify in the Calc % field. To increase the cost, type **I**. To decrease the cost, type **D**.

    *   **Calc %**: Use these fields to enter the percentage to increase or decrease the cost. The percentage you specify is used to calculate the dealer enhanced cost. The dealer enhanced cost for all vendors are compared. However, exception vendors must beat the dealer enhanced cost of the primary vendor by at least the percentage or amount you specify in the Diff % and Diff $ fields in the previous table to become the purchasing vendor.

9. At the Ready to Process Costs prompt, type **Y**.

(+I)[Z] Set Item Cost from Scanalog

The (+I)[Z] program has three options. One lets you shop for the lowest price, comparing cost from multiple vendors. The other two options allow you to specify how specific price plans are used as the Purchasing Vendor.

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When performing this procedure, the (+I)[Z] Tool prompts you to select an option for setting the Purchasing Vendor Cost for items (option M, P, U, or W). For each option selected, the cost and vendor source is displayed in the Purchasing Vendor record of the Item window. Each option is described below:

- **Option M — Find the lowest cost from all vendors listed in the Multivendor screens (affects all items). To use this option, there must be an I-CAT record for the item.** This option lets you shop for the lowest price between multiple vendors. Using this option, you can enter a percent or an amount that secondary vendors must beat the Primary Wholesaler before the secondary vendor is set as the purchasing vendor. The percentage or amount you specify is applied to all secondary vendors when comparing to your primary vendor, or you can specify vendors to exclude in the search. The search can include all items in your inventory database or you can exclude groups of items by listing their stock class or department. Dealers usually run the (+I)[L] tool to set the lowest cost from their primary wholesaler first. Then, they use the (+I)[Z] tool to compare all other vendors' cost to their primary wholesaler's best cost. If a lower cost is found, the program sets the purchasing vendor to that cost. The Purchasing Vendor ID box reflects the vendor associated with the lowest cost.

- **Option P — Put the costs from the Vendor Plan/Program into the Purchasing vendor cost (affects only items in that plan).** This option lets you specify a single vendor cost file to be set as the purchasing vendor. Some dealers may choose to first compare multiple vendor cost using the (+I)[ZM] option and then use the (+I)[ZP] option to process a specific cost file to override all other cost and be set as the purchasing vendor cost.

> **Note**: You can only specify one program at a time using option P. If you plan to set costs from more than one program, start with the least preferred program and end with the most preferred. If an item exists on more than one program, the cost from the last program is used.

- **Option U — Update costs from a specified Vendor Plan/Program into the I-WHL Vendor cost (affects only items in that plan for the Matching Vendor).** Option U updates the Primary Wholesaler's record with the specified price plan cost from the I-CAT file to the I-WHL file. However, it does not reset or affect the purchasing vendor cost.

- **Option W — Find the lowest cost from all vendors listed in the MultiVendor screens (affects all items). This option does not require that an I-CAT record exist for the item.** This option performs the same function as option M, described previously, but allows you to set the purchasing cost when the item does not have an I-CAT record, but has multiple I-WHL records instead.

- **Option V — Identifies the Purchasing Vendor and its location.** If the Purchasing Vendor is not priority 1 in the I-WHL record (Primary Wholesaler), cost is pulled from the Purchasing Vendor Record. If the vendors are the same, cost is written into the I-WHL priority 1 record.

Beginning the Procedure

1. Go to the (+I) screen and select the [Z] Set Item Cost from Scanalog action code.

2. At the This Program Will Set the Vendor Purchasing Cost prompt, select the option to use. Enter your response according to the following:

   Type **M** to find the lowest cost from all the vendors listed in the Multivendor screen. This option affects all items. To use this option, there must be an I-CAT record for the item. Go to the heading **Finding the Lowest Cost From All Vendors**.

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Type **P** to put the costs from the vendor plan/program into the purchasing vendor cost. This option affects only items in that plan. Go to the heading **Putting the Costs from the Vendor Plan/Program Into the Purchasing Vendor Cost**.

Type **U** to update costs from one vendor plan/program into the I-WHL vendor cost. This option affects only items in that plan for the matching vendor. Go to **Updating Costs from One Vendor Plan/Program Into the I-WHL Vendor Cost**.

Type **W** to find the lowest cost from all the vendors listed in the Multivendor screen. This option affects all items. This option does not require that an I-CAT record exist for the item. Go to the heading **Finding the Lowest Cost From All Vendors**.

Type **V** to update the selected vendor's Primary Wholesaler record with the Purchasing Vendor's cost if vendor name matches.

Finding the Lowest Cost from All Vendors

1. After you type M or W at the This Program Will Set the Vendor Purchasing Cost prompt, the Enter Printer for Parameters prompt appears. Enter the printer to use.

2. At the Enter Stock Classes to Exclude prompt, you can exclude items within certain stock classes from cost updates. To include all stock classes, leave this prompt blank. You can exclude up to 10 individual stock classes or a range of stock classes. To specify a range, enter the first class in the first field, type a dash in the second field and enter the last class in the third field. For example, [A] [-] [D] excludes stock classes A through D.

3. At the Enter Item Departments to Exclude prompt, you can exclude items in certain departments from cost updates. To include all departments, leave this prompt blank. You can exclude up to 10 individual departments.

4. At the Do Not Update Items with Less than an [8.0] Percent Difference prompt, you can specify the minimum savings percentage to accept before switching vendors for an item. This prompt defaults to 8 percent, which is the figure dealers usually use, taking rebates, freight and volume discounts into account.

   To switch vendors whenever there's a cheaper price, regardless of the percentage, type **0.1**.

5. At the Do Not Update Items with Less Than an [.000] Dollar Amount Difference prompt, you can specify the minimum savings to accept before switching vendors for an item.

   • To specify a minimum dollar amount, leave the default .000

   • To switch vendors only when there is a savings over a specific amount, enter the amount.

6. At the Do Not Update the Following Vendors prompt, you can exclude vendors from having their costs updated. You can use this prompt to update only your primary vendors by specifying the others here.

   • To include all vendors, leave this prompt blank.

   • To exclude vendors, specify the first four characters of each vendor's name. Make sure you use the first four characters from each vendor's name as it appears in the OPUS documentation.

7. At the Enter Cost to Compare prompt, type **P**.

8. At the OK to Proceed prompt, type **Y**.

Putting the Costs from the Vendor Plan/Program into the Purchasing Vendor Cost

1. After you Type P at the This Program Will Set the Vendor Purchasing Cost prompt, the Do You Want to Scan I-CAT For a List of Available Plans prompt appears. This step is optional. If you know the file name, scanning the I-CAT file is not required. Scanning may take several minutes to complete.

    *   Type **Y** to gather price plan information from your DDMS Multivendor file.

    *   Type **N** to not scan for a list of available plans.

2. At the Program ID prompt, enter the first three characters of the Program ID to set as the Purchasing Vendor. Enter it as it appears in the displayed column.

