



Digital Retail
SOLUTIONS

DRS Add-ins for Microsoft® RMS

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DRS PO Loader-Hobby™ Help

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1 DRS PO Loader-Hobby Online Help

1.1 Welcome

This utility allows you to transfer a purchase order created in RMS to a supplier's online order entry system. The purchase order is packaged by PO Loader Hobby into a data format compatible with your supplier's order entry system.

PO Loader Hobby is designed to work with Store Operations or Store Operations in a HeadQuarters environment.

You can use PO Loader Hobby to:

- View all open purchase orders for suppliers that support RMS integration
- Package purchase orders for acceptance by your supplier's order entry system
- Verify stock availability and cost before processing an order
- Quickly transmit the PO into the supplier's order entry system
- Mark processed orders as Placed
- Login to suppliers' order entry systems to view orders and confirm availability and shipping status

NOTE: For PO Loader Hobby to work properly you must have an online account with your supplier and your supplier's order entry system must include an interface to point-of-sale systems. If your suppliers do not currently interface with Microsoft RMS, please have them [contact](#) our sales office for information on how this can be accomplished.

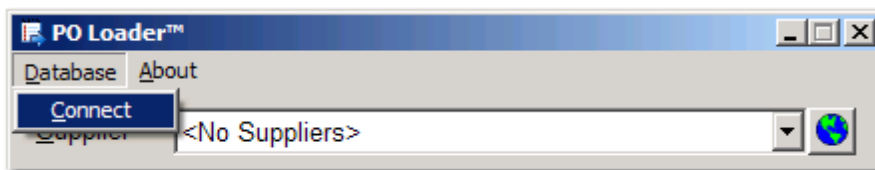
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1.2 Configuration

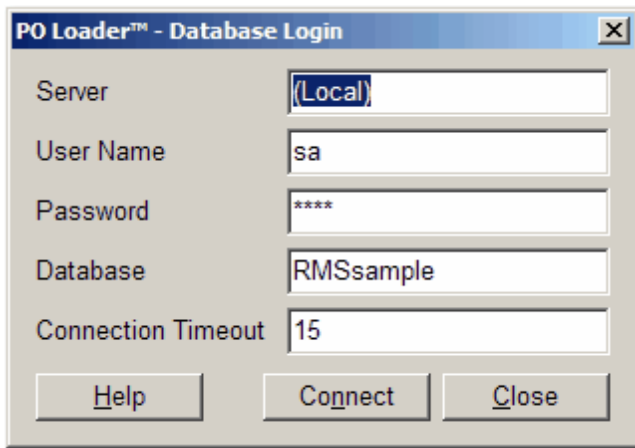
1.2.1 Database connect

From your Windows Desktop select **Start, Programs, Digital Retail Solutions, DRS PO Loader Hobby, PO Loader Hobby**.

Once **PO Loader Hobby** loads select **Database, Connect**.



This will pop-up the login window (unless another DRS utility has already been installed and configured on the same PC).

**Database Login:**

Server: Name of your RMS server. Use (Local) if PO Loader Hobby 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.

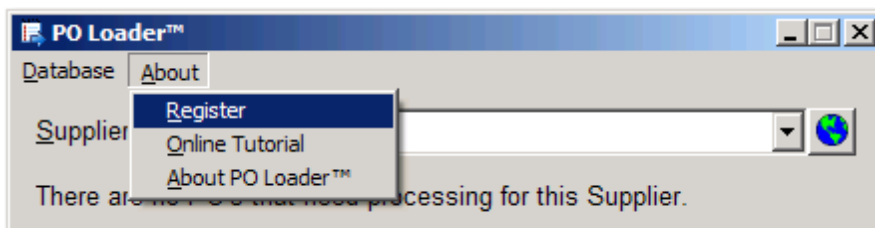
Click on **Connect** to confirm connection. If successful you will be returned to the main screen.

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.

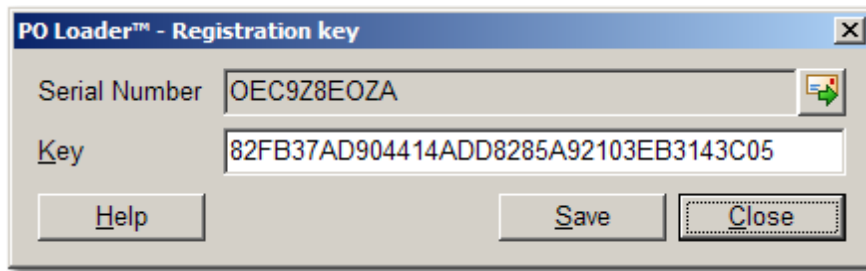
1.2.2 Registration

From your Windows Desktop select **Start, Programs, Digital Retail Solutions, DRS PO Loader Hobby, PO Loader Hobby**.

Once **PO Loader Hobby** loads select **About, Register**.




