Giant Bicycle Integration for Microsoft Retail Management System (RMS)

Integration with the Microsoft point-of-sale platform is accomplished by installing the Bicycle Bundle from Digital Retail Solutions. The Bicycle Bundle is a suite of add-ins specifically designed to meet the needs of bicycle retailers. Microsoft RMS serves as the frameset while the Bicycle Bundle provides the enhanced component gruppo to ensure the best ride.

Components include power tools for item creation, product search, catalog import, special order tracking, scan and sell, serialized tracking (bike assemblies), service management and more. Special features for Giant Bicycle dealers expedite their point-of-sale system deployment and streamline day to day operations. This includes connectivity with Giant's Axapta system.

The following series of tutorials covers system setup for Giant Bicycle dealers once Microsoft RMS has been installed and the retailer has switched to their live database. Prior to this point, the RMS system has been installed and the retailer has been running in training mode using a sample database (Tailspin Toys). The retailer and staff have completed some portion of the RMS eCourse or workbook training and they now are ready to enter their own store data. Bicycle Bundle setup is initiated by contacting DRS support services by phone or chat and requesting a remote logon session. The Bicycle Bundle is installed and configured on each PC beginning with the RMS database server.

1) **Giant initial setup (4 min)**
   DRS Linker-Setup (availability & catalog download, pre-labeling, auto-replenish, data upload)
   JumpStart, Supplier tab, create Giant supplier entry (supplier code = gianti)
   JumpStart, JumpStart tab, Supplier File, Giant Setup (price level, warehouse)
2) **Giant catalog import (9 min)**
   JumpStart, Supplier tab, QuickLoad
   JumpStart, JumpStart tab, Supplier File, Giant Preview
   QuickLoad, single item import, matrix import, batch import
   Giant single product import in POS (Power Ops/Quick Add)
3) **Giant catalog update (2 min)**
   JumpStart, JumpStart tab, Supplier File, Giant Update
   Pictures, MPN, cost, GTIN, discontinued, add Giant as supplier, make Giant primary supplier
4) **Warehouse stock check and special orders (3 minutes)**
   Power Ops, SWAT Search tab
5) **Purchase order integration with Giant dealer portal (3 min)**
   PO Loader
6) **Giant Pre-Labeling program (2 min)**
   DRS Tools + DRS Linker-Setup
7) **Giant Auto-Replenishment program (3 min)**
   DRS Tools + DRS Linker-Setup
8) **Giant Retail Data Capture (RDC) (1 min)**
   DRS Linker Setup (Data Upload) - automated
   Report (Manager, Reports, Custom) – manual view

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Tutorial transcripts are listed below for reference.

Microsoft RMS is comprised of two main applications, Store Operation POS and Store Operations Manager. Initial setup for Giant integration begins with Store Operations Manager which is typically run on the back office PC. This PC may also be the database server. A dedicated server is not necessary to run RMS. POS and Manager applications can also run one PC which also serves as the database server.

Microsoft RMS add-ins like the Bicycle Bundle are accessed from within the Store Operations Manager program by selecting Utilities, Add-ins. Or in POS by selecting a button on the right hand side.

Step 1 – Giant initial setup [DRS Linker – Setup]
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The first utility to configure for Giant integration is DRS Linker-Setup. This tool runs in background on the RMS database server to provide links to Giant's Axapta system. The first two links provide warehouse availability and product catalog download. Additional links include the Giant pre-labeling service, auto-replenishment program, and upload for retail data capture (RDC).

To enable a link, highlight the option and click the Schedule tab. You'll need to know a password for a Windows user with administrator rights. If the retailer has not added this password to Windows, the store owner or manager will need to add this under Control Panel, Users. Note: This password will need to be entered whenever the PC is restarted.

Next determine if the PC will be left on 24/7 or not. "Always on" is suggested to ensure Windows Updates are properly maintained. If not, you'll need to know what time the PC is normally turned on each day or what time the store opens.

Each link is then scheduled and run once to confirm a successful operation. Depending on the type of link, the schedule may vary from daily to weekly. Times should be staggered to avoid running multiple links at the same time. Giant links are setup according to the following table which coincides with procedures running on Giant's Axapta system.

