

# Product Management Pt.2

## Purchasing Information

Purchasing Information			
Alternate Cost 1		Last Month Sales Qty	
Alternate Cost 2		YTD Cost (\$)	\$ 1,000,000
Alternate Cost 3		MTD Cost (\$)	
Alternate Part #		Minimum Sell Increment	
Last Received	03-15-2016	Selling UOM Type	EA
First Sold	03-15-2016	Vendor Order Increment (PUOM)	
Last Sold	03-15-2016	Vendor Order (PUOM) Type	PACK
Last Returned	0000-00-00# : )	Per Car Qty	1
Part Min		Buy Qty	
Part Max		Purchase Increment	1
Part Order Point		Min Ord Qty	1
Primary Supplier		Sales Previous 13-24	
Lost Sales		Sales Previous 25-36	
False Loss		Manufacturers Pop Code	
Sales Previous - 12	10	Eligible Return Date	
Sales YTD (\$)	\$ 1,500,000	Sales Rank	N
YTD Sales Qty	10.00	Rank Group	
MTD Sales (\$)		Beginning Stock Date	
MTD Sales Qty		Turns	
Last Month Sales (\$)		Qty Defect Rate (%)	

**Alternate Cost 1 – 3 (Optional)** - These are alternate costs for this part. If you source this part from multiple vendors with different prices, you will likely want to use these fields. In the vendor record there is a field called “Pull Cost Price From” where you can map the vendor's price to one of these cost fields instead of the default “Current Cost” field. This allows you to keep accurate pricing for multiple vendors on the same part. If you have set this up correctly, then when you create a purchase order with this product on it, Fuse5 will pull the correct price for the specified vendor.

**Alternate Part # (Optional)** - If this product has other parts that can be substituted in its place, you can indicate them in this field using the specified format, with multiple entries separated by commas. For example, if you sell a WIX 51515 filter, you could put “WIX:51515mp” in this area. When you create a sales order, there will be an “AR” indicator when you pull up the 51515 filter. If you click on the “AR” it will display the alternate and related parts and allow substitution with the alternate part if you choose to do so.

**Last Received (Informational)** - The date, automatically generated by Fuse5, indicating the last time the part was received.

**First Sold (Informational)** - The date that this product was first sold. This is automatically generated by Fuse5.

**Last Sold** (Informational) - The date that this product was last sold. This is automatically generated by Fuse5.

**Last Returned** (Informational) - The date this product was first returned, along with the Sales Order number that it was returned under. This is automatically generated by Fuse5.

**Part Min** (Optional) - This is the minimum quantity of the product that you want to keep in stock. This number is used to calculate the order quantity on an “Order to Min” type of PO.

**Part Max** (Optional) - This is the maximum quantity of the product that you want to keep in stock. This number is used to calculate the order quantity on an “Order to Max” type of PO.

**Part Order Point** (Optional) - This is an exact stocking quantity that you are targeting for this part. This number is used to calculate the order quantity on an “Order to Order Point” type of PO.

**Primary Supplier** (Optional) - If you wish to designate a specific vendor as the primary supplier to you for this product, you can do that in this field. This is helpful when creating a purchase order, as you can choose to populate automated purchase orders (such as “Order to X”, or forecast) with only parts for which the vendor you are creating the purchase order for is the primary supplier.

NOTE: This field is NOT related in any way to the Primary Supplier field in a vendor information file.

NOTE: Choose the primary vendor abbreviation if you intend to use primary vendor functionality when creating purchase orders. This is NOT a requirement for doing purchase orders, but is useful if you order equivalent parts from multiple vendors. The primary supplier designation allows you to order equivalent parts along with parts that don't have equivalents that you have designated a primary supplier for.

NOTE: If you are using the “Exchange Rate” and Mark Up Factor” in the vendor record, you will need to use this setting. In the product record, user will select a vendor in this field. When we're generating a sell price for this product (regardless of customer). Look in primary supplier, check these 2 fields “ERF & MUF”

find sell price plan rule. This tell us the field we price off of. Could be CC, M1-M10.

Find that field. Then multiply it first by ERF, then by MUF. Now take the value, which is like what price-off field value is, and THEN apply the sell price plan rule TIMES to it.

