The Independent Newsletter for Computerized Hardware Retailers

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Hardgoods Confidential

Input

As in "Thanks for the input!" You'll notice that this issue has a lot more contributors than past issues, and I'm real excited about all the notes, faxes, and calls I've received in the past several months (has it been six months since the last issue?). I wanted to keep the newsletter to sixteen pages, so I did two things.

First, I left out graphs and pictures, to make room for more articles. Second, I decided to mail the newsletter in a manilla envelope and free up the half-page used for the address area in past issues.

I hope you like the changes... figured it was time to give up some of my "soapbox" space (although you'll still find a decent helping of my opinions and news from the grapevine).

Credits

Thanks to Bill Round Jr, Bob Whelan, Jim Dodson, Ron Ligouri, Wade Doss, Sam Costa, Tom Hanson, and Forrest Muehlthaler for their articles.

Material not credited was written by John Fix 3rd.

Subscriptions are $35 for four issues. For details, write us at Cornell's Hardware, 310 White Plains Rd, Eastchester, NY 10709.

Dead, or Dead in the Water?

What's the difference? Well, Triad system owners who've dropped system support (SSA) appear to be dead as far as Triad is concerned. In order to obtain a copy of the new bisync transmission program and/or ERP (Electronic Receipt Posting), they have to sign back on with Triad SSA for a full twelve months, plus pay for an on-site equipment and software survey by a field engineer (two to four hours at hourly rates). Then, they've got to buy the software.

Now, it's reasonable to expect that Triad will want to do some sort of on-site examination of the system, to verify the current software level and hardware configuration, so there is no conflict with the new software package when it is installed. And, it's also reasonable to assume that Triad would charge for the software package, either full price if it is a new install, or some reasonable "update" fee (since the customer hasn't been paying software SSA on the product). Requiring a twelve month SSA signup is ridiculous, and seems to be soley intended to force owners to make a choice between their current support vendor (if any) and Triad.

With recent court decisions (notably the case against Kodak's copier division) forcing original equipment suppliers to supply parts to independent support companies, it remains to be seen how this situation will turn out. However, in the interim, keep up the pressure to obtain the software for a reasonable fee, or just do without it.

Who's dead in the water? DX-10 owners appear to be, although the ERP release for DX-10 (rumoured to be available soon) is causing the boat to drift a little bit. Work has begun on Level 14, and preliminary indications show numerous changes to the IMU screens for Eagle.... but not DX-10 at present. Does this mean it's time to abandon ship? Hardly.... as I've written in past issues, the DX-10 is a solid system more than adequate for many store operations, and the cost of moving to Eagle may not be justified. Why bring it up at all then? Because if you're continuing to pay full SSA for all the software packages, but aren't seeing any enhancements (like the new Invoice Reprint available for Eagle POS owners but not DX-10 POS owners), it's time to call Triad and ask "What have you done for me lately?"

Number Please?

Cotter has been making some changes to the phone numbers for order entry, so it might be a good idea to verify that the phone number on the MTC screen is correct. Use function MTC, and display the COT and COTTPO streams. Look for the lines which begin with, APD or APN. The number

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which follows should be 18002315931. If it shows a different 800 number, you should change it over to the correct number, as the old numbers are being discontinued.

Check Your Digits

If you're on DX-10, and haven't received a new program tape in the past few months, you may have the ''old'' bisync routines installed on your system. When Cotter first announced a change to the check digit system, they proposed dropping the check digits entirely. Triad shipped new tapes to Cotter members, which disabled the check digit verification when formatting PO's to be sent to Cotter. After discovering that leaving off the check digit would cause too many keypunch errors for Telxon users, Cotter settled on a different check digit formula and has now shipped new chips for the Telxon units (the Telxon "B" chip).

However, many Triad stores with DX-10 systems still have the ''old'' bisync software with the disabled check digit. This could cause trouble if you load an sku with an incorrect IBM number. If you transmit an incorrect item number, the Cotter system merely drops the number, and it doesn't appear on your ''A'' copy. You'll either keep reordering the item, or it will get posted if you receive your ''A'' copy by zeroing out the exceptions and posting the rest. Create a test PO with the sku 123454 (or any other invalid sku) in the mfg part number field, use BTC and COTBPO to try and format the PO for transmission. If you don't get an error message, your check digit is disabled, and you should call Triad for a newer tape. It may cost them some money to send you a correct tape, but hey, that's why you pay $14 each month for EZ Talk.

Don't Get Burned by a Laser

Triad has been promoting the PC-based Laser Station in recent months, and the price appears attractive. They've upgraded the processor to a 386sx, and dropped the price a few hundred dollars. However, they only include a 40 meg hard drive for the PC, which will fill up fairly quickly if you run more than one or two PC programs. Once it gets filled, how much will Triad charge for a new hard drive? It costs over $6000 for an 80 meg drive for the DX-10's! OK, they won't charge you that much for a PC drive, but you might find out whether you can install your own drives and add ons without voiding your SSA. Also, it's not clear exactly what will be on the CD-ROM Cotter WPB once Cotter stops printing the pages in the Fall. Perhaps Triad will be using the new Fineline catalog, which is about four times the size of the WPB... will the monthly SSA go up? And finally, how does the laser station compare to the Macintosh based CD-ROM system Cotter will be showing at the Fall market? The bottom line.... wait a few months, and see what's at the show before buying a desktop unit from Triad.

Speaking of Waiting

Might as well wait if you're looking at hand held data terminals as well. Triad will almost certainly have one to show at the Fall market (manufactured by Symbol), with scanning capabilities for physical inventory and bin label verification (see related article about Physical Inventory). Cotter also has been looking into ''smart'' hand held terminals. The whole check digit change required a quick fix (the Telxon ''B'' chip), so there wasn't time to investigate programmable hand helds, but that doesn't mean that these units won't be available from Cotter in the near future.

And, you might want to wait for bin label printers as well (see article about sign and label printing). Plans are still underway to offer UPC coded bin tags with your weekly warehouse order price stickers, which might fill the needs of many stores who don't want to generate their own labels in-house. The timetable for these UPC labels is unknown... maybe details will be forthcoming at the Fall market as well.

User Meetings

Once again, the Triad Users Group meetings held at the market were informative and entertaining. Bill Wilson showed the finalized (or nearly finalized) version of ERP, and fielded questions and suggestions from the members in attendance at the Group 2 meeting (a similar demo and discussion was held during Group 1). If you missed the last few meetings at the market, you missed a good chance to find out what's being developed in upcoming releases, and to put in your two cents about what needs to be updated or corrected. Try and set aside an hour or two to attend the meeting this fall if you're coming to Chicago... it's time well spent.

Folks who attended the Triad-run workshops on Order Point, ERP, and other topics during the market were generally happy with the seminars. Plans haven't been announced yet for sessions this fall, but check at the Triad booth when you come to Chicago for dates and times, as I'm sure they'll offer a few product knowledge seminars during the market.

Why Don't the #@$%* End-Of-Month Reports Balance???

Bob Whelan

Implement Group, Ltd.