This will pop-up the registration key entry window.



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

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. 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**.

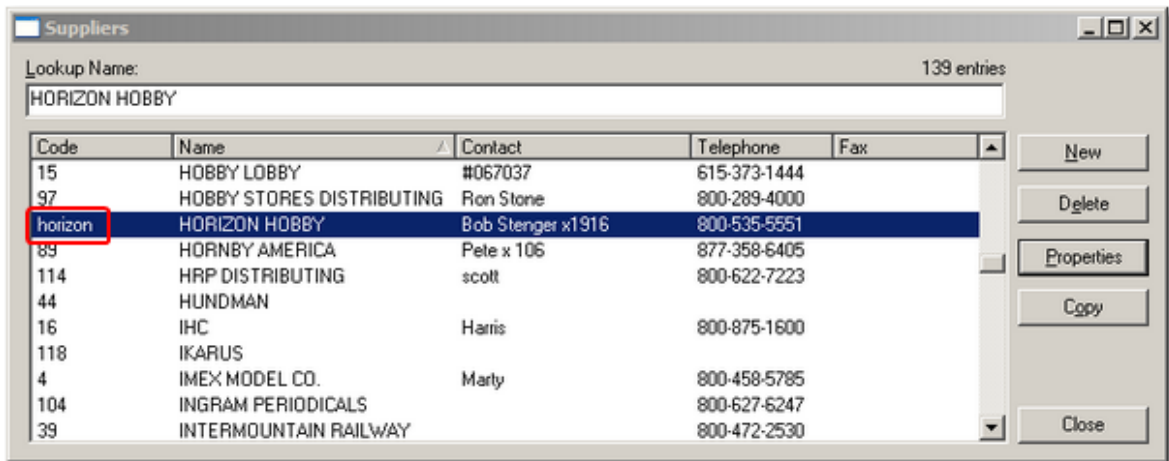
NOTE: If you are installing a DRS bundle and connect to a Store Operations database, you can enter the master key and it will be saved for all applications in the bundle that support a master key. If you subsequently connect to a Headquarters database, you must enter the registration key for each DRS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

1.2.3 Supplier Code

For PO Loader Hobby to function properly your RMS supplier code must match an industry standard* vendor ID.

Example: Horizon Hobby = horizon

Supplier codes are entered in **Store Operations Manager, Databases, Suppliers**.



*You will need to contact [DRS Support](#) to obtain the code for a participating supplier.

1.3 Operation

1.3.1 General

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

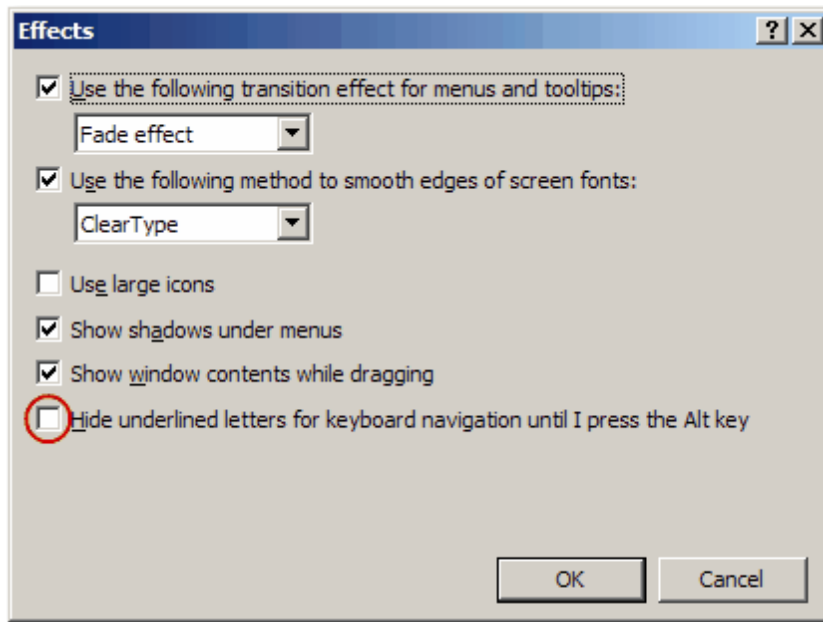
This application includes hot keys to support fast keyboard operation of menus, buttons, and screen layout.

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.