**Lost Sales** (Informational) - This is the number of times that this product was marked as a lost sale during the Sales Order process.

NOTE: When you log a lost sale during the sales order process, you will get a pop up that presents you with a number of reasons for the lost sale in a selection list. The reasons that are displayed in this pop up are editable in the Custom Settings section of Fuse5.

**False Loss** – This is the number of Disqualified Sales that have been entered from the point of sale for the product. Essentially, the number of sales that have been made that are NOT counting towards sales history.

**Sales Previous -12** (Informational) - This is the number of times this product was sold in the last twelve months.

**Sales YTD (\$)** (Informational) - This is the monetary sum of all the sales of this product in the current calendar year.

**YTD Sales Qty** (Informational) - This is the number of times that this product has been sold in the current calendar year.

**MTD Sales (\$)** (Informational) - This is the monetary sum of all the sales of this product in the current month.

**MTD Sales Qty** (Informational) - This is the number of times that this product has been sold in the current month.

**Last Month's Sales (\$)** (Informational) - This is the monetary sum of all the sales of this product in the month preceding the current month.

**Last Months Sales Qty** (Informational) - This is the number of times that this product was sold in the month preceding the current month.

**YTD Cost (\$)** (Informational) - This is the sum of the dollar amount that you paid your vendor(s) for the parts that you sold in the current calendar year. Current cost? ALC?

**MTD Cost (\$)** (Informational) - This is the sum of the dollar amount that you paid your vendor(s) for the parts that you sold in the current month. Current cost? ALC?

### **Minimum Sell Increment -**

There is a field in product records called 'Selling UOM'. This field is a location specific field that forces the counter person to sell that product in the specified increments.

If you only wanted to sell a product by cases of 12 then you would set the value in that field to 12. When the counter person added that item at the POS then tab through the quantity field then it would set the value to 12. If the counter person entered any value other than the increment specified Fuse5 would round up the quantity to the incremental value. The selling UOM is both a minimum quantity to sell and an increment.

Ex. 'Selling UOM' = '12'. If the counter person enters 1 in the quantity field Fuse5 would automatically round the quantity sold to 12. If the counter person entered 13 Fuse5 would round the quantity sold to 24.

Select the products unit of measure type from this list. The default selection is "Each", but if the product is a box of rags, you could select "Box" to help make your invoices more useful. This does not affect quantities. It is just for labeling purposes. Other options include: "Roll", "Feet", "Inch",

“Meter”, “Liter”, and “Gallon”.

The new "Selling UOM" field has been renamed to "Minimum Sell Increment" to more clearly identify what it is for. Also, the feature is now fully functional on Sales Orders AND Store Transfers, including Store Transfers during a sales order. Last week we rolled out the SO functionality, now it is fully implemented in ST, too.

During a Store Transfer, when you are getting a product from another location (the "From" location), the Minimum Sell Increment is enforced.

This feature was implemented to require the transfer/purchase of larger quantities of some products from your warehouse location.

If you DO NOT want to use this feature, you don't have to do anything. If you DO want to use this feature, all you have to do is put a number, besides 1 or <blank>, into the Minimum Sell Increment field of the product. It is controlled on a product by product basis at EACH location. Each location can have a different Minimum Sell Increment for a product.

**Selling Unit of Measure (UOM Type)** – used in conjunction with Selling UOM above, you set the type of quantities to be measured.

You have the ability to text enter your Selling Unit of Measure. **Selling UOM Type** allows users to describe what the **Minimum Sell Increment** actually is. Examples might be case, box, flat, package, meter, yard, gallon, liter, etc. This will be displayed at the Point of Sale. CAUTION: Some EDI's require specific formatting of Selling Increments. Fuse5 will use 'EA' (for EACH) by default. Fuse5 will automatically format these selling increments when users map any of the following **Selling UOM Types**:

<u>Selling Increment</u>	<u>EDI Mapping</u>
EACH	'EA'
BOX	'BX'
ROLL	'RL'
FEET	'FT'
INCH	'IN'
METER	'MT'
LITER	'LT'
GALLON	'GL'
QUART	'QT'

**Vendor order increment (PUOM)** (Optional) - If your vendor dictates that you purchase this product

in a specific increment, put that increment value here. Fuse5 will round up order quantities for this product on automated purchase orders to ensure that they reflect this increment value.