(G1) Availability file download – daily
(G2) Product catalog download – weekly on Monday
(G3) Pre-labeling – daily if retailer is using this service
(G4) Auto-replenishment – weekly on Monday to help aggregate orders
(G5) Data upload (RDC) – weekly on Monday

Scheduling a link adds it to Windows Task Scheduler to run in background at the time assigned. DRS Linker-Setup is a set-it-and-forget-it tool, but includes the option to view log activity to confirm operation or troubleshoot any problems. During the initial setup it is a good idea to run Task Manager by pressing Ctrl-Alt-Delete and select the Applications tab. Link jobs will be listed as "Running", followed by "Not responding" while data is being compiled. Then the job will disappear from the list. Afterwards you can check the History entries to confirm a successful run.

Once DRS Linker-Setup is configured and tested, the retailer does not need to run this utility again unless they need to change settings or trouble-shoot a connection problem. If a link fails, the log file will include a message and time stamp. The retailer is also warned when running other Bicycle Bundle tools if the product catalog file has not been updated in more than 7 days, or if the availability data is not current.

The next setup step is to add Giant Bicycles as a supplier in RMS if not already entered. This is accomplished by running JumpStart from the add-in menu. Next select the Supplier tab, and click New. If the retailer is running Bike-alog they can alternately search for Giant in Bike-alog and import Giant as a supplier. In either case you'll need to edit the supplier details and enter their Giant account number. The supplier code must also be set to ensure proper operation. "gianti" is a unique vendor ID assigned by Bike-alog and this ensures every supplier in RMS has a unique code.

Once a supplier entry is created for Giant, the next step is configuring JumpStart for Giant catalog integration. This is configured from the JumpStart tab by setting the Supplier File equal to Giant and then clicking Setup. From here the retailer selects their price level and preferred warehouse locations for bikes and parts. Once configured the retailer can click the Preview button to view and import products.

This concludes the Step 1 tutorial for DRS Linker-Setup and JumpStart configuration. When you are ready, please proceed to the next tutorial which covers Giant product catalog import.

Step 2 – Giant catalog import [JumpStart and Power Ops]
To view this recording visit digitalretailer.com/tutorials and scroll down to Giant Dealer Tutorials.

This tutorial covers Giant catalog import which is comprised of several options using two Bicycle Bundle applications, JumpStart and Power Ops. Options include QuickLoad, matrix import, batch import, and single item import.

JumpStart allows the retailer to quickly populate their RMS database with Giant products. To access JumpStart within Store Operations Manager, select Utilities, Add-ins, JumpStart. The first import session should consist of bike models as this comprises 50% of the store's inventory sales volume. To expedite entry into RMS, the retailer should gather a list of bikes currently in stock along with their quantities and retail prices.

Bicycles are imported with JumpStart by selecting the JumpStart tab, then set Supplier File equal to Giant, and click Preview. Next select the bike dept, optionally select a category, then pick a model year. Bike models listed will include all size/color combinations available for each model.

Highlight a model entry and click Import. If the item is available in a matrix you will be prompted to import the highlighted entry as a single import or import all related items in the matrix. Click Yes to import all sizes and colors in a matrix. Note: Items can also be imported as a matrix by tagging multiple entries before clicking Import. You'll then be prompted to import as a Matrix or Batch.

JumpStart will warn you if the item you are trying to import has been discontinued. If the item is in stock you'll want to bypass this warning, but you can control which matrix components are imported on the next screen. If the model can no longer be ordered, you should limit your import to only those sizes and colors that are currently in stock.

The matrix grid worksheet lists all possible sizes and colors. You should uncheck any entries that can't be reordered or which you won't be carrying. This worksheet allows you to enter your starting quantities and verify or edit the retail price. If you need to change a price for an entire column, enter the price in the first row, then right-click and select Copy, followed by right-click and Paste to all Rows. Min/max levels can also be entered which are called Reorder Pt and Restock Level in RMS.

Department/category must be assigned to imported items. The first time you import a product you will be prompted for this information. But the next time you import items from the same group, the routine will remember this entry.

When you are satisfied with your worksheet entries, click Save to import. A box will pop-up indicating a successful import, along with the item lookup code assigned for the matrix in RMS. If quantities were entered, you'll also be prompted to print price labels. This is our suggested method to inventory your products and enter them into RMS at the same time.

When you return to the preview list, your imported entries are marked with an X to indicate these products have already been imported. Continue with the next model import until all bike models have been completed.

Once bike lines have been loaded, the next step is importing parts, accessories, and clothing. To expedite this chore, a feature called QuickLoad allows the retailer to enter a list of Giant part numbers and quantities. This in turn creates a filtered list of import candidates. This part number list might be generated by Axapta or simply typed in from packing lists or invoices. QuickLoad is generally deployed as a one-time procedure to load the RMS database for a new store. However, stores can also use QuickLoad to add new items – with or without quantities.

