



Digital Retail
SOLUTIONS

DRS Add-ins for Microsoft® RMS

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DRS Tools™ Help

J.D. Young and Anil Garg

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Title page 1

Use this page to introduce the product

by J.D. Young and Anil Garg

This is "Title Page 1" - you may use this page to introduce your product, show title, author, copyright, company logos, etc.

This page intentionally starts on an odd page, so that it is on the right half of an open book from the readers point of view. This is the reason why the previous page was blank (the previous page is the back side of the cover)

DRS Tools™ Help

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All the people who contributed to this document, to mum and dad and grandpa, to my sisters and brothers and mothers in law, to our secretary Kathrin, to the graphic artist who created this great product logo on the cover page (sorry, don't remember your name at the moment but you did a great work), to the pizza service down the street (your daily Capricciosas saved our lives), to the copy shop where this document will be duplicated, and and and...

Last not least, we want to thank EC Software who wrote this great help tool called HELP & MANUAL which printed this document.

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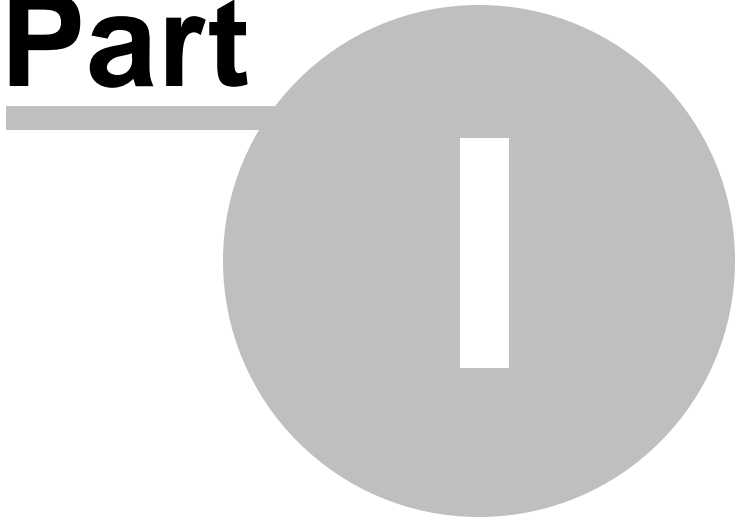
Foreword

This is just another title page
placed between table of contents
and topics

Top Level Intro

This page is printed before a new
top-level chapter starts

Part



1 DRS Tools Online Help

1.1 Welcome

This utility expedites certain procedures and processes in RMS through the use of wizards and maintenance tools. DRS Tools is designed to work with Store Operations or HeadQuarters.

You can use DRS Tools to:

- Mark items for inclusion in auto-replenishment services
- Mark items for inclusion in pre-labeling services
- View what item data* is transmitted to participating suppliers running **DRS Linker**
- Perform maintenance tasks such as mark items inactive, or mass delete customers and items with no activity

*Special reports are included with DRS Tools to list qualifying items. These reports can be used to view what data is transmitted by **DRS Linker™**.

NOTE: For DRS Tools to work properly your items must be assigned to their appropriate suppliers and include SRNs (Supplier Reorder Numbers).

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1.2 What's New?

The following enhancements have been added since the initial release of **DRS Tools**.

June 2010

- Added ability to enable Pre-Labeling for any Supplier

March 2009

- Added "Enable Not available on PO" to Inactive Item Wizard
- Added "Remove Available on web" options to the Inactive Item Wizard

March 2008

- Added ability to delete items with no activity -- only available for single store
- Added ability to delete customers with no activity -- only available for single store
- Clean-up on forms:
 - a. Added code to select first row by default when data is loading into the grid.
 - b. Added code to select the previously selected row if grid gets focus when down arrow is pressed in the textbox

October 2007

- Added code to allow user to pick between using Email client or Notepad when requesting a registration key
- Added code so all forms center on main form
- Added code to Item Details form to warn user if they try to close without saving

March 2007

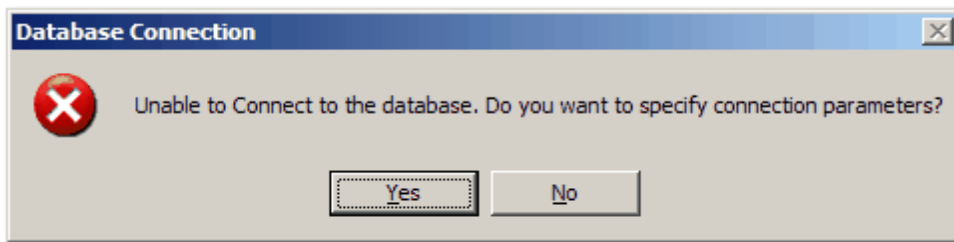
- Added code to reset database name if error is returned while creating custom index; allow user to enter correct database
- Changed sale price calculation so it also works if there is only one date set; fixed bug in the calculation
- Added code so title will flash if expiring within 3 days
- Added code to decide if database is RMS v1 or v2 and read info from appropriate table
- Made changes to Register form to show the SN for v1 and ID for v2 database
- Updated About form to read store details from HQ Configuration table when connected to HQ database
- Added code to encrypt the password in the registry
- Added ability to email key request from register form; message includes store details

