ACTIVANT®

Eclipse Palm RDC

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Legal Notices

Activant® Eclipse™ 8.6.2 Online Help System

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Palm RDC Overview

The Eclipse Palm Remote Data Collection (RDC) companion product facilitates inventory replenishment, billing, and counting at customer locations. Palm RDC operates on Palm devices with or without integral barcode readers. You can scan or manually enter order and count information and then upload this data to Eclipse using the Palm device HotSync feature.

Like all Eclipse Companion Products, your Eclipse installer must install and activate Eclipse Palm RDC before you can use it on your system.

RDC Order and Stock Levels Replenishment

You can use Palm RDC for both consignment and non-consignment customers. For non-consignment customers, use Palm RDC to create orders. For consignment customers, create billings of usage and perform counts for replenishment transfers.

Palm RDC has two replenishment counting modes:

- **Orders** – Orders or consignment billings are created based on product quantities entered or used.
- **Levels** – Orders or consignment billings, and current on-hand levels are created based on minimum and maximum stock settings.

RDC Auto Replenishment

RDC Auto Replenishment is similar to RDC Order and Stock Levels Replenishment. You can create Auto Replenishment orders in Order or Stock Levels mode. With Auto Replenishment, however, you can also create orders to completely replenish stock regardless of the on-hand quantity.

Auto Replenishment uses unique identifiers to tie individual products to customers so that it is not necessary to define customers on the Palm device, as you must do for RDC Order and Stock Levels Replenishment.

RDC Cycle Counting

You can also use Palm RDC for cycle counts or physical inventories in the warehouse.

RDC cycle counting works with standard Eclipse physical inventory programs to track and update on-hand quantities. Upload cycle count data from a Palm device to the Eclipse system to populate the physical count load in screen. Use normal cycle counting functionality to find quantity variances and adjust system quantities.

See Also:

Palm RDC Setup Overview

RDC Order and Stock Level Replenishment Overview

Palm RDC Setup Overview

Before using Palm RDC, you need to set up the functionality on both your Eclipse system and Palm devices.

- Begin by ensuring that the Palm RDC software is installed on both desktop terminals and Palm devices.

  Note: Your Eclipse installer will install the Palm RDC software and help you set up Palm devices. To update the software to a new version, look on the Eclipse Support website under "Software Downloads."

- After Palm RDC software is installed onto your system and Palm devices, define control and authorization parameters, customers, and customer part numbers.
- Finally set Palm RDC parameters on all Palm devices that will be used to gather RDC data.

See Also:

Palm RDC Setup on Eclipse Overview

Palm RDC Setup on Palm Devices Overview

Palm RDC Overview

Palm RDC Setup on Eclipse Overview

Palm RDC requires parameters to be set up on Eclipse before using it with Palm devices.

Setting up Eclipse includes:

- Verifying that the User Defined Upload Processing Routine has been defined for cycle counting.
- Defining Remote Order Entry parameters for customers.
- Defining control maintenance records and authorization keys.
- Flagging ship-to customers for consignment inventory.
- Defining customer part numbers, if required.

See Also:

Palm RDC Setup Overview

Setting Up the RDC Cycle Count Upload Routine

For uploading of cycle count information to work properly, the RDC Cycle Count Upload format must be defined and the corresponding upload subroutine must be assigned to the format.

Your Eclipse installer typically performs this setup when installing Palm RDC. If for some reason this setup has not been done or if the routine gets deleted, you must define the name and assign the corresponding subroutine.

To verify and set up the RDC Cycle Count Upload Routine:

1. From the **Tools > User Defined Documents** menu, select **User Defined Upload Processing** to display the User Defined Upload Format Maintenance screen.
2. In the **Upload Format Title** column, verify that **RDC Cycle Count Upload** exists.
3. In the **Subroutine Name** column, verify that the name corresponding to **RDC Cycle Count Upload** is **RDC.PHYS.UPLOAD**.
4. If they do not exist in the list, position the cursor in a blank line at the bottom of the list and enter them as specified in steps 2 and 3.
5. Press **Esc** to save the information and exit the screen.

See Also:

Palm RDC Setup on Eclipse Overview

Defining Remote Order Entry Parameters for Palm RDC Customers

Before counting inventory at customer sites, you must define Remote Order Entry parameters in the Eclipse customer records. Use the Remote Order Entry Parameters screen to set the following options:

- When to log bids or orders for review.
- Who to notify when counts information is uploaded.
- The users responsible for monitoring the Remote Order Entry Review Queue.
- Which order status to assign to transactions created from uploaded count information.
- Whether to round order quantities to package quantities.
- Whether users receive discounts when placing orders remotely.

To set remote order entry parameters on Eclipse for Palm RDC customers:

1. From the **Files** menu, select **Customer** to display the Customer Maintenance screen.
2. In the **Customer/New** field, enter the ID for the customer whose parameters you need to set.
3. Use the **Remote** hot key to display the Remote Order Entry Parameters screen.
4. Set the following parameters:

Field	Description
Log Bids for Review	Define when you want to send bids created from uploaded count information to the Remote Order Entry Review Queue. • **New Order** - Send bid to the queue whenever uploading count information creates a bid. • **Changes** - Send bid to the queue whenever you make changes to a bid created from uploading count information. • **Disable** - Do not send bids to the queue when uploading count information creates a new bid. **Note:** Leave this field blank to send the bid to the Remote Order Entry Review Queue.

Field	Description
Log Orders for Review	Define when you want to send orders created from uploaded count information to the Remote Order Entry Review Queue. • **New Order** - Send order to the queue whenever uploading count information creates a new order. • **Changes** - Send order to the queue whenever you make changes to an order created from uploading count information. • **Disable** - Do not send orders to the queue when uploading count information creates a new order. **Note:** Leave this field blank to send the order to the Remote Order Entry Review Queue.

Default User Messaged With New Order #	Enter the user ID for the user who is notified when uploading count information creates a new transaction.
	Note: Use the **Multi** hot key to select more than one user ID.
	• The system first checks for which settings to use:
	  • Settings for a ship-to customer override those set for the bill-to customer.
	  • Settings for the bill-to customer override those set for all customers using the Round To Sell Package Quantity On RDC Orders And Pocket OE Orders control maintenance record.
	• The system then checks for the defined user to be messaged:
	  • The user or users identified in the **User to be Messaged With New Order #** field on the Customer Remote Message Maintenance screen is messaged first.
	  • The user or users identified in the **Default User Messaged With New Order #** field on the Remote Order Entry Parameters screen is messaged next.
	  • The user identified in the **Default User Messaged With New Order** field in the Default Remote Order Entry (ROE) Messaging control maintenance record is messaged last.

Remote Order Queue Users	Enter the user or group responsible for monitoring orders in the Remote Order Entry Review Queue, and clearing the orders for processing for all remote order entry applications. Use the **Multi** hot key to include multiple user IDs or message groups.
RDC and Pocket OE Default Order Status	Define the order status to which to default for transactions created when you upload count information. We recommend using **Bid** as the order status to which to default. This allows for each transaction order to be inspected for errors. **Note:** Leave this field blank to use the **Bid** order status as the default.

Field	Description
Round to Sell Pack Qty on Remote Orders	Define whether users can order quantity that does not match the standard package quantity. • **No** - Allows the user to order any quantity. Does not notify the RDC Administrator. • **Warn** – Sends the user a message when placing a remote order indicating that the quantity selected is not an even multiple of the package quantity for the product. The user still has the option to order below the package minimum. Notifies the RDC Administrator that there are products on the order that are either below or that are not divisible by the minimum sell package quantity. • **Force** – Sends the user a message when placing a remote order indicating that the quantity selected is not an even multiple of the package quantity for the product, and changes the quantity to the standard package quantity with no option to change it. Does not notify the RDC Administrator unless there is an error. **Note:** Leave this field blank to use **No** as the default.
Remote/WOE Order Entry Discount%	Enter a percentage discount to apply to remote and web orders, if needed.

5. Repeat the process for all other customers using Palm RDC.
6. Press **Esc** to save the settings and exit the screen.

See Also:

Palm RDC Setup on Eclipse Overview

Defining Palm RDC Customer Consignment Sites

Product Replenishment Setup for Palm RDC Overview

Setup Requirements for Palm RDC

Following are the control maintenance records and authorization key used for Palm RDC.

Control Maintenance Records

Set the following control maintenance records:

PALM RDC

- Disable RDC Sync Logging

RDC SRC (Source)

- Default RDC Sales Source

RDC (Remote Data Collection)

- Palm RDC And Pocket OE Default Product If Not Found
- RDC Administrator Settings
- Round To Sell Package Quantity On RDC Orders And Pocket OE Orders

Inventory Consignment

- Allow Customer Consignment From Multiple Branches

Authorization Key

Assign the following authorization key:

- ENTITY.PN.EDIT

See Also:

Palm RDC Setup on Eclipse Overview

Palm RDC Setup Overview

Palm RDC Administrator Settings

Creating the Palm RDC Default Product If Not Found Record

Palm RDC Administrator Settings

You can assign a user at a branch to be the Palm RDC administrator in the RDC Administrator Settings control maintenance record.

