

RETAIL - FINDING THE SALES ITEMS

Introduction

The purpose of this Document is to explain the features, functions and steps available to the Operator to search for, find and return Catalog Item Codes to the Sales Item grid.

The Sales Item Grid

Account Balance	<input type="text"/>	Club	<input type="text"/>
Credit Limit	<input type="text"/>	Expiry	<input type="text"/>
Available Credit	<input type="text"/>	Directive	<input type="text"/>

ex Catalog ↓

	Stock Code	Store	Description	Price	Cust Price
1	3008412	01	OLYMPUS CAMEDIA	35.94	35.94
2					

Above we see a clip from a Retail Deal screen, where Catalog Items (or Stock Codes) are listed on a Retail Deal, and the next Stock Code goes into the pink cell.

Imagine for a moment a fast outlet operation, like a Supermarket. In such a case, the Operator is simply scanning the barcodes on the Items that the Customer has already selected (and put in a trolley or hand basket), and if any difficulty is experienced reading a barcode on a particular item (as occasionally happens), then the Operator will simply type in the Item Code. This is very easy, and the system is quite happy to do all of that.

Now imagine a different kind of Retail operation, where the Sales Service is 'counter driven' or partially so. In other words, think of a situation where the Customer needs some assistance in selecting the Item(s) to buy, and/or where the Customer does not have direct access to the Item Bins, but needs to be 'serviced' instead. In this case, it is usually necessary to lookup, find or search for the correct Items in the system Catalog.

IES has a number of functions to assist the Operator in 'finding the Sales Items'.

Request Lookup

Please Choose the Data To Select -

The selection type that you want kind of selection rule is being applied ↓

You may change any 'My Choice' value to prescribe which data should be selected ↓

Selection Tip	My Choice
1 Stock Code = >	[]
2 Description = ?	[]
3 Ledger Param = <	[]
4 Tax Type = >	[]
5 Discount Param = >	[]
6 Price Policy = <	[]
7 Group No =	[]
8 Sub Group = ?	[]
9 Sub Sub Group = ?	[]

When you press F2 (std lookup function) on the pink cell, the system offers the standard Request Lookup function, and you can search for items based on answering 1 or more of the criteria prompt.



Auto Power Lookup on Stock Code

By simply typing 1 or more characters, and starting with a numeric, the system automatically kicks in the Stock Code Power Lookup. For example, if you type '300' and press ENTER, the system will look for a Stock Code = '300'. If there is such a Code, then this is accepted as the Stock Code to sell, but if there isn't, then the system will list Stock Codes starting with '300'. This lookup works on the 'left-to-right-only' principle, i.e. system will not return codes that include '300' but does not start with it.

	Stock Code	Store	Description
1	3008412	01	OLYMPUS CAMEDIA
2	300		



Catalog Item	Price	OH	OHall	Order
1 30-02329 CANON NB-2L BATTERY	67.20	28	72	0
2 30-02094 CANON A85 DIGITAL	393.60	188	210	0
3 30-08064 OLYMPUS STYLUS 410 DIGITAL	423.07	70	730	0
4 30-02096 CANON A95 DIGITAL	492.00	198	212	0
5 30-02144 CANON G6 DIGITAL	885.60	42	71	0
6 30-07174 NIKON COOLPIX 8800	1,199.96	10	45	0
7 30-02385 CANON A-SERIES ACCESS KIT	50.40	96	120	0
8 30-07230 NIKON EN-EL1 BATTERY	53.96	105	132	0
9 30-07232 NIKON EN-EL3 BATTERY	53.96	140	164	0
10 30-03146 FUJI FINEPIX E510	382.20	126	674	0
11 30-02019 CANON DIGITAL REBEL W/EFS	1,279.20	182	204	0
12 30-05168 K.MINOLTA DIMAGE X50	480.00	6	24	0
13 30-08412 OLYMPUS CAMEDIA MASTER PRO	35.94	371	420	0
14 30-07520 NIKON D70 DIGITAL W/18-70D	1,736.96	210	210	0

All the Stock Codes listed here start with '300'. Do not be confused about the '-' following '30' in each case, because it is never typed, and is only a display mask, i.e. a presentation method for the Stock Code (and which can be set differently at your site).

