Enter/Edit a Sales Package

PROGRAM NAME: PACKAGE
MENU OPTION TITLE: Enter/Edit a Sales Package
MAIN MODULE: SALES ORDER PACKAGES
HELP KEY ACTIVE: YES

PROGRAM OVERVIEW

The Sales Package is a tremendous sales aid that is almost totally unique to the IBS sales systems. You can use one part number that can represent a whole list of inventory parts that you are selling as a group. This will help simply order processing and aid the order processor in offering a wider range of valued "Sales Packages" to their customer. With this function, you can support an aggressive sales environment that constantly groups and re-groups various products together to make sales packages attractive to their customers. This can be done without the interaction of the manufacturing system and without having to generate a work order to process the items. With this in mind, you cannot associate cost to a Sales Package. Full control is in the hands of sales if so desired.

This is not to be confused with a bill of materials. A bill of materials is a key component of a manufacturing work order system, which uses a part number to represent a whole list of parts that make up the part, and desires to collect full cost toward the manufacture of that part.

There is one limitation to the use of this system. You will not be able to use the automatic quantity discounting capabilities of either the Point of Sale or Distribution Order processing when using sales packages. This is because the pricing of any parts within a package is set also within the package. This allows you to have a discounted price for the parts a customer buys within a package other than purchased separately. This pricing overrides the individual parts prices in their respective part master file.

A recommended way to get around this is to create multiple packages for the quantities with the corresponding discounted pricing in each package. For example: "+A1" represents package "A" quantity one; "+A2" represents package "A" quantity two; and so on. Have each of these two packages pull up the right quantities at the right discounted prices for the parts within them.

NOTE: If you assign a Retail, Dealer, and Wholesale price to any Sales Package, you must make sure that the individual price on each item within the package totals up to the displayed price of the package part number.

When you type the package part number into an order, the assigned price displays in the {UPRICE} field. After you confirm the item on the order, the order detail will blank that Package Part number and replace it with the list of items and their respective selling price, represented by that Package Part number.

The function keys allow you to print the Sales Package along with many other features. F1 will display a list of function keys to assist you in this program and F7 will

show an options menu.

PROGRAM OPERATION

PACKAGE PART #: To create a new package part number, you need to decide on the part number scheme to use. The only requirement for a package part number is to have it begin with a (+) plus sign. This is the way the system recognizes Package Part number.

You should only create Package part numbers on this program. If you have created the part numbers in {INPRTGUT}, they are not ready to sell yet. This program is used to build the packages into sellable part numbers by adding the saleable items to the package. This also effects the price information. If you create and assign package prices in the part creation program {INPRTGUT}, you must ensure that the item pricing in the package detail adds up to the price assigned in {INPRTGUT}.

Also, when you set up this part, you should use your company as the MAIN VENDOR ID. The excise tax should be left blank. The standard flags should be left as they are default loaded. You will need to type in the sales account and cost account as normal. Leave all the pricing and cost information all blank.

This package does not exist. Do you want to create it (Y/N)? <Y>: Press <ENTER> to continue or tap the "N" key to start over.

DESCRIPTION: If you have typed in a new number, you can enter in the description that will represent the Package Part number. This field will fill in automatically when an existing PACKAGE PART # is typed in at the previous field and an options display will show at the bottom of the screen. These options are...

<A>dd allows you to add new valid parts to the package.

<C>hange will allow you to change the line that is currently hi-lighted.

<D>elete will prompt you for a line you wish to delete. This will be the line that is currently hi-lighted. You will be prompted

DELETE THIS LINE <Y/N>? Simply tap <Y> to delete or <N> to cancel this option.

<S>ee More allows you to scroll through all parts in the package.

<Q>uit? allows you to quit the program, saving all entries.

LINE#: This number is the unique identifier for each line in the sales package. The program assigns this number automatically. You can insert a line by typing in a line number that will place the line where you want it.

PART #: This must be a valid part number in the inventory master file. Hitting <ENTER> with no entry in this field will take the curser back to the bottom of the

screen and bring up the options again. You cannot include a package within another package. Also, you are not limited to the number of parts in a package, but you cannot have the same part twice within the same sales package.

TIP: You may want to have a text note that goes along with each package for explanation of the pricing and package, etc. You can do this by creating a part number for text purposes, using the parameters in the part as discussed in the {PART} paragraph above. Stock the part number with the maximum quantity so it can be deducted and not left backordered.

DESCRIPTION: This is the description of the valid part. You can change this description or just enter past this field.

QTY: This is the quantity of the part number entered in on this line per this package. In other words, if you want this package to pull up two of a part, then you will type in the number <2> here!

WHLSLE PRICE: This is the wholesale price of the part. You can use the price in the parts master file or put a different price in.

DEALER PRICE: This is the dealer price of the part. You can use the price in the parts master file or put a different price in.

RETAIL PRICE: This is the retail price of the part. You can use the price in the parts master file or put a different price in.

Just as a final reminder on the pricing. If you have multiple items in a package, you must be sure the individual prices equal the price of the package part.