



Efficiency

Product Management Manual

Version 4.5

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Product Module – Set up

First Steps

Prior to using the Product Module please check that the following areas of Efficiency are already set-up:

- Supervisor
- Operating Divisions
- Branches
- Warehouse
- Security
- Users
- Functional Security

Product Module Codes and Flags

Now you can set-up the Product Specific codes and Flags. These areas are explained in full detail within this manual. For any other set-ups required please refer to the relevant manual.

The following code and flag tables should be set up during the initial set up. Each table requires at least one record. The system will provide a default record of

Code: 00000

Description: Default record of

It is recommended to keep at least one default record in each table.

These tables (listed with their descriptive names, the database names are given on the detailed section for each item) are grouped in three categories. Some of the data in the tables relate to the whole corporation and some may be maintained at the operating division levels.

- Mandatory/Strongly Recommended
- Optional
- Site Specific

Mandatory or Strongly Recommended

Product Status	Corporate Level
Product Group	Corporate Level
Product Category	Corporate Level
Product Price Groups	Corporate Level
User Options	User Level
Shared Options	Corporate Level

Optional i.e. Default value may be used

Product Profile Group	Corporate Level
Product Profile Item	Corporate Level
Product Defaults	Operating Division
Product Transaction Category	Corporate Level
Product Transaction Type	Corporate Level
Product Transaction Status	Corporate Level

Codes and Flags

Product Group

The Product Group code is used to group the Product Category records as a major classification.

The grouping of the product categories hence the products are important, as the group codes are used to classify the Product Special Pricing matrix.

Product Group Tables and Fields

The Product Group code is maintained in the Product Group Code Table (prodgrp).

The data in this table should be designed to address the needs of each operating division.

Product Group fields in table PRODGRP

<u>Field Name</u>	<u>Field Description</u>
Group Id	A unique identification code for the group
Description	The description of the group

Product Group Hints and Tips

- The Product Group IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of '00000' is recommended
- If a Host System is used the length of the IDs is restricted by the Host system.

Product Group Data Example

Product Group Codes

<u>Group Id</u>	<u>Description</u>
00000	Default Product Group
PC	Personal Computers
OS	Operating Systems
WP	Word Processor Software

Key

Abc: This highlights the typical recommended records.

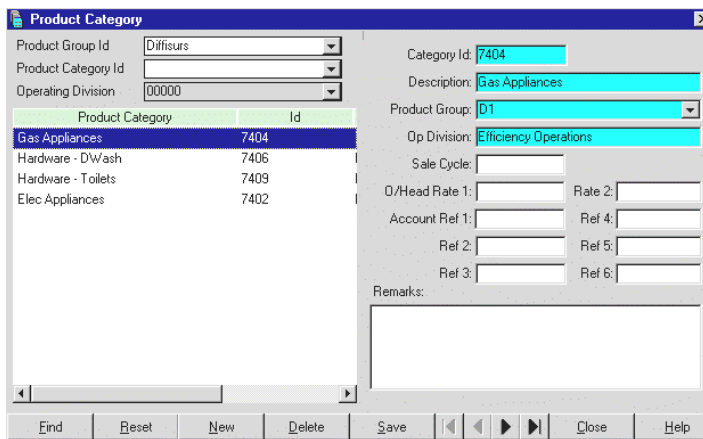
Abc: This highlights the mandatory or system dependant records.

Product Category

The Product Category code is used to group the Product records as a sub classification under the product groups.

Each product category record belongs to a product group record. You cannot create a category record without relating it to an existing group record.

The Product Category code is maintained in the Product Category Code Table (prodcat). The data in this table should be designed to address the needs of each operating division.



The grouping of the products is important, as the category codes are used to classify the Product Special Pricing matrix.

If the Host system is used the corresponding General Ledger codes are set in the product category table.

Data Fields

The user can maintain the following fields in the Product Category Codes table.

Category Id: Product Category identification code.

Group Id: Product Group identification code.

Operating Division Id: Operating Division identification code.

Description: The description of the category record.

Sale Cycle: The number of weeks required to replace the products in this category.

Account Reference (n): Up to 5 different account references (usually a predetermined GL code) of the Financial Systems.

Remarks: The general notes and remarks for the product category.

Product Category Hints and Tips

- The Product Category IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of '00000' is recommended
- If a Host System is used the length of the IDs is restricted by the Host system.

Product Category Data Example

Product Category Codes

<u>Group Id</u>	<u>Category Id</u>	<u>Description</u>
00000	00000	Default Product Category
PC	PC_IBM	IBM Personal Computers
PC	PC_HP	HP Personal Computers
PC	PC_DIG	Digital personal Computers
OS	OS_DOS	DOS Operating Systems
OS	OS_WIN	WIN Operating Systems
OS	OS_UNX	UNIX Operating Systems

Key

Abc: This highlights the typical recommended records.

Abc: This highlights the mandatory or system dependant records.

Product Status

The Product Status code is used to group the Product records by their status, i.e. Active, Non stock, Obsolete etc.

Active, Non stock, Obsolete etc.

Product Status Tables and Fields

The Product Status data is maintained in the Product Status (prodstat) table.

The data in this table should be designed to address the needs of the entire corporation.

Product Status fields in table PRODSTAT

<u>Field Name</u>	<u>Field Description</u>
Status Id	A unique identification code.
Description	The description of the product status

Product Status Hints and Tips

- The Status IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of '00000' is recommended
- The codes of 'A=Active', 'S=Stock Item' and 'O=Obsolete' must exist in the table at all times.

Product Status Data Example

Product Status Codes

<u>Status Id</u>	<u>Description</u>
00000	Default Call Status
A	Active Product
S	Stock Item
O	Obsolete Item

Key

Abc: This highlights the typical recommended records.

Abc: This highlights the mandatory or system dependant records.

Price Groups for the Special Pricing Overview

The Product Special Pricing Matrix is built around the following price dissection groups:

- Major Price Group
- Sub Price Group
- Product Group
- Product Category
- Product

Each Major Price Group can be expanded down to any combinations of the other dissection levels.

For example, for a dealer-distribution network the following price matrix may be created.

<u>Major Price Group</u>	<u>Sub Price Group</u>	<u>Product Group</u>	<u>Category</u>
MAIN DEALER		PC	
MAIN DEALER	SUB DEALER	PC	
MAIN DEALER	RE SELLER	PC	
MAIN DISTRIB		PC	
MAIN DISTRIB	AGENT	PC	IBM_PC
MAIN DISTRIB	AGENT	PC	HP_PC

Product Major

The Product Major Price Group code is used to group one or more of the Product Group, Category and Code level prices under major price Groups, i.e. Dealer, End

Price Group

User, VIP Customer etc.

This is used for the Special Prices Matrix.

Product Major Price Group Tables and Fields

The Product Major Price Group code is maintained in the Product Major Price Group Code Table (majprgrp).

The data in this table should be designed to address the needs of the *entire corporation*.