1.3 Configuration

1.3.1 Database connect

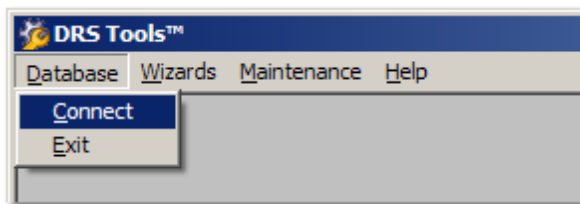
From your Windows Desktop select **Start, Programs, Digital Retail Solutions, DRS Tools, DRS Tools**.

If another DRS utility has not already been installed and configured on the same PC, you will receive this pop-up.

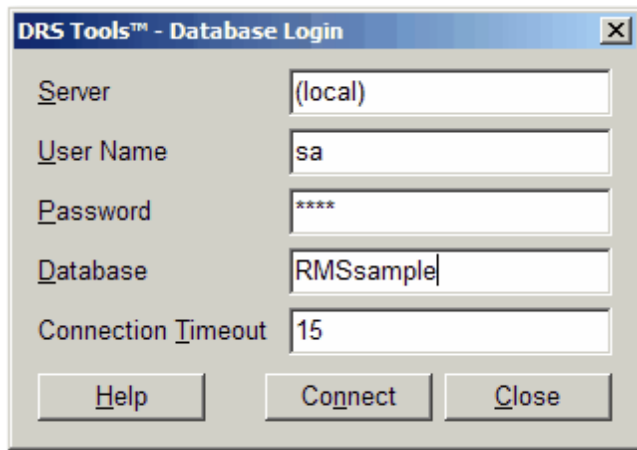


Select **Yes**.

If you need to change the database connection setting once **DRS Tools** loads, select **Database, Connect**.



The database login will appear.

**Database Login:**

Server: Name of your RMS server. Use (Local) if DRS Tools is installed on the PC where your RMS database resides.

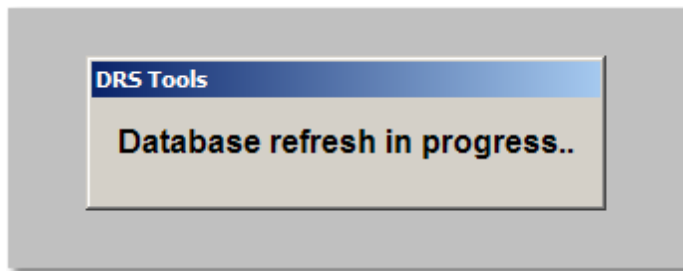
User Name: SQL Server User Name (default = sa)

Password: SQL Server Password for above user. Your SQL database password is created when you first installed MSDE or SQL Server.

Database: The name of your RMS database (located under RMS Administrator, File, Configure).

Connection Timeout: 15 should be fine; increase if you have a slow network connection.

Click on **Connect** to confirm connection. If successful the database refresh message will appear.



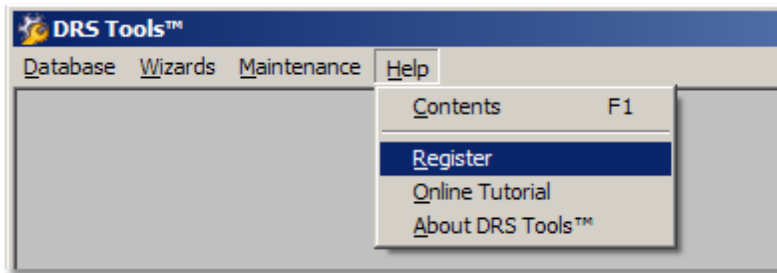
This indicates a table update is in progress. When run the first time on a large item database this may take a few minutes to complete. On subsequent runs the refresh looks only for changed data.

NOTE: The initial entry of database connections settings will update these settings for all DRS applications currently installed. Subsequent changes will need to be entered for each application on an individual basis.

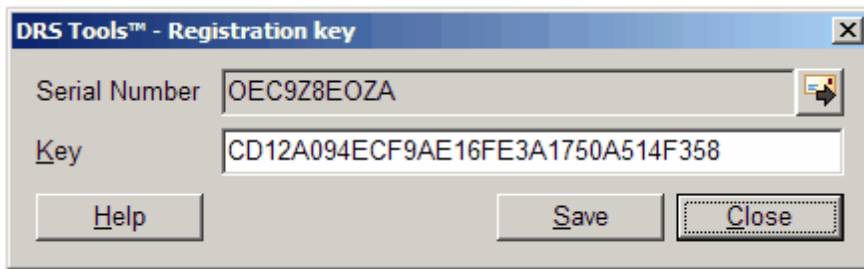
1.3.2 Registration

From your Windows Desktop select **Start, Programs, Digital Retail Solutions, DRS Tools, DRS Tools**.