QuickLoad is best deployed for parts and accessories rather than bikes and clothing. Bicycles and apparel products should be imported as matrix items with dimensions created, such as size and color. While the retailer has the option to import dimensional products as single items, placing them in a matrix makes it easier to manage and place orders. For this reason we recommend importing all clothing items in matrices. There may only be one size/color on a QuickLoad list, but you will likely order other sizes and colors in the future. The exception is when you are receiving products that cannot be reordered such as closeouts. There is no need to import all possible matrix dimensions for these products.

As a general rule, you should not import parts and accessories in a matrix unless they are reordered that way. For example, while it's common to reorder apparel or helmets in a size runs such as S, M, L, & XL, you don't reorder parts like bottom brackets or headsets in the same fashion.

To activate QuickLoad run JumpStart and select the Supplier tab, highlight the supplier, and click the QuickLoad button. You will be prompted to enter part numbers manually or import a list from a file. This can be any CSV or tab-delimited file containing part numbers and quantities, one item per line. Or select Manual Entry and type in your data, or use copy and paste. Quantity is optional and normally only entered for generating a starting database. Once items have been imported, future orders should be processed by generating purchase orders and receiving them.

When a QuickLoad file is processed by clicking Import, the part numbers are compared against the Giant catalog and a list of these items is created in the product catalog preview. If any errors occur, you can view the problem entries. You will then be prompted to proceed to the preview list. From there you can continue the import process and import items one at a time, or as a matrix, or in batch mode by category.

Batch mode allows you to import a group of items in the same category in one worksheet. For example, all headsets or lights. To import products in as a batch, sort your QuickLoad list by category, then tag all items in that category that you intend to stock. Skip any items you want to import as a matrix later. Click import and select the batch option. Verify retail prices and if the quantities are known, enter them now. If quantities were included in your QuickLoad file, they will be pre-populated in the preview list. Remember, quantity entry automates price label printing. Otherwise you'll need to process inventory counts later using the RMS Physical Inventory module, then print labels using the RMS Label Wizard.

You can also preview the Giant product catalog and search for items by part number, brand, description, dept/category, or UPC.

The alternative import option is to scan and import products one at a time using Power Ops. This option is typically deployed in POS and allows a retailer to literally scan and sell in rapid steps. For example, run Store Operations POS, click Power Ops on the right side, enable Quick Scan, then scan in the item's UPC. If the item is not already in the database you'll be prompted to search supplier files. Hit Enter to proceed. If the UPC is found you can immediately view the item, enter a retail price, import it, then sell it. If quantity is entered at the same time, you'll be prompted to print price labels.

You can also use this QuickAdd feature in the back office to scan, import, and add an item to a PO in rapid steps. In this case, run Power Ops from Utilities, Add-ins, Power Ops, then scan the item or enter the Giant part number. If not found, you'll be prompted to search supplier files. Once added you can tag the item, enter a quantity, and then add your tagged items to a PO.

This concludes the Step 2 tutorial for JumpStart and Power Ops import routines. When you are ready, please proceed to the next tutorial which covers the Giant catalog update procedure.

Step 3 – Giant catalog update [JumpStart]
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This tutorial covers Giant catalog update. This allows a retailer to update Giant product information in RMS, or add Giant as an alternate supplier to existing items, or assign Giant as the primary supplier when more than one supplier is associated with an item.

Giant catalog update is accessed from within JumpStart. Start JumpStart in POS or from Manager, Utilities, Add-ins. Select the JumpStart tab, set Supplier File equal to Giant, then click the Update button.

This procedure updates existing items on file in the RMS database based on Giant's part number or GTIN match. Options include update pictures, update manufacturer part number (MPN), update cost, update GTIN (UPC/EAN), update GTIN + MPN + cost at same time, mark discontinued items in RMS as inactive, add Giant as an alternate supplier based on GTIN match, or make Giant the primary supplier for items that have more than one supplier attached.

The latter two options are useful in cases where the retailer has already created items or imported products from other suppliers. First you can add Giant as an alternate supplier then identify Giant as the primary supplier. Please note that this only works if the retailer has entered GTINs into their database, so the item can be properly identified against the Giant product catalog.

Select an option and follow the prompts to run it. Results are displayed while processing.

Adding Giant as an alternate supplier, then primary supplier, requires two steps.

This concludes the Step 3 tutorial for Giant catalog update. When you are ready, please proceed to the next tutorial which covers the Giant warehouse stock check.

