DRS Add-ins
for Microsoft® RMS

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DRS AutoGen™ Help

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1   DRS AutoGen Online Help

1.1   Welcome

This utility allows you to configure the RMS database to automate certain procedures for new item adds or changes to selected data in Item Properties or Purchase Orders. Once configured **AutoGen** runs automatically as you create or update items.

AutoGen can be used to configure a Store Operations or HeadQuarters database depending on your license registration. **In a multi-store environment some options in AutoGen will be disabled when connected to a Store Operations database**. This is because HQ controls item code generation for a multi-store business.

NOTE: AutoGen should *only* **be installed once on the PC where your RMS database resides**. It should *not* be run from a workstation. This requirement applies to Windows Server 2003 and SBS environments and Store Operations or HQ. Once AutoGen has been configured and run, it does not need to be run again unless you want to change your original settings.

You can use AutoGen to:

- Define a pattern to autogenerate Item Lookup Codes (ILC) using a sequential number
- Define a pattern to autogenerate categorized ILCs using a category or dept/category prefix plus sequential number
- Define a pattern to autogenerate ILCs using a supplier code prefix plus sequential number
- Create a Special Order department* and autogenerate special order ILCs for use in POS (HQ database only)**
- Create a Trade-in department* and autogenerate trade-in ILCs for use in POS
- Automate sales tax assignment by location for new item adds in HQ (HQ database only)
- Define a default barcode type for printing ILCs in RMS; apply this setting to items on file without a barcode type
- Automate copying of the Supplier Reorder Number as an Alias
- Automate updates of Supplier and Supplier Reorder Number from Purchase Order entries

*The dept codes SO and TI are reserved for use with **DRS SO Tracker™** (Special Order Tracker).

Use this option with **DRS SO Tracker™. SO Tracker for Store Operations does not require special order ILCs when used in a single store environment.

AutoGen settings can be modified at any time, but we suggest you decide which features you'd like to use before loading your database. If you are installing AutoGen on a pre-existing database you should first decide if any changes to your dept/category codes are required. Example: If you are deploying autogeneration of categorized ILCs, you'll want to make sure your category codes are consistent with how you want your ILCs to appear in lookup screens and reports.

NOTE: AutoGen cannot be used fully with New Item Wizard when creating lookup codes for matrix, lot matrix, or assembly items. You can create the class lookup code (M, LM, A) but the class component entries will need to be renumbered. We suggest you use **DRS Power Ops™** or **DRS JumpStart™** which is faster than New Item Wizard and includes additional features. Both **Power Ops** and **JumpStart** fully support **AutoGen**.

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1.2 What's New?

The following updates or enhancements have been added since the initial release of **AutoGen**.

By December 2021

- Removed licensing requirement, expiry date, and copyright restriction.
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  To view a copy of this license, visit: http://creativecommons.org/publicdomain/zero/1.0

January 2014

- Updated licensing routine to show expiry date in header when 30 days remain, starts flashing when 15 days remain, and displays registration key form upon startup when 5 days remain

June 2012

- Changed email message used for sending registration request
- Moved registration key to database so user has to enter it only once for all workstations
- Added time limit to the registration key; updated Registration form and About form to show the expiry date

March 2008

- Tagalong option was removed due to conflicts with triggers and tagalong table
- Changed option to set item tax by store location in HQ to only update new items

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

March 2007

- Added code to reset database name if error is returned while loading department; allow user to enter correct database
- Added code so title will flash if expiring within 3 days
- Added code to decide if database is RMS v1 or v2 and read data from appropriate table
- Added code to accommodate new tables in RMS v2
- 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; email message includes store details