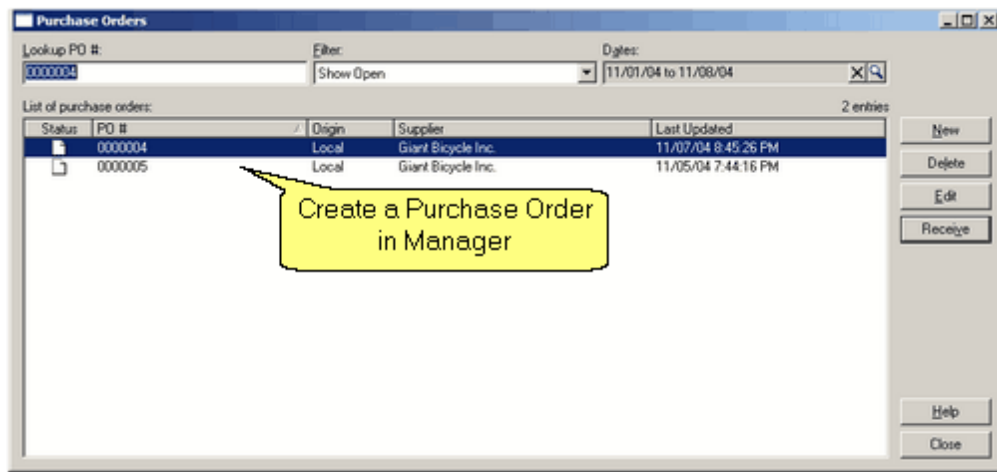
Bright blue text is used whenever a checkbox option has been enabled to aid quick identification.

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.

1.3.2 Create Purchase Order

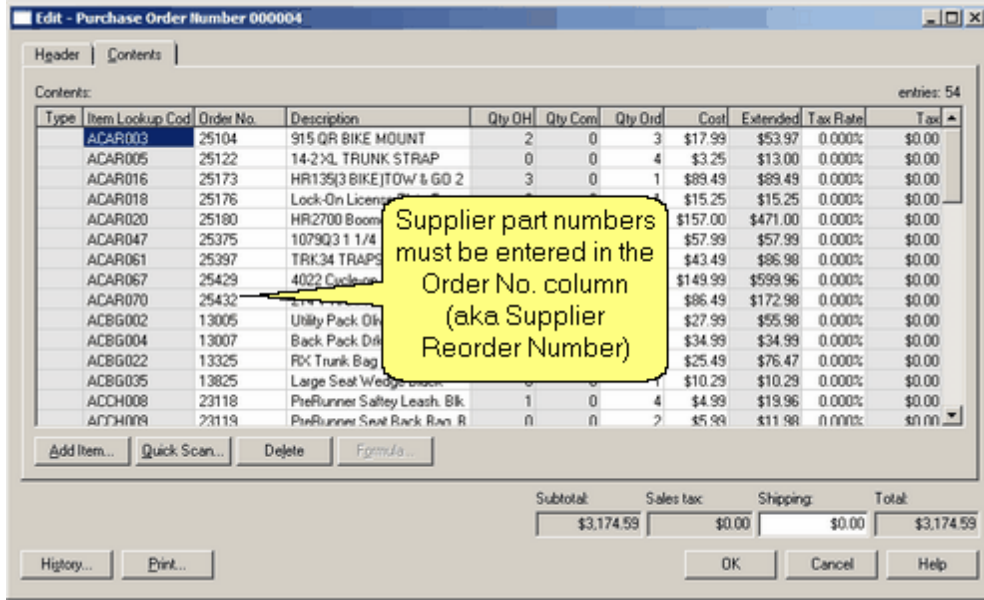
Select **Manager, Inventory, Purchase Order** and create a new purchase order. When completed you are ready to process your order using PO Loader Hobby.



For PO Loader Hobby to work correctly the following conditions must be met:

1. Supplier's order entry system is configured to accept RMS orders.

2. [Supplier Code](#) in RMS must match the industry vendor ID in use with PO Loader Hobby.
3. Supplier part numbers must be entered for each item on the PO (called Order No. on PO; also known as Supplier Reorder Number).
4. You may need a login name and password to access your supplier's order entry site.



NOTE: If you have installed **DRS AutoGen™** you can enable the option to update Supplier Reorder Numbers from Purchase Orders to the Supplier tab for each item. This eliminates the need to drill down to Item Properties to add a supplier part number.