It is not mandatory to assign an administrator. If an administrator is not assigned, the user assigned to the **User to be Messaged with New Order #** field on the Remote Order Entry Parameters screen will receive information that an RDC administrator routinely receives.

The RDC administrator and the user defined on the Remote Order Entry Parameters screen are meant to receive different information, unless they happen to be the same person. The user defined on the Remote Order Entry Parameters screen receives a basic notification that a new order has been entered on a Palm device.

An RDC administrator receives the following information:

- Existence of a new order entered on a Palm device.
- Notification of a change to a customer's shipping address.
- Notification of a change to a customer's existing purchase order number. If a purchase order number is added and there was no number assigned to which to default, the RDC administrator is not notified of the new number.
- Notification of a change to a customer's existing release number. If a release number is added and there was no number assigned to which to default, the RDC administrator is not notified of the new number.
- Notification when the user specified in the **Ordered By** field on the RDC Header screen does not match any of the users listed as authorized personnel on the Customer Authorization Maintenance screen, or if a name was not specified in the **Ordered By** field on the RDC Header screen and the customer requires that one of the names from the Customer Authorization Maintenance screen be specified.
- Notification of the number of items in a cycle count queue that were successfully counted, for example, 2543 of 2543.
- Notification that the zip code did not match the city. If that happens, the system uses the defined ship-to address assigned to the customer record and includes in the message the ship-to address that the user attempted to enter.
- Results from the RDC Sync Log report, sent automatically upon transferring information to Eclipse.
- Notification of incorrect customer settings. Examples of incorrect could be that no ship branch or price branch override is defined, or the customer is invalid.

See Also:

Setup Requirements for Palm RDC

Palm RDC Setup on Eclipse Overview

Creating the Palm RDC Default Product If Not Found Record

Palm RDC uses the product defined in the **Palm RDC And Pocket OE Default Product If Not Found** control maintenance record in the event that an incoming product number cannot be located in your Eclipse Product file. When you review RDC orders, substitute the correct product for this placeholder.

This "product not found" record is created by your Eclipse installer and assigned during the initial setup of Palm RDC. If no product record has been created and assigned to the **Palm RDC And Pocket OE Default Product If Not Found** control maintenance record, perform the following setup task.

To create a product not found record to which to default for Palm RDC:

1. From the **Files** menu, select **Product** to display the Product Maintenance screen.
2. Create a new product record, supplying the minimum information to save the record.

   Note: We suggest that when you create the product record, you specify *****RDC PRODUCT NOT FOUND***** as the product description. Include the asterisks and use all upper case letters.

3. Press **Esc** to save the record and exit Product Maintenance.
4. From the **System > System Files** menu, select **Control Maintenance** to display the Control Maintenance screen.
5. In the **Keyword** field, enter **default product if not found** to display the Palm RDC And Pocket OE Default Product If Not Found control maintenance record.
6. At the prompt, enter *****RDC PRODUCT NOT FOUND*****.
7. Press **Esc** to set the product not found record as the default and exit Control Maintenance.

See Also:

Creating Product Records

Setup Requirements for Palm RDC

Palm RDC Setup on Eclipse Overview

Customer Consignment Sites Setup for Palm RDC Overview

Before using Palm RDC to maintain customer consignment sites, you must perform the following setup:

- Define customer consignment locations.
- Create ship-to accounts for customer consignment locations.
- Consign inventory to a customer location.

See Also:

RDC Order and Stock Level Replenishment Overview

Palm RDC Setup on Palm Devices Overview

Palm RDC Setup on Eclipse Overview

Defining Palm RDC Customer Consignment Locations

Before you can use customer consignment inventory with Palm RDC, you must define customer consignment locations in Customer Maintenance.

Defining Customer Consignment locations

Define Palm RDC customer consignment locations using the Miscellaneous Customer Information screen. Along with flagging a customer as being able to maintain consignment inventory, define the customer's shipping branch, pricing branch, and ship-to account.

To define a Palm RDC customer consignment locations:

1. From the **Files**, select **Customer** to display the Customer Maintenance screen.
2. In the **Customer/New** field, enter the ID for the consignment customer whose parameters you need to set.
3. Use the **Add'l Info** hot key and then the **Misc Cust Info** hot key to display the Miscellaneous Customer Information screen.
4. In the **Shipping Branch Override** field, enter the branch that will ship products to the Palm RDC customer consignment location.

   Note: The shipping branch override must be the same as the Home branch set for the customer.

5. In the **Pricing Branch Override** field, enter the branch that prices the products for the Palm RDC customer consignment location.
6. In the **Consignment Inventory? (Y/N)** field, enter **Y** to mark the customer as a consignment customer.
7. In the **Under Ship-to** field, enter the ship-to or bill-to/ship-to account responsible for maintaining the consigned inventory.

   For example: A customer has multiple job sites that are serviced from a single parts trailer. Set the single parts trailer as the ship-to or bill-to/ship-to account for all of its job sites.

8. Press **Esc** to save changes and exit the screen.

Defining the Customer Consignment Home Branches

A customer consignment Home branch fills all of its customer consignment transfer orders. Define each Palm RDC customer consignment Home branch in the Accessible Branches screen.

Note: If the Allow Customer Consignment From Multiple Branches control maintenance record is set to **Y**, branches other than a customer's home branch can ship consignment inventory to the customer.

To define a customer consignment Home branch:

1. From the **Files**, select **Customer** to display the Customer Maintenance screen.
2. In the **Customer/New** field, enter the ID for the consignment customer whose Home branch you need to set.
3. Use the **Branch** hot key to display the Accessible Branches screen.
4. In the **Home Branch** field, enter the branch that will fill all of the customer consignment transfers for the defined customer.

   The Home branch must be the same as the Shipping Branch Override.
5. Press **Esc** to save changes and exit the screen.

See Also:

Ship-To Accounts Setup for Palm RDC Consignment Locations

Customer Consignment Locations Setup for Palm RDC Overview

Defining Remote Order Entry Parameters for Palm RDC Customers

Identifying Products to Count for Palm RDC

Palm RDC Setup on Eclipse Overview

Ship-To Accounts Setup for Palm RDC Consignment Locations

Create a customer ship-to account that is specific to the customer consignment inventory location. For the customer ship-to account, create both a ship-to only and a bill-to/ship-to account. The ship-to account uses the bill-to/ship-to account as its bill-to account. These separate ship-to accounts will be loaded on the Palm device.

> **Note:** You cannot use a bill-to account only for customer consignment inventory.

For information on how to create customer ship-to accounts, see Creating Customer Records.

Setting up multiple ship-to accounts for a single location

You can set up multiple ship-to accounts for a single consignment site. In addition to creating the ship-to and bill-to/ship-to accounts for the consignment location, do the following:

- From the Customer/Vendor Specific Part Numbers screen, set minimum and maximum levels for all consignment items within the master ship-to account. These levels settings apply to all subordinate ship-to accounts that you associate with the master ship-to account.
- On the Palm device, create subordinate ship-to accounts as customers for each consignment location. Assign either Order or Levels mode to each customer. DO NOT set up the master ship-to account in the Palm device.

See Also:

Defining Palm RDC Customer Consignment Locations

Customer Consignment Locations Setup for Palm RDC Overview

Identifying Products to Count for Palm RDC

Defining Palm RDC Customers

Palm RDC Setup on Eclipse Overview

Inventory Consignments for Palm RDC Customers

To provide customer consignment locations with inventory, create a customer consignment transfer.

- Use the Suggested Consignment Auto Transfer utility to determine what items need to be transferred to the customer based on minimum and maximum stocking levels.
- After running the Suggested Consignment Auto Transfer utility, use the Suggested Consignment Transfer Queue to:
  - Review the suggested items to transfer to the customer.
  - Create the replenishment transfer.

Once customer consignment locations are set up, maintain consignment inventory through orders and levels counting.

See Also:

Automating Consignment Transfers

Counting Products for Replenishment with Palm RDC

Reviewing Uploaded RDC Consigned Count Information

Customer Consignment Locations Setup for Palm RDC Overview

RDC Order and Stock Level Replenishment Overview

Product Replenishment Setup for Palm RDC Overview

Before identifying the products to count at customer locations, decide whether you will use Auto Replenishment options with Palm RDC.

Auto Replenishment

Auto Replenishment uses unique identifiers to tie individual products to customers. It is not necessary to define customers on the Palm device. When Palm RDC encounters an auto-replenishment number, it immediately knows the following information:

- Customer name.
- Product description.
- Product number.
- Product location at customer site.
- Minimum and maximum stocking levels.
- Purchase order number, release number, and break point code.
- Print override instructions.