August 2006

- Added 30 day evaluation code

February 2006

- Added 8 digit option to Auto generate sequential ILC

- Added 5 digit option to Auto generate categorized code
- New option (AS) to Auto generate ILCs with supplier code prefix
- New user defined default barcode type
- Added code to set the barcode type for existing items if not already set
- Increased the timeout period to update SRN to Alias to handle more data changes
- New Tutorial link (see About, Online Tutorial)
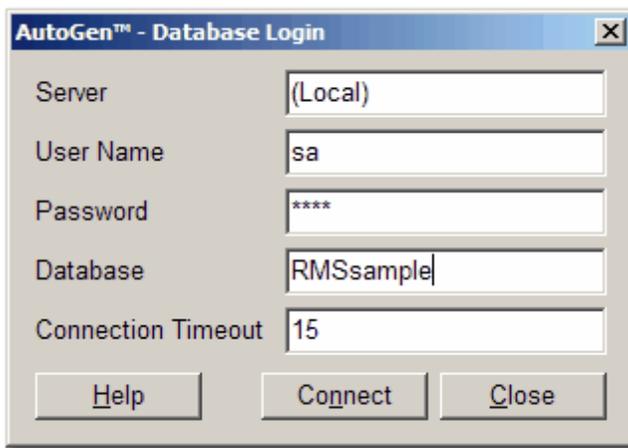
1.3 Configuration

1.3.1 Database connect

From your Windows Desktop select **Start**, **Programs**, **Digital Retail Solutions**, **DRS AutoGen**, **AutoGen**.
Once **AutoGen** loads select **Database**, **Connect**.
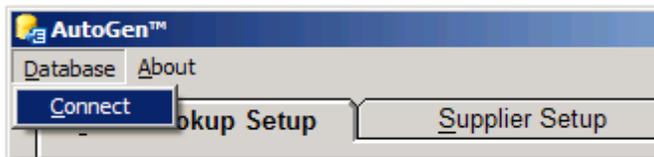
This will pop-up the login window:

Database Login:
Server: Name of your RMS server. Use (Local) if AutoGen 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.
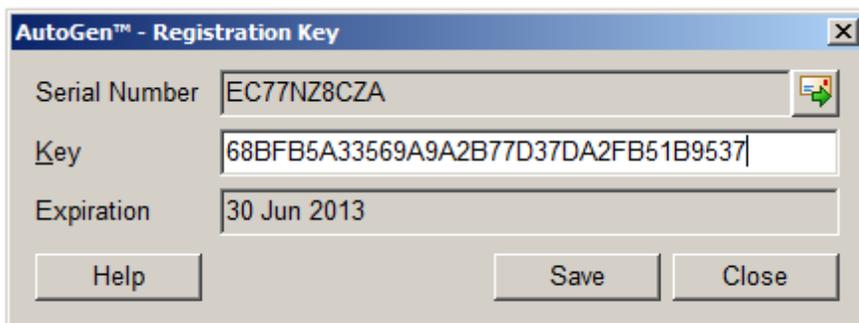
1.3.2 Registration

From your Windows Desktop select **Start**, **Programs**, **Digital Retail Solutions**, **DRS AutoGen**, **AutoGen**.
Once **AutoGen** loads select **About**, **Register**.
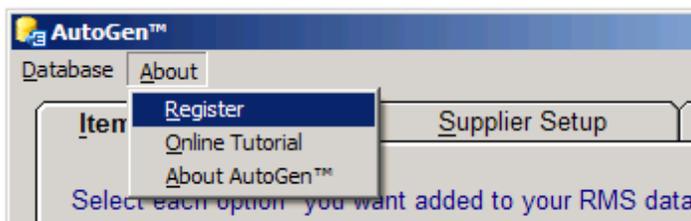
This will pop-up the registration key entry window.

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.

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.

Serial Number: If your serial number is not listed correctly, you must first connect to your database.

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

Key: When you receive your registration key, insert the key into the box provided and select **Save**. This will license all PCs running the same version of the application on the local network.

Expiration: Date shown will indicate the last day the software will run without renewing the license, To renew, click the envelope icon and follow the instructions.

NOTE: The expiry date will show in the title bar of the application when 30 days are remaining and start blinking when 15 days are left. The registration form will appear when 5 days are remaining. You should renew your license during this period to ensure continued operation. Click the envelope key and follow

the instructions. The expiry date is also displayed in the **About** form.