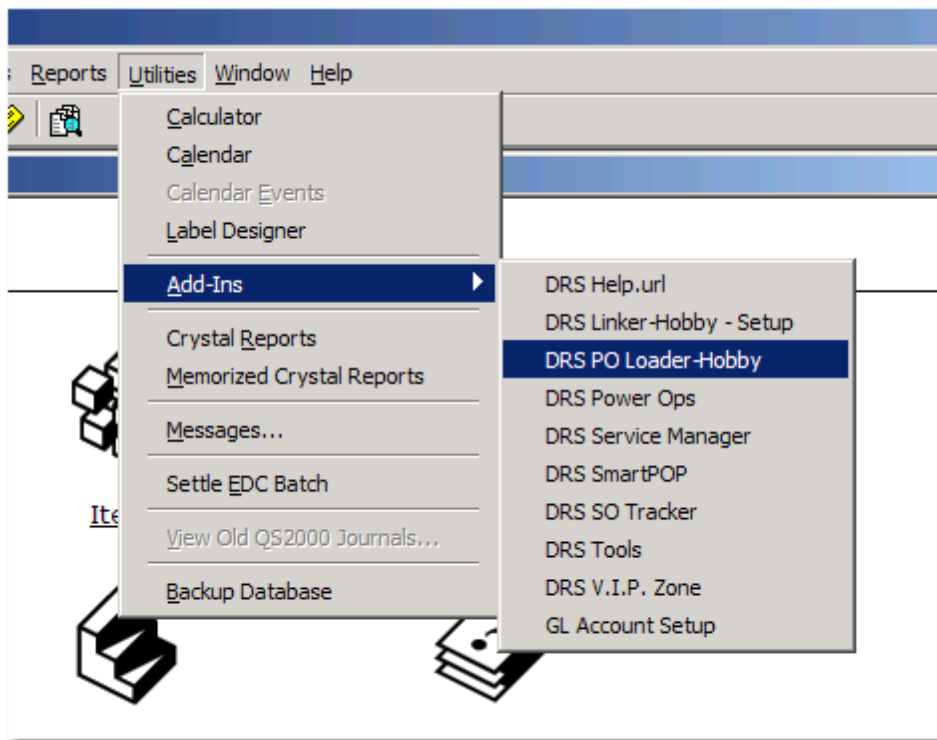
1.3.3 Process PO

1.3.3.1 Overview (step by step)

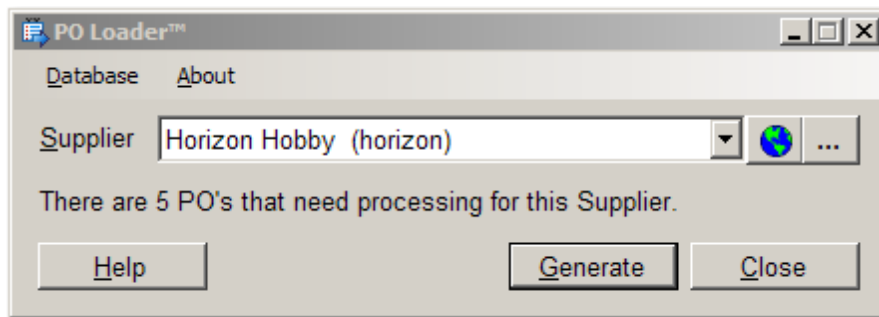
The method and procedure used to transfer your purchase order data will depend on the capability of the supplier's order entry system. This may involve a file upload, email message, FTP connection, or combination.

We will attempt to take advantage of XML to enable *automated* two-way exchange between Microsoft RMS and your trading partners. This provides EDI (Electronic Data Interchange) communication without the expense of traditional EDI. If your supplier cannot support XML we will deploy other methods to enable connectivity between RMS and the supplier's business systems.

Step 1) When you have completed a purchase order in **Manager** select **Utilities, Add-ins, DRS PO Loader Hobby**.



Step 2) When PO Loader Hobby loads select the supplier you want to work with. Example:



The number of PO's listed indicates how many purchase orders are currently outstanding. Outstanding means Status=Open and PO is not marked as Placed.

Example:

Status: Open

Placement status: Order not yet placed

Date placed: N/A

Ship To: Look Up...

Tailspin Hobby Center
2934 N. Main Street
Woodinville, WA 83743
Phone: (425) 555-0103
Fax:

FOB point: Terms: Date required: 05/08/09 PO date: 05/08/09

Remarks:

Step 3) Click on **Generate** to view a list of open purchase orders for processing.

| Process | PO Number | PO Date | Date Reqd. | Verified |
|-------------------------------------|-------------|----------|------------|-------------------------------------|
| <input checked="" type="checkbox"/> | POP-0000001 | 04/18/09 | 04/18/09 | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> | 0000005 | 05/08/09 | 05/08/09 | <input type="checkbox"/> |
| <input type="checkbox"/> | 0000001 | 06/12/09 | 06/18/09 | <input type="checkbox"/> |

Buttons: Help, Verify, View, Process, Close

Step 4) Select **Verify** to check warehouse availability and compare PO cost against current supplier information for all listed PO's. If a checkmark appears in the Verified column it means all items are in stock and PO cost matches supplier cost.