Product Major Price Group fields in table MAJPRGP

<u>Field Name</u>	<u>Field Description</u>
Group Id	A unique identification code.
Description	The description of the Major Price Group

Product Major Price Group Hints and Tips

- The Group IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of '00000' is recommended

Product Major Price Group Data Example

Product Major Price Group Codes

<u>Major Price Group Id</u>	<u>Description</u>
DEALER	Dealer
END_USER	End User
VIP	VIP Customers
GOV	Government
TELECOM	Telecom

Key

Abc: This highlights the typical recommended records.

Abc: This highlights the mandatory or system dependant records.

Product Sub Price Group

The Product Sub Price Group code is used to further group one or more of the Product Group, Category, Code, and Major Price Group level prices under Sub Price Groups.

The Sub Price Groups are maintained within the Major Price Groups. For example: Main Dealer, Distributor, Agent sub price group codes can be used under the "DEALER" major price group code.

Product Sub Price Group Tables and Fields

The Product Sub Price Group code is maintained in the Product Sub Price Group Code Table (subprgrp).

The data in this table should be designed to address the needs of the *entire corporation*.

Product Sub Price Group fields in table SUBPRGP

<u>Field Name</u>	<u>Field Description</u>
Group Id	A unique identification code.
Description	The description of the Sub Price Group

A Sub Price Group record can be created only within the existing Major Price Group codes.

Product Sub Price Group Hints and Tips

- The Group IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of '00000' is recommended

**Product Sub Price Group
Data Example**

Product Sub Price Group Codes

<u>Major Price Group</u>	<u>Sub Price Group Id</u>	<u>Description</u>
00000	00000	Default Sub Price Group
DEAL	DEAL_MAIN	Main Dealer
DEAL	DEAL_DIST	Distributor
DEAL	DEAL_AGENT	Agent
GOV	GOV_FED	Government Federal
GOV	GOV_LOC	Government Local

Key

Abc: This highlights the typical recommended records.

Abc: This highlights the mandatory or system dependant records.

*Product
Transaction
Category*

The Product Transactions Category code is used to group the Product Transactions records within the Category Groups

If the transactions are used for varying data as a data warehouse and presented in different data window objects (forms) then the Transaction Type and/or the Transaction Category are the main grouping methods. The Transactions Pick List and the Transaction Forms can be developed either during the implementation process or later by using the Development Kit.

**Product Transaction
Category Tables and
Fields**

The Product Transaction Category data is maintained in the Product Transaction Category (prodtrnc) table. The data in this table should be designed to address the needs of the entire corporation.

Product Transaction Category fields in table PRODTRNC

<u>Field Name</u>	<u>Field Description</u>
Transaction Category Id	A unique identification code.
Description	The description of the Transaction Category

**Product Transaction
Category Hints and Tips**

- The Category IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of '00000' is recommended

**Product Transaction
Category Data Example**

Product Transaction Category Codes

<u>Type Id</u>	<u>Description</u>
00000	Default Type
C1	Category One
C2	Category Two

Key

Abc: This highlights the typical recommended records.

Abc: This highlights the mandatory or system dependant records.

*Product
Transaction Status*

The Product Transactions Status code is used to group the Product Transactions records within the Status Groups

**Product Transaction
Status Tables and Fields**

The Product Transaction Status data is maintained in the Product Transaction Status (prodtrns) table. The data in this table should be designed to address the needs of the entire corporation.

Product Transaction Status fields in table PRODTRNS

<u>Field Name</u>	<u>Field Description</u>
Status Id	A unique identification code.

Description The description of the Transaction status

Product Transaction Status Hints and Tips

- The Status IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of '00000' is recommended

Product Transaction Status Data Example

Product Transaction Status Codes

<u>Status Id</u>	<u>Description</u>
00000	Default Call Status
C	Closed
A	Active

Key

Abc: This highlights the typical recommended records.

Abc: This highlights the mandatory or system dependant records.

Product Transaction Type

The Product Transactions Type code is used to group the Product Transactions records within the Type Groups

If the transactions are used for varying data as a data warehouse and presented in different data window objects (forms) then the Transaction Type and/or the Transaction Category are the main grouping methods.

The Transactions Pick List and the Transaction Forms can be developed either during the implementation process or later by using the Development Kit.

Product Transaction Type Tables and Fields

The Product Transaction Type data is maintained in the Product Transaction Type (prodtrnt) table. The data in this table should be designed to address the needs of the entire corporation.

Product Transaction Type fields in table PRODTRNT

<u>Field Name</u>	<u>Field Description</u>
Transaction Type Id	A unique identification code.
Description	The description of the Transaction Type

Product Transaction Type Hints and Tips

- The Type IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of '00000' is recommended

Product Transaction Type Data Example

Product Transaction Type Codes

<u>Type Id</u>	<u>Description</u>
00000	Default Type
T1	Type One
T2	Type Two

Key

Abc: This highlights the typical recommended records.

Abc: This highlights the mandatory or system dependant records.

Product Module – Maintenance

Product Master

The Product Master Tab is used to create a new record or to locate the existing product record in order to change the data or to perform various functions on the tab folder.

The product master details are maintained in the Product Master (product) table.

The Product Module in Efficiency is designed to hold all necessary information for the products and services, which are sold, marketed, and maintained by the Operating Divisions.

If Efficiency is used with a Financial System, the data in this module may be updated from the corresponding tables of the Inventory Control System. The update may be performed at regular intervals as Batch update or instantly via live link.

The information kept in the Product Module is used in the Quotation, Order Entry, Knowledge Base, and Service Modules.

Product Tab Folder

The Product Tab Folder is designed to maintain the Product Module

How to Find a Product Record

There are three ways of finding an existing record:

1. On Screen Search
2. Search by Standard Search Engine
3. Search by Enhanced Search Engine

On Screen Search

You can find the existing product record using any combination of the following fields:

- Operating Division
- Product Status
- Product Category

You should always type in at least 2 or 3 letters of the search name. Click on the drop down arrow or press the <F4> key.

The pre – keyed in letters will act as an instant filter and the system will display you a drop down pick list of the products starting with the entered letters. The more you had typed in the field before attempting the search will make the list presented so much more precise.

Highlight the required name and either click on it or press the <Tab> key. If you had used the tab key, the empty spaces on the window will be filled with the product's data. On the other hand if you had clicked on the pick list then the selected data will be displayed on the field. Now either click on any other field at the top section of the window or simply press the tab. The product's data will be displayed as a previous selection.

Note: Your access to some products may be limited by your current access privileges.

Filter Product IDs

If you wish to filter the content of the Product Id Drop Down List Box, first enter the filter values in one or more of the following fields:

- Operating Division
- Product Status
- Product Category

Filter Product Descriptions

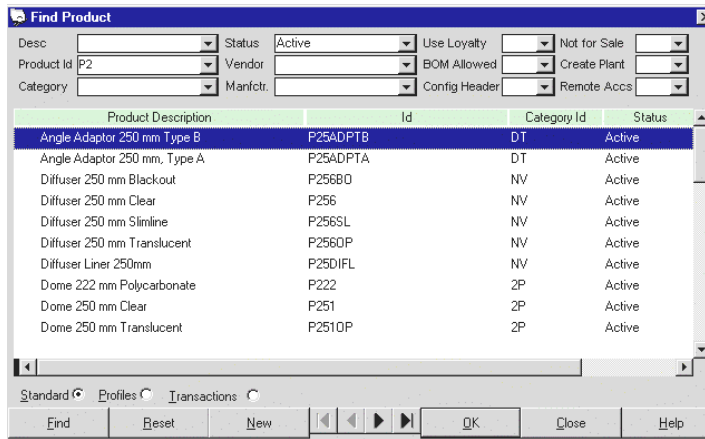
If you wish to filter the content of the Product Description Drop Down List Box, first enter the filter values in one or more of the following fields:

- Operating Division
- Product Status
- Product Category

The details of accessing and searching the Product records are discussed under the How to Find an Existing Product topic.