NOTE: If you are installing a DRS bundled suite of add-ins 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 Lookup Setup

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

The default tab is Item Lookup Setup.
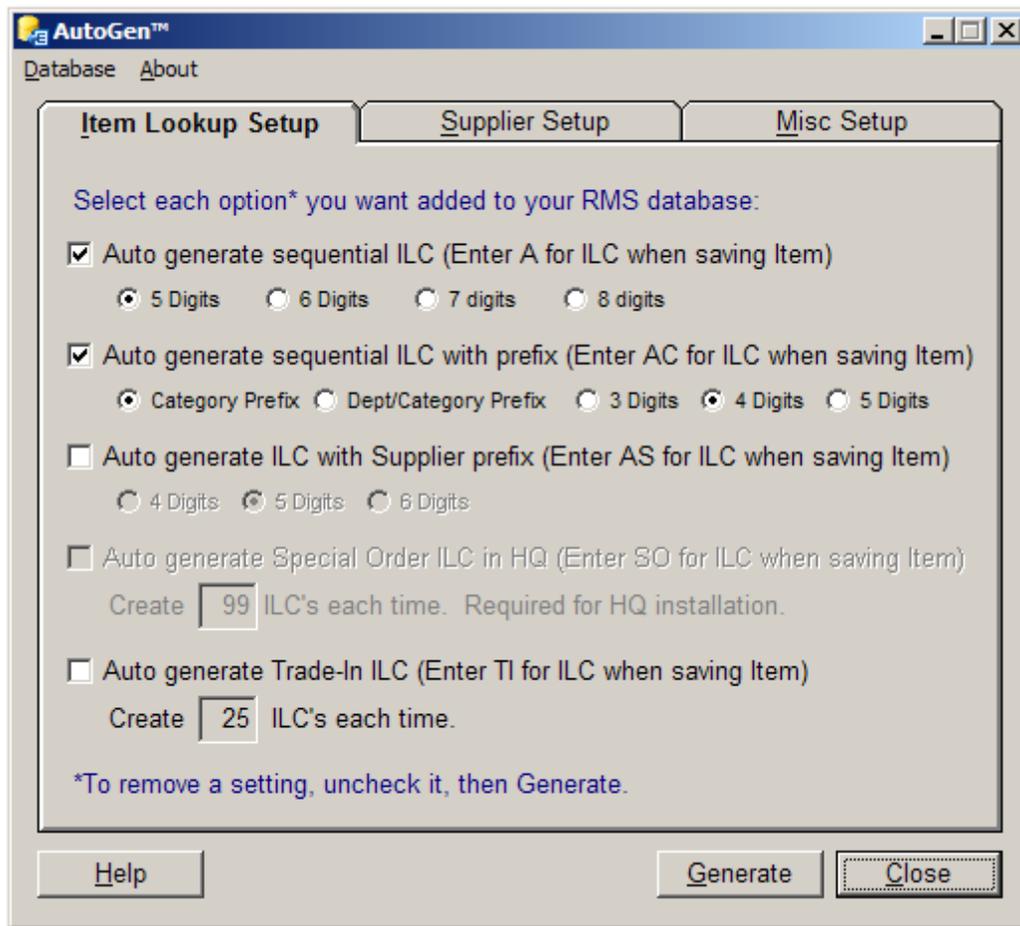
Auto generate sequential ILC creates item lookup codes based on a sequential 5, 6, 7 or 8 digit number. Select this option if you want to autogenerate sequential codes. Enter the letter "a" in the item lookup code when creating new items.

Example 5 Digit codes:
10000, 10001, 10002, 10003, etc.

Auto generate sequential ILC with dept/category prefix creates lookup codes based on a category code or dept/category code followed by a 3, 4, or 5 digit number. Select this option if you want to

autogenerate meaningful codes organized by category or dept/category. Enter the letters "ac" in the item lookup code when creating new items.

NOTE: If you do not have categories defined for a department, the prefix will be limited to the department code.

Example Dept/Category Prefix + 3 Digit codes:
ACLI001, ACLI002, ACLI003 where ACLI is the dept/category code for Accessories, Lights.
-- where AC is the dept code, LI is the category code, and 001 is the first sequential 3 digit number

NOTE: If you think you will have more than 999 items in any one category over time, choose the 4 digit setting (max=9999). If over 9,999 items in one category, choose 5 digits. If you reach the maximum count in any set, subsequent entries will be numbered at 000, 0000, or 00000 and must be manually edited. You can also start with 3 digits and switch to 4 or 5 digits as needed.