Once **DRS Tools** loads select **Help, Register**.




This will pop-up the registration key entry window.



RMS v1.x: Your serial number will begin with QC for Store Operations or QH for Headquarters.

RMS v2.x: Your serial number will be an alphanumeric entry.

If your serial number is not listed correctly, you must first [connect to your database](#).

To secure a registration key, click on the envelope icon  to email your serial number and company information to register@digitalretailer.com.

IMPORTANT: Your company information must be correct before requesting a registration key. To edit your company information select **Store Operations Manager, File, Configuration, Store** tab. For an HQ key select **HeadQuarters Manager, File, Configuration, Accounts** tab, **Billing Statement Return Address**. Make sure company name, city, state, zip, and phone number are correct. There is a charge to re-issue a registration key for an incorrect address or change of address.

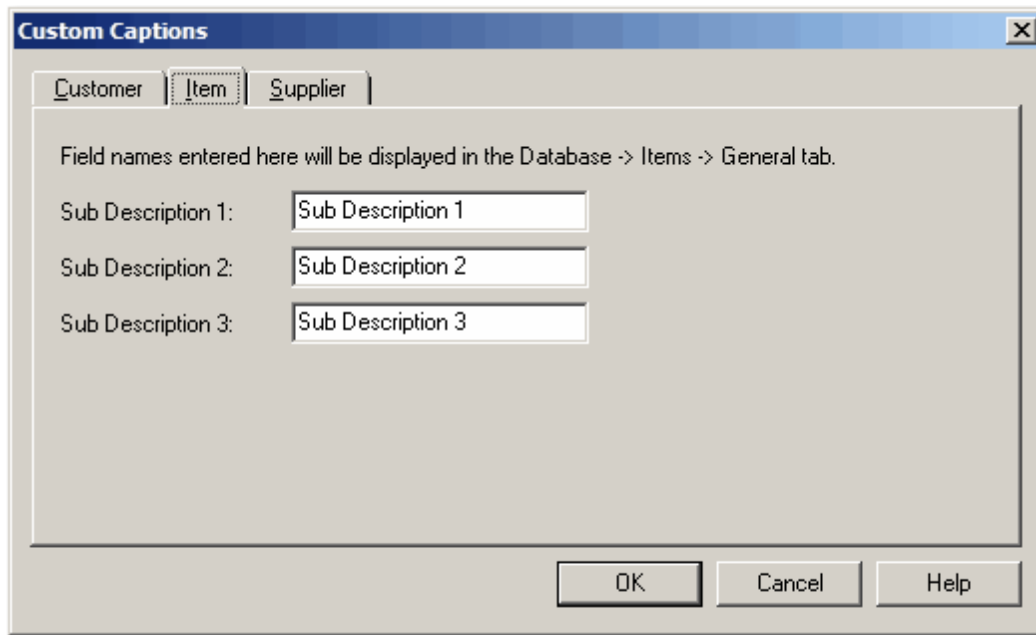
When you receive your registration key, insert the key into the box provided and select **Save**.

NOTE: If you are installing a DRS bundle and connect to a Store Operations database, you can enter the master key and it will be saved for all applications in the bundle that support a master key. If you subsequently connect to a HeadQuarters database, you must enter the registration key for each DRS application even if it is the master key.