NOTE: You can still always edit the order quantity on a purchase order if you wish to manually

**Vendor Order (PUOM) Type** (Optional) - For labeling purposes, you can type the unit of measure in which the vendor sells this product to you. Unlike the “Selling UOM” there is no drop down list to select from. You must enter the type manually. It has no affect on quantities. Used in conjunction with the Vendor order increment (PUOM) above, you se the type of quantities to be measured.

**Example of the PUOM: You need to order rolls of a product in 25 ft increments. The order increment would be 25, the vendor order type would be roll. On the PO the order quantity would populate as 25, with roll noted on the PO.**

**Per Car Qty** (Optional) - This is the quantity of this product that is typically used when performing maintenance or repair on a vehicle, and thus reflects the standard increment that the product is sold in. For example, brake pads are customarily sold in pairs, so you would likely want to have “2” in this field. It is assumed to be one unless otherwise specified here. This has no effect on a sales order (you would still need to specify the actual desired sell quantity there), but this field can be referenced to enforce “Per Car Qty” increments on purchase orders if you enable that option when creating the PO.

**Buy Qty** (Optional) - Enter a value here if there is a specific quantity that you wish to order when stocking this product. This is a *specific* value, and not a minimum, like the “Min Ord Qty” field, or an increment like the “Purchase Increment” field.

**Purchase Increment** (Optional) - If you want to purchase this product in a specific increment, put that increment value here. Fuse5 will round up order quantities for this product on automated purchase orders to ensure that they reflect this increment value.

NOTE: You can still always edit the order quantity on a purchase order if you wish to manually override this order increment setting.

override this order increment setting.

**Min Ord Qty** (Optional) - If there is a minimum order quantity that you want to set for this part, enter it here.

**Sales Previous 13-24** (Informational) - This is the number of times that this product was sold during the period 13 to 24 months prior to the current day.

**Sales Previous 25-36** (Informational) - This is the number of times that this product was sold during the period 25 to 36 months prior to the current day.

**Manufacturers Pop Code** (Optional) - If the manufacturer or vendor provides you with a pop code (a sales rank) for this product, you can import it or manually enter it here.

**Eligible Return Date** (Optional) - If there is a final date that the vendor will accept returns for this product or line, put that date here.

**Sales Rank** (Optional) - This is a code representing the sales popularity of this product within your business. The options are: “A”, “B”, “C”, “D”, “W”, “N”, and “X”. It is not directly related to the manufacturer’s pop code and may be different. You can edit the values of each code as you prefer. For example, you can establish that parts in the top ten percent of all sales are ranked as “A” parts, the next ten percent as “B” parts, the next ten percent as “C” parts, and the rest below that as “D” parts. Parts listed as “W” have no sales for a certain length of time determined by you. Parts listed as “N” are new parts, and will remain in this status for an amount of time determined by you before they are ranked by actual sales. Parts listed as “X” are discontinued parts. These codes can be generated by Fuse5, or manually entered by you. For more information see *Sales Ranks*.

**Rank Group** (Optional) - You can group certain types of parts together to get a more accurate view of their popularity. Maybe a certain oil pan is a “D” part overall, but within a grouping that you have created that contains similar products, it is a top mover. For more information, see *Sales Rank Groups*.

**Beginning Stock Date** (Optional) - This is the date you intend to begin stocking this product at your location(s).

**Turns** – turnover rate of inventory, updated weekly and based on a weekly QoH snapshot

**Qty Defect Rate (%)** - return percentage of total quantity returned in the last 12 months

# Forecasting Information

Forecasting Information			
Reorder	Yes	Avg Daily Demand	
Days Inventory	7	Order Frequency	7
FCST Blackout Date Start		Weeks Before X Rank	52
FCST Blackout Date End		Weeks of N Rank	26
Lead Time Receipts	67	Num of Invoices For Avg Qty Sold	11
Avg Lead Time		Avg Qty Sold	
Num of Invoices for Avg Days Between Sales	6	Num of Invoices For High Qty Sold	12
Avg Days Between		High Qty Sold	
Use Avg Between In Calc	No	Set reorder minimum using	HIGH
Projected Next Use		False Demand	
Use Project Factor	Yes	FD Order Frequency	
Projection Factor	0.90	FD Avg Lead Time	
Multiply FCST By Per Car	No	FD Days Inventory	
Weeks for Avg Daily Demand	26	FD Avg Daily Demand	