Auto generate sequential ILC with supplier prefix creates lookup codes based on a supplier code followed by a 4, 5 or 6 digit number. Select this option if you want to autogenerate meaningful codes organized by the primary supplier for each item. Enter the letters "as" in the item lookup code when creating new items. This option is best deployed when supplier codes are entered as short abbreviations or numbers, such a CAT or 101.

NOTE: If you do not have a primary supplier assigned to the item when saved, the ILC will end up as "as" and need to be renumbered by editing the item and adding a supplier entry.

Auto generate Special Order ILC in HQ is for use with a HeadQuarters database. Select this option to autogenerate special order codes which are assigned to each store location. These codes are then used by **DRS SO Tracker** to track and process special order items from POS. You can specify how many special order codes are generated each time this feature is executed. This feature will also create a Special Order department unless one already exists with a department code of SO.

NOTE: The dept codes SO and TI are reserved for use with **DRS SO Tracker**. If you have depts assigned with these codes already, you should change those codes before using SO Tracker. SO will be assigned to a Special Order dept and TI a Trade In dept when these features are activated.

Auto generate Trade-In ILC creates trade-in codes which can be selected and refunded in POS to handle trade-in items. You can specify how many trade-in codes are generated each time this feature is executed. This feature will also create a Trade-In department unless one already exists with the department code of TI.

WARNING: AutoGen ILC settings cannot be used freely with the New Item Wizard in RMS. If you create matrix, lot matrix, or assemblies using the New Item Wizard, you will need to manually renumber each component item created by the New Item Wizard. This is because the New Item Wizard applies its own numbering logic to component items as they are added to the database. However, AutoGen *will* work properly with the new item creator and matrix grid included in **DRS JumpStart** and **DRS Power Ops**.

1.3.4   Supplier Setup

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

Click on the **Supplier Setup** tab.

Auto update Supplier Reorder Number to Alias copies the supplier reorder number from the Supplier tab to Alias whenever a new supplier reorder number is added or updated. Select this option if you want to autogenerate aliases for each supplier reorder number. This expedites selling or receiving by supplier reorder number.

NOTE: This option will immediately update all existing records on file and copy unique SRNs to Alias.

WARNING: If you enable this option and use the New Item Wizard in Store Operations or HeadQuarters to create items, you may receive an error message "Row cannot be located for updating. Same values may have been changed since it was last read." This will only occur when saving a new item if the Supplier Reorder Number is entered *during* item creation. You can either ignore the error, add SRN *after* creating the item, use **DRS Power Ops** to add new items, or disable this function.

Auto update Supplier Reorder Number from Purchase Order copies the supplier reorder number from the Purchase Order to the item's Supplier tab whenever a Purchase Order is saved. Select this option if you want to update or add missing supplier reorder numbers direct from the Purchase Order Contents screen.

1.3.5   Misc Setup

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

Click on the **Misc Setup** tab.

Set Item Tax to store's default tax in HQ is for use with a HeadQuarters database. Select this option to automate sales tax selection when adding new items to the HQ database. To fully enable this feature you also need to set the default sales tax at each store. Run **Store Operations Manager**, **File**, **Configuration**, **Sales Tax**, **Default item tax group**, and select the item tax table you want to use. Repeat at each location. After the next 401 worksheet has been processed, new items added in HQ will default to the sales tax set at the stores.

Default barcode setting for Items allows you to select which barcode type is assigned to items created in RMS if one is not specifed during the creation process. 128A offers the most flexibility with regard to alphanumeric characters and support for ASCII (spaces, dashes, etc.). Other popular formats for point-of-sale use include 128B which adds support for lower case letters and Code 3 of 9. To generate the smallest possible width barcode we suggest using the AutoGen A option set to 6 digit sequential numbers and barcode type Interleaved 2 of 5.