Palm RDC separates products on orders according to their respective customer, purchase order number, release number, and break point combination.

Normal Replenishment

Normal replenishment uses customer/vendor product numbers to tie individual products to customers or vendors. You must define individual customers on the Palm device. When Palm RDC encounters a customer/vendor product number, it immediately knows the following information:

- Product description.
- Product number.
- Product location at the customer's location.
- Minimum and maximum stocking levels.

See Also:

Identifying Products to Count for Palm RDC

Identifying Auto Replenishment Products to Count

Entering Customer/Vendor Specific Part Numbers

Defining Palm RDC Customers

Selecting Scanning Modes for RDC Auto Replenishment

Identifying Products to Count for Palm RDC

If you use normal replenishment, populate count data for products you maintain with Palm RDC at customer consignment or non-consignment locations.

Products, Part Numbers, and Locations

Assign the following for each product to be maintained at a customer location.

- **Product description** – The product description in the Eclipse Product file.
- **Customer or vendor part number** – Assign a customer or vendor part number to products to cross-reference the customer's product numbering scheme with part numbers assigned on your system. When assigning more than one customer or vendor part number to a product, each number can have its own pricing formula, comments, and so forth to apply to the product. You cannot assign the same part number to more than one product.

  Note: You can use the User-Defined Customer Part # Entry utility to upload customer or vendor part numbers from a spreadsheet or text file.

- **Product locations at customer site** – Create bar code labels for scanning customer product locations during counting.

To assign customer/vendor-specific part numbers and locations to products:

1. From the **Files** menu, select **Customer** to display the Customer Maintenance screen.
2. In the **Customer/New** field, enter the ID for the customer whose parameters you need to set.
3. Use the **Part #** hot key to display the Customer / Vendor Specific Part Numbers screen.

   The Customer / Vendor Specific Part Numbers screen displays with the **Location** view.
4. In the **Product Description** field, enter the product for which to set part numbers and locations.
5. In the **Customer/Vendor Part #** field, enter one of the following:

Enter	Function
Customer part numbers	Assign a customer or vendor part number instead of the Eclipse Product ID. Customer/vendor part numbers appear on transactions with the line item comment "Your # customer/vendor part number."
An at sign (**@**)	The system assigns a part number for the customer by appending the product ID to the **@** sign. You must print bar code labels specifically for this customer part number.

6. In the **Location** field, enter the customer's product location.
7. Repeat for other products, as needed.
8. Press **Esc** to save changes and exit the screen.

Minimum and Maximum Stocking Levels

For each product to be maintained at a customer location, assign the following:

- **Minimum stocking level** – Define the minimum stocking level for a product at a customer location. Depending on settings, the system creates orders for products when their quantity dips below the minimum stocking level.
- **Maximum stocking level** – Define the maximum stocking level for a product at a customer location. Depending on settings, the system creates orders for products in order to bring quantity back up to the maximum stocking level.

To assign minimum and maximum stocking levels to products:

1. From the **Files** menu, select **Customer** to display the Customer Maintenance screen.
2. In the **Customer/New** field, enter the ID for the customer whose parameters you need to set.
3. Use the **Part #** hot key to display the Customer / Vendor Specific Part Numbers screen.

   The Customer / Vendor Specific Part Numbers screen displays with the **Location** view.
4. In the **Product Description** field, select the product for which to set stocking levels.
5. Use the **View** hot key and select **Min/Max** to display the Min/Max view.
6. Complete the following fields:

Field	Description
Min	The minimum quantity to stock at the customer location. If the on-hand quantity at the customer location falls below the minimum quantity, the system orders the product back to its maximum quantity. **Note:** This quantity is only used by remote data collection programs.
Max	The maximum quantity to stock at the customer location. If the on-hand quantity at the customer location falls below the minimum quantity, the system orders the product back to its maximum quantity. **Note:** This quantity is only used by remote data collection programs.

   Note: The **Level** field displays the previous on-hand quantity when the last count data was uploaded.

7. Repeat for other products, as needed.
8. Press **Esc** to save level settings and exit the screen.

See Also:

Product Replenishment Setup for Palm RDC Overview

Identifying Auto Replenishment Products to Count

Entering Customer/Vendor Specific Part Numbers

Uploading Customer Part Numbers

Palm RDC Setup on Eclipse Overview

Identifying Auto Replenishment Products to Count

If you use Auto Replenishment, populate count data for each product you maintain with Palm RDC at a customer location.

Products, Auto Replenishment Numbers, and Locations

Assign the following for each product to be maintained at a customer location.

- **Product description** – The product description in the Eclipse Product file.
- **Auto replenishment number** – Assign an auto replenishment number to each product to identify customer product. Because a replenishment ID is unique, when an employee scans a label containing the replenishment ID, the system identifies the customer, location, and product. No customer can have two identical replenishment numbers and no two customers can have the same replenishment number.
- **Product locations at the customer location** – Create bar code labels for scanning customer product locations during counting.

To assign auto replenishment numbers and product locations to products:

1. From the **Files** menu, select **Customer** to display the Customer Maintenance screen.
2. In the **Customer/New** field, enter the ID for the customer whose parameters you need to set.
3. Use the **Part #** hot key to display the Customer / Vendor Specific Part Numbers screen.

   The Customer / Vendor Specific Part Numbers screen displays using the **Location** view as the default.
4. In the **Product Description** field, enter the product for which to set auto replenishment numbers and locations.
5. In the **Customer/Vendor Part #** field, enter an exclamation mark (**!**). The system assigns a unique auto replenishment number to the product.

   Note: If you do not want the auto replenishment number to print on transactions, define a customer/vendor part number for the product in addition to the auto replenishment number.
6. In the **Location** field, enter the customer site product location.
7. Repeat for other products, as needed.
8. Press **Esc** to save changes and exit the screen.

Minimum and Maximum Stocking Levels

For each product to be maintained at a customer location, assign minimum and maximum stocking levels. For information on how to assign stocking levels, see Identifying Products to Count for Palm RDC.

Purchase Order Numbers, Release Numbers, and Break Point Codes

Define a purchase order number for each customer location. Define a release number and break point code for each product at the customer location. These determine when new orders need to be created.

When RDC creates an order for an auto replenishment number, the customer purchase order number is attached to the order. When RDC discovers a new auto replenishment number with a different purchase order number, release number, or break point code, it starts a new order.

For example: A customer location separates product by department and by workstation. Use the order release number to designate the products ordered for departments and the break point code to designate the products ordered for workstations. When orders are created for this customer location, the system attaches the purchase order number to the order. Each time the system encounters a different release number, it creates a new order for the department defined by the release number. Each time the system encounters a different break point code, it creates a new order for the work station defined by the break point code.

To assign purchase order numbers, release numbers, and break point codes to products:

1. From the **Files** menu, select **Customer** to display the Customer Maintenance screen.
2. In the **Customer/New** field, enter the ID for the customer whose parameters you need to set.
3. Use the **Part #** hot key to display the Customer / Vendor Specific Part Numbers screen.

   The Customer / Vendor Specific Part Numbers screen displays using the **Location** view as the default.
4. In the **Product Description** field, enter the product for which to assign purchase order numbers, release numbers, and break point codes.
5. Use the **View** hot key and select **Cus PN/PO/Break** to display the customer purchase order number/break point code view.
6. In the **Purchase Order** field, enter the customer's purchase order number to assign to the product.
7. In the **Break Point** field, enter the customer-defined break point code for the product.
8. Use the **View** hot key and select the **Cus PN/PO/Release** to display the customer purchase order number/release number view.
9. In the **Release Number** field, enter the customer-defined release number for the product.
10. Repeat for other products, as needed.
11. Press **Esc** to save changes and exit the screen.

Print Override Customer/Vendor Part Numbers

If you do not want auto replenishment number to print on transactions, identify a substitute customer/vendor part number to print for the product. Create this customer/vendor part number in addition to the auto replenishment number.

To assign print override part numbers to products:

1. From the **Files** menu, select **Customer** to display the Customer Maintenance screen.
2. In the **Customer/New** field, enter the ID for the customer whose parameters you need to set.
3. Use the **Part #** hot key to display the Customer / Vendor Specific Part Numbers screen.

   The Customer / Vendor Specific Part Numbers screen displays with the **Location** view.
4. In the **Product Description** field, enter the product for which to set print override instructions.
5. Use the **View** hot key and select **Print Override** to display the Print Override view.
6. In the **Print Override** field, enter the customer/vendor part number to print on the transaction.
7. Repeat for other products, as needed.
8. Press **Esc** to save changes and exit the screen.