3. At the Vendor ID prompt, enter the first four characters of the vendor that corresponds to the program you are setting as the purchasing vendor. Enter it as it appears in the displayed column.

4. At the Enter Stock Classes to Exclude prompt, you can exclude items within certain stock classes from cost updates. To include all stock classes, leave this prompt blank. You can exclude up to 10 individual stock classes or a range of stock classes. To specify a range, enter the first class in the first field, type a dash in the second field and enter the last class in the third field. For example, [A] [-] [D] excludes stock classes A through D.

5. At the Enter Item Departments to Exclude prompt, you can exclude items in certain departments from cost updates. To include all departments, leave this prompt blank. You can exclude up to 10 individual departments.

6. The Enter Printer for Parameters prompt appears. Enter the printer to use.

7. At the OK to Proceed prompt, type **Y**.

Updating Costs from a Specific Vendor Plan/Program into the I-WHL Vendor Cost

When you select this option, the specified cost is moved to the I-WHL record and the price plan name appears in the Wholesaler program field. This option also gives you the opportunity to save a copy of the I-WHL record in the Multivendor (I-CAT) file. However, if you are loading bump price plans, this is not recommended.

When you use this option, the Program Changed and Last Changed boxes in the Item database are updated, with the Program Changed box displaying the text ;OPS:SZU, and the Last Change box showing the date the change was made. The Created By box displays the program source that created the record. This option also deletes the I-CAT record for the price plan used to update the I-WHL cost.

Note: If you have run your set cost and your purchasing vendor shows a different price plan from the plan moved to the I-WHL file, the purchasing vendor does not change. Instead, the flag reflects the assigned record. You can always rerun the set cost when you update price plans.

1. The Do You Want to Scan I-CAT For a List of Available Plans prompt appears. This step is optional. If you know the file name, scanning the I-CAT file is not required. Scanning may take several minutes to complete.

    *   Type **Y** to gather price plan information from your DDMS Multivendor file.

    *   Type **N** to not scan for a list of available plans.

2. At the Program ID prompt, enter the first three characters of the Program ID.

3. At the Vendor ID prompt, enter the first four characters of the Vendor ID.

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4. At the Save I-WHL Records to I-CAT prompt, specify whether to retain a copy of the I-WHL record in the Multivendor (I-CAT) file. If you are loading bump price plans, we recommend you type N.

   • Type **Y** to retain a copy of the record. The Program Changed and Last Changed boxes in the Item database are updated. The Program Changed box displays the text ;OPS:SZU. The Last Change box shows the date the change was made.

   • Type **N** to not retain a copy of the record. We recommend this option if you are loading bump price plans.

5. At the Enter Stock Classes to Exclude prompt, you can enter specified stock classes to not update. To include all stock classes, leave this prompt blank. You can exclude up to 10 individual stock classes or a range of stock classes. To specify a range, enter the first class in the first field, type a dash in the second field, and enter the last class in the third field. For example, [A] [-] [D] excludes stock classes A through D.

6. At the Enter Item Departments to Exclude prompt, you can enter specified departments to not update. To include all departments, leave this prompt blank. You can exclude up to 10 individual departments.

7. At the Enter Printer for Parameters prompt, enter the printer to use.

8. At the OK to Proceed prompt, type **Y**.

Considering Rebates When Setting the Purchasing Vendor

If you decide to use the (+I)[Z] program, you have one other consideration: the rebate your first call vendor gives you. If you receive an eight percent rebate, for example, you wouldn't need the (+I)[Z] program to specify a different vendor if it only saves you four percent.

To avoid this:

   • Run the (+I)[L] program first, so you have the lowest possible cost from your first call vendor set as the purchasing cost.

   • Run the (+I)[Z] program. At the Do Not Update Items with Less Than an [.000] Dollar Amount Difference prompt, you can specify the rebate percentage to accept before switching vendors for an item. The program changes purchasing vendors only when the savings exceed your rebate percentage.

(+I)[A] Create Vendor Contracts

This tool lets you create a vendor contract from a flyer contract. You can then load the contract using the OPUS update.

1. Go to the (+I) screen and select the [A] Create Vendor Contracts action code.

2. At the Enter Contract to Read From prompt, enter the contract number to use to create a vendor contract. For example, if you loaded the flyer from the OPUS to contract 50, enter 50.

3. At the Enter Vendor Contract to Write To prompt, enter the vendor contract number to create. For example, to transfer the information to vendor contract 55, enter 55.

4. At the OK to Proceed prompt, type **Y**.

5. At the Update Pricing Record Price prompt, type **Y** to change the list price of the I-PRICE record with the new price based on the gross profit percentage and cost field above. Type **N** to not update the record.

6. At the Update the Price Only if the New Price is Greater Than the Old Price prompt, type **Y** to change the price specified if the new price is greater than the current price. Type **N** to not change the price.

7. At the OK to Begin prompt, type **Y**.

Note: You must specify at least one stock class. Leaving the stock ranges blank does not convert any items.

(+I)[B] Build NEW-C-ITEM File

Use this tool to change the Co (company) portion of the item key (which contains the item number and Co fields). This tool changes the I-MASTER record and creates the NEW-C-ITEM file on your inventory unit. The NEW-C-ITEM file can then be used by the DDMS program ;SPCCHG_IT to change the item keys in all related files with two exceptions: Short-buys and Receipts. When this process is complete, run the ;SPCCHGIT program to perform the item key changes procedure.

1. Go to the (+I) screen and select the [B] Build NEW-C-ITEM action code.

2. If the system prompts you to enter a password, enter the password.

3. When the OPUS Logo screen appears, press Enter.

4. If the file NEW-C-ITEM already exists, you are prompted to delete or rename the file. Type **D** to delete. Select this option if you no longer need the file or if it is stored. Type **R** to rename the file. Press Tab to accept the default CHK-C-ITEM or enter a different name.

5. The Build New-C-Item screen opens. In the Old Item Co field, enter the company name to change.

6. In the New Item Co field, enter the new company name to use.

7. In the 4 Char Abb Wholesaler field, you can limit by wholesaler or vendor. Enter the first four characters of the vendor's name.

8. In the Prefix field, you can limit the items by wholesaler prefix. Enter the prefix by which to limit.

9. To limit the items by stock class (from the I-MASTER file), enter the stock class in the Class field. To change all classes, type **0** in the Class field.

10. You can specify up to fifteen limits. When you finish setting limits, press Esc.

11. At the Are You Sure prompt, type **Y** to execute the program (changing the I-MASTER records and creating the NEW-C-ITEM file).

12. The records appear as they are processed. When the process is complete, execute the ;SPCCHGIT program for item key changes.

Note: To keep the file separate from the files created on your work unit during normal OPUS updates and other DDMS functions, the NEW-C-ITEM file is created on your Inventory Unit.

(+I)[C] Clear Asterisks from Description

Some item descriptions contain asterisks. When using EDI, these asterisks can cause transmissions to terminate. This tool lets you remove asterisks from item descriptions.