NOTE: Don't confuse the barcode type used in RMS with pre-printed barcodes on product packaging deployed by manufacturers. What you are selecting here in **AutoGen** is the default barcode type used to render the ILC as a barcode when you print labels in RMS.

Unless you are entering UPC codes as ILCs in RMS, you would never select UPC-A as the barcode type in RMS (or AutoGen). If your products have UPCs pre-printed on the box, there is no need to print another barcode on your label unless you want the ability to scan the ILC in addition to the UPC pre-printed on the box.
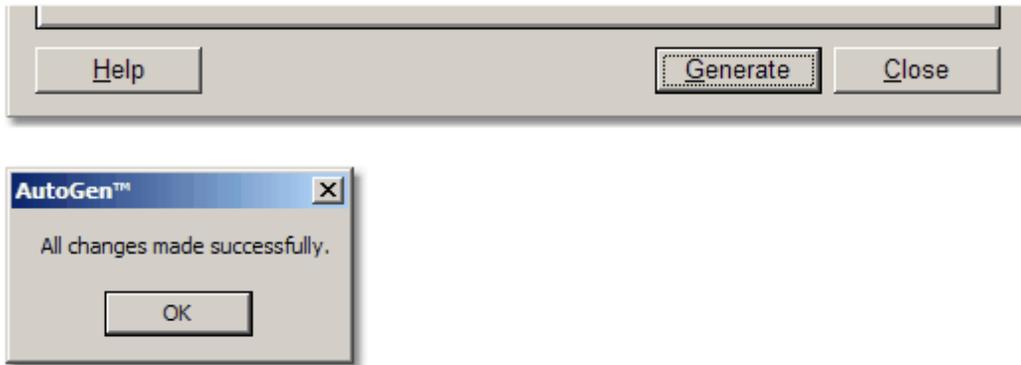
If you use **AutoGen** to generate your item lookup code numbers you should enter the product's UPC as an Alias. This ensures the item can be scanned for quick lookup independent of the Item Lookup Code. This double index works in all areas of RMS including Purchase Orders and Physical Inventory. Example: An autogenerated item lookup code of 10002 might be associated with a UPC entered as an

Alias as well as the SRN copied to Alias. The item will be found if you scan the UPC barcode on the box, scan the ILC barcode on the label, or enter the Supplier Reorder Number.

For more information on barcode types visit: http://www.adams1.com/pub/russadam/spec.htm
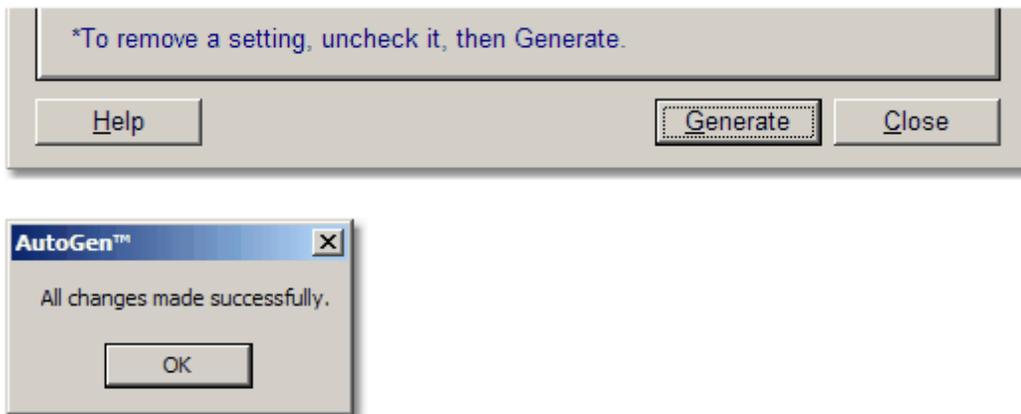
1.3.6 Generate Settings

When you have completed your configuration settings click on **Generate** to install your settings to your RMS database.

Click **Close** when successful.

1.3.7 Change Settings

To remove or update your AutoGen settings, make your changes under Item Lookup, Supplier, and Misc tabs, then click on **Generate**.

Click **Close** when successful.

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.