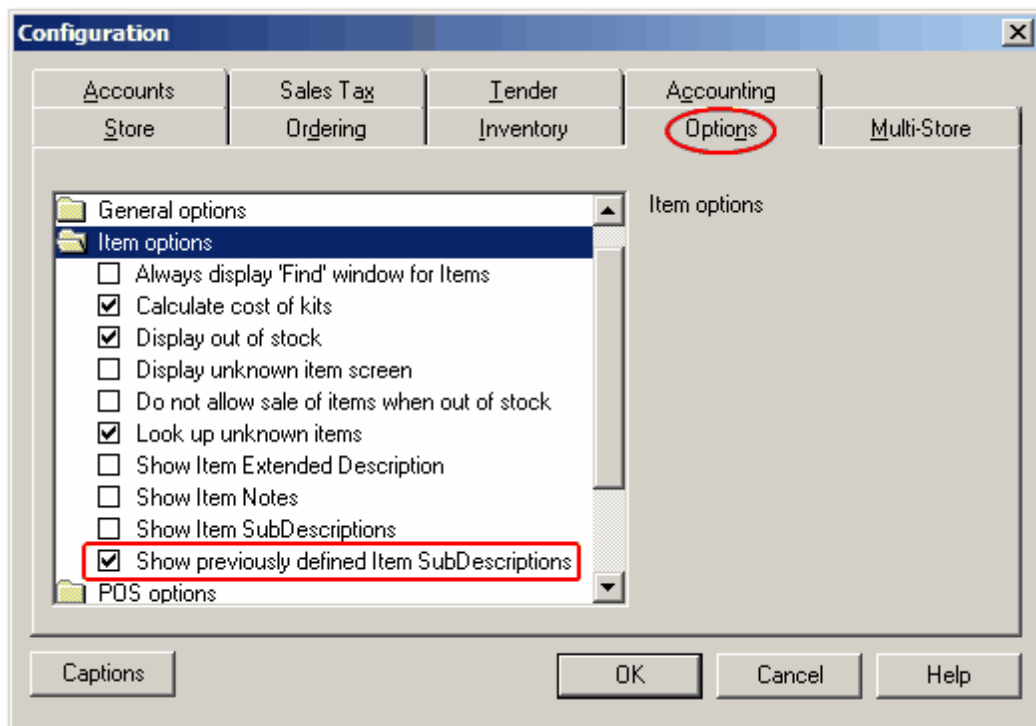
1.3.3 Item Captions

DRS Tools is designed to work with matrix items where Sub-Descriptions 1, 2 and 3 are deployed for sub-categories or matrix dimensions such as Size, Color, and Brand. If you are using these fields for other functions you may need a customized version of DRS Tools. [Contact](#) our Support office by email for details.

To label the sub-description fields for their intended usage, select **Manager, File, Configuration, Captions** button, **Item** tab.



You will also need to enable **Show previously defined Item SubDescriptions** under **Manager, File, Configuration, Options, Item options**.

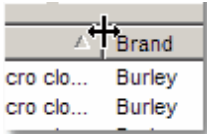


1.4 Operation

1.4.1 General

You can press **Esc** on any form to return to the previous form, or to exit the program from the main screen.

Columns can be sized to view all data in that column. Hover over the separator line between columns with your mouse and the cursor will change to a cross with left-right arrows.



Right-click and drag the column to fit, or double-click on the cross to auto-size the column to its longest entry.

To reset the list view to its default column width settings, press F8.

This application includes hot keys to support fast keyboard operation of menus, buttons, and screen layout.

F3 -- clears string search entry boxes without affecting combo box selections

F5 -- refreshes list view; useful when database changes have occurred on other stations

F6 -- resets the search criteria and clears any list views

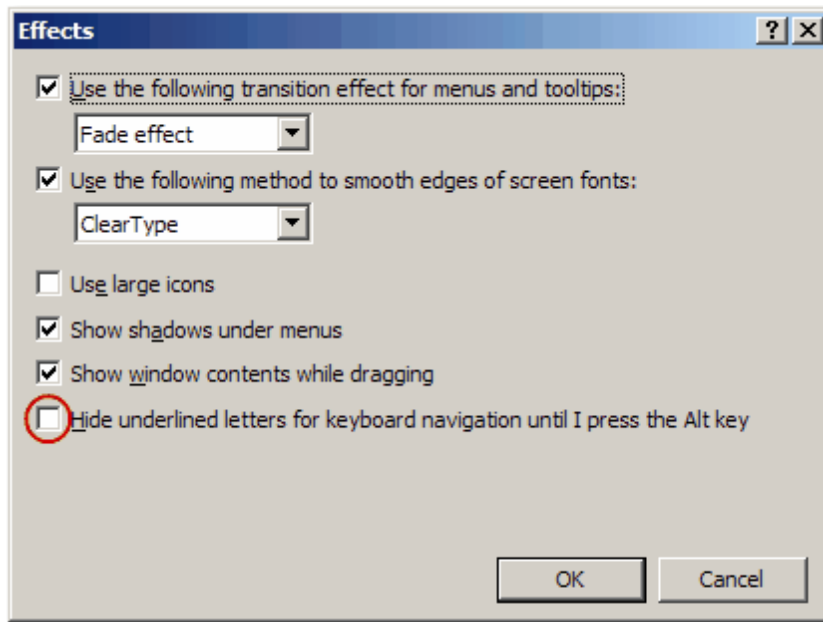
F8 -- resets the column width to the default settings on list views

Hot keys also include Alt-X combinations for menu and button options.



Example: **Alt-V** for **View**, **Alt-C** for **Close**

If you do not see underlined characters on most buttons and options it means this feature is set to hidden in Windows. To enable this feature go to **Display Properties**, select the **Appearance** tab, then the **Effects** button. Make sure "Hide underlined letters for keyboard.." is unchecked.



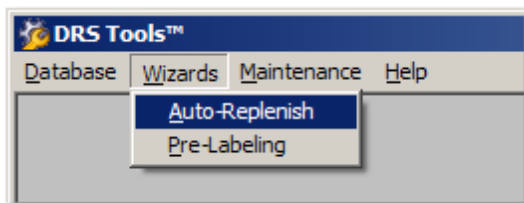
Bright blue text is used whenever a checkbox option has been enabled to aid quick identification.