Consistent, well thought out procedures are the keys to success for insuring that the data coming from your Triad system is "verifiable". When we refer to verifiability, we are speaking of the need to be able to go to more than one source for the same information. As this pertains to the Triad end of month reports, one should be able to go to any of the various end of month reports and see the same data for total monthly sales, sales tax liability (collected) and cost of goods sold.

The three main reports Triad owners look at from the end of month reports are the RDE (Departmental Sales Report), the RTX (Sales and Sales Tax Report) and the RMR (Monthly Recap). Depending on how certain transactions are handled, mostly back office, the potential exists that the three reports can all have different amounts for Monthly Sales and the RMR and the RDJ can be different for sales tax collected! Which is correct?

In fact, if the system is used properly, there are 7 reports at the end of the month which should all have the same sales figure. They are:

The RDE (Departmental Sales Report), the RTX (Sales & Sales Tax Report), the RSL (Salesperson Report), the RMR (Monthly Recap Report), the RFR (Period To Date Accounts Receivable Roll Report), the RCL (Class Sales Report), and the RFI (Fineline Sales Report).

The primary reason that these reports do not balance is that people don't follow the first rule of thumb when dealing with a problem generated by a point of sale transaction; If the transaction was generated at point of sale, correct it at point of sale!

There are only 2 transactions which should be done to Accounts Receivables customers in the back-office function MOI (Modify Open Item). These are sales tax debits and/or credits and service charge adjustments, and in fact, how these are handled makes all the difference in the world. If you should chose to go ahead and make sales tax adjustments through the back-office (MOI), you must be willing to accept the fact that the RMR and the RTX for sales tax collected will in fact be different.

You must also recognize that either of these two types of transactions done in MOI MUST be done WITHOUT touching that catch-all for all types of corrections, Non-Taxable Non-Merchandise. If that field is used in MOI, you are assured that the total sales that the RDJ and RSL have will differ from all of the other reports listed above. Rather, use the Tax field for either a Tax Credit (Transaction type "C") or Debit (Transaction type "I"). In the case of a service charge, you are better off using transaction type "F", and putting in a NEGATIVE amount so the customer will see on their statement a service charge "credit" in the current period. You can use the reference field (which prints on the customer statement" to refer to the document being credited. These procedures work in either a balance forward, open item or revolving account type.

The best place to make other types of adjustments to accounts receivables is through function ROA. The check number can be something you agree upon as a standard for adjustments (999999), and then one simply uses the "Allowance" field to make any necessary adjustments. These types of adjustments might include bad debt write-off, credit balance "write-off" and terms discounts given that were not previously allowed.

The list goes on for the types of transactions that occur every day that can foul up end of day and end of month reporting. For example, how does your company handle deposits taken for special orders? Do you "sell" a non-taxable SKU at point of sale equal to the deposit amount, then credit it when the merchandise is actually given to the customer? This will distort non-taxable sales, as well as possibly gross profit figures if this SKU has a desired gross profit of anything other than 99.99%! How do you handle giving a check to a customer for a credit balance on their accounts receivables account? Putting a dummy invoice through as non-taxable non-merchandise in function MOI will overstate your non-taxable sales. How do you process a company check written for a credit return of merchandise if there is not enough cash in the register? Improperly handled, this can create double posting to a cash journal.

Procedures should be reviewed for these and other types of transactions which can occur to make certain that you are not unintentionally distorting the end of month data. Failure to standardize these every day situations will always leave you wondering which report to look at for the end of month sales, gross profit and sales tax information.

Help! I've been Sku'd and I can't get up!

Bill Round Jr.

Rounds True Value Hardware

Stoneham, MA

I used to live in a world of nuts and bolts, fertilizer, tools, and faucet washers. Add a few colorful customers and that was the hardware business. Things have changed. My own little world has expanded to include the world of number. Everything has some sort of number attached to it, and often several. The customers have numbers. The store staff members have numbers. The merchandise has numbers. The merchandise numbers have numbers.

The merchandise in our stores spout numbers like our government produces laws and regulations. They change, and are sometimes even subject to interpretation. The reliability of the information in your Triad System and the reports it produces is directly tied to the procedures you employee to keep the numbers straight.

It's tough to keep the numbers straight. Cotter changes IBM numbers. That's a disaster and a half. Manufacturers change part numbers. UPC codes change. Manufacturers change. F-packs change. Items are discontinued. This information must be kept up to date or the surprises encountered at the receiving dock (or the cash register) will become increasingly frequent and amazing. Or, the displays on the salesfloor begin to look a bit lean and ill-tended. In either case, bad information costs money.

I wish to offer a few procedures you might use in your store to keep that root number of all your numbers straight: the SKU number. These might help to ease the transition from one Cotter sku to another while keeping merchandise on the salesfloor. In addition, I wish to address the strategies which might be employed when instituting sku change procedures.

To keep things clear, I shall try to illustrate a procedure by stating its application to a particular manufacturer's line in the Cotter warehouse. How I handled one or another sku changing operation might suggest to you a better way of handling your next one.

There are two schools of thought on changing Cotter Skus: Use function RCIN to change the sku (while updating key information in IMU or LOD); or just discontinue the old item and LOD the new one.

The Change Approach has in its favor the preservation of sales history, pricing schemes, short descriptions, codes, and no sku duplications. An added bonus is that stores which scan merchandise at POS can change skus while preserving the old UPC code to sell any of the old stuff. The cashiers will not notice until they have to ring a credit memo from a sales slip.

The LOD Approach enjoys the advantage of a clean slate and a fresh start... on the new sku number, that is. If new sku loading is the procedure used to handle Cotter sku changes, then the number of duplicate skus in the system will increase dramatically. Sales history will not be available. The user will have to devise a method of keeping these skus segregated from the "good" skus in the system to avoid confusion. As there are so many screens to enter to properly load a new sku in the system, I use the LOAD approach only when handling special circumstances, and rarely at that.

I usually go with the Change Approach. Various keyboard programming tools (such as the Triad VDT or Fab Software's NEWKEY) make changes for even hundreds of skus an easy task. RICU (the Triad function which makes various field changes across ranges of skus) is a useful tool, but is limited in the fields it can change. The EZ workstation tool for PC's enable the astute user to transfer a range of changed skus to a LOTUS 1,2,3 or EXCEL spreadsheet, edit them quickly over ranges, and post the changed fields back to the Triad.

Skus can be changed at once or later, individually or in groups. I would prefer to change them at once and in groups, but I don't have the personnel to do it. And, thankfully, most skus change here and there rather than over a range of hundreds of Cotter IBM numbers.

Faultless Casters

In the case of the change to Faultless Floor protectors, I changed the entire line at once. Any old stock scanned out through POS with no manual changes of price stickers on the sales floor. The operation took place prior to the market so that a purchase order could be created using existing sales history. Jim Olles, the Cotter department manager responsible for the line, provided the equivalency chart with old and new Cotter IBM numbers, and manufacturer's part numbers. This line was for the most part a mirror image of the old

Keystone-Franklin line. They were all fast movers, low value, and all had UPC codes. It changed fast and there were no problems.

