



Direct EDI Overview

Direct EDI is a technology in The Uniform Solution that provides you with a method to quickly and accurately send a purchase order to a vendor. Although faxing a purchase order may be fairly easy, it still requires someone in the vendor's customer service department to enter the purchase order – opening the door for both time delays and mistakes. The Direct EDI process does not require the vendor's customer service representative to enter your purchase order. Instead, your purchase order is sent to the vendor in a format that their order entry system can translate directly into a sales order. All you have to do is connect to the internet, select a purchase order, and press the F11-EDI PO Button from the Purchase Order List.

Benefits to the Retailer

Direct EDI will provide you with the confidence that your purchase orders are entered promptly and accurately by the vendor. You will also receive 2 confirmations during the process. The first will confirm that your purchase order was received by the vendor. The second will indicate whether or not the purchase order was accepted or rejected by the vendor.

Why Direct EDI not Conventional EDI?

EDI or Electronic Data Interchange has been around for years and is used by large retailers like JCPenney and Walmart. However, The Uniform Solution does not use Conventional EDI because of the high costs. Conventional EDI requires the purchase and maintenance of an EDI Translator (\$1,000-\$5,000 initial cost and \$200-600 per year), an account with a Service Bureau (\$40-\$50 per month), and a \$1-\$2 transaction fee for each purchase order.

Direct EDI in The Uniform Solution provides you with the benefits of Conventional EDI without the cost. So how can we do that? We are partnering with vendors in the uniform industry to provide what we call Direct EDI. Instead of using an EDI Translator and a Service Bureau to send your purchase orders to a vendor, we are creating the purchase order in a format requested by the vendor and sending it directly to their system. The purchase order we are sending can be quickly and accurately translated into a sales order by their order entry system.

The only cost you have using Direct EDI is the cost of maintaining a current software subscription with The Uniform Solution. With your software subscription, we'll make sure that the Direct EDI process continues to meet the on-going requirements of our partnered vendors.

Requirements

One of the reasons we are able to offer Direct EDI is because of one of the requirements – each item on a purchase order you send using Direct EDI must have a UPC barcode assigned to the item. This is certainly not a problem if you use the Vendor Catalog, but it may require some changes if the items you want to order using Direct EDI do not have a UPC barcode assigned to them. So why have this requirement? Since each customer has the ability to enter the style, color, and size however they want in The Uniform Solution, most likely it won't be the same way the vendor has it set up in their system. And since a customer service representative won't be entering the purchase order (and interpreting each item as they do now), the only absolute way to identify each item on the purchase order is send the vendor the UPC barcode for the item.



Premier Data Systems

1778 N. Plano Road Suite 110
Richardson, TX 75081-1962

(972) 235-2800

Getting Started with Direct EDI

Getting started with Direct EDI is quite simple if you already have each item you will be ordering identified with a UPC barcode number. If your items don't have the vendor's UPC barcode number set up, see the next page for more details on the UPC requirement.

Direct EDI Activation Steps

1. Contact the vendor to set up your account to perform Direct EDI.

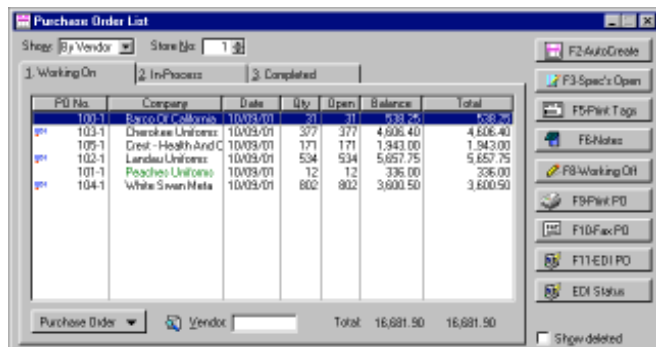
Vendor	Direct EDI Contact
Barco Uniforms	Mirko Minaya 310-719-2149
Cherokee - Strategic Partners	SPI Customer Care 800-283-7272 ext 198
Dickies Medical	Sophia Pineda 214-389-7202
Landau	Turner Foster 800-238-7513
Peaches	Peaches Customer Service 800-272-3224
White Swan	Michelle Clauser 800-797-1135

2. Go to the Vendor List in The Uniform Solution, select the vendor to set up for Direct EDI, and go to the Purchasing Tab. In the Direct EDI section, select the correct vendor. In the account number field, make sure your account number is correct. If you have multiple stores, make sure you setup each store's account number on the Acct No tab.