1. Go to the (+I) screen and select the [C] Clear Asterisks from Description action code.

2. At the Continue prompt, type **Y**. The amount of time required to run this procedure depends on how many items exist in your file.

Note: This program must be re-run after each update.

(+I)[D] Set DEPT & CLASS by CO Name

This feature lets you assign a specific department or stock class to items with the same data in the CO field. This tool only changes the fields in the I-MASTER file, not the I-PRICE file.

1. Go to the (+I) screen and select the [D] Set Dept and/or Class by Co Name action code.

2. When the warning message appears, press Enter to continue.

3. The system displays a screen that lets you select a company name by which to limit. Enter the limit in the CO field. The information you enter must exactly match the information set in the CO field in the I-MASTER file from the (E) screen.

4. In the corresponding Class box, enter a stock class by which to limit. To include all classes, type an asterisk (*) as a wild card limit. If you leave this field blank, no items are updated.

5. In the Dept field, enter an item department by which to limit. To include all departments, type an asterisk (*) as a wild card limit. If you leave this field blank, no items are updated.

6. In the New Class field, enter the new item stock class. To not change the stock class for these items, press Tab to move to the New Dept field.

7. In the New Dept field, enter the new item department. To not change the department for these items, press Tab.

8. When you finish specifying information, press Esc.

9. At the Are You Sure prompt, type **Y**.

(+I)[K] Remove Records from I-CAT by Program ID

When you load a vendor pricing plan, the system adds information about that plan in two places:

- It adds the pricing plan's costs to the I-CAT file. The purchasing vendor may use these costs if you run the (+I)[L] Lowest Cost for Vendor from Scanalog, the (+I)[Z] Set Item Cost from Scanalog, or the (+I)[T] Calculating Dealer Enhanced Cost functions.

- It adds the pricing plan as a contract in the (ET) screen (Price Plans). This lets you offer this pricing to your customers, by assigning them these contracts. (Some pricing plans do not offer customer pricing. OPUS creates contracts for them also, but these contracts contain only the list price.)

In the following cases, re-process the price plan:

- You loaded the wrong dealer cost column

- You loaded the wrong end consumer price level.

In the following cases, you can remove the pricing plan from your system to clean up unneeded records:

- You loaded a pricing plan you do not actually use.

- You needed to create a contract from a pricing plan, but did not need to use the pricing plan's costs.

- Your vendor released an updated flyer that has fewer or different SKUs.

In the following case, you can run a report or delete records:

- The I-CAT record has a difference in the buy quantity or unit of measure. Identifying differences in the buy quantity is helpful when comparing costs or drop shipping from the wholesaler, especially if the buy quantity is greater than your primary wholesaler.

Removing a pricing plan involves three basic steps:

- Removing the pricing plan from the I-CAT file

- Deleting the contract

- Loading the correct pricing plan (if necessary).

To remove the price plan from the I-CAT file, do the following:

1. Go to the (+I) screen and select the [K] Remove Records from I-CAT by Program ID action code.

2. At Enter Printer for Report, enter the printer to use.

3. At the Enter Program ID to Remove prompt, enter the code for the pricing plan to remove. You must specify the pricing plan code here, not the contract number. Go to **Step 8**.

   To report or delete records where the I-CAT record has a difference in the buy quantity or unit of measure, you must type **buy**. Be sure to use lowercase characters. Go to **Step 4.**

4. At the Delete or Print Records with BUY QTYS or UOM Different than I-WHL prompt, enter your response according to the following:

   To delete the records, type **D**. Go to **Step 5**.

   To print a report listing the items with a buy quantity or unit of measure different than the wholesaler, type **P**. Go to **Step 7**.

   To print a Summary Report, type **N**.

5. In the Records to Delete field, enter your response according to the following:

   Type **Y** to delete all records.

   Type **N** to delete records that do not contain an * (asterisk).

   Type ***** (asterisk) to delete records that contain an * (asterisk).

6. When prompted, type **Y** to print the deleted records or type **N** to not print. Go to **Step 8**.

7. In the Records to Print field, enter your response according to the following:

   Type **Y** to print or delete all records.

   Type **N** to print or delete records that do not contain an * (asterisk).

   Type ***** (asterisk) to print or delete records that contain an * (asterisk).

8. At the OK to Proceed prompt, type **Y**.

9. At the Remove from I-CAT is Complete prompt, press Esc.

10. At the Exit This OPUS Program prompt, type **Y**.

To delete the contract:

1. Go to the text-based (ET) screen. From the Master Menu, double-click . From the View menu, select Inventory Contracts.

2. Select the [D] Delete action code.

3. If the Enter Update Password appears, enter the password set in the ET Passwords Update field in the (LE1) screen.

4. At the By Item prompt, type **N**.

5. At the Customer # prompt, press Enter.

6. At the Contract # prompt, type the code of the contract to delete.

7. At the Customer Dept To # prompt, press Enter.

8. At the Contract prompt, type the contract code again.

9. At the Limit Items to be Deleted prompt, type **N**.

10. At the Are You Sure prompt, type **Y**.

11. At the End of Contract prompt, press Esc.

After removing the pricing plan not needed:

1. Download the correct pricing plan, if necessary, using OPUS PSNControl.

2. Process it using the (+IF)[P] Run Program function.

If you re-process a price plan after setting the purchasing vendor, you must:

• Reset the purchasing vendor back to the primary wholesaler (+I)[1].

• Process the price plan correctly. (The (+IF)[P] function automatically replaces the I-CAT records in question.)

• Set the purchasing vendor again ((+I)[L], (+I)[Z], or (+I)[T]).

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You can remove a vendor completely from your inventory if:

- You accidentally loaded the wrong vendor during your quarterly OPUS Load.

- A vendor you loaded went out of business.

- A vendor you loaded merges with another vendor and no longer provides item and pricing updates under its own name.

- A vendor you loaded moves its warehouse operations or makes other changes so that it no longer delivers your orders within an acceptable time frame.

If you do not remove a vendor in such cases, it can affect your short-buy process and possibly your pricing. For example, if the automated short-buy transmits a purchase order to a vendor who cannot provide acknowledgment or timely delivery, you may need to cancel and re-submit the purchase order to other vendors. If you have a customer on a cost plus plan with pricing coming from the vendor, ordering from a higher-priced vendor could lead you to increase the customer's price or to take the price difference as a loss. For detailed steps, see Removing a Vendor on the Customer Support Center.

(+I)[M] Move I-WHL PER to I-PRICE MIN

With this tool, you can have your wholesalers' minimum purchase amount placed in your pricing record's minimum order amount field.

The PER field in the I-WHL record indicates how many of your selling units, set in the I-MASTER record, are needed to make up the minimum buying unit set in the I-WHL record. By setting your customer's minimum order amount to equal your minimum purchase amount, you can avoid having broken cartons of non-stock items.