Step 4 – Warehouse stock check and special orders [JumpStart and Power Ops]
To view this recording visit digitalretailer.com/tutorials and scroll down to Giant Dealer Tutorials.

This tutorial shows how you can check stock availability at Giant warehouses while running POS or back office operations. In our example we'll use this feature to trigger the creation of a special order.

The ability to check warehouse levels is active during any of the import procedures including JumpStart and Power Ops. This feature is very useful when selling products at the POS register or while creating purchase orders. Stock check is available in Power Ops from the SWAT Search tab. This tool can also be accessed in Manager by selecting Utilities, Add-ins, Power Ops. You can search for Giant items by description, dept/category, item lookup code, or GTIN. You can also display all current Giant items in your RMS database by selecting Giant Bicycle from the supplier dropdown list. To perform a stock check, highlight any item and press F2. Giant warehouse inventory will be displayed.

SWAT Search stands for "Sell What's Available Today" and is based on a cascading search routine. When you first search for an item, you are checking your local store's database. If the retailer has more than one store, pressing F2 will next check availability at other store locations. If not found, pressing F2 again displays Giant warehouse availability. This is a powerful way to ensure a sale occurs regardless of where the product is available from – locally, at another store location, or from a Giant warehouse. A good example of this is selling a bike on a busy Saturday.

After the customer's needs are determined, you can use SWAT Search to quickly locate available bikes by type, price range, and size/color preference. Power Ops is accessed within the POS module by clicking the button on the right side. In this example I'll search for road bikes in the $1500 range to match a customer's budget. You have 5 bikes in stock, but are out of XS. You show the customer the Small in stock and they love the bike and want to buy it, but they need XS for a better fit. You can quickly confirm Giant warehouse stock by highlighting the item, press F2, and confirm which warehouse has stock. You can then process the sale as a special order.

Click Add to Sale and you are prompted to select workorder or layaway. If the customer is paying a deposit then balance in full when the bike arrives, select Workorder. If they'll be making payments over time, select Layaway. This flags the bike as a special order for this customer. You can then use Power Ops in Manager to add this bike to an open purchase order and place the order later. Or you can run Special Order Tracker to create a one-up order just for this customer. A one-up order means the PO is dedicated to this customer's sale and only contains their special order item.

See the Special Order Tracker tutorial for further instructions.

Whether you create a special order PO or add the item to a general purchase order, the PO can be pushed to Giant's Axapta system in two clicks. We'll cover that procedure in the next tutorial.

This concludes the Step 4 tutorial for Giant warehouse stock checks. When you are ready, please proceed to the next tutorial which covers order entry integration with Giant's dealer portal.

Step 5 – Purchase order integration with Giant dealer portal [PO Loader or Power Ops]
To view this recording visit digitalretailer.com/tutorials and scroll down to Giant Dealer Tutorials.

This tutorial demonstrates how you can push purchase orders created in RMS directly to Giant's order entry system online.

When purchase orders are created in RMS they default to the status of "Order not yet placed". This allows the retailer to generate a PO in worksheet fashion, and add items to it over several days before they process the order with Giant. The Bicycle Bundle includes a tool that expedites this process by transmitting the PO to Giant's order entry system.

PO Loader is accessed in RMS Manager by selecting Utilities, Add-ins. Or by running Power Ops and right-clicking on a purchase order. PO Loader lists the number of PO's on file for Giant that have not yet been placed. To process any of these orders, click Generate. This displays all open purchase orders that are available for processing. You can then select which orders to process by enabling the checkbox in the left column.

There are three steps to processing an order: Verify, View, and Process.
Verify allows the retailer to check stock availability and synchronize costs before processing.
If all items on the PO are in synch, and the costs are correct, Verified will have a checkbox enabled. If not, you'll want to view the PO before processing.

View displays the order and any stock outages, cost discrepancies, or discontinued items.
Notice that some items costs are not current in RMS. You can quickly sync the costs by clicking the Sync button. Also notice there is one item that can't be ordered and another item that is discontinued. You can remove this item from the order, and when you close this form, you are prompted to remove discontinued items. When you click Verify again notice the Verified checkbox appears, confirming all items on the PO are verified and in sync.

You can then select which POs you want to process. The Process button sends selected orders to Giant's Axapta system and marks the orders as placed in RMS.

Retailers can also quick link to the Giant dealer portal by clicking the globe icon from the main screen.

This concludes the Step 5 tutorial for order entry integration. When you are ready, please proceed to the next tutorial which covers Giant's pre-labeling service.