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 **V**iew, **Alt-C** for **C**lose

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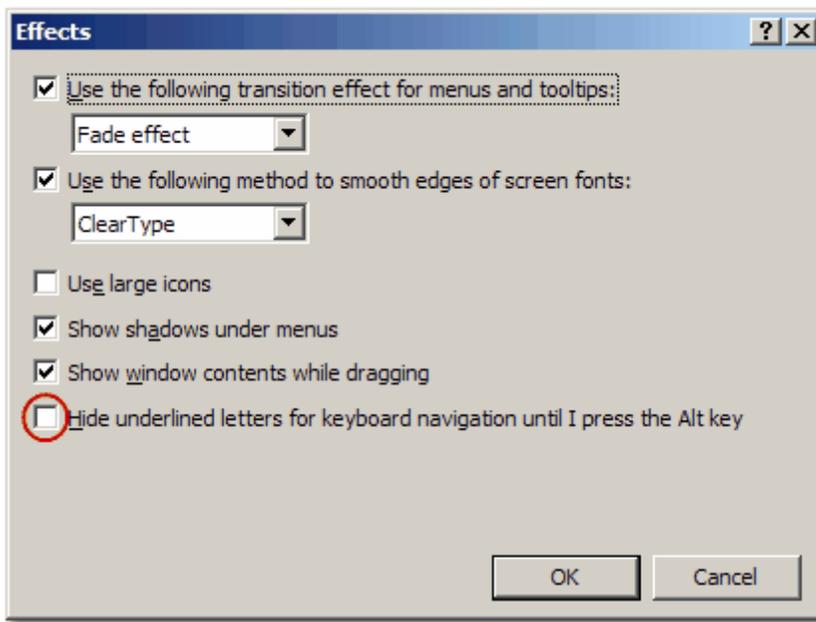
Bright blue text is used whenever a checkbox option has been enabled to aid quick identification.

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   New Items

Once you have configured your Item Lookup Settings you are ready to use AutoGen for creating new items. The examples shown below may or may not be active depending on which settings you have selected.

Select **Manager, Database, Items, New, Standard.** This will bring you to the Item Properties for a new item.

Option 1: Sequential Item Lookup -- Enter a or A into the **Item Lookup Code** field to generate a

sequential lookup code according to your setting. Complete the remaining entries on the **General** tab for your new item and click **OK** to save.

Example:

Enter A to autogenerate a sequential item code and click **OK**.

Item lookup code:	a
Description:	New Widget

This creates a sequential item lookup code.

Item lookup code:	100000
Description:	New Widget

This option can also be used to renumber an existing item.

NOTE: If you reach the maximum count within a sequential ranges, such as 99999 for 5 digit codes, subsequent entries will be numbered at 00000 and must be manually edited.

Option 2: Categorized Lookup Code -- Enter ac or AC into the **Item lookup code** to generate a categorized lookup code according to your settings. Complete the remaining entries on the **General** tab for your new item and click **OK** to save. You must assign department and category for the AC option to function properly. **If you do not have categories defined for a department, the prefix will be limited to the department code**.
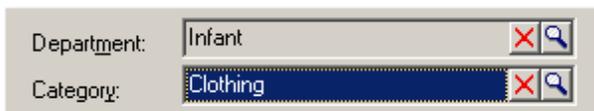
Example:

Enter AC to autogenerate a categorized code.

Item lookup code:	ac
Description:	New Infant Clothing Item

Assign a department and category and click **OK**.

Department:	Infant
Category:	Clothing

This creates a categorized item lookup code where 100 is the Infant dept code, CL is Clothing category code, and 001 is the first sequential 3 digit number.

Item lookup code:	100CL001
Description:	New Infant Clothing Item

This option can also be used to renumber an existing item.

NOTE: If you reach the maximum count of 999 or 9999 for three or four digit codes, subsequent entries will be numbered at 000 or 0000 and must be manually edited.

Option 3: Supplier Prefix Lookup Code -- Enter as or AS into the **Item lookup code** to generate a lookup code according to your supplier prefix settings. Complete the remaining entries on the **General** tab for your new item, then click the **Supplier** tab and assign a Primary supplier, and click **OK** to save. You must assign a primary supplier to the item for the AS option to function properly.