Dark blue text is used for instructional messages.

We welcome and encourage your feedback to help us improve this application. Please send your comments and suggestions, or any problem reports, to our [Suggestions](#) box.

1.4.2 Wizards

DRS Tools includes wizards to expedite procedures and processes in RMS. To select a wizard open the drop-down menu option labeled Wizards.



[Auto-Replenish](#) supports automated purchase order submission to participating suppliers based on min/max levels you control. Contact your supplier for details.

[Pre-Labeling](#) supports automated transfer of product data from RMS to participating suppliers. Contact your supplier for details.

1.4.2.1 Auto-Replenish

This option supports suppliers who offer auto-replenishment services and a means to upload your purchase orders to their order entry system for fulfillment. This wizard will allow you to select items for inclusion in this service and adjust item reorder information to match your stocking requirements.

NOTE: This option will be disabled if DRS Tools is connected to an HQ database. You will need to

perform this operation connected to a Store Operations database.

Suppliers interested in offering auto-replenishment services to RMS users can contact jumpstart@digitalretailer.com for more information.

NOTE: Auto-replenishment requires **DRS Linker** to be installed and configured to send your data to the participating supplier. Until this setup is completed you will not be able to select a supplier. See **DRS Linker Help** for instructions.

Operation:

Select items for auto-replenishment using one or more of the search options. Mark items for inclusion and **Save**.

You can also use this wizard to remove items from an auto-replenishment service.

The screenshot shows a software window titled "Select Items for Auto-Replenish". At the top, there is a search section with a text input for "Search by Description/ILC:" and a "Quick Scan" checkbox. Below this are four dropdown menus: "<Select Supplier>", "<All Departments>", "<All Categories>", and "<All Types>". There are also checkboxes for "Mark All", "Marked Only", and "Include Inactive". The main area is a table with the following columns: Mark, ILC, Reorder #, T, Description, Sub Descri..., Sub Descri..., Sub Descri..., Avail, RSL, RDP, On Ord, and Price. The table is currently empty. At the bottom of the window, there are buttons for "Help", "Save", "View", and "Close", along with labels for "Items:" and "Selected Items:".

Quick Scan -- limits searches to Item Lookup Code, Alias, or Supplier Reorder Number.

Include Inactive -- adds items to your list that have previously been marked as inactive.

Marked Only -- limits the list to only items that are already marked for auto-replenishment.

Mark All -- allows you to mark all items in the list view at once.

The **View** button allows you to view [item details](#) on each item and edit **Restock Level**, **Reorder Point** and **Reorder #**.

NOTE: A valid reorder number is required to synch your data with your supplier. Items without a reorder number will be skipped during processing.

1.4.2.2 Pre-Labeling

This option supports suppliers who offer pre-labeling services and provide a means to upload your product data for synchronization to their warehouse system. This allows you to receive products pre-labeled with your item lookup code, barcode, description, and retail price. Contact your suppliers for details.

Suppliers interested in offering pre-labeling services to RMS users can contact jumpstart@digitalretailer.com for more information.

NOTE: Pre-labeling automation requires **DRS Linker** to be installed and configured to send your data to the participating supplier. See **DRS Linker Help** for instructions. Otherwise you can use this wizard to flag items for pre-labeling, then run the [Pre-labeling Report](#) in Manager to send the data manually.

Operation:

Select items for pre-labeling using one or more of the search options. Mark items for inclusion and **Save**.

You can also use this option to remove items from a pre-labeling service.

Mark	ILC	Reorder #	T	Description	Size	Color	Brand	Avail	Price
<input type="checkbox"/>									

Quick Scan -- limits searches to Item Lookup Code, Alias, or Supplier Reorder Number.

Include Inactive -- adds items to your list that have previously been marked as inactive.

Mark All -- allows you to mark all items in the list view at once.

The **View** button allows you to view [item details](#) on each item and edit **Restock Level**, **Reorder Point** and **Reorder #**.

NOTE: A valid reorder number is required to synch your data with your supplier. Items without a reorder number will be skipped during processing.

1.4.2.3 Item Details

View displays all critical item information on one screen. Any editable fields will be shown with a white background.