Chicago Specialty Direct Import Program

When I saw the sku change sheets come through for the direct import program on basic plumbing repair items, I thought the crew in the back of the store would quit if set up a re-stickering operation for this merchandise. Re-stickering would be necessary as much of the old Master Plumber merchandise had no UPC codes. Plumbing stuff becomes jumbled even when the Cotter IBM numbers are printed right on the packages. And, my apprehension was increased by my then recent experience changing the Plumb-Pac line around.

I handled Chicago Specialty by changing the primary Vendor field in function IMU for each sku to be changed to CHANG. I had loaded this vendor in function MVR as the vendor for merchandise to be changed to a new vendor when the QOH goes to zero. I also entered in IMU in the secondary vendor field COT (for Cotter) and the new sku in the vendor stock number field. This set up enabled me to segregate the skus under the change vendor so a separate RSO could be run. Sku's on this RSO approaching or at zero would be changed and a new bin label cut. The new sku and vendor was stored by the system in the secondary vendor and vendor stock number fields which can be brought up with a Triad ReQuest report to eliminate the extra handwriting during the actual RCIN operation. Once a few of these skus show up on the RSO for the CHANG vendor, I change the sku numbers with RCIN, change the vendor back to COT, and enter a new order quantity to be picked up on the next Cotter RSO run.

Plumb-Pak, Inc.

This outfit makes the Master Mechanic thin-wall brass and PVC waste connectors. Cotter had not changed the skus in this case. I decided to change the packaging from carded to bagged. I bought a new display at the Market with new bagged merchandise. When the display came in I lined up the old skus with the new and changed the old to the new. I conducted a re-tagging operation for the old merchandise. The remaining carded merchandise received the new skus. It was a disaster. It's still not right down there. There were too many opportunities for confusion. There was carded PVC. There was bagged PVC. There was some bulk and a few carded items on the bagged PVC display. My Father found empty hooks on the display and immediately went to the micro fiche for skus. He found skus for, of course, carded PVC merchandise. He bellowed a few words about not having 1-1/2 slip extension tubes, and he subsequently intimidated the inventory information person into loading new carded skus... which were actually the old skus. The old skus where no longer in the system because they had been changed to the new bagged skus.

The Plumb-Pak situation was a perfect case for discontinuing the old and loading new merchandise. There was a lot of older merchandise in the assortment which would not sell through for several months. There were no UPC codes to help the change across to the new merchandise. The change was compounded by old skus remaining active in the Cotter system.

Master Plumber Compression Fittings:

We had stocked couplings company compression fittings for years. We saw the carded Master Plumber fittings at the Market last Spring and bought the line. I had the entire line loaded in our system while I discontinued the Couplings skus with RICU. I knew that--given my experience with Plumb-Pac-- this would be the only way to go with countless numbers of compression fittings. If I changed the skus on the couplings company merchandise I would never recoup the cost of re-stickering. Some of that stuff never got stickers, anyway. It was a time vampire waiting for night to descend to suck 20 hours of payroll time out of the operation. We loaded the skus, scanned the UPCs, turned off the price tags, and put the merchandise out for sale with no regrets.

Genova PVC Fittings.

While scanning those handy new product sheets which Cotter has been sending us for the past year or so- the ones on white paper with the holes punched in them-- I saw several Genova fittings added to Cotter warehouse stock. I hunted down my own skus for this merchandise and displayed each one. As I did, I entered CHANG in the primary vendor field and the new Cotter sku in the vendor stock number field. I would also enter the UPC code and the replacement cost. I then check the sheet to signify that this item is in inventory. These fittings show up every now and again on the CHANG RSO. When they do, the skus are changed, pencil changes made to bin labels, and new merchandise ordered.

These are a few cases where skus have been changed in our store and how they were handled. As you have seen in your own stores, Skus usually change because Cotter

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Promotion Archive History

Jim Dodson

Mutual True Value Hardware

Using function RPD, it is possible to store old promotions within the DX-10 or Eagle system. Promotion prices can be looked up for an expired promotion through function MIP by displaying the SKU and promo type. A report can also be printed out periodically using ReQuest (Eagle owners only), listing items in SKU sequence showing dates and prices of items from all past promotions on file.

Procedures to maintain the promotion file are relatively simple. When it is time to deactivate a promotion, run report RPD instead of RUP. Select option C to change the date of the active promotion. For a New Start Date, add four years to the actual start date. For a New End Date, add four years to the actual end date. I use four years, because using RQ I can do the math to subtract and print the actual dates on the report... and it also eliminates a leap year fouling up the dates scheme. Be sure to run your RPM reports BEFORE doing this, as all your promotion sales units in the MIP file will be lost when RPD is run. The process of forward dating the promotion will turn the promo prices off at the same time, so function RUP will not be necessary. Also, be sure on RPD to fill in all the appropriate From and To ranges so as not to disturb any other promotions resident on the system.

After a year, it will be necessary to purge old promotions out so they can be reused. For example, DM70 will again be used for Fall Shopper, thus requiring you to delete the old DM70 data. Use function RPD for this also. Simply change the dates to something prior to todays date, and the promotion will cease to exist.

I have been using this procedure since Fall Shopper 91, and currently have 7,000 promotion records archived. As I mentioned, a simple RQ report is created to sort by SKU and then the most recent date. MIP can also be used to scroll through all occurrences of a particular SKU.

I should again caution you about the need to be very precise with the From and To ranges. Also, be aware that sort time for RUP to activate promotions will be considerably slower, due to the size of the promotion file.

Accounting SKU's

For those of you using or planning to use ERP, here's a list of Cotter's ''accounting'' sku's. It's a good idea to load these as inventory records, and code them somehow (Order Indicator ''S'' and keep stock, prices, and dept data entered as NO on the IMU codes screen) so they don't appear as ''NOT ON FILE'' every week when you run ERP.

SKU #	Description
328534	Tote Box Charge - Cotter A Copy
300004	Warehouse Freight Charge - A Copy
650002	Freight Credit Charge - A Copy
313338	Tote Box Credit - A Copy
301192	Cotter UPS Charge - A Copy
100008	Cotter ''No Adjustments'' - A Copy
300491	Cotter Price Stickers - A Copy
292011	Special Invoice Charge - A Copy
611764	Special Order - Do Not Ship Later
611772	Prepaid Freight Charge - A Copy
611897	Transshp Emergency Order
860791	Paint Brush Hot Buy Discount
860809	Paint Hot Buy Discount

Thanks to Bill Round for compiling most of this list. If we've missed some SKU's, please drop us a line.

Variable Pricing Tip

If you like to use your primary vendor's retail price system (either standard SR's or variable SR's), but still like to variable price some of your items, here's a way to keep the prices straight.

Code your in-store variable priced items, and run a separate RSO to create a second PO for your weekly order. Send your main order (the one you want to use with your vendors SR's) first with ''Send Retail'' answered NO, and send the second PO (with YOUR retails) with ''Send Retail'' set to YES. Once the orders are sent, use BPO to combine the two PO's so you can receive them in one shot (either manually, or with ERP). When the order arrives, the labels will all have the proper retails.

Sign Me Up!

Last issue, I promised a review of available label making programs, for sign making and bin label printing. Since that issue, I have reviewed a number of software programs, and spoken to several store owners who are currently using one or more label programs in their own stores. Basically, sign and label making can be done one of four ways... manually, with a sign printer, on the Triad line printer, or on a desktop PC or Macintosh.