Search by Standard Search Engine

When the Search button was clicked the search engine window is displayed:



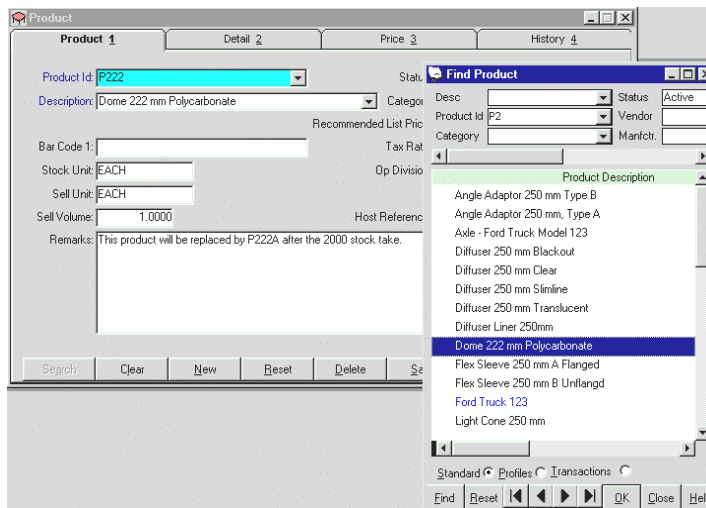
There are two sections on this window. You can enter any selection criteria in the top Query section. When the Find button is clicked the matching results set will be displayed in the second window. Highlight the required record and click on the OK button to return to the Product window with the selected product record.

If a product description fully or partially was entered in the product screen before clicking on the search button the search engine will be seeded with this value and the corresponding result set will be displayed automatically.

Search by Enhanced Search Engine

If the 'Product Search Engine Stays Open' entry was set to Yes in the Product section of the user options system will change the standard behaviour of the search engine to a continuous pick list.

When the Search button is clicked on the Product Module Tab the following is displayed.



The Search Engine window is now resizable and movable on the screen to a suitable location.

Make your query and selection as usual and click on the Find button. Double click on the selected line or click on the OK button will display the details of the selected record on the Product Tab Sheet.

This allows the user to search the database and freely move up and down on the selected list.

How to Edit an Existing Product Record

You can alter any information on the window that is also regulated by the edit privileges that had been granted to you.

Once the editing is finished simply click on the <SAVE> button.

How to Create a New Product Record

When you are ready to create a new record click on the <NEW> button.

If the system was set to an "AUTOMATIC" id creation mode a system generated sequential number will be displayed in the ID field. Otherwise enter a unique identification code for this campaign.

The MANUAL Id assignment is recommended.

Your cursor will be moved to the Description field so that you can start entering the new data.

Product Master Data Field Attributes

The data fields may carry various attributes:

Key Fields

The labels for these fields are presented in dark blue.

Mandatory Fields

You must enter a value in such fields and they are presented with a very distinctive colour (usually in light blue).

Functional Fields

The point will change from "Arrow" to a "Cross" when the cursor is on such a field. Double clicking on these fields will usually pop up a related utility, such as the calendar, clock or link to another module by using values obtained from the clicked

field (or even the whole row).

Audited Fields

There is no visual attribute to tell you that the field is being audited. However, if you have such a field, simply double click on it. You will see a detailed table showing the complete change audit for the values that had been altered in this field.

No Enter fields

Displayed in grey colour. The grey colour indicates that the data entry on the field is disabled. In some cases this is a temporary situation, in other cases it is permanent.

Data Fields

The user can maintain or read the following fields:

Product Id: A unique identification code for the product.

Description: The description of the product.

Bar Code 1: The bar code (1) id for the product.

Stock Unit: The description of the stocking unit for the product.

Sell Unit: The description of the selling unit for the product.

Sell Volume: The conversion factor of the selling unit over the stocking unit for the product.

Remarks: The general notes and remarks for the product. **OPTIONS:** Zoom Remarks.

Status: The status for the product.

Category: A unique identification code for the product category.

Recommended List Price: The list price (default) for the product. As the value on this field is changed the Price Recalc Options Window will prompt the user for various options.

Date: The date of the current price change.

Tax Rate: The tax (GST, Sales or VAT) rate for the product, entered as 20.00 for 20% or 17.50 for 17.50%.

Op Division: Operating Division for the product.

BOM Allowed: Whether this product is allowed to be used in Bill of Materials

Configurator Header: Whether this product is allowed to be used as a header for the configurator

Plant Create: Whether this product is allowed for automatic plant creation.

Not For Sale: Whether this product is allowed to be sold.

Remote Access Allowed: Whether this product is allowed for viewing via remote access such as the internet.

Command Buttons

Search

Activates the search engine for product module.

Clear

Clears the entire window so that a new search can be initiated. If this button was pressed during a new record creation or editing, the "save, yes-no?" dialogue box will require a confirmation of the action.

New

Creates a new product.

Reset

This is a 'Bail Out' button. If you are not happy with what you have been entering on the window, this button will reset the data back to the original state. You must respond to the confirmation dialogue box for save or reset.

Save

Press here to save the values on the screen (temporary) to the database (permanent).

Delete

If you click on this button one of many things may happen depending on the configuration of your system and your current privileges.

1. Nothing happens, you do not have enough privileges to delete the record.
2. Systems response to request with a confirmation dialogue box, when confirmed one of many things may happen:
 - 2.a If the "Soft Delete" option was put on by the supervisor, a dialogue will capture your reason for requesting the deletion of the record and sets the colour red on the text so that all the other users will know that this record is going to be deleted by the supervisor.
 - 2.b. If the standard delete function was enabled, based on your privilege, system will attempt to delete the record and also all of its children records.
 - 2.c. If the campaign was used by any other system, such as Order entry or Support module etc, the deletion will be rejected.

Exit

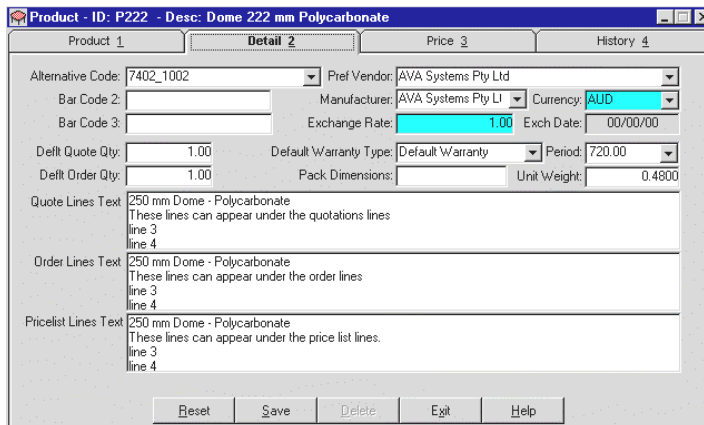
Closes the complete tab folder.