**Reorder** (Yes/No) - If this is set to “Yes”, this part will be eligible for reorder when you have Fuse5 generate an automated purchase order. If this is set to “No”, this part will not be included on any automated purchase orders, even if other criteria are met, such as having a quantity below “Part Min” on an “Order to Min” purchase order. If you want to order the part even though the reorder is set to “No” here, you can still manually enter the part on an automated purchase order after it has been generated, or create a Special Buy PO and enter it there.

NOTE: This field is not automatically applied during the purchase order generation process. You must enable the option on the purchase order.

**Days Inventory** (Optional) - This field is used for the Fuse5 forecasting logic and represents the number of days that you want an individual product to sit in your inventory before it is sold.

**FCST Blackout Date Start** (Optional) - This field is used for the Fuse5 forecasting logic. Enter a date when you want Fuse5 to begin disregarding this part while generating forecast purchase orders.

**FCST Blackout Date End** (Optional) - This field is used for the Fuse5 forecasting logic. Enter a date when you want Fuse5 to stop disregarding this part while generating forecast purchase orders if you had set up a blackout start date. If you do not have a valid blackout start date, then this field will do nothing.

**Lead Time Receipts** (Optional) - This field is used for the Fuse5 forecasting logic. Enter the number of purchase orders you want Fuse5 to consider when generating the average lead time for this part.

**Avg Lead Time** (Informational) - Based on your entry in the “Lead Time Receipts” field, this is the average number of days between when you placed a purchase order and when you received this product.

**Num of Invoices for Avg Days Between Sales** (Optional) - This field is used for the Fuse5 forecasting logic. Enter the number of sales invoices you want Fuse5 to consider when generating the average

days between sales for this part.

**Avg Days Between** (Informational) - Based on your entry in the “Num of Invoices for Avg Days Between Sales” field, this is the average number of days between separate sales of this product.

**Use Avg Between In Calc** (Yes/No) - This field is used for the Fuse5 forecasting logic. Selecting “Yes” will use the “Avg Days Between” value in the inventory forecasting logic.

**Projected Next Use** (Informational) - Based on sales history, this is the day that the Fuse5 forecasting logic projects that the next sale of this product will occur.

**Use Project Factor** (Yes/No) - This field is used for the Fuse5 forecasting logic. Selecting “Yes” will use the “Projection Factor” value in the inventory forecasting logic.

**Projection Factor** (Optional) - This is a value determined by you to project either increases or declines in the sales volume of this product. For example, entering a value of “1.15” in this field means that you are projecting a 15% increase in sales volume for the product. Conversely, entering a value of “.85” would represent a 15% decrease. This feature is only as good as your own judgment. Use it at your own risk.

**Multiply FCST By Per Car** (Yes/No) – Do you want Fuse5 to multiply by the Per Car Qty when generating a forecast PO?

**Weeks for Avg Daily Demand** – This will auto fill with the weeks of average daily demand last used to order on a forecast PO, or enter the number of weeks you want daily demand to look at.

**Avg Daily Demand** – Weekly net sales divided by days open for business. Based on the weeks average daily demand it will auto fill once you do a forecast PO.

**Order Frequency** – average number of Purchase Orders placed per week

**Weeks Before X Rank** – Number of weeks you want this product to have no sales history before you stop ranking it

**Weeks of N Rank** – Number of weeks this product will stay a new (N) Product before it gets ranked

**Num of Invoices For Avg Qty Sold** – Enter the number of invoices to find the average for this product

**Avg Qty Sold** – The average Qty Sold based on the number of invoices in the previous line

**Num of Invoice For High Qty Sold** – Enter the number of invoices to find the highest quantity sold on



one invoice

**High Qty Sold** – The highest quantity sold based on the number in the previous line

**Set reorder minimum using** – Select average, high, or neither

**False Demand** -Use this if it's a new product and you need to create false sales history for forecast ordering

**FD Order Frequency** -False Demand order frequency

**FD Avg Lead Time** – False Demand average lead time

**FD Days Inventory** – False Demand days inventory

**FD Avg Daily Demand** – False Demand average daily demand

# Additional Sections

**Product Image Information** – allows you to import product images

Product Image Information:

Product Image

Files Maximum 6

Browse...