We're in the computer age now, so we all want to stop doing those manual signs.... you know, the ones with the scrawled lettering, incorrect or missing information, etc. So, we're going to assume right from the start that hand lettered signs are no longer an option. We want professional looking signs for our store, equal or better than the signs provided by Cotter or other suppliers in promotional material kits.

In-store sign printers have been around for a number of years, usually involving some sort of ink and print arrangement that took a lot of time to set up and involved numerous typesetting pieces guaranteed to get lost within a week in an average hardware store. Enter laser technology, which eliminates the need for messy ink cartridges or rollers, and produces sharp, permanent images on plain paper and posterboard. One vendor offering a small, simple sign making system is Impulse Technologies. They've shown their typewriter-like system at several trade shows, and a number of owners I've talked with are using this system in their stores.

The major advantage of this system is ease of use. Any store employee can quickly generate a sign, without needing assistance from the resident computer expert. Load the card stock, type in the data, and out comes a sharp looking sign to put on the shelf or merchandise. However, the program can't print bar codes, and if you need more than a few signs (how about 1,000 or more for a direct mail piece), forget about it. Any manual entry of data means more chances for keypunch errors, so the more you use a system like the Impulse sign system, the greater the chance of errors cropping up on your store signage. Finally, the system doesn't handle bin label formats, one of the most important needs in many stores.

You can still print bin labels with your Triad, although more and more folks are unhappy with the present bin label format. When you add in the lack of a bar code and short shelf life of many of the computer ribbon inks, it adds up to a pretty inadequate bin label system. However, it works for those who don't have the funds or desire to purchase a stand-alone computer to use for creating labels. And, if you have ReQuest, you can generate custom bin labels and signs. Signs? Well, of a sort. Bill Round did some experimentation with some pin-feed sign stock, and managed to come up with some interesting sign formats. Using data from the system, he created signs with promotion dates, percent off retail, and other important data, and printed them right on the Triad line printer. However, once the signs were printed you still have to hand letter any large numbers or letters (i.e. the sale price), but it worked as a "cheap and dirty" sign making system.

Finally, we come to the stand-alone computer option. Using either a PC or Macintosh, you can generate high quality signs and bin labels either manually or directly from your system data files. The programs available range in price from $80.00 to over $1000.00, with most falling somewhere in the middle. In order to generate data files for these sign making programs, you need either EZ Workstation or PC Access to download the data from the Triad system to your desktop computer (DX-10 owners must use EZ Workstation).

You also need a decent printer. Although some of these programs will create usable signs with dot-matrix style printers (similar to the new Triad invoice printer), most require a laser printer for the best results. Prices for laser printers have fallen in the past year, and genuine HP Laser Jet printers (the industry standard) can be bought for between $750 (HP LaserJet IIP) and $1000 (HP LaserJet IIIP). If you plan on doing any desktop publishing (like this newsletter), you may need Post-script Emulation, which can cost $500 to $800 more. For label and sign making, an HP LaserJet IIP (or compatible from Epson and others) should be adequate for most stores. Well, now you've spent close to $1000, and you still don't have the software!

At the low end of the spectrum is a program called Labels Unlimited. This program will generate almost any size sign or bin label, on laser or dot matrix printers, and can import Triad data directly into the program. It comes with a variety of pre- defined label formats (Avery, 3M, etc.) which makes creation of bin labels a cinch. Sign making gets a little trickier, as you've got to first define the size of the form you're using by entering dimensions in inches or centimeters. Once you've defined the basic format, you select the data file to import and out come the signs. The major item missing from this program is the capability to print UPC codes (it does print postnet codes for mailings). However, for $80.00 from most vendors, it's a great little program for creating in store signs and bin labels if you don't need UPC bar codes for now. Contact Power Up Software at 800-851-2917.

Label Matrix from Strand Ware Inc. has more capabilities, and a much higher price. It handles most bar codes, and has a cleaner user interface with a nice WYSIWYG (What You See Is What You Get) display of the sign or label to be printed. You can easily add boxes, lines, shading, and graphics to a label or sign, and the menu driven interface is fairly easy to learn. It requires about 2 megabytes of free disk space on your PC to install. Contact Strand Ware at 800-552-2331 for more information.

Bear Rock Labeler, available from Southern Imperial, is designed for Windows users. It too has a WYSIWYG display to assist in designing your labels, but designing signs is more difficult than when using either Label Master or Labels Unlimited. A free demo disk is available from Southern Imperial (800-747-4665), as well as a catalog of their other label and sign printing products.

Cotter will begin offering a Macintosh-based desktop publishing system at the Fall market. This system will include a CD-ROM drive which will contain "clip-art" images of thousands of products from the Cotter promotions, as well as predefined sign, bin label, and sale flyer formats for easy in-store setup. The system will use Quark Xpress, a powerful desktop publishing program which takes full advantage of the capabilities of the Mac. The advantage to the Cotter system will be the CD-ROM database, containing images and formats which match Cotter's Direct Mail and magazine ads. The disadvantage will be the initial high price ($7000 and up for a Mac with printer). Contact RoseComm at 615-661-5460 for preliminary pricing information on the various systems configurations. At present, there is no "direct" Triad to Macintosh interface, although both Triad and other vendors are working on programs to link the two systems. In the meantime, a PC emulation program (see HG Confidential issue # 2) must be used on the Mac to run EZ Workstation or PC Access.

Finally, Triad themselves have begun to market a laser printer and sign/label making software, bundled as "PrintWare Plus". The package includes a Postscript compatible laser printer (made by Everex) and a sign and label making program similar to Label Master. The advantage to the Triad package is "guaranteed" compatibility with the system (Eagle only) as well as some pre- defined sign and label formats. One disadvantage is the price, which was $3000.00 at the market. You do get a Postscript printer, but that's not necessary for sign or label printing and is far slower than normal HP/Laser printer emulation mode. A second disadvantage is the lack of graphics capabilities. The programs listed above allow importation of different types of graphics files, so you can include logos, line art, and other pictures in your signs and labels. Presently, the Triad Printware system has no such capability.

We weren't able to test all the programs described here, instead opting to present articles from three different folks (one vendor and two store owners) discussing their "favorite" method to print labels. At Cornell's, we're using Labels Unlimited, and waiting to see the Cotter system at the Fall market.

EZ Software Update

Ron Ligouri

Cole Computer Products

San Francisco, CA

For the past fifteen months, EZ Software (Triad to PC Emulation) has been a hot topic at Cole Computer Products. For years, dealers have been yearning for more computing power out of their Triad systems. EZ Software has filled that need by letting dealers hook up their personal computers, download files from the Triad into databases and spreadsheets, print out reports on the PC printer, capture daily sales data into spreadsheet formats, and most recently, create bin labels from Triad data on the PC laser or dot matrix printers. Unlike vendors selling generic label printing programs, Cole Computer Products offers a special product that out performs them all. They have created a product called EZ_Label. It works as an upgrade to the EZ Workstation program, integrating a powerful label making program called LabelSoft into EZ SOftware. The net result of doing this is the user gets to choose the bin label style or format they want, without having to go through the trouble of purchasing, learning, and struggling with a technical Label Designing Program.