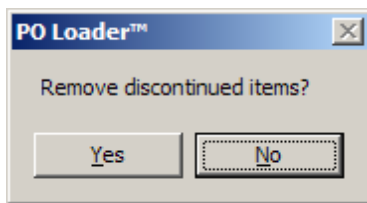
Select **View** to see the results of a verification for the highlighted PO. Example:

| ILC | Order No. | Description | Qty Ord | Qty Avail | PO Cost | Supp Cost |
|----------|------------|-----------------------------|---------|-----------|----------|-----------|
| BBN0001 | PRB3200 | 1/12 Formula RTR Hydro | 2 | Y | \$269.99 | \$269.99 |
| CJB20001 | MTC7811 | Afterburner Funny Car RTR | 1 | | \$303.99 | |
| DZE0001 | TCS00251 | 54mm ACW North Calvary O | 2 | | \$34.14 | |
| EAB0001 | | FA-125A AAC w/Muffler:AG | 2 | | \$269.99 | |
| FAE0001 | HAN8000 | 6-Minute Epoxy,9oz | 11 | N | \$4.49 | \$4.49 |
| FTA0001 | IWAECL4500 | HP-CS Eclipse Airbrush | 2 | Y | \$0.00 | \$0.00 |
| FTH0001 | LOSA99104 | Losi Race Wrench: US 4pc. | 2 | Y | \$26.00 | \$26.49 |
| KBA0001 | ARO89002A | Initiator Systems Pack, RMS | 2 | L (8) | \$161.46 | \$161.46 |
| PAB0001 | ACY12414 | NYA 1/72B-17G "Nose Art" | 6 | L (6) | \$23.18 | \$23.18 |
| PAE0002 | MMI14521 | 1/144 Delta DC-8-71 | 2 | | \$20.98 | |
| PMB0001 | ACY13409 | 1/72 M26 Armored Vehicle | 13 | Y | \$16.01 | \$16.01 |
| SAA0001 | AFX9939 | 4-Lane Intl Super Challenge | 4 | Y | \$109.20 | \$110.29 |
| SBC0001 | SCX20030 | Digital System,Changeover | 8 | Y | \$14.99 | \$14.99 |

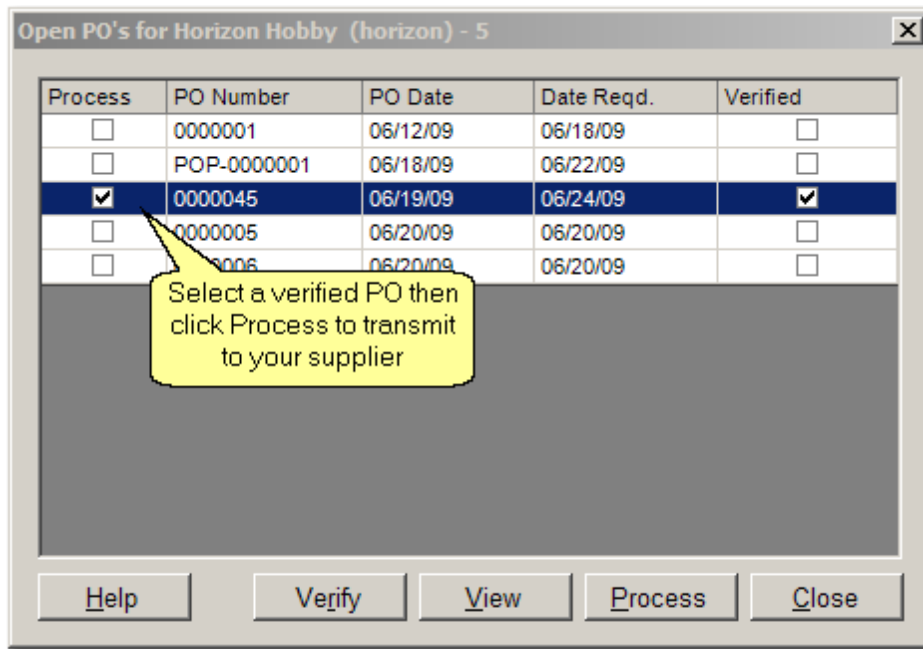
Red highlights indicates a discrepancy between the PO and supplier data.
 Red in Order No. column indicates *bad* or *missing* supplier reorder number (could not be verified). This may also mean the item is no longer available (discontinued).
 Red in Qty Ord column indicates there is *insufficient* quantity at the supplier warehouse.
 Red in PO Cost column indicates PO Cost is *higher* or *lower* than supplier cost on file.
 Red in Supplier Cost column indicates item has been *discontinued*. These items should be removed from the PO before processing.

Yellow indicates a *quantity cap* by the supplier is displayed rather than an exact quantity. Example: 50+
 If the PO contains a quantity greater than this value it cannot be verified.

You can edit the PO quantities and costs as necessary before processing the order.
 The **Sync Cost** button will update the PO Cost column with Supplier Cost for all items that show a discrepancy.
 Use the **Delete** button to remove a selected item from the PO.
 After editing a PO select **Close** to return to the generated list.
 If you have not removed all discontinued items, you will be prompted to do so when closing the form.