1. Go to the (+I) screen and select the [M] Move I-WHL PER to I-PRICE MIN action code.

2. At the Enter I-PRICE Location to Update or Create prompt, enter the I-PRICE location to be set.

3. There are no other limits. If a record does not exist in the I-PRICE location, one is created using the average cost and list price using the location one record. If location one does not exist for the I-PRICE record, the cost and price is used from the I-WHL record. If the Purchasing Vendor is not set to the primary wholesaler, the Purchasing Vendors Per Field is used instead.

4. At the OK to Continue prompt, type **Y**.

(+I)[N] NEW-C-ITEM Key Swap for Scanalog

With this tool, the keys of the I-CAT file used in the Scanalog are updated with changes contained in the NEW-C-ITEM file.

1. Go to the (+I) screen and select the [N] NEW C-ITEM Key Swap for Scanalog action code.

2. At This Program Will Check the OPUScanalog for Key Changes in the NEW-C-ITEM prompt, type **Y**.

(+I)[W] Set Quantity Breaks in Contract to 1

Use this feature to set the quantity breaks in a contract to one.

1. Go to the (+I) screen and select the [W] Set Quantity Breaks in Contract action code.

2. At the Enter Contract Number to Copy From prompt, enter the contract number. This is the number of the contract to which you are copying.

3. At the Enter Contract Number to Copy To prompt, enter the contract number. This is the number of the contract to which you are copying.

4. At the OK to Proceed prompt, type **Y**.

(+I)[X] Cross Reference Prefix in Item Number

Use this tool to create reference only items that let you access items using the item's prefix and item number. You cannot limit the item information. Running this procedure affects all the items in your inventory.

1. Go to the (+I) screen and select the [X] Cross Reference Prefix in Item Number action code.

2. At the Continue prompt, type **Y**.

(+I)[3] Set Class/Department by Purchasing Vendor or Program ID

This feature lets you set stock classes and/or departments for your items by limiting to the purchasing vendor. You can also set stock classes and/or departments by Program ID. Be sure to obtain and run the most current OPUS Install to insure OPUS tools are current.

Note: The following procedure is dedicated. Make sure no one else uses your system until it is complete.

Setting Class/Dept by Purchasing Vendor

1. Make sure you have a complete backup of your inventory units. These are the units specified in the Inventory, Inv Hist, Inv Aux and Inv Whl fields in the (L0) screen.

2. From the text-based Master Menu, type **+I** to open the (+I) screen.

3. Select the [3] Set Class/Department by Purchasing Vendor action code.

4. At the Enter Vendor to Match prompt, enter the complete name of the purchasing vendor to which to limit. The stock class or department you are setting up is limited to the purchasing vendor you specify. You must enter a vendor to continue.

5. At the Purchasing Vendor Only prompt, type **Y** to set class/dept by purchasing vendor.

6. At the Enter Program ID to Match prompt, you can limit to a particular program ID for the purchasing vendor. If you leave this field blank, the system changes all inventory records that have the specified vendor, regardless of the program ID. Enter the program ID or press Enter to leave this field blank.

Note: The program ID is the price plan ID you enter when loading price plans through UpdateUni (DDMS), PLUSESND (DDMSPLUS) UpdateSPR (DDMS), PLUSSPR (DDMSPLUS), or Vendor Multiloader.

7. At the Enter Stock Class to Set prompt, enter the stock class to which to set the items. If you do not need to change the current stock class on the items, press Enter and leave this field blank.

8. At the Enter Department to Set prompt, enter the department to which to set the items. If you do not need to change the current department on the items, press Enter and leave this field blank.

9. At the Enter Class to Limit On prompt, you can limit the changes to items that are currently in a specific stock class. Suppose you are setting stock class D to items from purchasing vendor ABC. If you specify C in the Enter Class to Limit On field, the system only changes items to stock class D if they meet two conditions: they have a purchasing vendor of ABC, and they're currently in stock class C.

   • To limit your changes to items within a specific stock class, enter the stock class..

   • To change all items for the purchasing vendor (and program) you specified to the new stock class or department, regardless of the class or department they're currently in, press Enter.

10. At OK to Proceed prompt, type **Y**. The system displays a count as it processes the item records that meet your limits.

11. When the Reset is Complete message appears, press Esc to return to the Master Menu.

Setting Class/Dept by Program ID

1. Make sure you have a complete backup of your inventory units. These are the units specified in the Inventory, Inv Hist, Inv Aux and Inv Whl fields in the (L0) screen.

Note: This procedure is dedicated. Make sure no one else uses the system until the process is complete.

2. From the text-based Master Menu, type +I to open the (+I) screen.

3. Select the [3] Set Class/Department action code.

4. At the Enter Vendor to Match prompt, enter the complete name of the vendor to which to limit. The stock class or department you are setting up is limited to the vendor you specify. You must enter a vendor to continue.

5. At the Purchasing Vendor Only prompt, type **N**.

6. At the Enter Program ID to Match prompt, enter the Price Plan in which to limit the mass change.

7. At the Enter Stock Class to Set prompt, enter the stock class to which to set the items. If you do not need to change the current stock class on the items, press Enter and leave this field blank.

8. At the Enter Department to Set prompt, enter the department to which to set the items. If you do not need to change the current department on the items, press Enter and leave this field blank.

9. At the Enter Class to Limit On prompt, press Enter and leave the field blank.

10. At the Enter Class to Limit On prompt, you can limit the changes to items that are currently in a specific stock class. Suppose you are setting stock class D to items from purchasing vendor ABC. If you specify C in the Enter Class to Limit On field, the system only changes items to stock class D if they meet two conditions: they have a purchasing vendor of ABC, and they're currently in stock class C.

   • To limit your changes to items within a specific stock class, enter the stock class.

   • To change all items for the purchasing vendor (and program) you specified to the new stock class or department, regardless of the class or department they're currently in, press Enter.

continue to next page

11. At OK to Proceed prompt, type **Y**. The count displays as it processes the item records that meet your limits.

12. When the Reset is Complete message appears, press Esc to return to the Master Menu.

MakeBuy: Inventory Selling Unit Converter

The (+I)[Y] Make-Buys Toolbox option is no longer recommended. Instead, you should use the SIMPLE Wizard and select the Make-Buys option ABOUT MAKE-BUYS.

Each quarter, especially in the fourth quarter, major wholesalers typically change their units of measure (UOM) to reflect purchasing trends. As a result, the selling units that you use as a dealer may not match your vendors' new buying units for each of the affected items.

Note: Review your vendors' lists of UOM changes to determine the extent to which your inventory is affected and to determine whether this step is necessary for the current quarter. Contact your vendors for their lists of Unit of Measure changes.

Vendors provide these UOM changes, sometimes for hundreds of items, in the quarterly OPUS Update.

You have the flexibility to address these UOM changes in several ways:

- You can keep your original selling UOM for these items. For example, you may have a contract or bid with a large customer that commits you to a list of items with specific units of measure.

- You can make your selling UOM match the vendor's new buy UOM for all affected items, for example, to avoid breaking up a carton to fill an order for a smaller quantity than your vendor sells.