See Also:

Product Replenishment Setup for Palm RDC Overview

Identifying Products to Count for Palm RDC

Entering Customer/Vendor Specific Part Numbers

Palm RDC Setup on Eclipse Overview

Palm RDC Setup on Palm Devices Overview

Palm RDC parameters must be set up on the Palm device before it can be used for ordering and counting. Set the following parameters on the Palm device:

- Palm RDC HotSync options
- Palm RDC customers
- Palm RDC branches
- Scanning modes if you use Auto Replenishment
- Palm RDC customized counting features

See Also:

Editing Palm RDC Customers or Branches on the Palm Device

Palm RDC Setup Overview

Setting Up Palm RDC HotSync Options

Before uploading count information from the Palm device to Eclipse, set up Palm RDC on the Palm device. Use the HotSync Setup screen within the Palm RDC application to do the following:

- Enter an Eclipse serial number to activate the Eclipse Palm RDC software.
- Identify you as the Palm device user.
- Ensure that the Palm device can communicate with the Eclipse server.

To set up RDC HotSync options:

1. Display the Palm RDC application on your Palm device.
2. Tap the **Menu** screen button to display the Palm RDC menu bar.
3. Tap **Configuration** and then tap **HotSync Preferences** to display the HotSync Setup screen.
4. Tap the **Enter Serial No.** box to display the Eclipse Serial Number screen.
5. Enter a serial number assigned for the Palm device and tap **OK** to return to the HotSync Setup screen.

   This serial number is required for Palm RDC to synchronize with Eclipse.

   Note: The serial number assigned to one Palm device cannot be used with any other device. Sharing serial numbers violates your licensing agreement. If you do not know what the correct serial number is, contact Eclipse Advance Technical support.

6. In the **User ID** field, enter the Eclipse User ID of the person who will be using this the Palm device.
7. In the **Host Name** field, enter the name of the Eclipse server.

   Note: You must use a Domain Name Server (DNS) name. You cannot use IP addresses. If you do not know the name of the Eclipse server, contact Eclipse Advance Technical support.

8. Select the following options, as needed:

Option	Function
Sync with Eclipse	• Select to upload count information to the Eclipse server. • If you need to HotSync the Palm device to the Eclipse server but do not want to upload count information, de-select this option before running the HotSync. For example, in the middle of an inventory count, you need to HotSync the Palm device to update information for another application and you do not want to upload the incomplete count information.

Option	Function
Clear Sent Orders	• Select if you want count information to be deleted from the Palm device after it is uploaded to the Eclipse server. • If you anticipate needing to re-upload orders, de-select this option. Once orders are processed you can later select this option to clear them on the next HotSync.

Auto Generate Paths	• Select to use automatically generated synchronization paths when running a HotSync.
	• De-select to display the **Set Paths** button, which you can use to define your own synchronization paths:
	  • Tap the **Set Paths** button to display the Sync Paths screen.
	  • In the **Path and name of download file** field, enter the pathway of the file to which to download the count information.
	  • In the **Path and name of upload file** field, enter the pathway of the file to which to upload the count information.
	  • Tap **OK** to save the settings and return to the HotSync Setup screen.
	Note: We recommend that you select **Auto Generate Paths**. If you want to set your own paths, contact Eclipse Advance Technical support.

9. Tap **OK** to save settings and exit the screen.

See Also:

Palm RDC Setup on Palm Devices Overview

Defining Palm RDC Customers

Before creating orders at customer sites using Palm RDC, you must define customers on the Palm device.

Note: If you use the Auto Replenishment scanning mode and auto replenishment products, you do not need to perform this setup task.

You can define customers on your Palm device in one of two ways:

- If you have the Eclipse Pocket Contacts companion product installed on your Palm device, use the **Look Up** feature to search for customer names.
- Enter the Eclipse Customer ID.

In addition, select the type of count information you will be collecting for the customer, whether for orders, levels, or both. The types vary depending on whether they are used for non-consignment or consignment customers.

To define a Palm RDC customer using the Eclipse Pocket Contacts companion product:

1. Display the Palm RDC application on your Palm device.
2. Tap the **Menu** screen button to display the Palm RDC menu bar.
3. Tap **Options** and then tap **New Customer** to display the New Customer screen.
4. Tap **Look Up** to display the Contacts Lookup screen.
5. In the **Find** field, enter the first few letters of the customer name to locate a customer.
6. Tap the name you want to select.

   The New Customer screen displays with the Customer ID and customer name in the respective fields.
7. Next select the type of count information to collect for the customer.

To define a Palm RDC customer using the Eclipse Customer ID:

1. Display the Palm RDC application on your Palm device.
2. Tap the **Menu** screen button to display the Palm RDC menu bar.
3. Tap **Options** and then tap **New Customer** to display the New Customer screen.
4. In the **Eclipse Account ID** field, enter the Eclipse Customer ID for the customer record.
5. In the **Customer Name** field, enter the customer's name.

   Note: Because the name stored on the Palm device is used for your reference only, the customer name does not have to match the name stored in the customer record on Eclipse. Spelling and capitalization are not checked and abbreviations are allowed.
6. Next select the type of count information to collect for the customer.

To select the count information type to collect for a customer:

1. Display the Palm RDC application on your Palm device.
2. Tap the **Menu** screen button to display the Palm RDC menu bar.
3. Tap **Options** and then tap **New Customer** to display the New Customer screen.
4. Define the new customer.
5. Tap one of the following to select the type of count information you will be collecting for the customer:

Type	Non Consignment Customers	Consignment Customers
Orders	Upon information upload, creates orders based on product and count information. Orders can be created for products which may or may not already exist at the customer site.	Upon information upload, creates a consignment billing based on the product and count information.
Stock Levels	• Counts product for stock replenishment based on pre-set minimum and maximum stocking levels. • Upon upload, the system creates a sales order for those items whose on-hand quantities are below their **Min** stocking level. The system orders quantities that bring the product back to their **Max** stocking level. **Note:** The auto replenishment option does not require that a customer be defined on the Palm device.	• Counts product for usage billing and stock replenishment based on pre-set minimum and maximum stocking levels. • Upon upload, the system creates a consignment billing for the products used at the consignment location. • The system then creates a consignment transfer for those items whose on-hand quantities are below their **Min** stocking level. The system orders quantities that bring the product back to their **Max** stocking level. **Note:** The auto replenishment option does not require that a customer be defined on the Palm device.
Both	Creates two customer records for the customer on the Palm device. Use this to set both orders and levels information to be collected.	

6. Tap **Create** to save the information and exit the screen.
7. Repeat for all remote customers and consignment locations.

See Also:

Defining Remote Order Entry Parameters for Palm RDC Customers

Defining Palm RDC Branches

Editing Palm RDC Customers or Branches on the Palm Device

Defining Palm RDC Customer Consignment Locations

Ship-To Accounts Setup for Palm RDC Consignment Locations

Selecting Scanning Modes for RDC Auto Replenishment

Palm RDC Setup on Palm Devices Overview

Defining Palm RDC Branches

Before counting inventory with Palm RDC, define cycle counting branches on your Palm devices. On each Palm device, define the branches in which the device will be used to cycle count.

To define a branch on the Palm device:

1. Display the Palm RDC application on your Palm device.
2. Tap the **Menu** screen button to display the Palm RDC menu bar.
3. Tap **Options** and then tap **New Branch** to display the New Branch screen.
4. In the **Branch ID** field, enter the branch you want to define to the device.
5. In the **Branch Name** field, enter the branch's name.

   Note: Because the name stored on the Palm device is used for your reference only, the branch name does not have to match the name stored in the branch record on Eclipse. Spelling and capitalization are not checked and abbreviations are allowed.

6. Tap **Create** to save the information and exit the screen.
7. Repeat for all branches.

See Also:

Editing Palm RDC Customers or Branches on the Palm Device

Defining Palm RDC Customers

Palm RDC Setup on Palm Devices Overview

Editing Palm RDC Customers or Branches on the Palm Device

You can edit or delete customer or branch information on the Palm device after defining the records in the Eclipse system.

To edit an existing customer or branch on the Palm device:

1. Display the Palm RDC application on your Palm device.
2. Tap the black triangle at the top of the screen to display a list of customers and branches.
3. Locate and select the customer or branch record.

   Because a customer may have separate records set up for both orders and levels, be sure you edit the correct one, or both, if necessary.
4. Tap the **Menu** screen button to display the Palm RDC menu bar.
5. Tap **Options** and then tap **Edit Active Database** to display the Edit Customer/Branch screen.
6. Edit the customer or branch record, as necessary.
7. Tap **OK** to save settings and exit the screen.

To delete an existing customer or branch on the Palm device:

1. Display the Palm RDC application on your Palm device
2. Tap the black triangle at the top of the screen to display a list of customers and branches.
3. Locate and select the customer or branch record.

   Because a customer may have separate records set up for both orders and levels, be sure you select the correct one, or both, if necessary.
4. Tap the **Menu** screen button to display the Palm RDC menu bar.
5. Tap **Options** and then tap **Delete Active Database** to display the Customer/Branch Deletion prompt.
6. Tap the **Yes** button to delete the record and exit the screen.