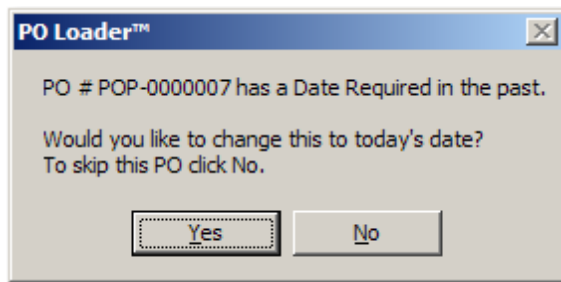


You are now ready to process the PO and transmit it to your supplier's order entry system.



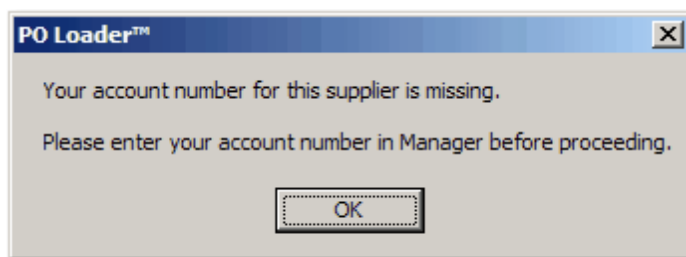
Step 5) Mark which PO's you'd like to transmit to your supplier in the Process column and click **Process**.

If the Date required is older than today you will receive the following message.



If this purchase order needs to be processed, answer **Yes** to change the 'Date Required' to today's date. To bypass the purchase order and move on to the next order click **No**.

If the supplier's account number is missing you will receive the following message.

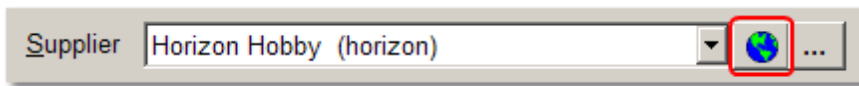


Click **OK**, go to **Manager, Databases, Suppliers**, locate the supplier and select **Properties** and enter your **Account Number** in the **General** tab.

Step 6) Click **OK** to close PO Loader Hobby if you are finished. Any transmitted PO's will be marked as **Placed** in RMS.

Depending on the type of link, your supplier's system will now process your order or hold it for approval.

TIP: PO Loader Hobby includes a quick link to the supplier's order entry system. You can use this to confirm availability for items you transmitted or to review your order online.



Click on the globe to visit the supplier's order entry site.

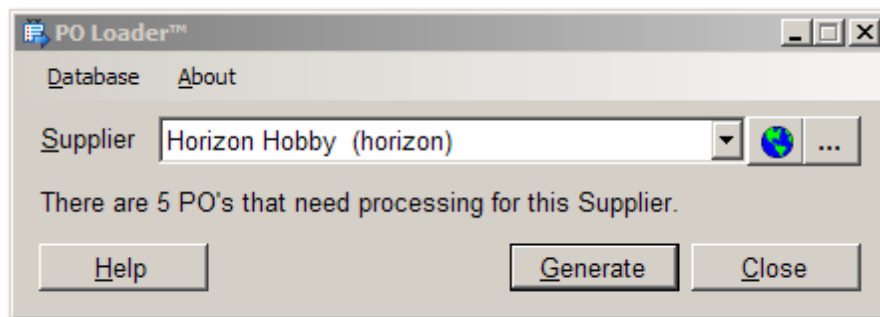
1.3.3.2 Horizon Hobby

Horizon Hobby integration includes the ability to transfer purchase orders in XML format directly into Horizon's order entry system.

See [Overview](#) for general instructions and error messages.

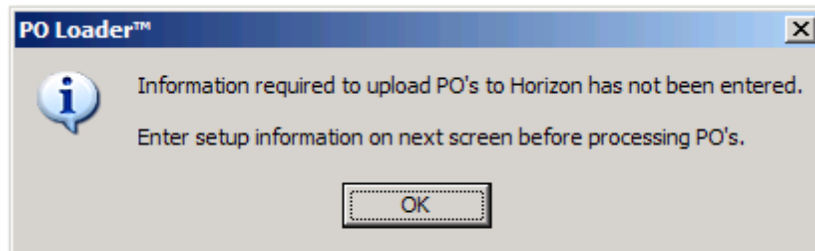
Step 1) When you have completed a purchase order in **Manager** select **Utilities, Add-ins, DRS PO Loader**.

Step 2) When PO Loader loads select Horizon Hobby as the supplier you want to work with.