Also, for this lookup, it is only necessary that the 1st character be numeric. In other words, Stock Codes may include alpha characters, but this search will work if the 1st character is numeric. **So what if you have Stock Codes not starting with a digit?** Well, there is solution for that also. You can still activate the Power Lookup, but you need to add '%' at the end of your search code. In other words, for Stock Codes starting with 'AB', just type 'AB%'.

Auto Search on Item Description

By simply typing 1 or more characters, and NOT starting with a numeric, the system automatically kicks in the Item Description Search. For example, if you type 'digi' and press ENTER, the system will look for Stock Codes where the Description includes 'digi' and 'digi' may appear anywhere in the Description, not necessarily 'starting with'.

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	Stock Code	Store	Description
1	3008412	01	OLYMPUS CAMEDIA
2	digi		

SINGLE SELECT: Values Found ...

	Catalog Item	Price	OH	OHall	Order
<input type="checkbox"/>	1 30-02094 CANON A85 DIGITAL	393.60	188	210	0
<input type="checkbox"/>	2 30-08064 OLYMPUS STYLUS 410 DIGITAL	423.07	70	730	0
<input type="checkbox"/>	3 30-02096 CANON A95 DIGITAL	492.00	198	212	0
<input type="checkbox"/>	4 30-02144 CANON G6 DIGITAL	885.60	42	71	0
<input type="checkbox"/>	5 30-15688 SECURE DIGITAL 128MB CARD	36.01	358	388	0
<input type="checkbox"/>	6 30-15689 SECURE DIGITAL 256MB CARD	60.00	378	404	0
<input type="checkbox"/>	7 30-16254 SECURE DIGITAL 512MB 45X F	102.00	40	50	0
<input type="checkbox"/>	8 30-15690 SECURE DIGITAL 512MB CARD	84.00	70	82	0
<input type="checkbox"/>	9 30-15692 SECURE DIGITAL 1GB	120.01	100	111	0
<input type="checkbox"/>	10 30-02019 CANON DIGITAL REBEL W/EFS	1,279.20	182	204	0
<input type="checkbox"/>	11 30-07520 NIKON D70 DIGITAL W/18-70D	1,736.96	210	210	0
<input type="checkbox"/>	12 02-00540 # CANON EOS 20D DIGITAL BO	1,968.00	48	70	0
<input type="checkbox"/>	13 30-02129 CANON S410 DIGITAL ELPH	492.00	72	86	0
<input type="checkbox"/>	14 15-39304 OPTEX DIGITAL LENS PEN	9.58	30	48	0
<input type="checkbox"/>	15 30-15670 SECURE DIGITAL/MMC USB2.0	24.36	82	94	0
<input type="checkbox"/>	16 30-02182 CANON S60 DIGITAL	639.60	56	64	0
<input type="checkbox"/>	17 30-02091 CANON A75 DIGITAL CAMERA	295.20	229	251	0

Select ALL Show Full Line Cancel OK

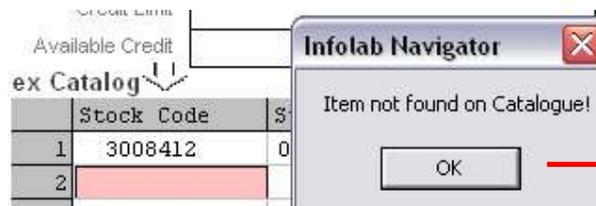
All of the above Items include 'digi' somewhere in the Description.

Fine Tuning the Search

Now what if the system returns a result of 500 Items? A long list like that is difficult for the human eye to work with, and it takes too much time scanning through the list. Therefore, it is necessary to be able to refine the search.

The 1st step in refining the search may be to start with what was typed before, and therefore the system stores your search value in memory, and you can retrieve it with the F1 key.

On the result list offered by the system, choose CANCEL, i.e. select nothing. When the system returns to the 'pink cell', it complains that it cannot find the Stock Code, and this is because nothing was selected. Just ENTER or click OK, and then press F1 ...



When you press F1, the system returns your previous search value ...

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	Stock Code	Store	Description
1	3008412	01	OLYMPUS CAMEDIA
2	digi		

Note that F1 is the Help Key, but in this case has a dual function. If there is a 'search' value in memory, the system returns this value, and after that it will show the Help if you press F1 again.