- You can do some combination so one group of items keeps your original selling unit of measure and another group of items matches the selling UOM to the vendor's new buy UOM.

Selecting the Make-Buys option in SIMPLE automatically recalculates all your costs, prices, contracts, inventory quantities, shipping weights, and inventory history totals.

Preparing to Process UOM Changes

To ensure accurate adjustments in the shortest possible time, complete these steps:

1. Review your vendors' lists of UOM changes to determine the extent to which your inventory is affected.

2. Complete purchasing and flushing processes. This ensures that all quantities are current.

3. Determine which items to convert by stock class. The Make-Buys option in SIMPLE requires you to specify at least one stock class to convert. You can assign up to 10 unique stock classes to the items Make-Buys can convert. You can even specify a From/To range of stock classes. See the heading **Setting the Make-Buys Option in the SIMPLE Wizard**.

4. Delete any contracts no longer needed. The Make-Buys program converts selling quantities in your CONTRACTS file. Your CONTRACTS file may contain numerous instances of an item. The larger your file, the longer the Make-Buys program takes.

5. Complete any other pre-OPUS load procedures.

6. Make a complete backup of your DDMS files.

Setting the Make-Buys Option in the SIMPLE Wizard

1. If you haven't already, download and install the latest quarterly OPUS Install to update your PSNControl and SIMPLE software.

2. If you haven't already, download the latest quarterly OPdb Multi-Vendor Catalog Update file from the OPUS PSN.

3. Make sure TBL Server (DDMS only) is running. (These are dedicated procedures. Make sure no one else is using the system.)

4. From the Microsoft® Windows® Start Menu, launch the SIMPLE program.

5. Click Global Parameters and update the first page, if needed.

6. Click Next.

7. On the second page of Global Parameters, click the Run Make-Buys After the Update check box. When you do, additional prompts appear, as shown on the following page.

8. Enter at least one stock class to reflect new vendor UOMs. You can enter a range of stock classes. Use the first space as the stock class specifying the From portion of the range, place a dash in the second space and use the third space for the stock class specifying the To portion of the range. Stock classes entered in the fourth through tenth spaces are in addition to those within the range specified.

Examples:

- [2] [Y] [ ] [ ] [ ] [ ] [ ] [ ] [ ] = updates the 2 and Y stock class

- [0] [-] [Z] [ ] [ ] [ ] [ ] [ ] [ ] [ ] = updates ALL classes

- [A] [-] [L] [ ] [ ] [ ] [ ] [ ] [ ] [ ] = updates classes A thru L

- [A] [-] [L] [O] [P] [U] [S] [ ] [ ] = updates classes A thru L and classes O, P, U, S

Note: You must specify at least one stock class for the Make-Buys program. Leaving the stock ranges blank does not convert any items.

9. If needed, check the Convert Your Items with Larger Sell UOM to Match the Whlsrs Smaller Buy UOM box.

Note: By default, the Make-Buys program adjusts your selling UOM to match your primary wholesaler's buy unit when the buy UOM is larger than your selling UOM. In addition, you can also adjust your selling UOM when it is larger than the buy UOM by answering Y to Convert Your Items with Larger Sell UOM to Match the Whlsrs Smaller Buy UOM.

10. Before you complete the SIMPLE program, be sure to set all other Global, Vendor-Specific and Index parameters, so the complete OPUS load is done according to your specifications.

11. After you click Finish, the You Have Selected to Run the Make Buys Program During the Simple Update prompt opens. Click Yes. You can continue with the SIMPLE update.

After you set your SIMPLE parameters and launch the update, no further intervention is needed.

What (+I)[Y] Make-Buys Updates

| File	Description	Data Updated by (+Y) Make-Buys
I-MASTER	Inventory Master Record Per Item	Sell UOM, Item Weight
I-MFG	Direct Buy	Buy Unit, Carton Size, Cost, Last Cost, List, and Future Cost
I-WHL	Primary Wholesaler	Buy Unit, Carton Size, Cost, Last cost, List, and Future Cost
I-PRICE	Pricing Record	Minimum Quantity (must be blanked out), Cost, List
I-COLUMNS	Quantity Breaks	Quantity 1-5, Price 1-5
I-AUX	Inventory Usage Record	Minimum Quantity (must be blanked out), Cost, List, Quantity, Month-to-Date Sold, Backordered Allocated, On Order, and Receipts
I-AUX	Inventory History-Yearly Totals	Year-to-Date Quantity, LYTD Quantity
I-HISTORY	Inventory History-Monthly History Record	Month 1-12 Sold Month 13-24 Sold
CONTRACTS	Inventory Contract Price, Customer Price & Quantity Breaks	Sell Quantity, Sell Price, Set Contract Cost

Using the Make-Buys Exceptions Report

The Make-Buys program creates an exceptions report named Make-Buys on your work unit. The DDMSPLUS file name is MBMMDDhhmm.txt and the location is DDMSPLUS Folder\OPUS\Log. It lists any items and their data fields that could not be divided equally. The UOM adjustments were made successfully on these items but this file logs any remainder that may need to write off or otherwise to account. Suppose you formerly sold pencils by the each, had 13 on-hand, and now sell by the dozen. The Make-Buys Exception Report shows the adjusted on-hand amount of 1 (1 DZ) and a remainder of 1 (1 EA).

(+I)[E] Electronic Catalog

1. Go to the (+I) screen and select the [E] Electronic Catalog (Scanalog) action code.

2. If the system prompts you to enter a password, enter the password.

3. The OPUS Catalog Item Screen opens. Retrieve the item to view. If you do not completely fill the field, press Enter.

4. The system displays information for the item you specified, including the item number, company, description, unit of measure, department, stock class, and alternate item fields from the I-MASTER file. The primary fields of the I-PRICE file are also shown. The left side of the screen shows details from the I-WHL record, the item's vendor and its related information.

   The remainder of the screen is divided into seven sections which display the items's I-CAT records. If no I-CAT records appear, this is the only vendor selected that carries the item; the item is not on any flyers selected to load.