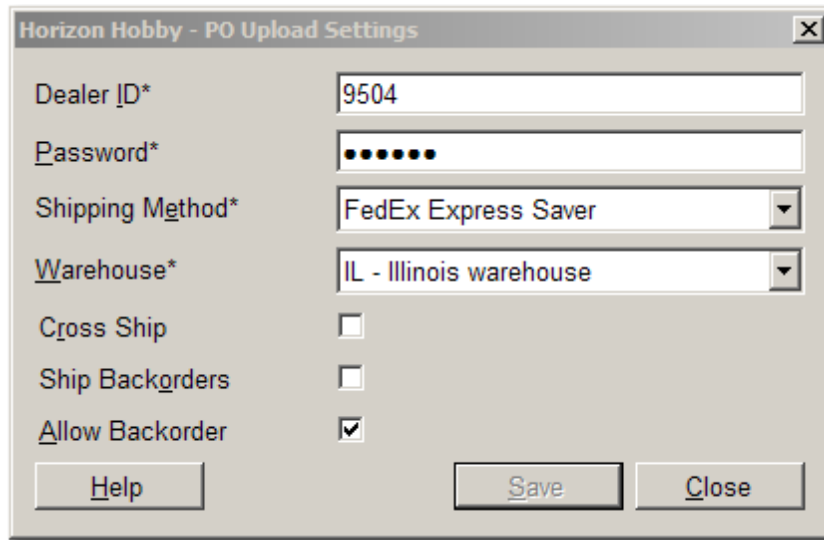
Step 3) Click on **Generate** to view a list of open purchase orders for processing.

If this is the first time accessing Horizon Hobby you will be warned to enter setup information.



Click **OK** to proceed to the setup form. To enter or change this information later, click on the ellipsis 

next to the globe icon.



Horizon Hobby - PO Upload Settings

Dealer ID* 9504

Password*

Shipping Method* FedEx Express Saver

Warehouse* IL - Illinois warehouse

Cross Ship

Ship Backorders

Allow Backorder

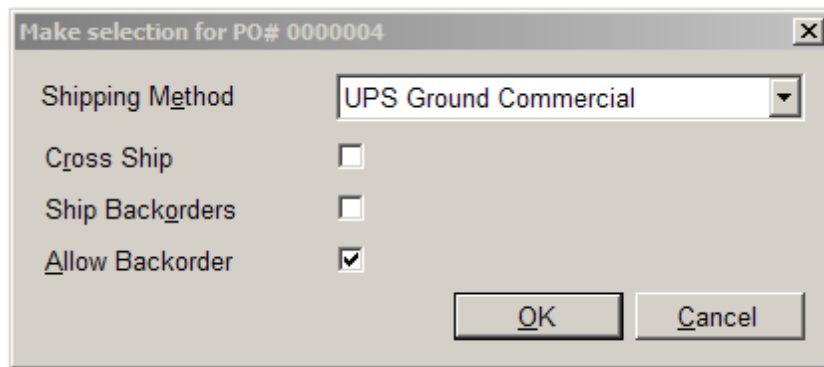
Help Save Close

NOTE: Contact Horizon Hobby if you do not know what information to enter into this form.

Click **Save** when done.

Step 4) Mark which PO's you'd like to transmit and click **Process**.

You will be prompted to confirm shipping options for each selected PO.
Change as necessary and click **OK** to proceed.



Make selection for PO# 0000004

Shipping Method UPS Ground Commercial

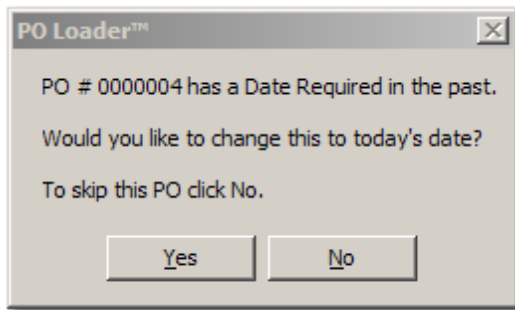
Cross Ship

Ship Backorders

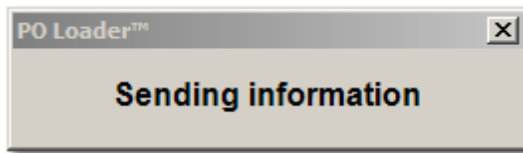
Allow Backorder

OK Cancel

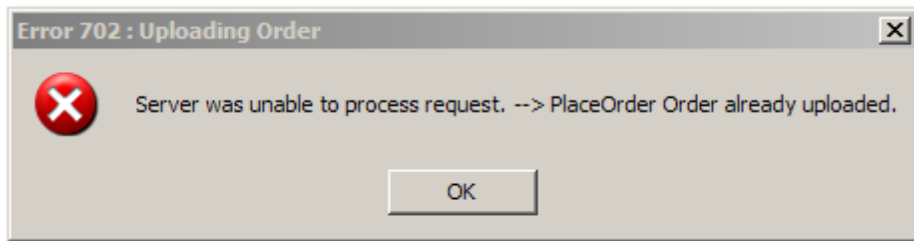
If the PO's Date Required is older than today's date, you will be prompted to change it.



As the PO is being processed, a message will appear.