**Description Information** – allows you to import or edit additional descriptive information

Description Information

Description

## Equivalent Part Information

Allows you to see equivalent parts.....

Equivalent Part Information

ADD EP

Showing 0 - 0 of 0

Part #	Line Code	Vendor Name	Current Cost	Core Cost	Action
No Equivelant part Found.					

Add EP (Create Equivalent Parts).....

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**Create Equivalent Parts**

Save Cancel

Product Information			
Line Code		Vendor Name	
Product Number		Vendor Line Code	
Product Stripped		Unit Barcode	
Product Name		Unit Barcode Qty	
Subline		Inner Case Barcode	
Product Division		Inner Case Barcode Qty	
Current Cost: (\$)		Case Barcode	
Core Cost: (\$)		Case Barcode Qty	
Master Part Info	<div style="border: 1px solid black; padding: 2px;">DCC:1971</div> <small>Format: Lincodes:Part number</small>		
		Comments	
		Date Cost Updated	

Save Cancel

### Equivalent Parts Listing Page (not part of a product record, but related to it)

Equivalent parts are used if you order from vendors using different line code and part numbers that what you have in Fuse5 or if you order the same parts from more than one vendor. By saving the vendor part information in equivalent parts you can print their part numbers on purchase orders. Within the purchase order module there is also functionality that allows you to order equivalent parts from only the lowest cost supplier.

Go to Product Management > Products > Equivalent Parts. On the listing page you can see a complete list of all equivalent parts created in your Fuse5 system. You can view, edit, and delete equivalent parts. Any changes made to an equivalent part from the listing page WILL be reflected in the equivalent parts section of the product record.

In addition to viewing current equivalent parts, you can create a new equivalent part using the orange + button from the Equivalent Parts listing page. Equivalent parts can also be imported through the Equivalent Parts listings page as well.

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**Purchase Orders – button allows you to create a PO from this page. Drop down shows all Purchase Orders created with this product on it. Allows you to view the purchase orders and by**

## Fuse5 Training Materials

using the “Create Purchase Order” button, you can redirect to creating a new purchase order.

Purchase Order						Create Purchase Order
Showing 1 - 8 of 8						
Date	PO Number	Vendor Name	PO Status	Created By	Action	
2013-02-14	P1-28711	Training Vendor	Order Received in Full			WH
2013-02-06	P1-28685	Training Vendor	Order Received in Full	admin		WH
2013-02-04	P1-28657	Training Vendor	Finalized	admin		WH
2013-01-18	P1-28629	Centric Parts Industry	Order Received in Full			WH

**Sales Orders** - button allows you to create a Sales Order from this page using the “Create Sales Order” button. Drop down shows all Sales Orders created with this product on it.

Sales Orders							Create Sales Order
Showing 1 - 20 of 52							1 2 3
Date	Account Name	SalesOrder No	Total	Counter Person	COD	Action	
2013-02-26	ROBERT T SUGGS JR.	2-131355	0.460	admin	No		
2013-02-21	ROBERT T SUGGS JR.	BB13131940	596.990	admin	No		
2013-02-18	ROBERT T SUGGS JR.	S1-131864	15.760	admin	No		
2013-02-18	ROBERT T SUGGS JR.	3-130873	23.490	admin	No		

**Store Transfers** - button allows you to create a Store Transfer from this page using the “Create Sales Order” button. Drop down shows all Sales Orders created with this product on it.

**Related Docs** - Within Product Information pages as well as Account Information pages we have added a new section called 'Related Docs'. This section can be found in the footer (almost the very bottom) of both Product and Account information pages.

In this new section you can now upload documents related to the product or account. Just click on the 'Upload Related Docs' and browse for the file you are going to upload. Documents can be added one at a time and there is an available field to add a description for each document.






Once uploaded, users can then download the docs you have added from any computer logged into Fuse5 with the associated action icon at the far right.

### Related Docs

**Branding** -allows you to take parts using your line code / product number and band them with another number and name for resale.