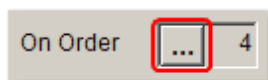
Item Details							
ILC	RUTI0030	On Hand	2	Sale Price			
Description	MR. TUFFY 26X1.75/2.125" BRN	Committed	0	Price	\$19.99		
Ext. Desc		Available	2	Price A	\$0.00		
		On Order	...	0	Price B	\$0.00	
Size	26X1.75/2.125	Transfer Out	0	Price C	\$0.00		
Color	BROWN	Offline	0	MSRP	\$0.00		
Brand	MR. TUFFY	Received/ Not Cmtd	0	Cost	\$8.54		
Department	Rubber Goods	UoM	PR	Margin	57.3%		
Category	Tires & Parts	Parent Item		Qty			
Item Type	Standard	RSL	3	ROP	1	Last Recvd	07/19/05
						Last Sold	08/08/05
Barcode	Code 128A	Bin		Member Of			
Discount	None	Reorder #	87226				
Notes	Tire liner, Mr. Tuffy 41602, 26 x 1.75/2.125", brown						
Help		Save		Close			

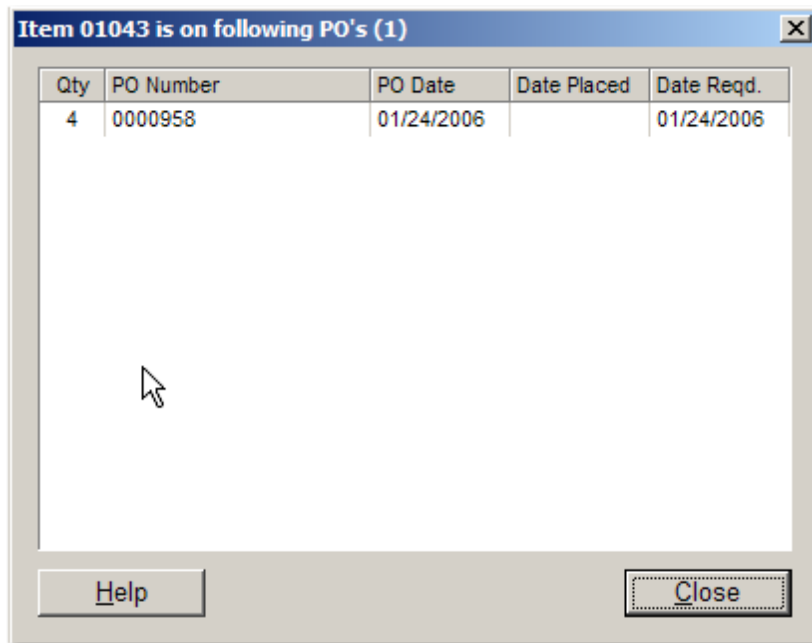
RSL -- restock level is the quantity of units you will want to stock when an auto-replenishment order is generated. Example: If the restock level is 3 and the reorder point is 1, and the current quantity on hand has dropped to zero, the suggested reorder would be 3 units.

ROP -- reorder point is the minimum number of units required before a purchase order will be generated for [Auto-Replenish](#).

Reorder # -- supplier reorder number is required for [Auto-Replenish](#) and [Pre-Labeling](#) to synch your item lookup codes with your suppliers.

If you click on the On Order ellipsis you can drill down to view purchase order information.

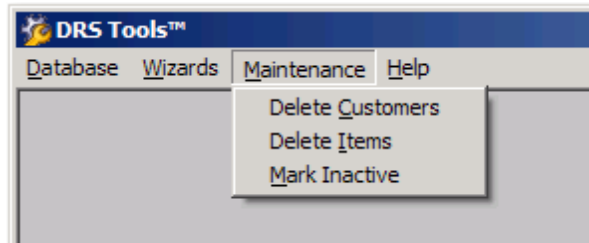




Qty	PO Number	PO Date	Date Placed	Date Reqd.
4	0000958	01/24/2006		01/24/2006

1.4.3 Maintenance

DRS Tools includes maintenance tools to expedite procedures and processes in RMS. To select a tool open the drop-down menu called Maintenance.



[Delete Customers](#) allows you to remove customer accounts that were added but never used. This option is only available for single store users and cannot be used in multi-store environments running HeadQuarters.

[Delete Items](#) allows you to remove items that were added but never used. This option is only available for single store users and cannot be used in multi-store environments running HeadQuarters.

[Mark Inactive](#) allows you to generate a list of items which are no longer active in your database and mark those items inactive. Inactive items do not list in normal RMS searches or reports. Inactive items should be retained in your database to validate customer purchase histories or provide sales analysis for past periods.

1.4.3.1 Delete Customers

If you add or import customers into your RMS database that are never used, you can use this option to mass delete those accounts. The default cut-off date lists customers added 3 years ago with no activity since added.

NOTE: In an HQ environment this option will be disabled since deletions would need to be synchronized

between locations and activity may have occurred at one location but not another. For this reason RMS does not allow deletions of global customers in an HQ environment.

The **Delete Customers** task in DRS Tools allows you to view customer accounts for deletion and quickly mark them for processing.

Deletion candidates are customer accounts with:

- no sales transactions or order activity
- a creation date before the cut-off date

The default cut-off date is three years from today. You can modify this date to list more recent candidates if desired.

Operation:

Press F5 to view all candidates based on cut-off date.