   The customer or branch is deleted from the Palm device.

See Also:

Defining Palm RDC Customers

Defining Palm RDC Branches

Palm RDC Setup on Palm Devices Overview

Customizing Palm RDC Counting Features

Palm RDC provides options to suit how you count items with a Palm device. Options are available for Palm devices both with and without barcode scanners.

Counting Options for Palm Devices with Barcode Scanners

Following are the counting options available for Palm devices that support barcode scanners:

- **Skip Location Field** – Determines whether a user is forced to enter a product location.
- **Allow Quantity Scans** – Determines whether a user can scan a barcode quantity for a product or whether a user must manually enter the quantity.

  For example,. you print a quantity of 10 on small widget barcodes because you stock ten small widgets at a time. If the preference is selected, users can scan the 10 as the available quantity for the product. If the preference is not selected, the user must manually enter the available quantity for the product.
- **Default Quantity to 1** – Determines whether the quantity to use as the default is set to 1.

Counting Options for All Palm Devices

Following are the counting options available for Palm devices without barcode scanners:

- **Add Quantities** – Determines whether quantities entered for the same product are consolidated. If selected, all quantities entered for the same product are added together. If not selected, each time a new quantity is entered for the same product, the new quantity overrides existing quantities.

  For example, a user scans in 3 small widgets. The user then discovers 2 more small widgets. If the preference is selected, the system adds both quantities together, totaling the count to 5 small widgets. If the preference is not selected, the system overrides the first quantity of 3 small widgets and replaces it with 2 small widgets.

  - If Warn Before Adding Quantities is selected, the system prompts the user to select whether to consolidate or replace quantities.
  - If Always Add Quantities is selected, the system consolidates quantities without a warning.
- **Remember Location** – Determines whether the previous location scanned displays for the next item.

Setting Counting Options

Perform the following task to set counting options for Palm devices with and without barcode scanners.

To select scanning and counting features on the Palm device:

1. Display the Palm RDC application on your Palm device.
2. Tap the **Menu** screen button to display the Palm RDC menu bar.
3. Tap **Configuration** and then tap **Preferences** to display the RDC Preferences screen.
4. If your Palm device supports a barcode scanner, select the following options, as needed:

   Note: Skip these options if your Palm device does not support a barcode scanner.

Option	Function
Skip Location Field	• Select this option to skip the **Location** field when scanning items. The cursor moves to the **Quantity** field. This option makes counting items without locations faster. • De-select this option to always position the cursor in the **Location** field when counting items. **Note:** You can always manually enter a value in the **Location** field, regardless of the setting of this option.
Allow Quantity Scans	• Select this option to scan quantity labels when the cursor is positioned in the **Quantity** field. • De-select this option to manually enter a value in the **Quantity** field. **Note:** Selecting this option de-selects the **Default Quantity to 1** option.
Default Quantity to 1	• Select this option to default the quantity of a product to 1. If this is not the correct quantity, you can enter a different amount in the **Quantity** field. • De-select this option to either allow quantity scans or to enter quantities manually. **Note:** Selecting this option de-selects the **Allow Quantity Scans** option.

5. Select the following options for Palm devices both with or without barcode scanners:

Option	Function
Warn Before Adding Qtys	• Select this option to be prompted whether to consolidate quantity scanned for the same item at the same location. • De-select this option to override the previously scanned quantity for the item at the same location with the currently scanned or entered quantity. **Note:** Selecting this option clears the **Always Add Qtys (No Warning)** option.

Option	Function
Always Add Qtys (No Warning)	• Select this option to consolidate quantity scanned for the same item at the same location. **Note:** The system does not prompt for confirmation when this option is selected. • De-select this option to override the previously scanned quantity for the item at the same location with the currently scanned or entered quantity. **Note:** Selecting this option clears the **Warn Before Adding Qtys** option.
Remember Location	• Select this option to retain the last location scanned or entered so that you do not need to re-enter it. • De-select this option to clear the **Location** field when counting the next item.

6. Tap **OK** to save settings and exit the screen.

See Also:

Palm RDC Setup on Palm Devices Overview

RDC Order and Stock Level Replenishment Overview

Use RDC order and stock level replenishment to maintain product at both consignment and non-consignment customer locations.

With consignment locations, you store product at the customer's locations, charging the customer only for the product that was actually used. The customer returns any unused product back to you at the end of the contract. With non-consignment locations, you charge the customer up-front for all product that is sent to their location.

To maintain product at both consignment and non-consignment locations, collect order and stock level replenishment data with an RDC Palm device on a regular basis. You can use Order or Levels mode to collect the necessary data. The system processes the data for each mode differently depending on whether it is for a consignment or non-consignment location.

Note: If you have customer locations that use flat files instead of Palm devices to collect count data, upload and process the data using RDC Flat File Processing.

Order Mode

Use Order mode to manually enter quantity needed or used, as follows:

- **Non-consignment locations** – Use to create orders for the customer. With the Palm device, enter items and quantities needed. Upon upload of the order information, the system sends you a message – if you are the RDC Administrator or defined user – that an order has been created. You can review the order information from the sync log, Sales Order Entry screen, or Remote Order Entry Review Queue. If errors occurred, such as the system not recognizing a product ID for an uploaded item, resolve the errors. Process a sales order from the Sales Order Entry screen. Orders can be created for products which may or may not already exist at the customer location.
- **Consignment locations** – Use to create billings of usage, which charges the customer for the product and quantity used, for the customer location. Every time the customer uses a product, they scan the product and enter the quantity used on a Palm device. Upon upload of the information, the system sends you a message – if you are the RDC Administrator or defined user – indicating that a billing of usage has been created for the customer. You can then review the billing of usage from the sync log, Sales Order Entry screen, or Remote Order Entry Review Queue. If errors occurred, such as the system not recognizing a product ID for an uploaded item, resolve the errors. Process the billing of usage from the Sales Order Entry screen.

  Note: You will need to perform regular counts in Levels mode to replenish consigned inventory.

Levels Mode

Use Levels mode to count the amount of on-hand inventory at a customer location, and then create replenishment transfers, as follows:

- **Non-consignment locations** – Use to create replenishment transfers. With a Palm device, count on-hand quantities for items at the customer location. Items with on-hand quantities below their minimum stocking level will be replenished back to their maximum stocking levels.

  Upon upload of the count information, the system sends you a message – if you are the RDC Administrator or defined user –that a replenishment transfer has been created. You can review the order information from the sync log, Sales Order Entry screen, or Remote Order Entry Review Queue. If errors occurred, such as the system not recognizing a product ID for an uploaded item, resolve the errors. Process the replenishment transfer from the Sales Order Entry screen.

- **Consignment locations** – Use to create billings of usage, which charges the customer for the product and quantity used, and replenishment transfers for the customer location. Count on-hand quantities for all items at the customer location to create both billings of usage and replenishment transfers.

  The system creates billings of usage for items with quantities below their maximum stocking levels. Upon upload of the information, the system sends you a message – if you are the RDC Administrator or defined user – indicating that a billing of usage has been created for the customer. You can then review the billing of usage from the sync log, Sales Order Entry screen, or Remote Order Entry Review Queue. If errors occurred, such as the system not recognizing a product ID for an uploaded item, resolve the errors. Process the billing of usage from the Sales Order Entry screen.

  Create replenishment transfers by running the Suggested Consignment Auto Transfer utility. This utility compares the uploaded count quantity with minimum stocking levels for each item. It then suggests replenishment transfers up to the defined maximum for any item with quantity below the minimum. Use the Consignment Transfer Queue to review suggested transfers and then create the actual replenishment transfer.

  Note: You can view the most recent uploaded count quantity for an item in the Customer / Vendor Specific Part Numbers screen's **Level** field.

See Also:

RDC Replenishment Transfers for Non-Consignment Inventory Overview

RDC Replenishment Transfers for Consigned Inventory Overview

RDC Replenishment Transfers from Flat Files Overview

Palm RDC Reports Overview

Palm RDC Cycle Counting Overview

Customer Consignments Overview

RDC Replenishment Transfers for Non-Consignment Inventory Overview

Use Palm RDC to maintain non-consignment locations' inventory. As with consignment locations, you can maintain inventory through Order and Stock Levels modes.

To maintain inventory at non-consignment locations, perform the following tasks:

- Count inventory at the customer locations.
- Review count information on the Palm device.
- Upload count data from the Palm device to the system.
- Review count information on the system.
- Resolve any counting errors.
- Process orders and transfers.

  Note: If you have customer locations that use flat files instead of Palm devices to collect count data, upload and process the data using RDC Flat File Processing.