In fact, with EZ Label, you get a variety of choices of how you want your bin label to look. Cole COmputer Products will even let you scribble out your own bin label designs, and they will do the technical designing for you. When you get your software, your custom design is already included with your label options. Your bin labels can include fields like Popularity Code, Catalog Page #, Last Date Received, as well as Price, SKU, UPC Bar Code, and other common fields. EZ Label is generated from spooled RIS, RPC, or RPO reports giving the user a number of ways to produce labels. Laser and Dot Matrix compatable labels are also available from Cole Computer Products.

The toll free number is 800-222-0039 (800-400-0091 in CA).

Label Matrix

Forrest Muehlethaler

E-G Homecenter

Downers Grove, IL

E-G HomeCenter first bought the Label Matrix system on the recommendation of another True Value dealer (Sue Biebel 414- 547-4301) who also happens to be a Tru Trac owner. Sue was making bin labels at her store with help from Mark Thibadeau at CKC Software (414-371-8841), whom she had purchased the Label Master software from. The bin labels she was printing using data from the Tru Trac looked great. I bought the software, but encountered a few problems with the data coming off the Triad.

The major problem was the fact that I had " marks in my descriptions, which are interpreted as the end of a data field by many PC programs (including Label Matrix) This caused descriptions to be shortened, and other data fields to shift to the wrong location in the label. Mark wrote a program to convert the " marks to the letters "in" (for inches). I also wanted to seperate the dollar field from the cents field, so that we could print the cents underlined and smaller on our bin label. This was a feature that Sue had included in her labels, and Mark added this feature to our program as well.

Our biggest goal was to make bin labels which were legible for our customers, with easy to read retail prices (unlike the Cotter or Triad bin labels). We build an RQ tranfer file containing the information we need for the bin label, then download the file to our PC. The information can be sorted by department, location, manufacturer, UPC number, or almost any combination of data fields. Once the file has been transferred to the PC, it is read by the Label Matrix program. The program converts the data into the label format I have designed, and then prints it on the vinyl label stock I purchase from Southern Imperial.

To keep the bin labels current, we print new labels from the information in the Price Change file (RPC) when we receive price changes from Cotter or Direct Ship vendors. An RQ program was written to pull the info from the Price Change file for transfer to the PC. We have certain in-store promo items which we run bin labels for, which we also pull from the promotion file using RQ. New items which are ordered direct are pulled from the Purchasing file. "Fill-in" labels (lost, misplaced, stolen, or ripped) are pulled from the Price Change file after being manually keyed in via function IPC (Item Price Change). The whole procedure has run very smoothly. We started in February 1992, and now have all three stores bin labeled (about 72,000 sku's).

The real surprise to me was being able to make my own signs as quickly and easily as we have. We print signs out of the Promotion file (MIP) or use the PC keyboard to input data. The last flyer of our own that we ran had about 150 items in it. We printed signs for our three stores in about 15 minutes. We keep the data on many of the signs which we have built and simply pull them back out of the file and make changes as necessary for new promotions. We group them by department, manufacturer, location in the store, or in many cases by SKU. Formats are easy to build and come out looking great. Once again, we order our sign stock from Souther Imperial.

We have been experimenting with printing our own UPC "price tag" with this system, and soon hope to print these for our products. I use a 286 "clone" PC with 2 meg of RAM, DOS 5.0, and an 80 megabyte hard drive. The printer is an HP IIIP Laser Jet (cost about $1500 including an extra megabyte of RAM to speed printing). If you have questions, comments, or suggestions about our procedures, please call (708-665-2900) or fax (708-665-5215) us at the store.

Editors Note:

E-G Homecenter also designs their own direct mail pieces in-house, so they are familiar with many other aspects of desktop publishing and printing.

Bear Rock Labeler

Wade Doss

Bates Ace Hardware

Atlanta, GA

Bates Ace Hardware of Atlanta, GA, uses the Bear Rock Labeler software program for bin labels, bar code labels, shelf talkers, and signs that they need in large quantities. We use RLA or TBL to build the transfer files that we need for bar code labels and bin labels. We also use a program from Southern Imperial called Convert-a-Code which duplicates the records by the number of bar code labels that you will need for each item. It also shrinks the record by taking out the spaces that are in the original file that the Eagle builds. This is helpful in that when printing the bar code label it takes out the spaces after the SKU field thus allowing you to use smaller labels on the individual items. Especially since Ace has started to go to seven digit SKU numbers, it max's out what will fit on a 1" X 1 1/2{ label. This is the largest label we like to use on individual items so as to not cover up any important information on the package.

The bin labels we use are a vinyl label and are very durable and easier to remove from shelves and pegs as they peel off without tearing. Also they do not fade out over time as so many other labels have in the past, using the old Triad thermal printer. The vinyl labels we use are 1 1/4'' X 2'' and 32 to a sheet. Ace stocks the holders in their warehouses to fit these making it real convenient. We do print some labels on paper labels for our warehouse and parts room as they are less expensive and have no pricing, just part number and description so it's very rare that they would ever need to be changed.

As I mentioned earlier, we also print signs with the Bear Rock software using the Ace stock signs that they have in their warehouse with the Ace logo in the top left corner. It makes for a very attractive sign that is longer lasting than our Insignia signs and also quicker to generate when we need to print a large volume of signs for an upcoming promotion. Bear Rock also has many more type selections and font sizes to use when designing your sign. The only draw back is the set up time for signs takes a little longer than the bin lbel set up. The printer orientation must be set to Landscape rather than Portrait, but I have written a macro in Windows to do that for me, speeding up the process somewhat. Setting up the sign on the screen takes a little more time as well, although the results make up for the time spent. The shelf talker tags that SOuthern Imperial sells are much easier to set up initially, but are not as large in size. We can print signs up to 11'' by 14'' using our HP IIIP laser printer.

If anyone would like further information about how we print our signs and labels, they can call myself or Dave Brenner at (404) 351-4240.

Editors Note: A demo copy of Bear Rock Labeler can be obtained from Southern Imperial (800-747-4665).

Which is the Cotter System?

We've got both a Triad Eagle and a Tru Trac EL in our store. Surprisingly, only the Eagle can handle the new Cotter check digit system. The folks at Tru Trac should have new software out by the time you read this, but it doesn't seem to be a good sign when Triad can adjust to Cotter data processing changes faster than Cotter's own Tru Trac programmers.

Used Equipment Services

Have you ever thought about buying or selling used Triad equipment? If so, Cole Computer Products is one source for this service. They're in touch with Triad owners around the country, on the phone and through mailings to dealers, and they can help you purchase or sell used components. Sellers can turn old equipment into cash, while buyers can save hundreds of dollars over new equipment. All used equipment is sold on a satisfaction guaranteed basis. The buyer has to right to reject any item they receive that does not meet their needs. Cole Copmuter can also help sellers with the current market value of used items.

Their toll free number is 1-800-222-0039 (800-400-0091 in CA).

Need to reach us? You can contact Hardgoods Confidential by fax (preferred method) at 914-961-8443, by mail at 310 White Plains Rd, Eastchester, NY 10709, or by voice at 914-961-2400.