Help

Activates the help screen related to this section.

Product Details

The product detail tab is used for adding extra details related to the product.



Data Fields

Alternative Code: An alternative product id, which may be used for the quotes and orders.

Bar Code 2: The bar code (2) id for the product.

Bar Code 3: The bar code (3) id for the product.

Default Quote Qty: A quantity value, which is used as default value during the quote lines entry.

Default Order Qty: A quantity value, which is used as default value during the order lines entry.

Quote Lines Text: The additional or alternative description to be included on the quote lines. OPTIONS: Zoom Remarks.

NOTE: This line text can be added to display in the quote line edit button in quotation module when this product is being quoted on for the clients.

Order Lines Text: The additional or alternative description to be included on the order lines. OPTIONS: Zoom Remarks.

NOTE: This line text can be added to display in the order line edit button in order module when a client is ordering this product.

Price List Lines Text: The additional or alternative description to be included on the price list lines. OPTIONS: Zoom Remarks.

Preferred Vendor: The preferred vendor who usually supplies the product. If there is a Product Reference record for this vendor the Currency details will be displayed from this record and they will be overwritten.

Manufacturer: The Manufacturer of the Product. This will come from the Vendor table.

Currency: The currency of the supplier country.

Exchange Rate: The currency that is used to calculate the list price.

Exchange Date: The date on which the exchange rate was applied.

Default Warranty Type: A warranty type usually given by the supplier.

Period: A warranty value (days), usually given by the supplier.

Pack Dimensions: The dimensions (WxLxH) of the product for packaging purposes.

Unit Weight: The unit weight of the product.

Product Prices

The product cost and prices related details are maintained on the Product Prices Tab.

Although the three (3) cost prices are usually maintained by the accounting system and the values are updated either on line or by means of a suitable update process, for the standalone Efficiency system these values may be maintained locally.

The Cost and Selling Price values can be

- Accessed (visible to the user) and/or
- Modified (may be changed by the user) as the supervisor granted the privileges to the user.

As the values on most the following fields are changed the Price Recalc Options Window will be prompt the user for various options.

Data Fields

Last Cost: The most recent last cost of the product.

Standard Cost: The current standard cost of the product.

Average Cost: The current average cost of the product as calculated by the Host stock control system.

Last Cost Date: The date of the last cost value change of the product.

Minimum Sell Price: The minimum selling price (default) for the product.

Some users may have privileges to go below this value as the selling price of the product during the Quotation, Order and the Service Spare Part line entry process. The supervisor on the user level controls these privileges like the cost and selling price privileges.

Cost Include Tax: Check the Yes radio button if the cost includes tax.

Price Include Tax: Check the Yes radio button if the selling price includes tax.

Recalc Minimum Price Style: When the price is re-calculated how the minimum price is effected is decided by one of the three options:

- Linear Adjustment
- Percentage Adjustment
- Not to recalc minimum price

Cost Factors: Up to 5 cumulative cost factors can be established. The Price Recalc function will consider these when the selling price {List Price} is recalculated. These factors are applied to the vendor's discounted selling price to establish the landed cost.

Percentage Analysis Factors: Up to 3 analysis factors (percentage) can be entered for each product that may be used for various analysis purpose.

Linear Analysis Factors: Up to 3 analysis factors (linear values) can be entered for each product that may be used for various analysis purpose.

Commission Points: The commission points (default) for the selling of the product.

Commission Percent: The commission percentage (default) for the selling of the product.

Margin or Mark-up: Check on the appropriate radio button to set the method of price calculation either on Gross margin or on Mark up.

Percent: The percentage of the Mark-up or the Gross Margin is calculated and displayed by the system. (The field on the database always holds the mark up value for the product i.e. over the std cost).

Use Rounding: Check this box if the cost and selling price values to be rounded up to when saving the prices

Unit Value: Enter here the rounding value.

For example:

1.00 to round the values to the whole value

0.50 to round the values to the half

0.10 to round the values to the nearest 10 cents.

Handling Charge: The handling charges (default) for the product if applicable.

Use Loyalty: Check Yes radio button if this product is to be used in the Loyalty selling

Loyalty Points: Enter here the loyalty points for this product. Use (-) value if this product is used for redeeming purpose.

Command Buttons

Recalc: Is used to recalculate the minimum price values.

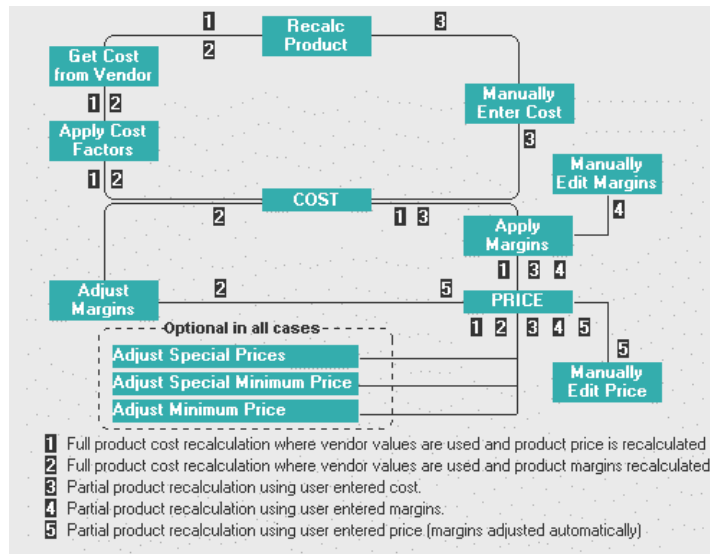
Price Recalc Options

Product price recalculation on the Price Recalc Options Window function has the following options:

- Full product cost recalculation where vendor values are used and product price is recalculated.
- Full product cost recalculation where vendor values are used and product margins recalculated.
- Partial product recalculation using entered cost.
- Partial product recalculation using user entered margins.
- Partial product recalculation using user entered price (margins adjusted automatically)

The Product Price recalculation logic is detailed on the following diagram.

Price Re-calc Flow Diagram



The 'Price Recalc Options' dialog box contains the following settings:

- Type of Recalc:** Adjust Margin / Markup, Adjust Price
- Cost to Use:** 40.0000, Recalc from Vendor Price
- Special Price Recalc Style:** Linear, Percent, None
- Special Minimum Price Recalc Style:** Linear, Percent, None

Buttons: OK, Cancel, Help

Type of Recalc: Select one of the two options:

- Adjust Margin or Mark up
- Adjust Price

Cost to Use: Establish one of two cost recalc options:

- Enter a cost price to be used in the recalculations
- Recalc from the Vendor Price

Special Price Recal Style: Enter one of the three options to establish how the special prices are to be recalculated:

- Linear
- Percentage
- None

Special Minimum Price Recal Style: Enter one of the three options to establish how the special minimum prices are to be recalculated:

- Linear
- Percentage
- None

Product History

The previous values (single level history) of the various product data that have been captured by the system are displayed on the Product History tab sheet.