Before using counting items for replenishment, set up the following:

- Palm RDC counting preferences
- Customers for whom to create orders both in the system and on the Palm device.
- Products to order or count
- Product locations

See Also:

RDC Order and Stock Level Replenishment Overview

RDC Replenishment Transfers for Consigned Inventory Overview

RDC Replenishment Transfers from Flat Files Overview

Counting Products for Replenishment with Palm RDC

Use the RDC Orders/Levels screen on the Palm device to count inventory at customer locations. The process for counting inventory at consignment and non-consignment locations is the same, but the way the system processes the information is different:

- If you are counting in Order mode:
  - For *non-consignment* locations – The system creates orders for the quantity entered.
  - For *consignment* locations – The system creates a billing of usage for the quantity entered.
- If you are counting in Levels mode:
  - For *non-consignment* locations – The system creates replenishment transfers based on stocking levels defined for the location.
  - For *consignment* locations – The system creates a billing of usage for the quantity used based on stocking levels defined for the location. You must create replenishment transfers using the count information.

  Note: If you use flat files instead of Palm devices to collect count data, manually count inventory and populate the flat file. Use RDC Flat File Processing to upload and process the count data.

To count products for replenishment:

1. Display the Palm RDC application on your Palm device.
2. Tap the black triangle to display a list of all customers set up for replenishment.
3. Tap **Orders** or **Levels** for the appropriate customer.

   Note: Edit the header information for the order, as needed.
4. In the **Location** field, enter or scan a location, if necessary.

   Note: If you selected the **Skip Location Field** box on the RDC Preferences screen, you do not need to enter a location.
5. In the **Item Number** field, scan or enter one of the following for the item:
   - Customer part number
   - Eclipse part number
   - UPC number
   - User-defined number
6. In the **Quantity** field, scan or enter one of the following:
   - **Order mode** – The quantity for which to create the order or billing of usage.

- **Levels mode** – The quantity in the location for which to create a replenishment transfer if below the defined minimum or a billing of usage.

Note: If you selected the **Allow Quantity Scans** box on the RDC Preferences screen, you can scan the quantity for the product. If you selected the **Default Quantity to 1** box on the RDC Preferences screen and the quantity is one, skip this field. If the quantity is more than one, edit this field.

7. Tap the **Next Item** button to store the item in the count table and clear the screen for the next entry.
8. Repeat steps 4-7 for all items.
9. After counting all items, tap the **View Counts** button to display the count table for the items.
10. Review and edit the order, if needed.
11. Upload the information to the system.

See Also:

Entering Order Header Information in Palm RDC

Reviewing Products Counted with Palm RDC

Uploading Count Information from Palm RDC

RDC Replenishment Transfers for Consigned Inventory Overview

RDC Replenishment Transfers from Flat Files Overview

Entering Order Header Information in Palm RDC

Use the RDC Order Header screen to enter information specific to the order or count data from the Palm device. If you leave the Header screen blank, the system uses the defaults defined for the customer in Customer Maintenance.

To enter order header information in Palm RDC:

1. Display the Palm RDC application on your Palm device.
2. Tap the black triangle to display a list of all customers set up for replenishment.
3. Tap **Orders** or **Levels** for the customer, as is appropriate.
4. Tap the **Header** button to display the RDC Order Header screen.
5. Fill in the following fields, as necessary:

Field	Function
PO#	If appropriate, enter a purchase order (P/O) number for the order. If there is a P/O number assigned to the customer, the number you enter in this field overrides the assigned number. The system sends a message to the RDC administrator.
Rel#	If appropriate, enter a release number for the order. If there is a release number assigned to the customer, the number you enter in this field overrides the assigned number. The system sends a message to the RDC administrator.
Ordered By	If appropriate, enter the name of the customer buying the product. The system validates the entry in this field if the customer has one or more employees who are assigned as buyers on the Customer Authorization Maintenance screen. **Note:** The order total is compared against the customer's credit limit. If the total is more than the credit limit, the order will go on credit hold.

6. Tap the following buttons to enter or edit information, as needed:

Button	Function
Ship To Address	Edit the customer's ship-to information for this order only. • After entering the new ship-to information, tap **Done** to save the information. • At the prompt, tap **Yes** to confirm the new shipping address and return to the Order Header screen. Upon upload, the ship-to address for the customer is updated with the new information for this order only.
Shipping Instructions	Enter or edit shipping instructions for the order. After entering the instructions, tap **Done** to return to the Order Header screen. The system appends these shipping instructions to the pre-defined instructions set up in the customer record. The instructions are preceded by *****RDC Instructions***** in the customer record.

Button	Function
Internal Notes	Enter or edit internal comments for the customer or order. After entering the notes, tap **Done** to return to the Order Header screen. The system appends these notes to the pre-defined notes set up in the customer record. The notes are preceded by *****RDC Notes***** in the customer record.

7. Tap **Done** to save the information and return to the order.

See Also:

Counting Products for Replenishment with Palm RDC

Reviewing Products Counted with Palm RDC

RDC Order and Stock Level Replenishment Overview

Reviewing Products Counted with Palm RDC

Before uploading count information to the system, review the counted products on the Palm device.

If upon reviewing items you find that a quantity needs to be changed or an item needs to be deleted, you can edit the list of counted items. You can also remove all items from the list of counted items or delete items that have already been uploaded to the system.

To review and edit products counted with Palm RDC:

1. Display the Palm RDC application on your Palm device.
2. Count the items for replenishment or auto-replenishment, or perform the cycle count.
3. Tap the **View Counts** or **List Items** button to display the count table for the items.

   Initially, the last active item is highlighted, whether it was the last item entered or an item in the list that was located using the **Find** button.
4. Select the item you want to review by using one of the following options:

Option	Function
Scroll arrows / **Scroll** buttons	Scrolls up or down in the list. Highlight the item you want to review.
Find button	Displays the View Counts Find screen. • In the **Find** field, enter the product ID or scan the label of the product you want to find in the list. **Note:** Searches are case and punctuation sensitive. For example, if you want to locate the product with the barcode **01-03-A**, you must include the dashes and capitalize the **A**. • Tap **OK** to search for the product. • If a match is found, the Palm device highlights the item in the list. • If no match is found, the Palm device beeps and reactivates the **Find** field for a new search.
Menu button > **Options** menu bar	Scrolls to the top or bottom of the list: • **Go To Bottom Rec** – Highlights the last item in the list. • **Go To Top Record** – Highlights the first item in the list.

5. Edit the item by doing one of the following, as needed:

To...	Do this...
Edit the quantity...	• Highlight the quantity for the item. • Enter the correct quantity over the old quantity.

To...	Do this...
Delete an item...	• With the item selected, tap the **Menu** screen button to display the RDC menu bar. • Tap **Records** and then **Delete Item**. • At the prompt, tap **Yes** to confirm the deletion.
Delete all items...	• Tap the **Menu** screen button to display the RDC menu bar. • Tap **Records** and then **Delete All Items**. • At the prompt, tap **Yes** to confirm the deletion.
Delete sent items...	• Tap the **Menu** screen button to display the RDC menu bar. • Tap **Records** and then **Delete Sent Items**. • At the prompt, tap **Yes** to confirm the deletion.

6. Tap **Done** to save changes and return to the previous screen.

See Also:

Counting Products for Replenishment with Palm RDC

Cycle Counting Products with Palm RDC

Creating Orders with RDC Auto Replenishment

Uploading Count Information from Palm RDC

Reviewing Uploaded RDC Count Information

Reviewing Uploaded RDC Consigned Count Information

Reviewing Processed RDC Cycle Count Data

RDC Order and Stock Level Replenishment Overview

Cycle Counting with Palm RDC

Uploading Count Information from Palm RDC

After collecting Palm RDC data on a Palm device, upload the information to the system by performing a HotSync.

After the upload is complete, the system sends a message to the Palm RDC Administrator and user defined in Remote Order Entry Parameters indicating that an order or bill of usage was created, or that a cycle count was performed.

> **Note:** Ensure all HotSync preferences are set before performing an upload.

To upload count information from Palm RDC to the system:

1. Gather the information that you want to upload to the system.
2. Place the Palm device holding the information in its cradle, which is connected to the primary PC set up for receiving data.
3. From the **Main** menu, tap the **HotSync** icon to display the HotSync screen.
4. Tap the **HotSync** icon to being the synchronization process.

   Once the HotSync is complete, the system sends the defined users messages indicating Palm RDC information has been uploaded.
5. Review the uploaded information, as needed.

See Also:

Counting Products for Replenishment with Palm RDC

Cycle Counting Products with Palm RDC

Creating Orders with RDC Auto Replenishment

Reviewing Uploaded RDC Count Information

Reviewing Uploaded RDC Consigned Count Information

Reviewing Processed RDC Cycle Count Data

RDC Order and Stock Level Replenishment Overview

Cycle Counting with Palm RDC

Reviewing Uploaded RDC Count Information

When you upload RDC count information for non-consignment customers from the Palm device to the system, the system sends the count information to the following places:

- RDC Administrator's Hold Entries as a sync log.
- Defined user's message queue if an order is created from the count information.
- Remote Order Entry Review Queue if an order is created from the count information.