Let's Get Physical!

Physical inventory.... the mere mention of those two words can strike terror in the minds of store owners and employees. Thanks to the perpetual inventory maintained by the Triad system, a fairly accurate inventory valuation can be printed any time of the year. However, we all know that shrinkage takes its toll and physical counts of the items in the store must be made at various times (depending on your own stores shrinkage rate) to keep the counts accurate.

Triad has a Physical Inventory program available for the DX-10 and Eagle systems, which makes physically inventories easier to manage. Using this program to generate count sheets assists in the counting process, and the reports listing variances in counts are easy to scan and verify once the counts have been entered in the Triad. The problem with this program, and even the manual method is getting the counts into the Triad quickly and accurately.

Recently, a few members have begun to use hand-held data collection terminals to collect inventory counts and post them to the Triad system via a PC. Some owners are also using these terminals to enter locations and UPC codes. And, one or two brave store owners are even attempting to get working "real time" portable data look-up to verify counts and prices, using hand-held RF (radio frequency) wireless terminals.

Let's go one step at a time though, and begin with basic physical inventory count procedures. In the simplest setup, you need a Telxon data entry unit (from Cotter), a PC or compatible, and software for the PC (EZ Workstation and EZ Inventory). The data is keyed into the Telxon either as a warehouse order, or as an inventory. Using the warehouse order module in the Telxon is fastest, but doesn't allow for either location codes or non- Cotter sku's to be entered. As our location codes were pretty much in order, we decided to physically count ONLY six digit sku's using the Telxon, then do a count later using count sheets for non-Cotter items (which made up about 20% of our stock). Although you could count during the day, we decided on an after hours approach to keep interuptions to a minimum.

Using the Telxon, we keyed in sku's and counts on one side of an aisle, then connected the unit to a PC and saved the data as a file. We chose file names based on the name of the person who had input the data on the Telxon (i.e. JOE1.DAT for the first section counted by Joe, JOHN1.DAT for the first section I counted, etc.). Once an aisle was counted upstairs, we moved downstairs and keyed in overstock counts. After all the items were counted, I used a program called ECheck to combine all the data files and add together counts of the same SKU's. This solved the problem of items counted both upstairs and downstairs. The original data files were preserved, so I could go back and check who had counted a particular section if discrepancies were found later.

Once all the .DAT files were combined into one file, I used EQPIP to post the counts to the Triad from the PC. The program took about five minutes to input 800 sku's to QPIP. Once the counts were transferred to the Triad, we shut down for the night and left the audit reports for the next day. As the Physical Inventory system tracks items sold or changed once they are in the PI (Physical Inventory) file system, it wasn't necessary to immediately update or check the counts.

The next day, I ran the RPI report to both finalize zero variance items (i.e. items where the QPIP count and quantity on hand were equal) and report those where there was a variance. I looked for items with a large variance in count or dollar value, and double checked the count on the shelf and in the basement. After satisfying myself with the figures, and making any corrections to the count via PIP, I finalized the remainder of the counts.

Finally, to catch the "missing" items, I printed a report of only items with a Physical Inventory date older than the current date (and located in the aisle we counted) to list all the items which hadn't been found at all. This list also contained the non- Cotter sku's we had skipped, which we then counted and keyed in via QPIP a few at a time over the course of the next day or two. Any Cotter items which printed a QOH (Quantity on Hand) greater than zero were double checked, then zeroed if we still couldn't find them. Surprisingly (we get a lot of shoplifting) the counts were not too far off, considering it had been two years or more since the last true physical inventory of that section. We saved the RPI totals showing the shrinkage dollar value for our records, as "evidence" of theft/shrinkage loss for anyone who decides to question our gross profit or inventory figures down the road.

This procedure can best be described as the "cheap and dirty" method, as it relies on the Cotter-supplied Telxon unit and uses some workarounds if you need to key in

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ERP!

No, that's not a verbal expression signifying intestinal distress.. it's the function acronym for one of the newest Triad programs, Electronic Receipt Posting. The program went into test sites early in the year, and was running in about ten Cotter stores by the April market. Since then, further roll-out of the product was been delayed due to occasional data errors which were cropping up when the ''A'' copy data is copied from the Cotter mainframe computers to the Triad ERP ''server''/ front-end. However, as of this writing, it appears that the problems are solved as additional stores are receiving the program.

The ''server'' is essentially a Triad CPU connected to a modem, which members dial into to receive an electronic version of their warehouse ''A'' copy. The ''A'' copy originates on the Cotter mainframe system, is copied to a 9-track tape for transfer to a desktop PC, which then creates a copy of the data on a tape cartridge (similar to the backup tapes used in the stores) which is then copied to the ERP front-end CPU. Each of these steps must be done manually, every morning, in order to make sure the ''A'' copy data is available in a timely fashion.

To facilitate the testing of the product, Cotter sends an extra copy of the data tape to Triad each day, so they can check the integrity of the data and try and finalize the software release for additional store installations. Obviously, Triad wants to start getting some payback for the investment they've made in software development.

It shouldn't take them too long to recoup their investment though, based on both the selling price for the product ($500) and the monthly SSA fees ($14). Coupled with the other two telecom monthly license fees, members will be paying $ 42.00 per month in fees just for communication support. These products are listed as ''license'' rather than under the ''support'' category, which may explain why there haven't been many enhancements to the telecom packages since their introduction. Add these fees to the amount Cotter pays to support the three Triad front ends at the Chicago office, and it adds up to a nice healthy source of income once full roll-out of the product occurs in late summer.

Meanwhile, the program itself is proving to be a great time saver in the installed sites. By eliminating the manual entry of prices and quantities when posting the ''A'' copy, countless keypunch errors are eliminated. The reports generated by ERP help you quickly find cost and retail changes, so they can be corrected before the order arrives at your store.

Ship Laters are shown on the report, giving you an extra day or two to locate a secondary source. However, there is no easy way to break out these items and quantities in a separate ''Backorder Report'', which would make it easier to find backordered items. A special report for these items alone would be useful at the check-out or service counter so employees could be more informed of an items status, and pass this info along to customers waiting for items to arrive.

The only problems with using ERP involve the changes necessary to your in-store procedures handling the ordering and posting process. The program receives all ''A'' copies from Cotter, which means zero dollar adjustment invoices come through in the transmission. Paint D/S orders come through as well, but without reflecting the volume discount in the line item cost... although this is not the fault of the program but the fault of the ''A'' copy information (or lack of information) from Cotter.

In summary, ERP is proving to be a great addition to the Triad system, saving many hours of keypunch time, adding accuracy to the costs and retails in the system, and eliminating errors caused by erroneous keypunch errors in the back office.

Coming Soon

EDI (Electronic Data Interchange) is in development, and may be available in some form by the end of the year. This program is a generic electronic communications routine, which will allow stores to place direct ship orders with certain vendors electronically, and also receive the priced invoice over the phone. The basic framework for the program is on the Level 12 release (go into MTC and display EDI), and now the big step is for Triad to make arrangements with the networks which handle these types of transmissions.