- Previous Vendor
- Last Lists Price and the date of change
- Previous Exchange rate and the date of change and the executive's Id who changed it
- Last cost and the date

The following historical enquiry screens are also available selecting the Module Enquiry option from the pop up menu

- Quotation History
- Sales History
- Quantities
- Order History
- Warehouse Quantities

Product History Tab Sheet

Product historical information is displayed on this tab sheet.

The screenshot shows a software window titled "Product - ID: P222 - Desc: Dome 222 mm Polycarbonate". The window has four tabs: "Product 1", "Detail 2", "Price 3", and "History 4". The "History 4" tab is active. The form contains the following fields:

- Previous Vendor Id: AVASYS
- List Price: Previous: 120.00, Date: 11/09/2000
- Exchange Rate: Previous: [empty], Date: 00/00/0000, Previous Changed Date: 00/00/0000, Last Changed By: 01
- Last Cost: Previous: [empty], Date: 00/00/0000

At the bottom of the window are buttons for "Reset", "Save", "Delete", "Exit", and "Help".

Fields

Previous Vendor Id: Id of Previous vendor.

List price (Previous): Previous price.

List price (Date): Previous price set-up date.

Exchange Rate (previous): Previous value of exchange rate.

Exchange Rate (Date): Current exchange rate set-up date.

Exchange Rate (Previous Exchange Date): Previous exchange rate set-up.

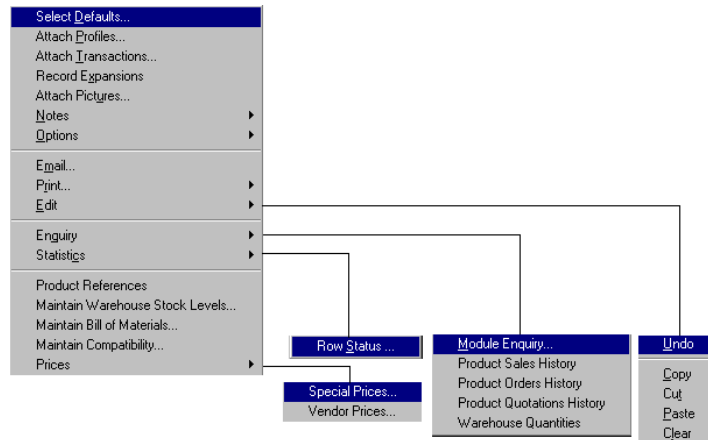
Exchange Rate (Last Changed By): Initials of an executive who last updated the records.

Last Cost (previous): Previous cost value.

Last Cost (Date): Last cost set-up date.

Product Pop Up Menu Options

From the Product Module the user may right mouse click in any grey area on any Tab to obtain a list of additional functions or enquiries available



Select Defaults

Information as set up in the selected default will be updated into the current product record automatically during a new product record creation as detailed under the Module Defaults topic.

Attach Profiles

Each product record can have many profile items attached to it as described under Product Profiles topic.

Attach Transactions

Each product record can have many transactions attached to it as described under the Module Transactions topic.

Record Expansions

Additional information can be created for each Product Record and accessed instantaneously as described under the Module Expansions topic.

Attach Pictures

Each Product record can have pictures, documents, audio and video objects as described under the Pictures topic.

Notes Sub Menu

Edit Remarks

Remarks attached to each Product Record can be edited, added or deleted as described under the Module Remarks topic.

Attach Notes

Unlimited number of secured, date time stamped and sorted notes can be attached to each Product Record as described under the Module Notes topic.

Attach Yellow Sticky Notes

Automatically displayed Yellow Sticky Notes can be attached to each executive record as described under the Yellow Sticky Notes topic.

Options Sub Menu

Duplicate

A product record can be duplicated and another product record created with the same or similar attributes as described generally under the Record Duplication topic.

Maintain User Flags

Up to 5 User Flags can be added to each product record as generally described

under the topic of User Flags Maintenance.

Email

This will activate the Email facilities. Refer to the Email topic for general information.

Print Sub Menu

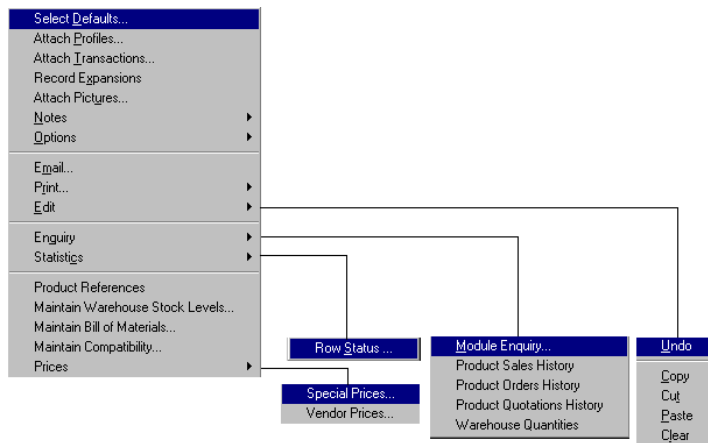
The screen print or to print a pre-designated report can be processed here.

Print Current Data

Click on this to print the active datawindow. The Print Function details how to print and the available options.

Print Formatted Data

Click on this to print a pre-determined format (which should have been set up by the supervisor) using the current contact record. The Print Function details how to print and the available options.



Edit Sub Menu

Selecting the appropriate option can perform the Undo, Copy, Cut, Clear and Paste functions at the field level.

Enquiry Sub Menu

Module Enquiry

This option will allow you to enquire about current module.

Product Sales History

To check sales history for a product.

Product Orders History

To check the order history for a product

Product Quotations History

To check the quotations history for a product

Warehouse Quantities

To check warehouse product quantities

Enquiry – Host Stock Info

To check the stock information in host system

Enquiry – Host Stock Quantities

To check the host system product quantities.

Statistics Sub Menu

Statistics – Row Status and Row Count

Click on one of the above menu entires display the status of the record as described under the Statistics topic.

Product References

To check product references.

Maintain Warehouse Stock Levels

To maintain stock levels in warehouse.

Maintain Bill of Materials

Maintaining bill of materials for product

Maintain Compatibility

To configure product compatibility

Prices Sub Menu

Special Prices

To set-up special prices for product

Vendor Prices

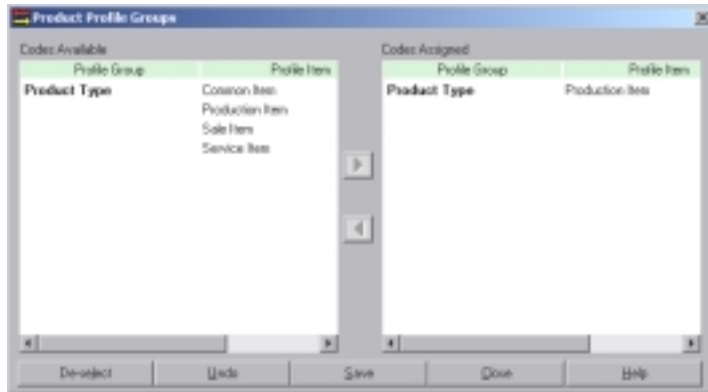
To set-up a vendor prices

Link Host

To link to the host system as described under the Link Product Master to Inventory Master topic.