Using Direct EDI

1. After creating a purchase order, connect to the internet.

2. On the Purchase Order List, highlight the purchase order you want to send and select the F11-EDI PO button. If your Direct EDI account has been set up by the vendor and the purchase order passes the validation process for the vendor, the purchase order will be sent to the vendor. If the purchase order does not pass the validation process, you will be provided with a message describing why the purchase order failed the validation step. After the purchase order is sent to the vendor, an EDI icon will be placed next to the purchase order number. If you need to modify or cancel the purchase order, you will need to contact the vendor.



3. After sending the purchase order to the vendor, you can check the status of the purchase order by selecting the F12-EDI Status button on the Purchase Order List. Depending on the vendor, it may take 5 minutes to an hour for the purchase order to be processed. Once the vendor has processed the



Premier Data Systems

1778 N. Plano Road Suite 110
Richardson, TX 75081-1962

(972) 235-2800

purchase order and the status is checked, The Uniform Solution will indicated if the purchase order was accepted or rejected by the vendor.

If the purchase order was accepted, there is nothing more to do. If it was accepted with errors, open up the purchase order to see what items were rejected. Rejected items are noted with an EDI icon. After opening a purchase order sent using Direct EDI, you can find more information about the status of a purchase order by viewing the EDI Tab on the purchase order itself, or on the EDI tab for the individual item.



UPC Barcodes – Required for Direct EDI

Direct EDI requires that each item on a purchase order have a corresponding UPC barcode number. If you always use the Vendor Catalog to set up new inventory items, your inventory items already have the UPC barcode assigned for our partnered vendors.

If some or all of your inventory items don't have a UPC barcode number, Version 2.02 of The Uniform Solution adds a number of new features to help you set up your inventory items to use the appropriate UPC barcode number. Please review the options below to see how to best proceed with assigning UPC barcodes to your inventory items.

Determine Your Situation for Each Partnered Vendor that Uses UPC Barcodes

To view items without a UPC barcode for a vendor, preview the report "Inventory w/o UPC's". Once you have determined the extent of the missing UPC's, you can determine the best method for getting your inventory UPC barcoded. If you are only missing a few UPC's, you can use either the UPC Utility or the Add UPC's Option (F6-Prices/UPC's button) on the Catalog List. If you are missing a large number of UPC's, you may prefer to use the Auto-Discontinue option – just be aware there are different levels of involvement required when you use this option. However, using the Auto-Discontinue option can also be a great way to clean-up your inventory if you need to.

UPC Options

UPC Utility – Maintenance > Inventory Utilities > UPC Scanning Utility

The UPC utility can easily add the UPC barcode number to each inventory item by scanning the barcode printed by The Uniform Solution, then scanning the UPC barcode assigned by the manufacturer. This process is fast and simple, but it requires that you have the items in stock and tagged.

Add UPC's from the Catalog List

If you are missing UPC barcodes for a vendor, they can be added to existing inventory items by selecting the F6-Prices/UPC button on the Catalog List. If an exact match (style, color, and size) is found between the Vendor Catalog and your inventory, the UPC barcode will be added to the inventory item.

Getting your Inventory to match the Catalog may require some work, but there are some options to make it easier. First, print a Catalog Price List for the Vendor by selecting Reports > Inventory > Catalog > Catalog Cost Price List. If your color codes don't match the Catalog, changing the color code to match the Catalog is easy. Go to Lists > Inventory Standards > Color Tab and select the Vendor. If you change a color code to match the Catalog color code, the program will update all instances of the old color code.