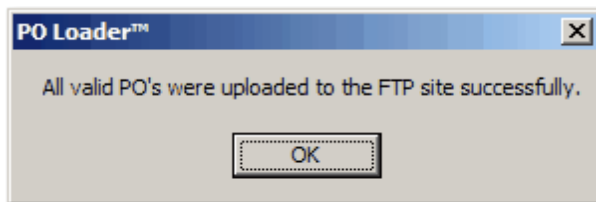


If the PO has previously been transmitted, but not marked as placed in RMS, a warning message will appear.

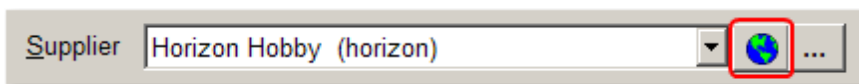



If you receive any errors during processing see [Overview](#) for an explanation.

When purchase orders are processed successfully you will receive this message.

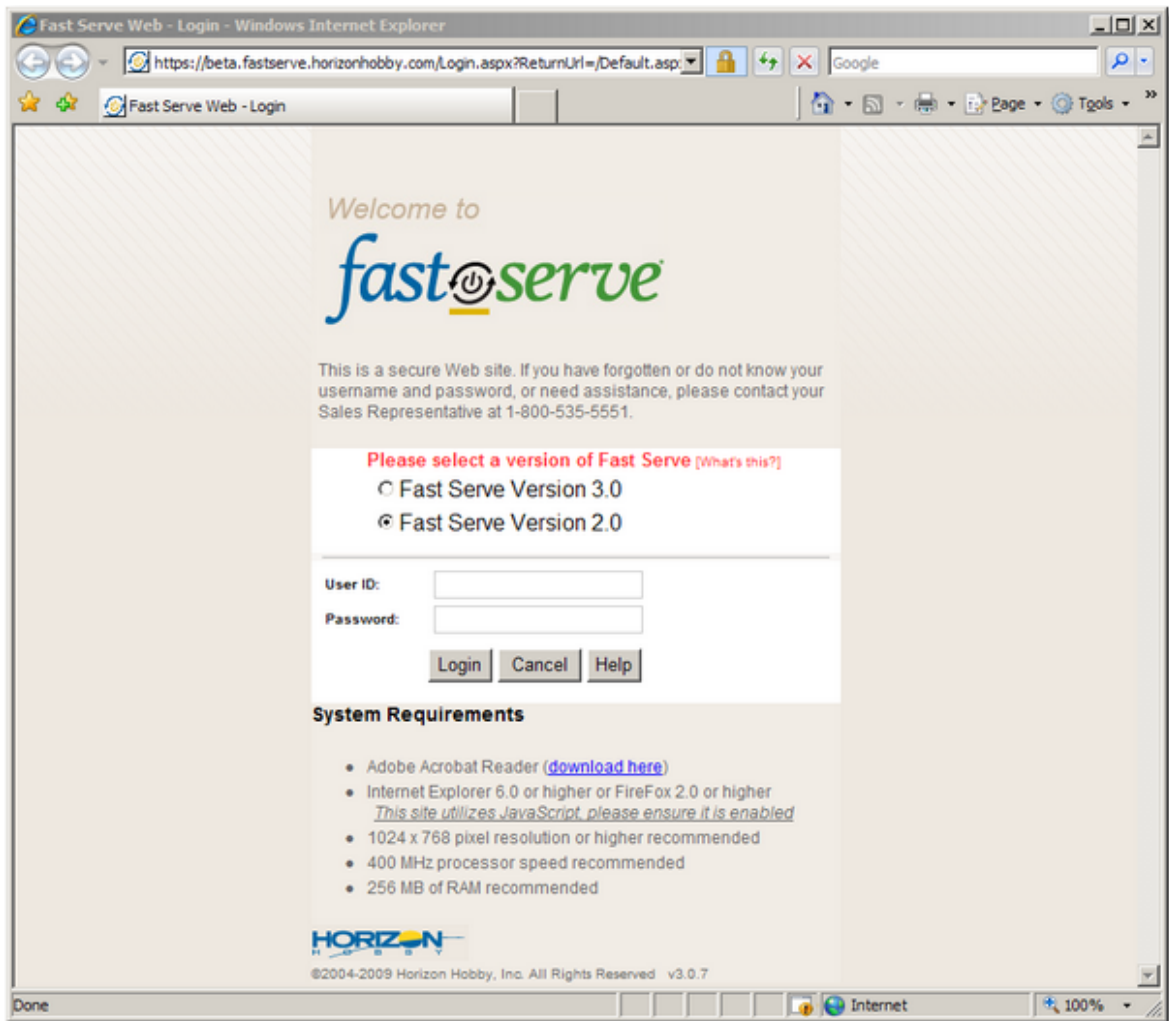


TIP: PO Loader includes a quick link to the supplier's order entry system. You can use this to confirm availability for items you transmitted or to review your order online.



Click on the globe  to visit the supplier's order entry site.

In Horizon's case you will be directed to Fastserve where you can login to view your orders.



1.4 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



1.5 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.