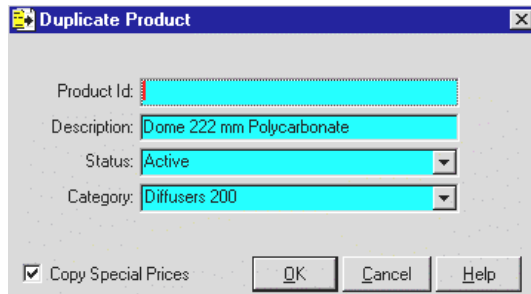
Product Profiles

You can add as many user defined Profile Groups and Items as required to the Product records.



Duplicate Product

This utility will copy over the existing product details to a new product record on the Duplicate Product window. If the user (executive) does not have the "Price Access" rights, this utility may not be used.



Data Fields

Product Id: Enter here the new product id.

Product Description: The existing product description is displayed. You may change it to a new description.

Product Status: The existing product status is displayed. You may change it to a new status.

Product Category: The existing product category is displayed. You may change it to a new category

Copy Special Prices: Check this box if the existing special prices matrix is to be copied to the new record.

Click on the "OK" button to create a new product record. The new record on the tab sheet will be displayed. You must "Save" it before to close the session.

*Link Product
Master to Host
Inventory Master*

The Products in Efficiency can be linked to the Host system (Accounting System).

Product Linked

Right click in product main tab and select link host option, you will be presented with Host Upload - Edit Default Stock Values window, in this window product values can be entered that would be used in the host accounting system.

The values (typical only for a certain Host system) that displayed on this window are read directly from the Host Inventory system by using a pre-registered Inventory Code in Efficiency Host control table.

NOTE: The link host option can also be used to updating product information that have been changed in Efficiency to update in the host system.

Command Buttons

Reset: Resets the screen.

Save: Saves the details entered.

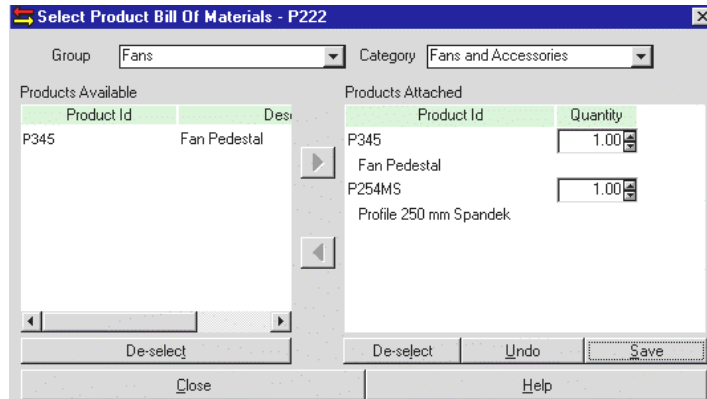
Close: Closes the screen.

Help: Activates the help screen relevant to this section.

*Product Bill of
Materials*

This utility is designed to attach products (Bill of Material) and quantities to the selected product record on the Product Bill of Materials Maintenance Window.

The BOM details are stored in the (prodbom) table.



Product Category Group: Select the product category group.

Product Category Select the product category.

Products Available: All the available products within the selection criteria are displayed.

Select the Bill items from this list and click on the right arrow button to attach the items to the product.

Products Attached: The Bill items (attached) for the product are displayed on this list.

Select the Bill items to remove from this list and click on the left arrow button to detach the items from the product.

Quantity: Enter here the bill quantity for the items.

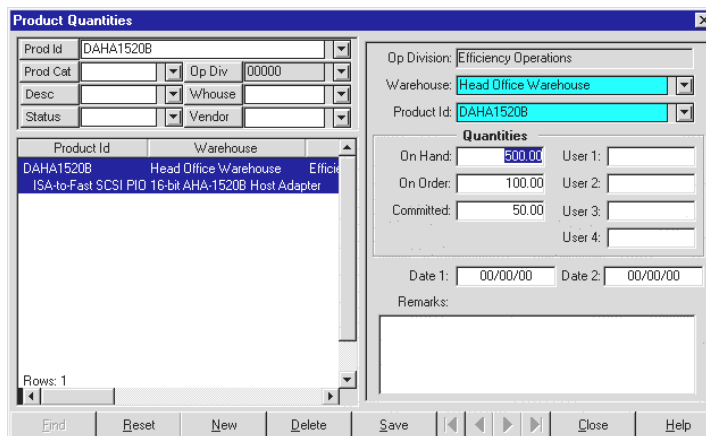
If a mistake was made, simply click on the <Reset> or the <Undo> button to undo the changes.

Product Warehouse Quantities

The information displayed on this enquiry window is accessed from the Efficiency Product quantities table. This table is updated from the Corporation's Financial System's Inventory module by the supervisor at regular intervals.

Efficiency Order Entry Module may (optional) maintain only the Quantity-on-Hand values. Other quantity values may be adjusted manually using the Warehouse Quantity Maintenance function. The recommended method is to update the opening balances from the Financial Systems at regular intervals.

Alternatively if the site licence includes the "Host Integration Module" this information can be accessed from the Financial System on line.



Query and Selection List

The contents of the Query and List data windows may be changed for each user by the user preferences function.

The following screen is used to Maintain warehouse stock levels, it can be accessed from right click menu in product module's main tab.

There are 3 sections on this window.

- Query Section
- Selection Criteria
- Data Entry

Query Section: You may enter any selection criteria to drill down to the product selection.

You can enter complete or partial data as query criteria:

- Product Id
- Product Category
- Description
- Status
- Warehouse
- Vendor

Selection Criteria: Once the query criteria is entered, click on the find button. The left side of the screen will be populated with the products.

As the product is highlighted on this window, the detail of it is also displayed on the right side of the window, which is allocated for entering data.

Data Entry: The right side of the window is used to enter a new product warehouse quantity, or edit an existing one.

Data Fields

Warehouse: Warehouse location of the product.

Product Id: A unique product Id.

Quantities – on – hand: Product quantities available in the warehouse.

Quantities – on – order: Product quantities ordered.

Committed: The quantity being ordered by the customers not delivered yet from the warehouse.

User 1 – 4: Users defined quantity for this item for the warehouse.

Date 1 – 2: User defined dates for this item for the warehouse.

Command Buttons

Find

After entering the criteria click on this button to display the selected product.

New

Click on this button if you wish to create a new warehouse stock levels for the product.

Reset

Reset the selection criteria.

Delete

Click on this button to delete the product warehouse stock level entry.

Save

You can save the details of the edited record.