   In the figure below, the item is carried by several selected vendors. The item's prefix appears before the item number. In this example, the item is on a flyer, and the cost is loaded into the wholesaler's record. The item's non-flyer information is in an I-CAT record that displays to the right of the wholesaler record. It also shows that the item is carried by the secondary vendor.
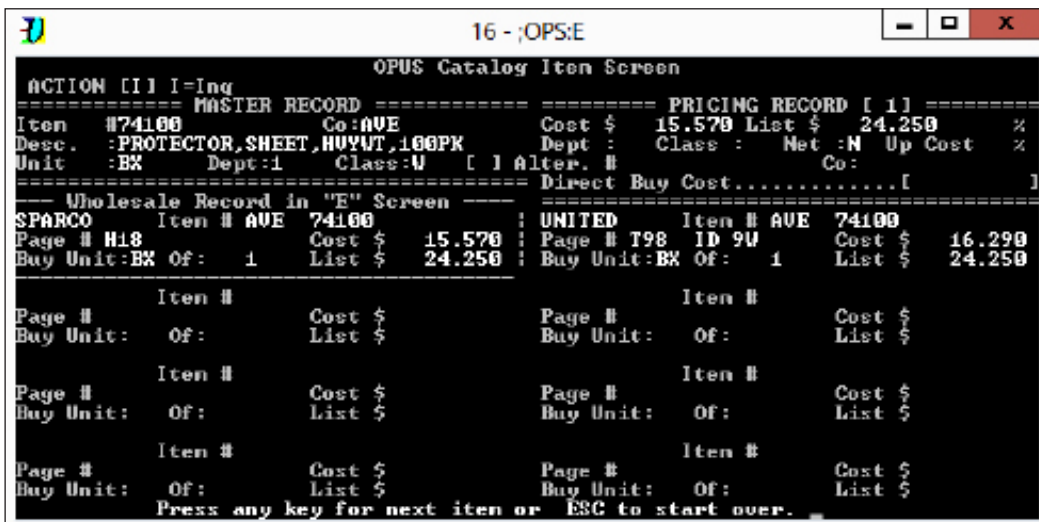
   If an item exists on flyers that were specified to load, the system displays this information in the ID field in the I-CAT record. The ID represents the flyer with the item price/cost.

5. To view the next item, press Enter. When you finish viewing items, press Esc.

(+I)[P] Item Updating, Viewing, Reporting from OPS-CHANGE

This OPUS feature lets the dealer keep item information changes to help facilitate business decisions, price label printing, and item reporting.

Report Writer has formatted reports and label printing capabilities that print from the OPS-CHANGE file, in addition to the standard reports from the OPUS Changes screen.

1. Go to the (+I) screen and select the [P] OPS-CHANGE File action code.

2. When the OPUS Change screen opens, you can select from the following options:

   - **View a Specific Item**: The OPUS Update History screen opens. It displays item information similar to the Scanalog screen, including the item number; company, if changed; new and old cost; list; and update date. This screen displays information for up to four subsequent dates.

   - **View Item Number Changes**: After you enter the starting and ending manufacturer codes, the system displays the information from the OPS-CHANGE file for the number and/or the company for the changed item.

   - **View Item Cost Changes**: After you enter the starting and ending manufacturer codes, the system displays the cost information for the changed item.

   - **View List Price Changes**: After you enter the starting and ending manufacturer codes, the system displays the list information for the changed item.

   - **Print Item Number Changes**: After you enter the printer and the starting and ending manufacturer codes, the system prints the information to the printer you specified.

   - **Print Item Cost Changes**: After you enter the printer and the starting and ending manufacturer codes, the system prints the information to the printer you specified.

   - **Print List Price Changes**: After you enter the printer and starting and ending manufacturer codes, the system prints the information to the printer you specified.

   - **Purge Changes to a Prior Date**: You can remove old information from the file that was written to the OPS-CHANGE file during previous OPUS loads. After specifying a printer for the purge report, the screen displays the last date of your OPUS SIMPLE update. At the Purge Previous Dates prompt, type Y to purge all records written prior to your last displayed load date. Type **N** to manually enter a date to use.

(+I)[V] Viewing and Printing OPUS Parameters

This tool lets you view or print your OPUS loading parameters.

1. Go to the (+I) screen and select the [V] Print OPUS Parameters action code.

2. At the Enter Print or View prompt, type V to view the parameters. The system prompts you as to which parameters to view.

   - Type **1** to print OPUS parameters or type **2** to print OPdb2 Parameters.

   - Type **P** to print the parameters. At the Enter Printer for Parameters prompt, enter the logical name of the printer where the parameters print—P1 or P2, for example.

(+I)[R] Reporting Items to OPUS

If your system is incorrectly calculating a cost or price, you can help Technical Support determine the problem by emailing your SIMPLE parameters.

Note: You can compile this information in case you have issues not only with costs and prices, but other item data — for example, item prefixes, descriptions, page numbers, units of measure, product classification codes, weights, and so on.

This procedure has two basic parts:

- Printing item information
- Printing OPUS parameters

Printing Item Information

1. Go to the (+I) screen and select the [R] Report Items to OPUS function. (The function may be called Report Item Discrepancies.)

2. At the Enter the Item Number to Report prompt, enter the problem item number. If you do not fill the field with characters, press Tab.

    In the second field, enter the item's company. If you do not fill the field with characters, press Enter.

3. At the Report This Item prompt, if the system is displaying the correct item, type **Y** and go to **Step 4**.

    If the item is incorrect, type **N** until the correct item appears, or press Esc to specify a different item.

4. At the Item Location prompt, enter the inventory location that includes this item.

5. At the Print OPUSdb Parameters prompt, type **N**.

6. At the Enter Problem Number prompt, type **14**.

7. At the Enter Comments to Be Sent prompt, press Enter.

8. At the Enter Printer Designation prompt, press Enter to accept the default, or specify a different printer. Save the printouts so you can fax them.

Printing OPUS Parameters

1. In the (+I) OPUS Toolbox screen, select the [V] View OPUS Parameters action code.

2. At the Enter [P]rint or [V]iew prompt, type **P**.

3. At the 1=OPUS Parameters prompt, type **1**.

4. At the Enter Printer for Parameters prompt, press Enter to accept the default, or specify a different printer.

(+I)[F] OPUS PSN Utilities

The OPUS PSN Utilities provides electronic communication and information.

Using the OPUS PSNControl software, you can obtain all your quarterly OPdb OPUS Multi-Vendor Updates by simply downloading them via the Internet. OPUS distributes the OPdb Multi-Vendor Update file via the OPUS PSN service. Using the OPUS PSN, transmissions are dramatically simpler, faster and more reliable.

Setting Up Communications

1. Go to the (+I) screen and select the [F] OPUS PSN Utilities action code. Then select [I] Go to the ID Screen. The User ID screen opens.

2. In the action code field, type **A** to add or **C** to change your information.

3. In the ID field, enter your User ID and press Tab. If you are changing information, the Correct ID and BBS prompt appears. Type **Y**.

4. In the PSN field, enter the PSN user name provided by Data Services. Press Tab.

5. In the Password field, enter your password. Press Tab.

6. In the Download Folder field, enter the volume serial (folder name) for your work unit, set in the (L0) screen, W1, for example. Press Enter.

7. Press Esc until the cursor returns to the Master Menu.

(+I)[I] Super Index

The Super Index links item numbers to any unique item numbers, prefixes, buy units, and UPC numbers you create for items. For example, you might set up unique item numbers to match those given you by your customers. If you build the Super Index, you can find those unique item numbers using the original item number in Order Entry, EDI applications, and ECI website products.

To use the Super Index, you must first build the file (I-SUPER). The Super Index links the prefix and item number to the item key. The system cross-references the item number and company of the item to the item key in the Master Record. Even if the item number or company in the I-WHL, I-MFG, or I-CAT file is different from the item key in the Master Record, you can still query and retrieve these items in order entry.