Step 6 – Giant Pre-Labeling program [DRS Tools]
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This tutorial shows how you can flag items for inclusion in Giant's pre-labeling program. This feature allows stores to receive products pre-labeled with the store's item lookup code, barcode, description, and retail price as listed in RMS. Labels are packaged with the products when shipped from a Giant warehouse. This accelerates receiving at the store and allows items to be unpacked and placed on the shelf immediately.

Pre-labeling is enabled in DRS Linker-Setup then controlled by running DRS Tools. DRS Tools is accessed in Manager, Utilities, Add-ins. Once loaded select Wizards, Pre-Labeling, and set supplier to Giant Bicycle. This will display all current Giant items in the RMS database. You can then filter the list by dept/category such as all Accessories.

First verify the retail prices are correct. Next mark which items should be included in the pre-labeling program by enabling the checkbox in the first column, then click Save. Once saved, this information is sent to Giant's Axapta system on a timed basis by DRS Linker. Normally this occurs once a day.

You can also use this wizard option to remove items from the pre-labeling service. To do that, enable the Marked Only checkbox and disable the checkboxes for selected items, and click Save.

This concludes the Step 6 tutorial for Giant's pre-labeling service. When you are ready, please proceed to the next tutorial which covers Giant's auto-replenishment service.

Step 7 – Giant Auto-Replenishment program [DRS Tools]
To view this recording visit digitalretailer.com/tutorials and scroll down to Giant Dealer Tutorials.

This tutorial shows how you can flag items for inclusion in Giant's auto-replenishment program. Purchase orders are then automatically generated for these products based on their min/max settings in RMS. These PO's are transmitted to Giant's order entry system on a timed basis. This means store managers need not worry about running out of basic stock items. This is especially helpful in-season when it's difficult to stay on top of reorders. This also ensures shelf space is maintained for Giant products.

Auto-replenishment is enabled in DRS Linker-Setup then controlled by running DRS Tools. DRS Tools is accessed in Manager, Utilities, Add-ins. Once loaded, select Wizards, Auto-Replenishment, and set supplier to Giant Bicycle. This will display all current Giant items in the RMS database. You can then filter the list by dept/category such as all Accessories or just Computers.

Next mark which items should be included for auto-replenishment by enabling the checkbox in the first column. Also verify the min/max settings in RMS are properly configured for each item. You can change reorder information by double-clicking on an entry or click View. When finished with your changes, click Save.

Restock Level (RSL) in RMS indicates the desired shelf quantity or maximum number to carry. Reorder Point (ROP) is the minimum quantity on hand to trigger a reorder. For example, a Restock Level of 12 with a Reorder Point of 2, would trigger a reorder of 10 when quantity on hand reaches 2.

Once this information is saved, these setting are used to generate PO's and transmit the orders to Giant's Axapta system on a timed basis (DRS Linker). This schedule is normally set to once a week. Orders can be pooled in Axapta and processed according to Giant's order minimums and shipping rules.

PO's generated by the auto-replenishment method will be numbered with the prefix AR for auto-replenish. This allows you to distinguish these orders from regular PO's when viewing open purchase orders in Store Operations Manager or Power Ops.

You can also use this wizard option to remove items from the auto-replenishment service by enabling the Marked Only checkbox, then disable checkboxes for selected items.

This concludes the Step 7 tutorial for Giant's auto-replenishment service. When you are ready, please proceed to the next tutorial which covers Retail Data Capture (RDC) for Giant products.

Step 8 – Giant Retail Data Capture (RDC)
To view this recording visit digitalretailer.com/tutorials and scroll down to Giant Dealer Tutorials.

This tutorial shows what sales and inventory information is collected for Giant's retail data capture program. This data helps Giant to accurately forecast demand cycles, allocate distribution between warehouses, and manage accounts.

Data Upload is enabled in DRS Linker-Setup and normally sent once a week on Monday morning.

This information can be viewed by running Store Operations Manager, Reports, Custom, Giant RDC Report. Accept the defaults and click OK to run the report. Data includes accumulated sales LM and YTD, quantity on hand, plus dates of last sold/received. To view all possible fields, right-click on the report and select Show/Hide.

This concludes the Step 8 tutorial for Giant's retail data capture reporting. If you'd like to view other tutorials in the series, please return to the main list.

If you have any questions about Giant integration with Microsoft RMS, please contact DRS support services by phone, email, or chat. Visit www.DRShelp.com for details. Thanks for watching.