Enhanced Auto Search on Description with AND modifier

Following on our example above, we can now enhance our search by editing the previous search value, and we will use this example to demonstrate the AND modifier. With the AND modifier, you are still using the auto search on Description, but with the added capability of looking for Items that meets more than 1 match. For example, by changing 'digi' to '.digi.canon', the system will look for Items where the Description includes both 'digi' AND 'canon'.

	Stock Code	Store	Description
1	3008412	01	OLYMPUS CAMEDIA
2	.digi.canon		



	Catalog Item	Price	OH	OHall	Order
<input type="checkbox"/>	1 30-02094 CANON A85 DIGITAL	393.60	188	210	0
<input type="checkbox"/>	2 30-02096 CANON A95 DIGITAL	492.00	198	212	0
<input type="checkbox"/>	3 30-02144 CANON G6 DIGITAL	885.60	42	71	0
<input type="checkbox"/>	4 30-02019 CANON DIGITAL REBEL W/EFS	1,279.20	182	204	0
<input type="checkbox"/>	5 02-00540 # CANON EOS 20D DIGITAL B0	1,968.00	48	70	0
<input type="checkbox"/>	6 30-02129 CANON S410 DIGITAL ELPH	492.00	72	86	0
<input type="checkbox"/>	7 30-02182 CANON S60 DIGITAL	639.60	56	64	0
<input type="checkbox"/>	8 30-02091 CANON A75 DIGITAL CAMERA	295.20	229	251	0

If we compare the above list with the previous one, it is shorter and includes only Items where the Description has both 'digi' and 'canon', and the order of appearance of the search values in the Description is irrelevant.

The rule for using the AND modifier is simply to start with dot ('.'), and separate each search value with dot (no spaces!). You can also use more than 2 search values, i.e. as many as you want.

AND Startwith

The AND modifier can also be used to find Items where the Description 'starts with' a specified string. In this case, just start with 2 dots, e.g. "..ph" will list Items where the Description starts with "ph". The lookup can still accommodate multiple AND's, e.g. "..ph.paper" (this will find "Photo Paper", etc.)

Enhanced Auto Search on Description with OR modifier

The OR modifier is still on the same theme, and similar to the AND modifier, but in this case, only 1 of the values have to be matched, and the OR modifier is indicated with comma (',') instead of dot.

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Therefore, “,digi,canon” means ‘find all Items where the Description includes ANY OF ‘digi’ or ‘canon’. Once again, you can use more than 2 values if required.

Part Number and Description Combination Search

The % indicator can also be used to initiate a combo search on Part Number and Description, for example: 123%valve

Where any characters before ‘%’ is treated as Part Number (lead-in or startwith), and anything after ‘%’ is treated as Item Description (may appear anywhere in description). The system will find all Items where the Part Number pattern AND the Description pattern are matched.

Different Detail depending on Item Hit Rate

In the previous examples where we have shown a List of Items, the system has shown, in each case: Item Code, Description, Price, On Hand (Current Store), On Hand (All Stores), and On Order Qty. However, this only happens when you hit results of up to 30 Items. If the list is longer, then the system returns only: Item Code, Description, Price, OHI (OHI = On Hand Indicator, for Current Store).