Left and right arrows

Are for scrolling through the selected criteria list.

Close

Closes this screen and returns to the main tab folder after confirmation.

Help

Activates the help screens relevant to this section

Product Special Prices

The Product Special Pricing Matrix is built around the following price dissection groups:

- Price Group
- Sub Group
- Product Group
- Product Category
- Product

Each Price Group can be expanded down to any combinations of the other dissection levels. For example, for a dealer-distribution network the following price matrix may be created.

Price Group	Sub Group	Product Group	Category	Product
MAIN DEALER			PC	
MAIN DEALER	SUB DEALER	PC		
MAIN DEALER	RE SELLER	PC		
MAIN DISTRIB			PC	
MAIN DISTRIB	AGENT		PC	IBM_PC
MAIN DISTRIB	AGENT		PC	HP_PC

To access the special price screen, right click and select price/special price option, the following screen will appear:

For each Price Matrix entry, up to 10 special prices can be entered: The following options will be triggered automatically if a valid value was entered in the following fields:

- Price
- Discount
- Price and Discount
- Quantity Break
- Start Date to End Date
- Minimum Sell Price
- Commission Point and Percentage

A specific Customer record or a Customer Type can be assigned to the following Special Price groups in the Client Management Module:

- Campaign Split
- Major Price Group
- Sub Price Group

During the Quotation, Order Entry and the Spare Parts Maintenance data entry, a special price is automatically selected from the Special Prices module if a

corresponding Customer or the Customer Type is found.

The following screen is used to set-up product's special pricing in the (prodprce) Table.

There are 3 sections on this window.

- Query Section
- Selection Criteria
- Data entry

Query Section

You may enter any selection criteria to drill down to the product special pricing selection.

You can enter complete or partial data as query criteria:

Product Group	Price Group
Product Category	Sub Group
Product Id	Op Division

Selection Criteria

Once the query criteria are entered, click on the find button. The left side of the screen will be populated with the product's special pricing.

As the product is highlighted on this window, the detail of it is also displays on the right side of the window, which is allocated for entering data.

Data Fields

The right side of the window is used to enter a new product special pricing, or edit an existing one.

Price - Id: Price id.

Price - Group: Major price group id.

Price - Sub Grp: Sub price group.

Product - Group: Product group id.

Product - Cat: Product category Id.

Product - Id: Product Id.

Price Ex Tax: Product price excluding of tax.

Disc: Product price percentage discount.

Add: If box ticked the price will have a percentage discount added.

Qty Break: Quantity of product discounted for.

Start: Start date for the discount.

End: End date for discount.

Min Price: Minimum product price can be sold for.

Commission Points: Commission points when selling product.

Commission Percent: Commission percentage.

Command Buttons

Find

To find a particular product.

Reset

To reset the screen to the original status.

New

To create special prices for the selected product.

Delete

To delete special prices for the selected product.

Left and Right arrows

To switch to the next product in the list.

Close

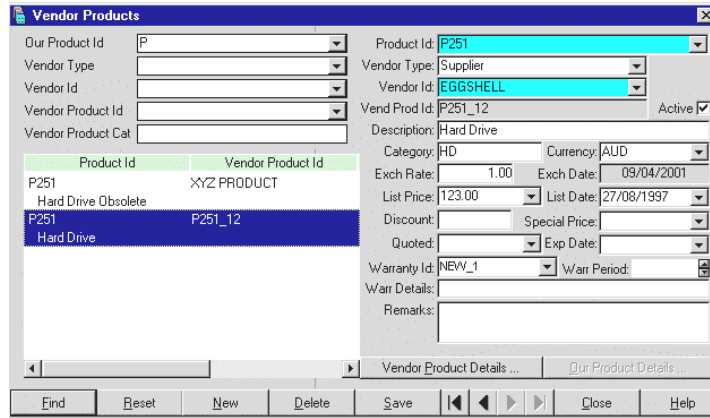
To close the special price screen.

Product References

The Product Reference Maintenance Window is designed to access further information on the vendors', competitors and our products.

The comprehensive data about our products are maintained in the 'Knowledge Module'

The graphics display application must have been registered in the system by the supervisor.



Our Product Picture File: Enter here the file name including the full directory path for the picture (graphics) file of the product. You can use the <Browse> button to locate the file.

Application to View: Select the suitable application to display the selected file.

Vendor Product Picture File: Enter here the file name including the full directory path for the picture (graphics) file of the vendor's product. You can use the <Browse> button to locate the file.

Application to View: Select the suitable application to display the selected file.

Vendor Product Notes: Enter here text, or maintain the existing text for the vendor's product.

Product Reports and Enquiries

The following list is the typical standard reports and enquiries provided in the system. The content of the list varies depending on the site configuration and the licence.

Product Reports

- Product List by Id
- Product List by Category
- Product List by Profile
- Product Bill of Materials
- Product Price List - Standard
- Product Price List - Special
- Product Sales History
- Product Warehouse Quantities Report

Product Enquiries

Depending on the content of the site licence the following standard enquiry options are available:

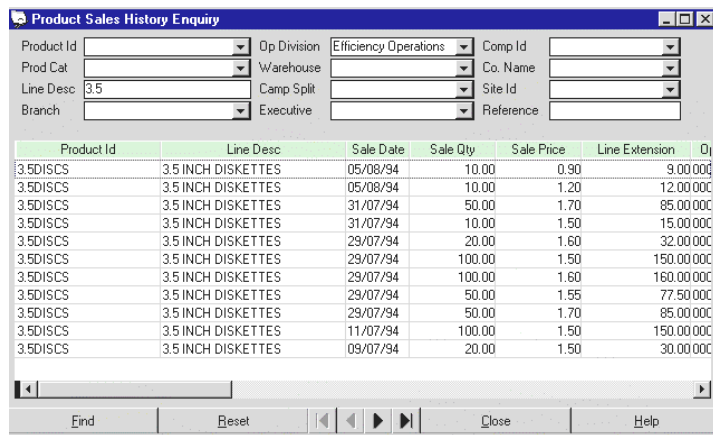
- Product Sales History
- Product Quotation History Product Order History
- Product Warehouse Quantities

Use the Pop up Menu on the Product Tab Sheets to make enquiries for an already selected product item. If you want to make general enquiries then you should select the items from the Enquiry option of the product main menu.

Product Sales History

The information displayed on this enquiry window is accessed from the Efficiency Sales History (salehist) table. This table is updated from the Corporation's Financial System's Accounts Receivable Invoice module by the supervisor at regular intervals.

Alternatively if the site licence includes the "Host Integration Module" this information can be accessed from the Financial System on line.