The system builds from four files and each item combination is linked back to the I-MASTER item number.

*   **Vendor Item Company to SKU Item Key**: This index links the item number and company from the I-WHL, I-MFG, and I-CAT records to the item key. With this index, you can query and retrieve the item with the item number followed by the company.

*   **Vendor Prefix/Item to SKU Item Key**: This index links the item prefix and number from the files I-WHL, I-MFG, and I-CAT to the item key. With this index, you can query and retrieve with the item prefix followed by the item number.

*   **MFG Item Number to SKU Item Key**: This index links the item number from the I-WHL, I-MFG and I-CAT files and compares it to the item key. If you build this index, you can query and retrieve with the item number from manufacturer's, wholesaler's, and I-CAT file.

*   **UPC Number to SKU Item Key**: The system links the UPC numbers to the item key. This index includes the records of any items that have UPC numbers set up in the (E) screen, or with UPC numbers loaded through OPUS. With this index, you can query and retrieve with the item's UPC number.

The following is an example of an item. The primary vendor is Essendant, but this item also has I-CAT records for Sparco:

Item Nbr	Company	Vendor Nbr	Vendor Pref	Vendor
10330	SMD	10330	SMD	Essendant
10330	SMD	153L	SMD	Sparco

You could enter 10330 or SMD10330 and the system would display the records for Essendant. If you entered 153L, the system would display the records for Sparco.

If you are using the Super Index, you must rebuild it after each OPUS load. If you add items between OPUS loads, you must rebuild the Super Index to include those items in the index. The Super Index is stored in the I-SUPER file.

To rebuild the Super Index:

1. Go to the (+I) screen and select the [I] Super Index action code.

2. At the Rebuild I-SUPER prompt, type **Y**.

(+I)[O] Mark Items as DELETED

This tool identifies orphaned items that are not updated for Direct Buy and Wholesale records. Inventory items can become orphaned if the vendor stops including that item in the file given to OPUS. Once an item exists in your file, it remains there until you delete it. This tool lets you report items that are not updated on the Last Update date of your choosing. You can also mark items that aren't updated as DELETED. This tool *does not* delete inventory records. Instead, it marks them as DELETED when you select the Mark option. In the graphical Item database Vendors tab, it displays in the Created By field when marking Direct Buy items, and in the Program field when marking Wholesaler items. OPUS recommends removing items marked Deleted prior to loading the Simple update. After running (+I)[O] to mark items as DELETED, refer to the Inventory Housekeeping documents to remove Direct Buy or Wholesaler items from your inventory database.

Note: When you use the (+I)[O] tool, items that are not updated due to price variance from SIMPLE or Vendor MultiLoader PSN updates might be included. We recommend checking SIMPLE, UpdateSPR (DDMS), PLUSSPR (DDMS), UpdateUni (DDMS), PLUSESND (DDMSPLUS), and Vendor MultiLoader Update Reports to see which items were not updated because of price variance. PSN program reports are located in the DDMS SR folder and begin with rpt-xxx. The SIMPLE Exceptions report is located in the DDMS Work folder (volume serial). A new file is saved each time you perform the OPUS update with a time-stamped file name in the following format: OPMMDDhhmm (OP = OPUS, MM = Month, DD = Day, hh = Hour, mm = Minute). For more information on price variance exceptions, see Correcting List Price Variances After Loading OPUS.

Reporting Direct Buy Records

1. Go to the (+I) screen and select the [O] Mark Items as DELETED action code.

2. At the Do You Want to Report I-MFG prompt, type **Y**.

3. At the Do You Want to Mark I-MFG prompt, type **N**.

4. At the Do You Want to Report I-WHL prompt, type **N**.

5. At the Search for I-MFG Items That Have a Last Update Before prompt, enter a date to search for items that have a Last Update date before the specified date in the I-MFG Last Update field.

continue to next page

6. At the Enter I-MFG Vendor to Match Blank ALL prompt, enter the Direct Buy Vendor ID to match or leave this field blank to match on all vendors.

7. At the Stock Classes to Exclude for I-MFG prompt, enter a stock class or range of stock classes to not mark as DELETED.

   Use a dash in the second [ ] field for a range of stock classes.

8. At the OK to Proceed prompt, type **Y**. The DEL-MFG report is created in the DDMS work folder to review and print.

9. At the Viewfile Now prompt, type **Y** to view the report in Notepad.

10. Use the (Z)[D2] options in Utilities to print a Disk File (DDMS only).

11. Enter DEL-MFG as the file name and the Unit number for your DDMS work unit.

12. At the printer prompt, enter your DDMS file printer number.

Marking Direct Buy Records as DELETED

1. Go to the (+I) screen and select the [O] Mark Items as DELETED action code.

2. At the Do You Want to Report I-MFG prompt, type **Y**.

3. At the Do You Want to Mark I-MFG prompt, type **Y**.

4. At the Do You Want to Report I-WHL prompt, type **N**.

5. At the Search for I-MFG Items That Have a Last Update Before prompt, enter a date to search for items that have a Last Update date before the specified date in the I-MFG Last Update field.

6. At the Enter I-MFG Vendor to Match Blank ALL prompt, enter the Direct Buy Vendor ID to match or leave this field blank to match on all vendors.

7. At the Stock Classes to Exclude for I-MFG prompt, enter a stock class or range of stock classes to not mark as DELETED.

   Use a dash in the second [ ] field for a range of stock classes.

8. At the OK to Proceed prompt, type **Y**. The DEL-MFG report is created in the DDMS work folder to review and print.

   For more information on removing I-MFG records marked DELETED, see Inventory Housekeeping: Removing Direct Buy Items.

Reporting Wholesale Records

1. Go to the (+I) screen and select the [O] Mark Items as DELETED action code.

2. At the Do You Want to Report I-MFG prompt, type **N**.

3. At the Do You Want to Report I-WHL prompt, type **Y**.

4. At the Do You Want to Mark I-WHL prompt, type **N**.

5. At the Search for I-WHL Items That Have a Last Update Before prompt, enter a date to search for items that have a Last Update date before the specified date in the I-WHL Last Update field.

6. At the Enter I-WHL Vendor to Match Blank ALL prompt, enter the Primary Vendor ID to match or leave this field blank to match on all vendors.

7. At the Stock Classes to Exclude for I-WHL prompt, enter a stock class or range of stock classes to not mark as DELETED.

   Use a dash in the second [ ] field for a range of stock classes.

8. At the OK to Proceed prompt, type **Y**. The DEL-WHL report is created in the DDMS work folder to review and print.

9. Use the (Z)[D2] options in DDMS Utilities to print a Disk File.

10. Enter DEL-WHL as the file name and the Unit number for your DDMS work unit.

11. At the printer prompt, enter your DDMS file printer number.

Marking Wholesale Records as DELETED

1. Go to the (+I) screen and select the [O] Mark Items as DELETED action code.

2. At the Do You Want to Report I-MFG prompt, type **N**.

3. At the Do You Want to Report I-WHL prompt, type **Y**.

4. At the Do You Want to Mark I-WHL prompt, type **Y**.

5. At the Search for I-WHL Items That Have a Last Update Before prompt, enter a date to search for items that have a Last Update date before the specified date in the I-WHL Last Update field.