We will now use a search that will produce a longer list: -

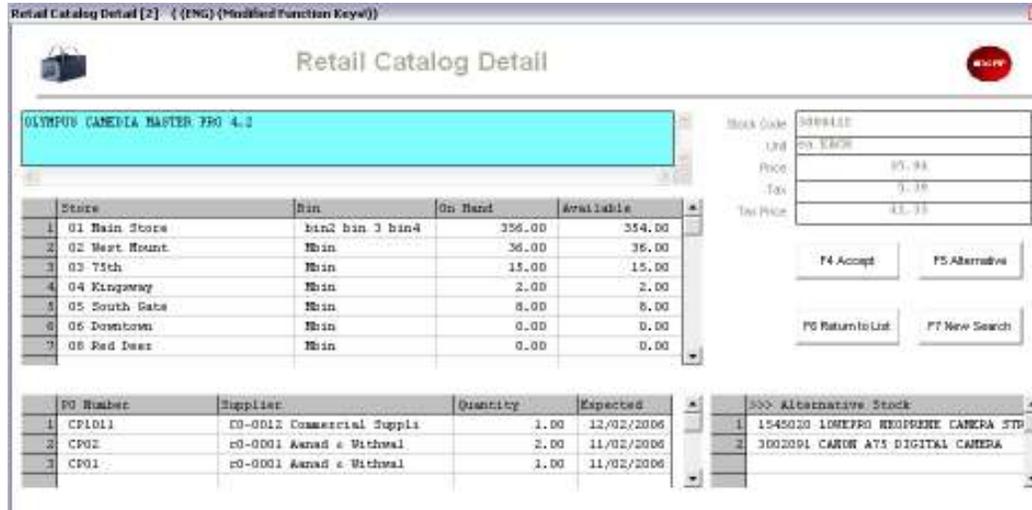
Catalog Item	Price	OHI
<input type="checkbox"/> 079 30-15240 SMART MEDIA 128MB CARD	66.20	38
<input type="checkbox"/> 280 14-03140 3V LITHIUM BATTERY/CR123A	3.24	1,020
<input type="checkbox"/> 381 48-5397A KODAK XTOL DEV 50L	58.08	0
<input type="checkbox"/> 202 64-89904 406 CLIP FRAME	1.02	64
<input type="checkbox"/> 389 65-19514 12X12 SCRAPERBOOK REFILL (5)	1.80	22
<input type="checkbox"/> 284 40-00032 KODAK GOLD 100 GA 135-24	5.12	37
<input type="checkbox"/> 285 12-54445274A Detail on Dust Sales # 3 plus what else?	35.00	
<input type="checkbox"/> 206 64-97424 CLASSIC 604 FOLDER - BLACK	0.76	572
<input type="checkbox"/> 287 65-12229 PAPER #95VH PAGES (5) BLACK	3.58	6
<input type="checkbox"/> 288 30-15617 COMPACT FLASH SLIDE EXTREME 40X	100.82	202
<input checked="" type="checkbox"/> 289 30-22538 EPSON PICTUREMATE PRINT PAGE 100	32.94	74
<input type="checkbox"/> 290 40-10466 FUJI RPM 220 (40DASA) EACH	15.13	75

This list has more than 30 results. In order to save time, the system is not calculating the Available Quantities for all the Stores, nor checking the ‘On Order Qty’.

However, you have ample opportunity to see the detail you want to see, by either refining the search to produce a shorter HIT list, or by using the optional ‘detail’ step, which will be explained below.

Optional Expanded Detail on Item Selection

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In the picture shown here, the system is displaying a lot of pertinent Sales Data on the selected Item. It shows all Stores, and the On Hand and Available quantities in each Store for this Item, plus all current Purchase Orders and expected delivery dates for the Quantities listed.

If you like what you see, you choose ACCEPT, and the Item is immediately selected and returned to the Sales grid.

To step through details on any listed alternates, just choose F5.

To return straight back to the original list that was offered, i.e. to select or check out a different Item, just choose RETURN TO LIST.

To ignore the current Item and the previous list, i.e. to do a new 'fresh' search, just choose NEW SEARCH.

The 'Expanded Detail Step' is optional. When it is not 'ON', the system will return a selected Item from a search results list directly to the Sales grid, i.e. bypassing this step. You can toggle this option between ON and OFF at will by choosing DEAL VIEWS on the Retail screen, and then select the ON or OFF, which is dependent on whether the option is currently on or off.



Please note that the toggle option is for 'on demand' use while on the Retail screen, but your preferred default choice is specified on your personal Retail Profile. In other words, if on your Retail Profile the function is set OFF, then it is OFF when you open a Retail screen, and you will have to use the toggle option if you want it ON. However, if the function is set ON for your Retail Profile, then it is always ON when you are on a Retail screen, except if you use the toggle to switch it OFF.

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Note (1): The Detail Step, when 'ON', will also show if a full Stock Code is entered, i.e. without a Lookup being activated. Also, you can still recall the detail step at any stage by activating the Stock Code cell for which you want to see it. In other words, just dbl-click the Stock Code cell, and when it goes active (pink), press F2 OR press the right arrow key and then press ENTER. After returning from the Detail Screen, just press ESC to de-activate the Stock Code cell.

Note (2): The Detail Step is also shown when F2 is pressed while the Quantity field is active.

Stock Code	Store	Description	Price	Cust Price	Qty
3008412	01	OLYMPUS CAMEDIA MAS	35.94	35.94	1



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