The Eagle async modem, referred to as the Remote Service Port, is due to be working soon. It will be turned on in Osprey with the SETRSP (Set Remote Service Port) command. The port can be set for one time use (for dial in from Triad reps for troubleshooting the system) or for ''permanent'' use (with a PC or Teleterminal from a remote site).

One Way to Run ERP

Sam Costa

Costa's True Value Hardware

Smethport, PA

We are on the Cotter Ship Later program, so that we can take advantage of the price in effect at the time of our order, and also get the priority status that results when an item is on S/L for an extended time.

However, I do not attempt to track S/L's in the system using "prepetual" backorder PO's. I've nevr been able to devise a fool-proof method of removing an item from a Ship Later purchase order. We find it much simpler to reorder all S/L's every week. We cancel each warehouse purchase order when it is received, and depend on the system to re-order for the next week.

There are two advantages to working this way. One is that you never have to reconcile your PO to Cotter's S/L list, nor remove items manually either because they have been cancelled or received. Reason two is far more important... we manually verify QOH for every RSO generated and at the same time check the shelf to see if any items should be ordered that are not on the RSO. If an item is on a S/L PO, it will keep the item off the RSO (depending on the RSO select options), which means you must check the QOH and QOO at a terminal before you can be satisfied that the RSO your're working is complete. We currently have over 200 items on S/L, and verifying those items requires far too much effort.

And so to ERP... we receive the transmission specifying "R", having the system reconcile to PO # 1, and to PO "PAINT" (with the new program for sending DS paint orders between 144 and 300 gallons from the RDC, we usually have about three paint orders per month). We also specify to APPEND extra items, and to resequence PO #1 to match the "A" copy sequence. We do not choose any pricing options at this time.

After the report completes, we make changes as necessary to F- Packs, discontinueds, etc., and wait for the truck. We then zero out the RDC "floor" markouts, and run RRP Option "F". Finally, two people manually compare the "A" copy to the final RRP for one last accuracy check.

And then the cycle starts over.

Notes on ERP

Our store is also on the Cotter Ship Later program, and we have had undesirable results trying to track S/L items on a separate purchase order each week. We vary Sam's procedures slightly, as we enter the ship laters from the "A" copy into the NOQ (New Order Quantity) field. We created a Flex Load (for function FIL) for quick entry of the two or three hundred weekly Ship Later items, so we don't have to go through IMU. This way, when RSO's are run, Ship Later items appear with an asterisk alongside the quantity indicating the NOQ already had an entry. To create our weekly Cotter PO, we run an RSO with option "F", selecting only items with NOQ greater than zero. This has the net effect of transmitting our S/L items each week, just as Sam does at his store.

Another note on ERP.... although the program can reconcile to multiple purchase orders, this can cause problems if you try and print price labels. The current RLA program can't print in line number sequence across multiple purchase orders, so if you have two (or more) PO's for one "A" copy, the labels will be out of sequence with the "A" copy sequence.

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has brought in a new supplier. Where merchandise is UPC coded and quite similar in price and packaging, changing skus will probably pay off. Where the merchandise is cheap, sales history is not paramount, and the possibilities for confusion is great, Loading a new items might be considered.

Another tactic on sku changing is to rely solely on the Cotter A-copies for change information. This isn't a bad way to do it, but it should be a last resort. Function RCIN will change sku numbers on the purchase orders even if they have been posted against by function RP. By the time Cotter is discontinuing and substituting for an item, it is several months gone. I personally like to get this information into the system as soon as possible so that the information will be as clean as possible for the market order preparation.

I wish Cotter didn't have to add another level of complexity to our daily operations, but it's there, and it must be worked into our routine. If you have comments or suggestions about changing skus in your operation, please give me a call. I would like to hear from you. The store number is 617-438-0131.

Two Great Additions

In addition to the ERP program available for both DX-10 and Eagle systems, the latest software release for the Eagle contains two great new software packages.

Autopilot

The first is the new "Autopilot" program, which lets you set up a predefined schedule which will automatically load report queues. End of day and end of month queues will automatically load on the proper day. User defined queues can also be set up to load on a particular date, the same day each month, even at a particular time of day.

One of the great uses for this new set of programs is automating your ROP reports. You can define weekly ROP's to run on the 7th, 14th, 21st, and 28th of each month, and set up different queues for each date (see issue # 2 for a discussion of weekly ROP queues).

Autopilot was originally requested by the advice line staff, so they could assist customers in building EOD and EOM queues once, and avoid the month-end crush of calls from folks trying to set up their report queues again and again. The program has a set of pre-defined Triad schedules which can't be modified, as well as the capability to define your own custom schedule options.

Autopilot (which consists of two functions - MQS and SEQ) will be provided as an enhancement to all Eagle system owners with the release of Level 12, once it has been completely tested. At this time, it is near full release, and is running fine at numerous test sites.

Quick Recall

This new program has two levels of capability... all Eagle owners will get the capability to reprint invoices the same day at no additional cost. This allows you to print duplicate invoices, for extra copies, or to generate a new ticket if the printer jams.

The purchase options portion of QuickRecall (list $1000) allows "unlimited" transaction storage, of both cash and charge sales. The storage is limited by the available space on your drive, combined with your average number of transactions. The length of time a transaction is stored in the system can be determined in a number of ways, allowing complete customization of your own system.

For example, in our store we set up the system to save cash transactions for two weeks, charge sales for six weeks, and transactions containing "special" sku's for two months (more on these later). We've also set some customer accounts to save transactions for additional time, especially accounts which have a history of questioning charges months after the sale. Instead of digging back through our files to locate a sale, we can print a copy in a matter of seconds right from the POS screen. So far, the additional space taken up by the transaction storage hasn't caused a problem... we've got about 10,000 transactions stored, and still have over 50% of our drive space available (Eagle 1530, 35,000 sku's, 1000 customer records). Luckily, we also still need just one backup tape, although some stores have had to go to two due to the addition of the transaction data.

The "special" sku's I mentioned earlier can be defined in IMU using the TALLY field. You can set an SKU to prompt for serial number or other information, as well as the customer name, address, etc. QuickRecall will then save the transactions containing this sku for whatever amount of time you've set in function MQK (Modify Quick Recall constants). The QuickRecall data is accessible through ReQuest, so you can generate reports from the stored data and do analysis of particular items (i.e. what other items are purchased with a particular mower?).

We've found numerous situations where we've used the program, including tracking down a two different gas grills which had been billed out incorrectly. We've also used the program to assist in auditing UPC capture at POS, since we can now look back quickly and determine which cashier loaded a particular UPC incorrectly.

The program also ties in to the RSM (Statement report) so you can print copies of the invoices at the end of the month, possibly saving some manpower time in the stuffing/mailing envelopes process. I'm not real pleased with the invoice reprint format used for RSM... perhaps it should be designed to work with some sort of "form" report paper, as on plain or lined paper it gets a little jumbled. I doubt most commercial accounts would be happy with the output.

I've written in the past about Triad charging for "enhancements", and I have mixed feelings about the $1000 charge for Quick Recall. It does appear to be a POS and/or Accounts Receivable enhancement. Owners who licensed the software back when it was just one big "Inventory/Accounting/POS" system can make a legitimate claim that they should get this enhancement at no charge. Others who purchased some combination of packages (AR I, Classic Inventory, whatever) appear to be stuck having to buy the package as a separate program.