## Fuse5 Training Materials

### Actions

-  Create Sales Orders
-  Create Purchase Orders
-  ALL SH
-  Product Tracker
-  Physical Location

**OE Part Information** **ADD OE** ▼

**Catalog Part** ? **ADD Catalog Part** ▼

**Bora Bora Related Part Information** ? **ADD RP** ▼

**OE Part Information** –This interface allows the user to enter an individual OE number, or if you situation dictates, multiple OE numbers.

**OE Part Information** **ADD OE** ▼

**OE#**

**Save** or **Cancel**

**No Record Found.**

**Catalog Part** - A Catalog Cross Reference Part is used when doing catalog searches. If you have a part in Fuse5 that does not exist in the catalog, but the catalog has an equivalent part that it DOES find, you can put that part as a 'Catalog Reference Part' on the Fuse5 part the catalog does not have. Now if you get a match on a part in the catalog, and that part is a catalog reference part on a different product loaded into Fuse5, the Fuse5 part will show in the catalog search.

### Example 1:

Say you have a proprietary brand of oil filters called 'Better Than Original' loaded with line code BTO. If the BTO:XYZ123 part is a replacement for a WIX:51515, you can make the WIX:51515 a 'Catalog Reference Part' on the BTO:XYZ123 part. Now, if you get a match in the Epicor Catalog on a Wix:51515, it will show your proprietary BTO:XYZ123 part. It works very similar to an Alternate Part with 2 big exceptions... 1) The WIX:51515 does NOT need to be loaded in Fuse5. The BTO part does not need to be configured as an alternate to the WIX (which you probably do not want in our system anyway). 2) The thinking is the same, but only in reverse. Instead of making your parts Alternates to WIX, you are making WIX alternates to yours. You could achieve the same result if the AC:PF2 was the catalog part for BTO:XYZ123, since it is also a WIX:51515 alternate. It all depends on what you want as coverages in our Epicor set up (WIX vs AC).

### Example 2:

Say you are using the Partslink catalog, which does not have actual part numbers. It has industry standardized numbers used by a segment of the industry dealing in body parts. The partslink #

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HO1100243 is a rear bumper cover for a 2006-2007 Honda Accord. If you make this partslink number a 'Catalog Reference Part' on the product record you stock that fits this car, your part will show up in a Partslink catalog search. This means you no longer need to load up a bunch of partslink numbers as Fuse5 products just so you can make your REAL parts alternates to them so they show up in the catalog. This is much easier and keeps your product database clean.

Currently, this feature only works on Epicor and Partslink catalogs.



The screenshot shows a web interface for 'Catalog Part Cross Reference'. At the top, there is a header bar with 'Catalog Part' and a question mark icon, and a button labeled 'ADD Catalog Part'. Below this is a form with two input fields and buttons for 'Save' and 'Cancel'. The main content area has a table with columns 'Linecode' and 'Part#'. Below the table, the text 'No Record Found.' is displayed in a large, bold font.

**Related Part Information** - Related Parts are those closely related to this Product and are often sold/used in conjunction with it. Related Parts can be required (R) or suggested (S) at POS. Required Related Parts are automatically added to the Sales Order at POS. An "AR" symbol appears in the Action column of the Sales Line Item (SLI) when Related Parts are assigned to the Product entered in the SLI.

Selecting the "AR" symbol opens a popup where a Related part can be chosen. The popup automatically opens if the Custom Setting "Alternate & Related Part Pop Up at Point of Sale" (PERSONAL & ADMIN>SETTINGS>CUSTOM SETTINGS) is set to either "Popup If Related Part" or "Pop Up if Alternate or Related Part."



The screenshot shows a web interface for 'Bora Bora Related Part Information'. At the top, there is a header bar with 'Bora Bora Related Part Information' and a question mark icon, and a button labeled 'ADD RP'. Below this is a form with four input fields: 'LC', 'Prod#', 'Part Type' (with a dropdown menu showing 'R'), and 'Qty'. There are 'Save' and 'Cancel' buttons. Below the form is a table with columns 'Location', 'LC', 'Prod#', 'Part Type', 'Qty', and 'Action'. Below the table, the text 'No Record Found.' is displayed in a large, bold font.