Upon notification that count information is uploaded and orders created, review the information or orders.

Note: If you have customer locations that use flat files instead of Palm devices to collect count data, upload and process the data using RDC Flat File Processing.

To review count information in a sync log:

1. From the **System > Printers** menu, select **Your Hold Entries** to display the Spooler Control screen.

   Note: You must be the RDC Administrator for the shipping branch to access the sync log from Your Hold Entries.

2. Select the sync log from the list of reports.
3. Use the **View** hot key to display the RDC Sync Log Report.

   The customer name, transaction number, and type of uploaded information display at the top of the report.

4. View the following information:

Column	Description
Customer Part #	The part number used by the customer for the item. If the uploaded information was from Auto Replenishment, the number is preceded by an exclamation point (**!**).
Eclipse Part #	The product ID corresponding to the customer part number.
Description	The first line of the product description stored in the Eclipse Product File. If an uploaded product is not found, or if there is an error, the description as defined in the Palm RDC And Pocket OE Default Product If Not Found control maintenance record displays.
Location	The customer location for the product.
CN	If the uploaded information was from Auto Replenishment, the override customer part number for the product.
Customer Name	If the uploaded information was from Auto Replenishment, the customer for whom the information was uploaded.
Qty	The quantity scanned or entered for the product if this was a normal order count.

Column	Description
Level	The quantity counted for the product if this was a normal levels count. The total levels count displays at the bottom of this column.
MinQty	The minimum stocking level defined for the product if this was a normal levels count.
MaxQty	The maximum stocking level defined for the product if this was a normal levels count.
Ordered	The quantity ordered for the product, if any.

5. Press **Esc** to exit the screen.
6. Edit the order, if needed.

To review an order from your message queue:

1. From the **System** menu, select **Message System** to display the Message System screen.
2. Use the **Recvd** hot key to display the Received Messages screen.
3. Select the RDC Order message.

   Note: You must be defined as the defined user to receive RDC order creation messages.

4. Use the **View** hot key to display the Order Entry screen for the order.
5. Review the following information:

Field	Description
Bill To	The bill-to defined for the customer.
Ship To	The ship-to defined for the customer.
Qty/Unit	The amount ordered for the item, along with its unit of measure, such as 1 each (ea), 1 box (bx), or 1 case (cs).
Product Description	The product description for the ordered item. If an ordered product is not found, or if there is an error, the description as defined in the Palm RDC And Pocket OE Default Product If Not Found control maintenance record displays, along with the following: • The part number entered on the Palm device. • If this order is for a levels count, the level entered for the product. Find out which product this error is for and edit the order.

6. Process the order.
7. Press **Esc** to save updates and exit the screen.

See Also:

Counting Products for Replenishment with Palm RDC

Entering Order Header Information in Palm RDC

Resolving RDC Replenishment Order Errors

If you find a *****RDC Product Not Found***** error when you are reviewing uploaded RDC replenishment orders for non-consignment locations, resolve the error by doing the following:

- Determine for which product the error occurred.
- Edit the product description.
- For Levels counts, manually calculate the quantity needed based on minimum and maximum stocking levels.

  For example, an error occurred for the ABC widget's levels count. The widget's minimum stocking level is 10 and its maximum stocking level is 20. The levels count for the widget was 5. Since the count is 5 below the minimum, order a quantity of 15 to bring the widget quantity back to its maximum stocking level of 20.
- Edit the ordered quantity.

After resolving an order error, process the transaction as you would any delivery order.

To edit an RDC replenishment order error:

1. Display the order either from your message queue or the Remote Order Entry Review Queue.
2. Review the quantity and items ordered.
3. In the **Product Description** field, locate the *****RDC Product Not Found***** record.
4. Use the **Part# entered** to determine the actual item.
5. Delete the *****RDC Product Not Found***** record and replace it with the actual product ID.
6. If this order is for a Levels count, use the **Lvl entered** to calculate the quantity to order:
   - Review the item's minimum and maximum stocking levels.
   - If the quantity in the **Lvl entered** description is below the minimum stocking level, enter the quantity required to bring the stocking level back to the maximum.
   - If the quantity in the **Lvl entered** description is above the minimum stocking level, delete the item from the order as additional quantity is not needed.

   Note: You do not need to perform step 6 if the order is for an order count.
7. Process the order.
8. Press **Esc** to save updates and exit the screen.

See Also:

Entering Delivery Sales Orders

RDC Replenishment Transfers for Consigned Inventory Overview

Use Palm RDC to maintain customer consignment locations' inventory. As with non-consignment locations, you can maintain inventory through Order and Stock Levels modes.

To maintain inventory at customer consignment locations, perform the following tasks:

- Count inventory at the customer location.
- Review count information on the Palm device.
- Upload count data from the Palm device to the system.
- Review count information on the system.
- Resolve any counting errors.
- Process billings of usage.
- Create consignment transfers for replenishment.

  Note: If you have customer locations that use flat files instead of Palm devices to collect count data, upload and process the data using RDC Flat File Processing.

Before maintaining inventory at customer consignment locations, define the following:

- Customer consignment locations on the system.
- Customers for whom to create orders both in the system and on the Palm device.
- Palm RDC counting preferences.
- Products to order.
- Product locations.

In addition, you will need to perform an initial consignment transfer of inventory to the customer's location.

See Also:

How the System Calculates RDC Consignment Usage

RDC Order and Stock Level Replenishment Overview

RDC Replenishment Transfers from Flat Files Overview

Customer Consignment Locations Setup for Palm RDC Overview

Reviewing Uploaded RDC Consigned Count Information

When you upload RDC count information for consignment locations from the Palm device to the system, the system sends the count information to the following places:

- RDC Administrator's Hold Entries as a sync log.
- Defined user's message queue if a billing of usage is created from the count information.
- Remote Order Entry Review Queue if a billing of usage is created from the count information.

Upon notification that count information has been uploaded and billings of usage have been created, review the information or orders. After reviewing the uploaded data, process billings of usage and create replenishment transfers as needed.

Note: If you have customer locations that use flat files instead of Palm devices to collect count data, upload and process the data using RDC Flat File Processing.

To review count information in a sync log:

1. From the **System > Printers** menu, select **Your Hold Entries** to display the Spooler Control screen.

   Note: You must be the RDC Administrator for the shipping branch to access the sync log from Your Hold Entries.

2. Select the sync log from the list of reports.
3. Use the **View** hot key to display the RDC Sync Log Report.

   The customer name, transaction number, and type of uploaded information display at the top of the report.

4. View the following information:

Column	Description
Customer Part #	The part number used by the customer for the item. If the uploaded information was from Auto Replenishment, the number is preceded by an exclamation point (**!**).
Eclipse Part #	The product ID corresponding to the customer part number.
Description	The first line of the product description stored in the Eclipse Product File. If an uploaded product is not found, or if there is an error, the description as defined in the Palm RDC And Pocket OE Default Product If Not Found control maintenance record displays.
Location	The customer location for the product.
CN	If the uploaded information was from Auto Replenishment, the override customer part number for the product.

Column	Description
Customer Name	If the uploaded information was from Auto Replenishment, the customer for whom the information was uploaded.
Qty	The quantity scanned or entered for the product if this was a consignment order count.
Level	The quantity counted for the product if this was a consignment levels count. The total levels count displays at the bottom of this column.
MinQty	The minimum stocking level defined for the product if this was a consignment levels count.
MaxQty	The maximum stocking level defined for the product if this was a consignment levels count.
Billed	The quantity entered on the billing of usage for the product, of any.

5. Press **Esc** to exit the screen.
6. Edit the billing, if needed.

To review a billing of usage from your message queue:

1. From the **System** menu, select **Message System** to display the Message System screen.
2. Use the **Recvd** hot key to display the Received Messages screen.
3. Select the **RDC Billing of Usage** message.

   Note: You must be defined as the defined user to receive RDC Billing of Usage messages.

4. Use the **View** hot key to display the Order Entry screen for the billing of usage.
5. Review the following information:

Field	Description
Bill To	The bill-to defined for the customer.
Ship To	The ship-to defined for the customer.
Qty/Unit	The amount used and billed for each item.
Product Description	The product description for the billed item. If a product is not found, or if there is an error, the description as defined in the Palm RDC And Pocket OE Default Product If Not Found control maintenance record displays, along with the following: • The part number entered on the Palm device. • If this billing is for a Levels count, the level entered for the product. Find out which product this error is for and edit the order.