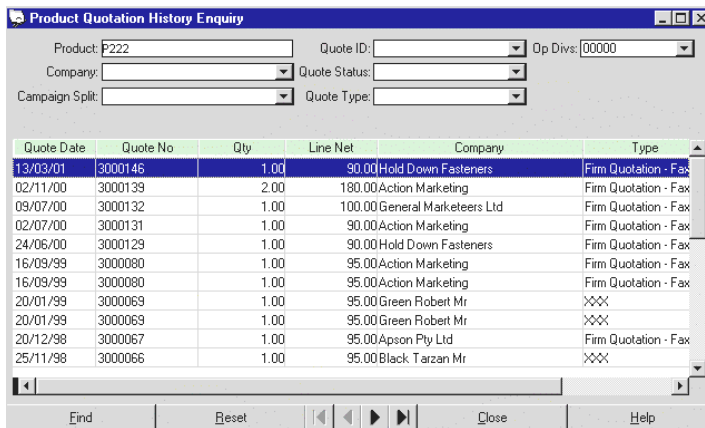
Query and Display

Make the query selections at the top section of the window. Click on the <FIND> button.

The Pop up Menu on the List section will allow the user to use the E-Mail (if available), Filter, Print and the Sort functions.

The contents of the Query and List data windows may be changed for each user by the user preferences function.

Product Quotation History The information displayed on this enquiry window is accessed from the Efficiency Quotation Header and Lines tables.

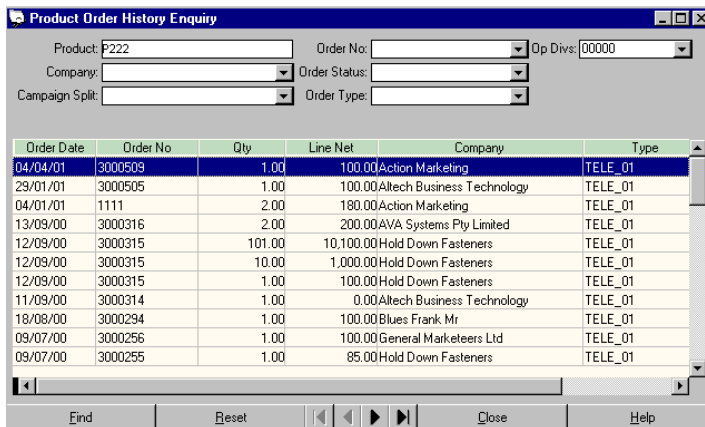


Query and Display Make the query selections at the top section of the window. Click on the <FIND> button.

The Pop up Menu on the List section will allow the user to use the E-Mail (if available), Filter, Print and the Sort functions.

The contents of the Query and List data windows may be changed for each user by the user preferences function.

Product Order History The information displayed on this enquiry window is accessed from the Efficiency Order Header and Lines tables.

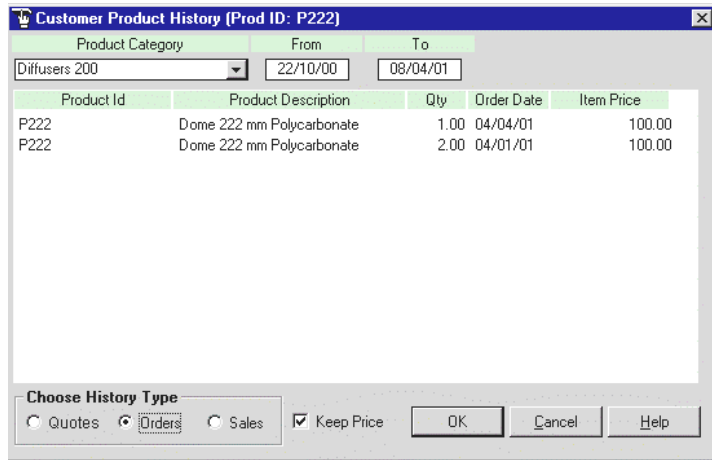


Query and Display Make the query selections at the top section of the window. Click on the <FIND> button.

The Pop up Menu on the List section will allow the user to use the E-Mail (if available), Filter, Print and the Sort functions.

The contents of the Query and List data windows may be changed for each user by the user preferences function.

Customer Product History The historical Product information for the Client can be accessed at the time of order and quotation line entries. These are effectively the customer's buying and interest patterns.



The **Quote**, **order** and **sales** radio buttons will display the relevant information. A selected line item can be dragged and dropped on to the new Order or Quotation as a new line item using the historical price or the up to date price.

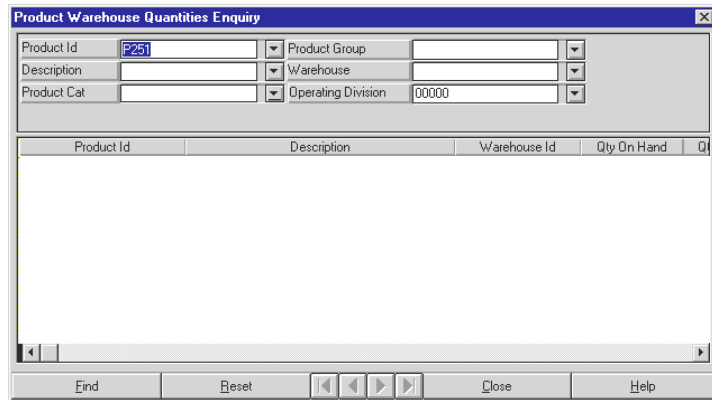
The top section of the window contains selection fields.

Enter a Product category and beginning and end dates for the historical information.

If Quotation option was selected use the Quotation Type selection to filter the list.

Product Warehouse Quantities

The product warehouse quantities can be enquired on this window.



Product Defaults

Product defaults are used when creating a new product, instead of typing values in all of the fields manually; they can be preset in the default screen and enabled in user option set-ups.

NOTE: system's supervisor maintains User options set up.

Data Fields

Default Id: The product default template id.

Description: The description of the product default.

Product Category: The product category.

Stock Unit: The stock unit.

Sell Unit: The sell unit.

Sell Volume: The sell volume (sell unit / stock unit)

Tax Rate: The tax rate (percent).

Default Mark Up: The default mark up (percent)

Currency Id: The currency id.

Default Quote Qty: The default quotation quantity.

Default Order Qty: The default order quantity.

Use Loyalty: Click on yes or no to enable and disable the use of loyalty points.

Loyalty Points: Loyalty point's amount.

Operating Division: The operating division identification code.

Product Status: The status for the product.

Default Warranty Type: A warranty type, which is usually applied by the supplier.

Default Warranty Period: A warranty value (days) usually given by the supplier.

Recalc Min Price Style: When price is recal, 'N' = not to recalc min price, 'L' = Linear adjust.

Round up Prices: Click on yes or no to enable and disable round up product prices.

Rounding Unit: The value to round up to when saving prices.

Margin or Markup: 'G'ross margin or 'M'arkup for calculating sale price.

Default Commission Points: The commission points (default) for the selling of the product.

Default Commission Percent: The commission percentage (default) for the selling of the product.

User Flags 1 – 2: A user defined flag selected from the profiles table.

BOM Allowed: Allow Bill Of Materials when setting up products.

Configurator Header: Header configured allowed for the product.

Not for Sale: Click radio buttons yes or no to enable not for sale option.

Create Plant: To enable automatic plant creation for the product when creating an order.

Remote Access: Click radio buttons yes or no to enable or disable remote access for the product.

Cost Include Tax: To enable or disable tax inclusive or exclusive for the cost.

Price Include Tax: To enable or disable tax inclusive exclusive for the price.