Now that I've said that, let me also say that it's worth the $1000 price. We've already saved that much in the errors we've caught and corrected. It's assisted us when checking orders for delivery, possible overcharges, credit card payment errors, and cash refunds. We've barely tapped the potential uses for item sales analysis. If you've got spare disk drive space on your Eagle (over 50%), I'd highly recommend it as a powerful and productive tool for your Triad system. If you're a little shy on space, find out how much Triad will soak you for a larger hard drive. Triad's prices are still a little out of line when it comes to hard drive upgrades. Perhaps if system owners with limited space hold off on buying QuickRecall, they'll modify their price structure.

Seasonal Coding

Tom Hanson

Bangor True Value Hardware

Bangor, ME

When I first started using our Triad to generate orders, my RSO's showed more items that I didn't want than items I did want. Having unwanted items constantly printing on RSO's is a good way to increase your inventory, as well as a good way for your department managers to become disenchanted with the new computer. Out of season items accounted for most of the "extra" items on the RSO's. It seemed reasonable to separate out the seasonal items for order point calculations.

I use one space of the user code (or the seasonal code can also be used) to designate the beginning of the selling season for each "seasonal" item. I use one through nine for January through September, and O, N, and D for October through December. When an item is not wanted any more because it is out of season, we change the order indicator to "S", which prevents it from appearing on RSO's. Each month, we use RICU to search for items that contain the appropriate month code and order indicator "S". These items have the order indicator cleared, allowing it to once again appear on RSO's. Before I run RICU to clear the order indicators, I run an RIS with the same selection criteria so I can preview the items due to be reactivated (ed note: a good idea for ANY large run of RICU!). The result is that unwanted items are prevented from automatically being reordered until after the date we have set to reactivate them.

The Pound Sign

The pound sign (#) is very useful when used with the exclusion codes on the Triad, but I do not believe its use is explained in any of the current manuals. I learned of its use at a meeting of the New Engalnd True Value Triad users group. It allows me to use these same monthly codes to run seasonal and non-seasonal ROP's without using an additional space in the user code field. Using the pound sign (#) under "Codes" and an "N" under "Exclusions" when specifying the report selection will exclude anything that has ANY character in that particular code field. It will allow only items with a blank code to appear on the report. Conversely, putting a "Y" under the "Exclusions" will include any item with ANY character in this field on the report, and items with the selected field blank will be excluded.

Using these codes allows me to run my ROP's with option CFM and a minimum opder point of one for seasonal items, with a weighting formula that looks at how these items sold about a year ago. This allows the order point to change a considerable amount from season to season without intervention on my part. For a while, I allowed order points to go to zero for seasonal items, but some slow movers never came back on their own. For non-seasonal items, I use a weighting formula that reflects how an item has sold recently as well as how it sold the same period last year. These order points change more slowly. I use a very handy method that Sam Costa showed me: use option FM on the ROP (but not C) with a minimum opder point of two. This allows items with an order point of two or more to be changed by the ROP, and items with an order point of one or zero will remain set that way unless adjusted manually. I also run ROP's for direct shipment only items by coding them using order indicator D.

A final item of interest is a program which may be of interest to some users. It will generate a list of five digit sku numbers (four digit plus a check digit). Better yet, I have a friend that can provide anyone a nicely formatted booklet of these sku's for a modest fee. This may be important to some users, now that Cotter is using ALL the six digit SKU's.

If you need further details, or sample pre-page report printouts, contact me at (207) 945-5542.

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non-Cotter sku's. By purchasing or renting programmable Psion, Symbol, or other collection terminals, you could customize the data terminal to key in any format of SKU or part number, but this would require some additional programming (either by yourself or one of your computer vendors). Fred Nichandros of EZ Software has written some custom routines for specific applications (like loading UPC codes using hand-held Psion terminals and a scanner), which can then be used with his EZ Workstation product to enter captured data into the Triad. Contact Fred (FAX 510-538-2010) for details, or the name of one of his distributors.

Both Triad and Cotter are investigating sophisticated hand held data terminals, with Triad hoping to have a unit with a scanner (manufactured by Symbol Technologies) in time to show at the Cotter Fall Market.

On the Trailing Edge

Much of this newsletter is devoted to discussions of the "latest and greatest", whether it be the newest piece of computer hardware or the latest software package. Not everyone is necessarily up to that stage yet though, and some stores are missing out on what might be considered basic pieces of equipment in the current retail environment.

First, only about half of the 150 subscribers provided a fax number for their stores. Fax machines can be purchased for less than $300 now, and set up to share a main store phone line with no conflict. They can be set to only answer once the store is closed, or after six or more rings, etc., so sharing a phone line is now problem. Faxing Direct Ship orders to vendors rather than calling them in saves a day or two delay for Cotter credit approval, as your DS approval stamp is on the faxed order form and the vendor doesn't have to call Cotter's A/R dept. If you don't have a fax machine, order one today.... you'll use it!

Second, many members don't take advantage of the bisync capabilities of their Triad system. I still talk with members who key in their orders on a Telxon, type in price changes by hand, and manually enter promotion prices from the "green sheets" Cotter mails out. The cost of the modem and software will be recouped in a few months based on labor savings alone... not to mention keypunch errors.

Finally, UPC scanning.... many stores say they aren't busy enough to justify it, or not enough items are coded. How much can you save by not having to price each item? How much do you lose due to switched price stickers? How many times have receiving clerks marked an item with the wrong sku? And finally, how much time do you spend changing stickers when Cotter revises SKU's? (see article by Bill Round)

Like advertising, these technologies may not really cost... if you use them, they actually pay.

Survey Results

Back in April, when I began working on this issue (chuckle!), I sent a questionnaire to subscribers with FAX machines in order to determine what types of systems and software packages were being used. The results will be used to help determine future topics for articles in the newsletter, as well as provide for some interesting analysis of how folks are using their systems.

I received 71 responses to the survey. Thirty seven of the stores owned Eagle systems, while the other thirty four owned DX- 10 based systems. Only twenty seven of the stores (17 Eagle, 10 DX-10) were using UPC scanning at POS, while thirty stores owned the Special Order software (14 Eagle, 16 DX-10). Most stores were running ROP reports on a regular basis (Monthly was most common), but a number of subscribers added notes about their desire to learn more about this procedure.

The survey was not truly scientific, as it only reached subscribers with fax machines (and only if they were on the night I sent the survey). Based on the Law of Technology, which says that stores with one high tech gadget tend to try and buy all other available high tech gadgets (talk to Dane Sheehan about this), I assume that most stores without FAX machines also have DX-10 systems. This means the subscriber base is about 75% DX-10 and 25% Eagle. We'll try and keep the articles of a "generic" nature, covering techniques of interest to owners of both types of systems. However, as time goes by and new software and hardware is introduced by Triad, certain specific topics (i.e. Quick Recall) will only apply to Eagle owners.

If you didn't receive a survey back in April, please fill out the copy included with this issue, and mail it back to us so we can include your "profile" in our database. Thanks!