Example:

Enter AS to autogenerate a supplier prefix code.

Assign a primary supplier and click **OK**.

This creates a sequential item lookup code with the supplier code as a prefix (ex. DATUMxxxxx).

This option can also be used to renumber an existing item.

NOTE: We suggest you keep your supplier codes short for this function, such as abbreviations or numbers.

Option 4: Special Order Codes (HeadQuarters only) -- Enter so or SO into the **Item lookup code** to generate a series of special order codes by store ID. Click **OK** to save and generate. *This option works for a HeadQuarters database only. To track Special Orders in Store Operations use **DRS SO Tracker**.*

Example:

This will create a series of unique special order items for each store location. These items are marked inactive by default and won't be visible except when activated by **DRS SO Tracker** or if you run a report listing Inactive items.

As special order item codes are depleted you can 'recharge' your database with more special order codes by repeating the SO process.

Option 5: Trade-In Codes -- Enter ti or TI into the **Item lookup code** to generate a series of trade-ins codes. Click **OK** to save and generate.

Example:

This will create a series of unique trade-in items for use in POS. These items will be selected and returned in POS to credit trade-ins during a sale. You should also create a Reason Code in Manager to return the trade-in item to the sales floor if the item will be sold as is, or to move the item to offline inventory if the item will be refurbished before sold.

As trade-in item codes are depleted you can 'recharge' your database with more trade-in codes by repeating the TI process.

1.4.3   Supplier Reorder Numbers

Once you have configured your Supplier Setup options, AutoGen will cause Supplier Reorder Numbers (SRN) to be updated automatically. The examples shown below may or may not be active depending on which settings you have selected.

Option 1 -- If you have enabled **Auto update Supplier Reorder Number to Alias** any entries made under the Supplier tab will be copied as an Alias.

Select **Manager, Inventory, Items**. Select an existing standard item or create a new one. Click on the **Suppliers** tab.

Example 1:

Add a Supplier and Supplier Reorder Number and click **OK** to save.

General	Inventory	Suppliers	Pricing	Discounts	Commission

Primary?	Supplier Name	Reorder No.	Min. Order	MPQ	Cost	
☑	Blue Yonder Airlines	AC-19982	12	12	$124.990	Add
☐	Wide World Importers		12	12	$113.450	Delete
						Primary

2 entries

This action will also create an entry under Alias with the same Supplier Reorder Number.

Aliases	Substitutes	Special	Serial	Kit	Options

Alias	
AC-19982	Add
	Delete

1 entry

Example 2:
Update a Supplier Reorder Number and click **OK** to save.
This will remove any matching SRN entry under Alias and replace it with the updated entry.

Example 3:
Clear a Supplier Reorder Number and click **OK** to save.
This will remove any matching SRN entry under Alias.

Option 2 -- If you have enabled **Auto update Supplier Reorder Number from Purchase Order** any entries made under the Reorder Number column in the Purchase Order will be updated to the Supplier tab for that item.

Select **Manager, Inventory, Purchase Orders.** Select an open purchase order or create new one. Click on the **Contents** tab.
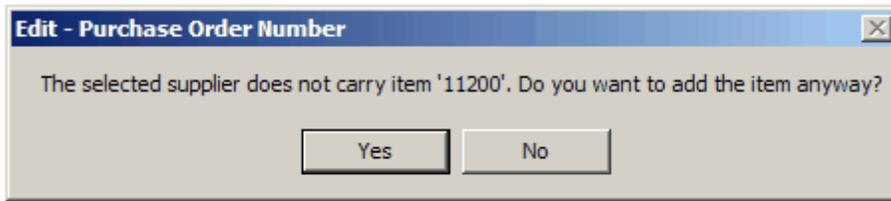
Example 1: Add a missing Supplier Reorder Number (called Order No.) to a purchase order.

Header	Contents

Contents: entries: 1

Type	Item Lookup Cod	Order No.	Description	Qty OH	Qty Com	Qty Ord	Cost	Extended	Tax Rate	Tax
	11200	AC-19982	R/C Glider	39	4	1	$124.99	$124.99	0.000%	$0.00

When the purchase order is saved the missing Supplier Reorder Number will be updated to the Supplier tab for that item.