There is also a "Merge" option for customers that setup larger sizes under a separate style number. To Merge a Style with another Style, highlight the style to merge on the Inventory List, then select Edit > Merge, and enter the Style to merge to. The selected style will be merged with the one you entered.

Auto-Discontinue All Inventory for a Vendor – No Max/Min Levels

If you are missing most of the UPC barcode numbers for a vendor, and you are not using Max/Min levels, using Auto-Discontinue is the perfect option. The Auto-Discontinue process will mark each item for the vendor as discontinued and hide it on the Inventory List, but all of the price tags and current stock levels will remain unchanged and continue to work as always. The inventory value for the vendor will also remain unchanged. You can then copy all of the inventory items for the vendor from the Catalog List – creating an inventory ready for Direct EDI.



To use the Auto-Discontinue feature, go to Lists > Vendors, highlight the desired vendor, and select Edit > Auto-Discontinue All Inventory. Once the process is complete, go to the Catalog List, tag the appropriate vendor, and copy the items to your Inventory List. After copying the inventory items for the vendor, make sure your prices are correct. If you don't use Max/Min levels, you won't have to do any re-tagging. Eventually all of the auto-discontinued merchandise will work its way out of your inventory.

Auto-Discontinue All Inventory for a Vendor – Max/Min Levels Used

If you have Max/Min levels set and you still want to use the Auto-Discontinue option, there are a number of considerations to make. Before you begin, print the report "Inventory with Max Levels" for the vendor before using the Auto-Discontinue feature – you'll have to re-enter the Max/Min values after copying the Vendor Catalog. You'll also need to re-tag your inventory by using QuickLoad. A summary of the recommended steps is as follows:

1. Print an "Inventory with Max Levels" and an "Active Inventory" report for the vendor
2. Use the Auto-Discontinue feature for the vendor
3. Set the default pricing scheme for the vendor on the Pricing Tab of the Vendor Form
4. Copy the inventory items for the vendor from the Vendor Catalog
5. Set the proper retail prices for the newly copied items that do not use the default pricing scheme
6. Clear the Physical Inventory List and update the current inventory count to Zero for the vendor
7. Use the QuickLoad procedure to reprint tags and add the correct stock quantities for the new items by scanning the UPC barcode from the manufacturer (make sure you scan the UPC barcode on the garment – not the original price tag).
8. Reset the proper Max/Min levels for the items copied from the Catalog.
9. Check your purchase orders for items already on order for stock. There are two options at this point:

Option 1

The ideal thing to do is to delete the original (now discontinued) item on order for stock from each purchase order, and add the new item copied from the catalog in its place. This process will make it easy to properly receive the items when they arrive from the vendor. It also makes the auto-create process work correctly since your items on order for stock are correct.

To fix the purchase order, do the following: either delete the item and add the new one back if nothing has been received, or if the PO line item already has a partial quantity received, reduce the original quantity to the quantity received and add the new item for the balance. Also, **make sure you leave special order line items alone** - they will work their way out and deleting them will cause them to be re-ordered on the next auto-created PO.

Option 2

Leave the original PO alone and follow this procedure when you receive the now discontinued merchandise: use the setting to receive items not on a purchase order, and receive all stock items by scanning the UPC, not selecting it from the original PO (F2-Add PO). Selecting the items from the PO will place the item in stock for the discontinued version of the item – not the new one. If there are special order items on the original PO, you will have to select them from the original PO (F2-Add PO). And when the purchase order is complete, you'll need to cancel the original purchase order since the items on order for stock are not updated when received.

If you use this method, be careful when using the Auto-Create function for creating purchase orders. You could quite easily re-order new merchandise already on order for items that were discontinued (since the PO's weren't updated). Until all of the PO's that were created for discontinued items are complete, you may want to use the Auto-Create function to re-order items that you have sold for a particular date range – not for items below re-order points.

**Depending on how your inventory is organized in the store, consider performing the above process for multiple vendors to make the QuickLoad and re-tagging process more efficient.