Select customers for deletion by marking entries in the checkbox column and click **Delete**.

1.4.3.2 Delete Items

If you add or import items into your RMS database that are never used, you can use this option to mass delete those entries. The default cut-off date lists items added 1 years ago with no activity since added.

NOTE: In an HQ environment this option will be disabled since deletions would need to be synchronized between locations and activity may have occurred at one location but not another. For this reason you should not delete items in an HQ environment unless they were just added and have not been distributed to the stores. However, you can use [Mark Inactive](#) with your HQ database to prevent items from appearing in standard searches and reports.

The **Delete Items** task in DRS Tools allows you to view items for deletion and quickly mark them for processing.

Deletion candidates are items with:

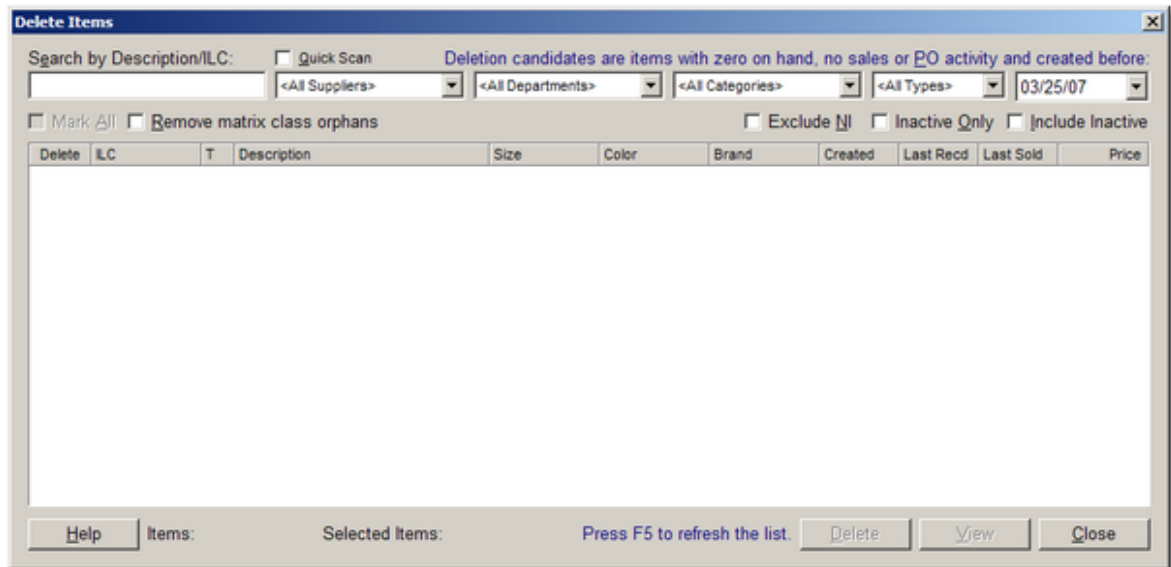
- no sales, refunds, adjustments, transfers, or purchase order activity
- a creation date before the cut-off date

The default cut-off date is one year from today. You can modify this date to list more recent candidates if desired.

Operation:

Press F5 to view all candidates based on cut-off date.

Select items for deletion by using one or more of the search options, then mark entries in the checkbox column, and click **Delete**.



Remove matrix class orphans -- enable this checkbox to remove matrix class items if all components in the matrix have been deleted. Matrix class items in RMS are the M codes that contain a list of the matrix components.

1.4.3.3 Mark Inactive

Over time some of your items will be discontinued and need to be purged from your system. If a product is associated with any sales activity you should *not* delete the item, but mark it inactive instead. This ensures the purchase history for each customer is retained. Otherwise a blank entry will appear under the customer's purchases indicating an item has been deleted. To prevent this from happening we suggest you disable the Delete option in Manager and use this tool exclusively to process your old and discontinued items.

NOTE: In an HQ environment this option will be disabled if DRS Tools is connected to a store database. You will need to perform this operation connected to an HQ database.

The **Mark Inactive** task in DRS Tools allows you to view items for inactive/delete action and quickly mark them for processing.

Inactive candidates are those items with:

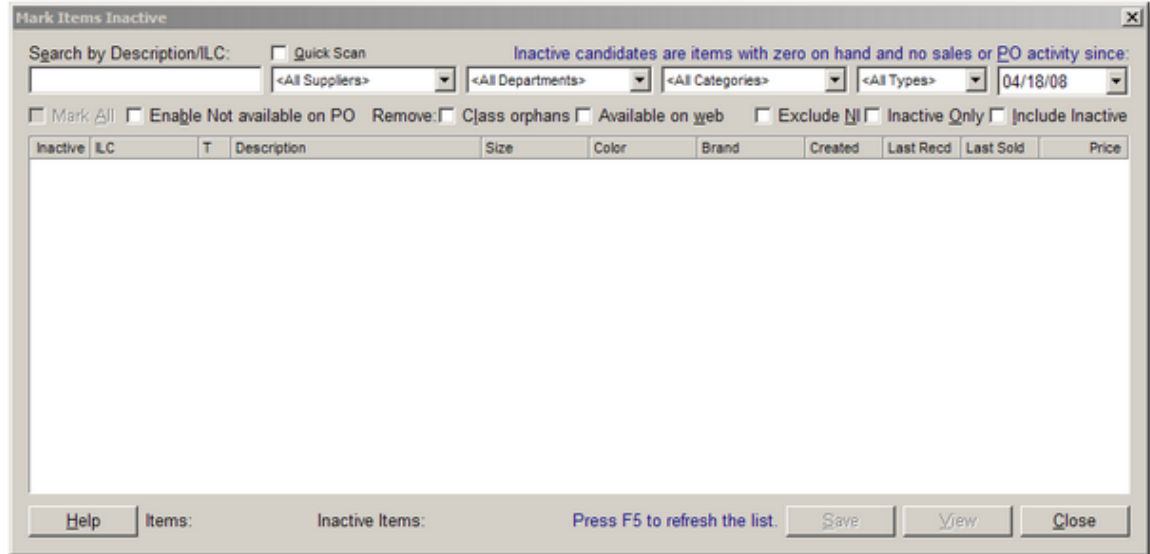
- zero stock on hand
- no sales or purchase order activity since the cut-off date

The default cut-off date is one year from today. You can change the date to view more recent candidates.

Operation:

Select items to mark inactive using one or more of the search options. Mark items for inclusion and click **Save**.

You can also use this wizard to return inactive items to service.



Enable Not available on PO -- enable this checkbox to flag the inactive items so they cannot be placed on future purchase orders (Item Properties, Options tab).

Remove: Class orphans -- enable this checkbox to remove matrix class items if all components in the matrix have been marked Inactive. Matrix class items in RMS are the M codes that contain a list of the matrix components.

Remove: Available on web -- enable this checkbox to remove the web status flag (Item Properties, Options tab).

NOTE: Deletions should be disabled in an HQ environment since item deletions cannot be sent down to the store on a worksheet. Also, an item may have activity at one location and not at another. For this reason you should only mark items inactive in an HQ environment. The Inactive flag is passed down to the store level with a worksheet 250 (for items recently changed).

1.4.3.4 Item Details

View displays all critical item information on one screen. Any editable fields will be shown with a white background.

Item Details					
ILC	100729	On Hand	0	Sale Price	
Description	DIAMANTE PRO 700X23 YELLOW	Committed	0	Price	\$59.99
Ext. Desc		Available	0	Price A	\$0.00
		On Order	...	Price B	\$0.00
Size	700X23C	Transfer Out	0	Price C	\$0.00
Color	Yellow	Offline	0	MSRP	\$0.00
Brand	VITTORIA	Received/ Not Cmtd	0	Cost	\$22.50
Department	Rubber Goods	UoM		Margin	62.5%
Category	Tires & Parts	Parent Item		Qty	
Item Type	Standard	RSL	0	RQP	0
		Last Recvd	05/22/04	Last Sold	01/06/05
Barcode	Code 128A	Bin		Member Of	DIAMANTE PRO (M)
Discount	None	Reorder #	0332123		
Notes	Clincher tire, Vittoria "Diamante Pro", 700C, 23mm width, 130psi, Kevlar bead, yellow, 210gm				
Help		Close			

1.4.4 Reports

To view any reports included with DRS Tools, run **Manager**, and select **Reports, Custom**. These reports will display the data being sent to your trading partners when **DRS Linker** is setup to transmit this information. You can also use these reports to manual send data by running the report and selecting the export icon in the report toolbar.

Reports include:

- Auto-Replenish Report
- Pre-Labeling Report

Run each report to view the details.

1.5 Contact Info

Digital Retail Solutions Contact Information

Sales Office:

Phone: 800-322-9471
 Int'l: +1 305 420 6170
 Email: info@digitalretailer.com
 Website: www.DigitalRetailer.com

Hours: 9am-5pm EST Mon-Fri

Support & Training:

Email: support@digitalretailer.com

Website: www.DRShelp.com

Hours: Available 7 days*

*See our [Support Agreement](#) for details.

Mailing Address:

Digital Retail Solutions Inc.
2018 Electric Rd PMB 205
Roanoke, VA 24018-1938
USA



1.6 Make a Suggestion

We are very interested in making improvements to our RMS utilities and add-ins to meet your needs.

- Have an idea for an enhancement?
- Thought of a feature we left out?
- Want to report an operating problem?

Please click through to our [Suggestion Box](#) and let us know right away.

Updates and upgrades to DRS add-in utilities are included with a DRS annual maintenance plan. Contact your RMS reseller for details.

Endnotes 2... (after index)

Back Cover