6. At the Enter I-WHL Vendor to Match Blank ALL prompt, enter the Primary Vendor ID to match or leave this field blank to match on all vendors.

7. At the Stock Classes to Exclude for I-WHL prompt, enter a stock class or range of stock classes to not mark as DELETED.

   Use a dash in the second [ ] field for a range of stock classes.

8. At the OK to Proceed prompt, type **Y**. The DEL-WHL report is created in the DDMS work folder to review and print.

   For more information on removing I-WHL records marked DELETED, see Inventory Housekeeping: Removing Wholesaler Items.

(+I)[*] Set Dates in Purchasing Data

During your quarterly OPUS catalog update, the Cost/Price Programs section of the SIMPLE wizard lets you specify the effective starting and ending dates of any pricing files processed. This setting is optional. These fields are blank by default. If you leave these fields blank, it prevents the contracts from expiring.

If you select or type an incorrect date for a vendor's pricing files, it can cause several problems. For example, it sets the effective dates in the (ET) screen (or Price Plans). If the affected contracts have expired dates, customers may not receive the correct contract pricing.

The effective dates parameter also sets dates in the Purchasing Vendor and I-CAT records in the (E) screen (or graphical Item window). When these dates are incorrect, the system may not calculate costs correctly on pick tickets and purchase orders. In addition, the system may not correctly match vendors in the purchasing and automated short-buy applications.

If you set the wrong effective dates during your OPUS catalog update, you must specify the correct contract dates in two places to correct this problem:

- The I-CAT/Purchasing Vendor records

- The contract itself.

1. Go to the (+I) screen and type an * (asterisk) to select the Set Dates in Purchasing Data action code.

2. At the Enter Flyer Code for Dates prompt, you can change dates for a specific contract, or for all contracts for a specific vendor.

   - To change dates for a specific contract or flyer, specify the flyer code.

   - To change dates for all contracts from a specific vendor, press Enter. At the Enter Vendor Nbr for Dates prompt, enter the vendor name the way it was loaded by OPUS.

3. At the Enter Starting Date for These Items prompt, enter the new starting date (09/01/20, for example).
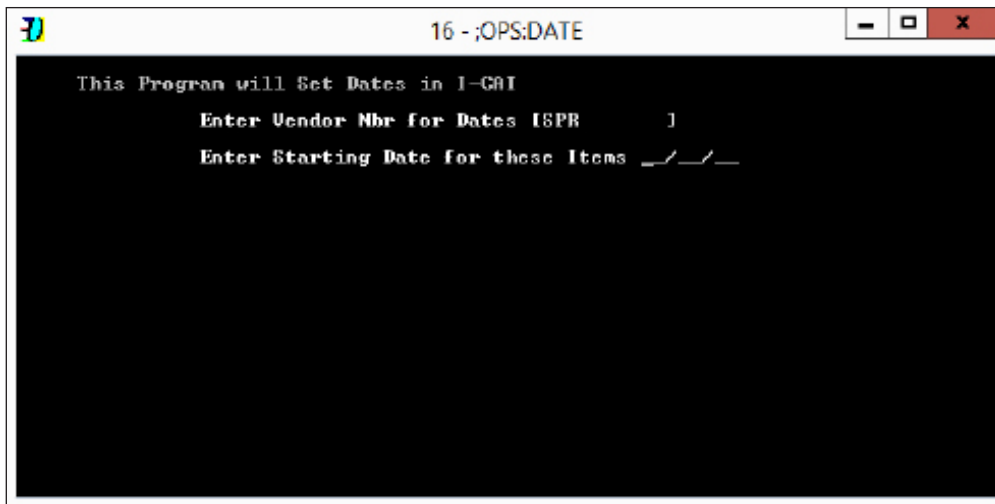
4. At the Enter Ending Date for These Items prompt, enter the new expiration date. To avoid having the contracts expire, enter an ending date of 99/99/99.

5. At the OK to Proceed prompt, type **Y**.

6. When the process is complete, the Total Records Processed message appears. Press Enter.

7. After correcting dates in the I-CAT and Purchasing Vendor records, correct them in the contract.

   7.1   From the Master Menu, double-click .

   7.2   From the View menu, select Inventory Contracts.

   7.3   Select the [C] Chg action code.

   7.4   If the Enter Update Password prompt appears, enter the password set in the ET Passwords Update field in the (LE1) screen.

7.5 If the Enter Cost Password prompt appears, enter the password set in the Set Cost/List field in the (LE1) screen.

7.6 At the Cost to Use prompt, press Enter until the cursor moves to the By Item field.

7.7 At the By Item prompt, press Tab.

7.8 At the Customer # prompt, press Enter.

7.9 At the Contract # prompt, enter the number of the contract for which you are changing dates.

7.10 Tab to the Dates field and specify the beginning and ending dates, as shown below.

7.11 Press Enter until the cursor moves to the Item Number field. At this point, your date changes have been saved.

(+I)[U] Update Pages from I-CAT to I-WHL

This function copies a vendor's page number from the Multi-Vendor (I-CAT) file or from a OPUS loaded contract to the primary wholesaler or direct buy record. This function lets you use a vendor's supplemental catalog page number as opposed to the vendor's general line list price catalog page number.

1. Go to the (+I) screen and select the [U] Update Pages from I-CAT to I-WHL action code.

2. At the Enter I or C prompt, type **I** to update from the I-CAT file. Type **C** to update from contracts.

3. At the Enter Printer for Report prompt, enter the printer to use.

4. At the Update I-MFG or I-WHL prompt, type **W** to update the catalog page number in the I-WHL (wholesaler record). Type **M** to update the catalog page number in the I-MFG (direct buy record).

   - If you selected to update using the I-CAT file, the Enter Program ID to Match prompt appears. Enter the program ID of the catalog you loaded into the I-CAT file containing the page number to use.

   - If you selected to update using contracts, the Enter Contract Number prompt appears. Enter the contract number from the (ET) screen that contains the page number to use.

5. At the OK to Proceed prompt, type **Y**.

(+I)[!] Reset I-MFG Vendor Name

Use this feature to reset a direct buy vendor's name to the prefix.

1. Go to the (+I) screen and select the [!] Reset I-MFG Vendor Name action code.

2. At the Enter the Vendors to Reset prompt, enter the vendor's name to change.

3. At the Enter Stock Class for Changed Items prompt, enter the stock class for the items you are changing. Leave this field blank to keep the existing stock class.

4. At the Enter Department for Changed Items prompt, enter the department for the items you are changing. Leave this field blank to keep the existing department.

5. At the OK to Proceed prompt, type **Y**.