Example 2: Change a Supplier Reorder Number (Order No.) on a Purchase Order. When the purchase order is saved the changed Supplier Reorder Number will be updated to the Supplier tab for that item.

Example 3: Assign an item to a new Supplier with Supplier Reorder Number (Order No.) on a Purchase Order.

When the purchase order is saved the new Supplier and Supplier Reorder Number will be updated to the Supplier tab for that item.

1.4.4   Renumbering

You can renumber an existing item code at any time by entering A, AC, or AS in the Item Lookup Code field and clicking OK. Since RMS uses an internal ID for each item, renumbering an existing item does not adversely affect its position in the database or lose any associated transaction data.

Renumbering may be required to keep your item code entries consistent or after creating a matrix, lot matrix, assembly class lookup code with component items.

Example:

BEFORE

Enter AC to autogenerate a categorized code, verify department and category are assigned, and click **OK**.


AFTER

Enter A to autogenerate a sequential number.
Enter AS to autogenerate a sequential number with supplier code prefix (requires primary supplier
entry in Supplier tab).

1.4.5 SO ILC Count (HQ only)

When **DRS SO Tracker** is used in an HQ environment, a number pool of special order ILCs (Item Lookup
Codes) is maintained in **HQ Manager**. These numbers need to be replenished whenever they run low.

SO Tracker will display the current number pool count in the lower portion of the screen when run from
within POS.
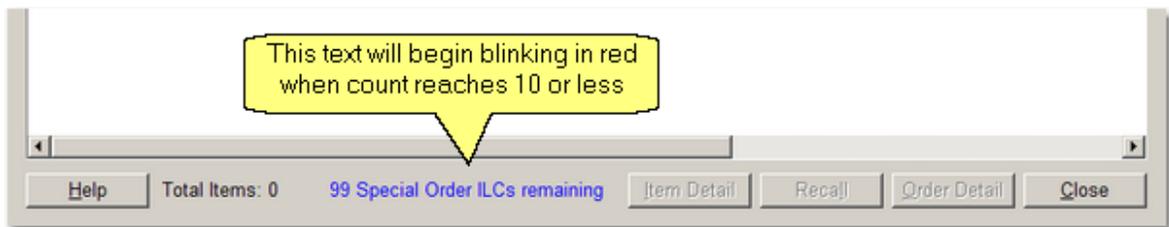
When the count drops below 10, the count indicator text will change from blue to blinking red.
Store personnel should notify the person in charge of HQ Manager to generate more SO codes. If the
count drops to 0 you will not be able to enter any more Special Order items until the SO codes have
been replenished.

Replenishment instructions:

NOTE: To automate replenishment of SO codes, see **HQ Bridge** instructions. Once automated, you can
skip Step 1 and Step 2 below. If you do elect to automated this process, you should NOT process
worksheet 250s as indicated in Step 2 below.

To manually replenish SO codes, follow these steps.

Step 1: To generate additional SO codes, run **HQ Manager**, activate **Maintenance Mode**, select
Items, **Database**, **New**, **Standard** and enter "so" as the **Item Lookup Code**, then click **OK**. This will
generate new special order codes for each store location. Note: These items will not be visible in the
item list as they are marked Inactive until used at the store level.

Step 2: Next run **Worksheet 250**, **All stores**, **Use items in these departments**, select **Special Orders**
dept. Generate the worksheet, then right-click on the **Contents** page and select **Recently changed**
(today's date). This will populate the worksheet with the generated SO codes. **Approve** the worksheet
and the next **401 Data Upload** will send these items down to each store for use with SO Tracker.

IMPORTANT: Do not process a worksheet 250 for the same item codes again or you will end up with duplicate codes at the stores.

1.5   Contact Info

Digital Retail Solutions Contact Information

info@digitalretailer.com

Mailing Address:
Digital Retail Solutions Inc.
2014 Electric Rd PMB 205
Roanoke, VA 24018-1938
USA

www.digitalretailer.com
Digital Retail
S O L U T I O N S