6. Process the billing of usage.

See Also:

Counting Products for Replenishment with Palm RDC

Entering Order Header Information in Palm RDC

Reviewing Products Counted with Palm RDC

Reviewing Remote Order Entries

Resolving RDC Consignment Errors

Processing Billings of Usage for RDC Consignment Locations

Creating Consigned Transfers for RDC Replenishment

RDC Replenishment Transfers for Consigned Inventory Overview

RDC Replenishment Transfers from Flat Files Overview

Resolving RDC Consignment Errors

Two main types of errors can occur when working with consignment billing of usage:

- Incorrect or unrecognized product IDs have been uploaded.
- Negative on-hand quantities have been uploaded.

Follow the tasks below to resolve these issues.

Resolving ***RDC Product Not Found*** Errors

If you find a *****RDC Product Not Found***** error when you are reviewing uploaded RDC billings of usage for consignment locations, resolve the error by doing the following:

- Determine for which product the error occurred.
- Edit the product description.
- For Levels counts, manually calculate the quantity to bill based on maximum stocking levels.

  For example:

  An error occurred for the ABC widget's levels count. The widget's maximum stocking level is 20. The levels count for the widget was 5. Subtract the count, 5, from the maximum stocking level, 20, to determine how much product was used, which is 15. Bill for a quantity of 15.
- Edit the billed quantity.

After resolving an order error, process the billing of usage.

To edit an RDC billings of usage error:

1. Display the billing of usage either from your message queue or the Remote Order Entry Review Queue.
2. Review the quantity and items billed.
3. In the **Product Description** field, locate the *****RDC Product Not Found***** record.
4. Use the **Part# entered** to determine the actual item.
5. Delete the *****RDC Product Not Found***** record and replace it with the actual product ID.
6. If this order is for a Levels count, use the **Lvl entered** to calculate the quantity to bill:
   - Review the item's maximum stocking level.
   - Subtract the on-hand quantity in the **Lvl entered** description from the maximum stocking level to determine the quantity to bill.

   Note: You do not need to perform step 6 if the order is for an order count.

7. Process the billing.
8. Press **Esc** to save updates and exit the screen.

Resolving Negative On-Hands with Stock Level Counts

If you encounter negative on-hands when counting stock levels using Palm RDC, you must resolve the quantities by doing the following:

- Run a consignment transfer to bring the quantities to zero.
- After the consignment transfer, cycle count and adjust the actual on-hand quantities.

  Note: If you have a negative on-hand quantity and enter zero, the RDC application will ignore the zero. No credit will be given to the customer and the on-hand quantity will not move to zero when uploading. If you must issue that credit in conjunction with the adjustment to zero from a negative on-hand, you must make the postings manually.

To handle negative on-hands with stock level counts:

1. Run the Inventory Valuation Report to identify all items with negative on-hands.
2. Create a consignment transfer for items with negative on-hands to bring their on-hand quantities to zero.
3. Cycle count the items at the customer's location.
4. Adjust the on-hand quantities in the branch to their correct on-hand quantities.

   Note: If a customer has used more than you provided, it is most likely due to over-shipping.

See Also:

RDC Replenishment Transfers for Consigned Inventory Overview

Reviewing Uploaded RDC Consigned Count Information

How the System Calculates RDC Consignment Usage

Processing Billings of Usage for RDC Consignment Sites

After reviewing billings of usage for customer consignment locations, invoice the billing of usage to charge the customer for the quantity used and to adjust the customer's inventory in the system.

To invoice consignment billings of usage:

1. Display the billing of usage either from your message queue, the Remote Order Entry Review Queue, or by selecting it on the Sales Order Entry screen.
2. Review the billing of usage.
3. Resolve any errors.
4. Press **Esc** to display the Status screen.
5. In the **Order Status** field, enter **Invoice**.
6. Press **Esc** to invoice the consignment billing of usage.

See Also:

How the System Calculates RDC Consignment Usage

RDC Replenishment Transfers for Consigned Inventory Overview

Reviewing Uploaded RDC Consigned Count Information

Resolving RDC Consignment Errors

Creating Consigned Transfers for RDC Replenishment

On a regular basis, review a customer's on-hand quantity and create replenishment transfers, as needed.

You create replenishment transfers by running the Suggested Consignment Auto Transfer utility. This utility compares the uploaded count quantity with minimum stocking levels for each item. It then suggests replenishment transfers up to the defined maximum for any item with quantity below the minimum. Use the Consignment Transfer Queue to review and create suggested transfers, and then process the actual replenishment transfer from Sales Order Entry.

> **Note:** You can view the most recent uploaded count quantity for an item in the Customer / Vendor Specific Part Numbers screen's **Level** field.

To create a consigned inventory transfer for replenishment:

1. Perform a consignment levels count to upload a customer's current on-hand quantity to the system.
2. Review and process the billing of usage for the consigned inventory.
3. Run the Suggested Consignment Auto Transfer utility to compare current on-hand quantity with minimum and maximum stocking levels.
4. Review the suggested consignment transfers for the customer in the Consignment Transfer Queue.
5. From the Suggested Consignment Transfer Queue screen, use the **Create** hot key to create the consignment transfer.
6. Process the consignment transfer from Sales Order Entry.
7. Repeat this process periodically to maintain inventory at the customer consignment location.

See Also:

RDC Replenishment Transfers for Consigned Inventory Overview

Automating Consignment Transfers

Entering Delivery Sales Orders

How the System Calculates RDC Consignment Usage

The following describes how consignment billings of usage are calculated for both Levels and Order count data.

Levels Mode

The consignment billings of usage for Levels mode is calculated with the following formula:

((Beginning On-Hand Quantity + Received Transfers Since Last Hot Sync) - (In-process Customer Consignment Transfers - (Open Consignment Transfers - Cycle Counted Level Uploaded by Palm RDC))) = Usage.

For example:

- Your customer has 100 widgets as their beginning on-hand quantity, for which the minimum is 60 and the maximum is 100.
- After a week, you cycle count the widgets and find that the customer only has 50 left.
- You HotSync the cycle count, and create a consignment transfer for replenishment for 50 more widgets.
- You send 40 of the widgets, which the customer receives the following Monday.
- Monday you send 5 more widgets, leaving 5 more to fill the transfer order.
- On Tuesday, you perform another cycle count of the widgets. The customer has 90, which you upload using the Palm RDC.
- After the cycle count, you calculate usage:

  (((100 + 40) - (5 - (5 - 90))) = 50

  The consignment billing for usage is for 50 widgets.

Order Mode

The consignment billings of usage for Order mode is calculated with the following formula:

((Beginning On-Hand Quantity + Received Transfers Since Last Hot Sync) - (In-process Customer Consignment Transfers - (Open Consignment Transfers - Orders Uploaded by Palm RDC))) = Usage.

For example:

- Your customer has 100 widgets as their beginning on-hand quantity, for which the minimum is 60 and the maximum is 100.
- After a week, the customer cycle counts the widgets and finds that they only have 50 left.
- They HotSync the count, and create a consignment transfer for replenishment for 50 more widgets.
- You send 40 of the widgets, which the customer receives the following Monday.

- Monday you send 5 more widgets, leaving 5 more to fill the transfer order.
- On Tuesday, the customer cycle counts the widgets again. The customer has 90 widgets, which they upload using the Palm RDC.
- After the upload, you calculate usage:

  (((100 + 40) - (5 - (5 - 90))) = 50

  The consignment billing for usage is for 50 widgets.

See Also:

Processing Billings of Usage for RDC Consignment Locations

RDC Replenishment Transfers for Consigned Inventory Overview

RDC Order and Stock Level Replenishment Overview

RDC Replenishment Transfers from Flat Files Overview

If you have customer sites that maintain inventory through Order and Stock Levels modes, but use flat files instead of Palm devices to collect the count data, process the data with RDC Flat File Processing.

Flat file count data functions the same as regular Palm RDC count data, with the only difference being the way in which the count data is uploaded and processed. Instead of using Palm devices to collect and upload count data to the system, do the following:

- Manually count inventory and enter the data in a flat file.
- Upload the flat file to Hold Entries in the system.
- Process the data within the flat file using RDC Flat File Processing.

When the system processes the flat file count data, it does so as if the data were uploaded from a Palm device. The Palm RDC Administrator and user defined in Remote Order Entry Parameters receives a message indicating that an order, transfer, or billing of usage was created. You can then review the count data and process orders, transfers, or billings of usage, as needed.

RDC Flat File Processing can be used with both non-consignment and consignment locations.

See Also:

RDC Flat File Formatting Guidelines

Processing Flat Files for RDC Replenishment

RDC Order and Stock Level Replenishment Overview

RDC Replenishment Transfers for Non-Consignment Inventory Overview

RDC Replenishment Transfers for Consigned Inventory Overview

RDC Flat File Formatting Guidelines

Flat files used with RDC Flat File Processing need to be in a tab-delimited format and contain specific columns of information.

Tab-Delimited Format

Tab-delimited formatting separates cells of information by one tab and lines of information by one carriage return. Tab-delimited flat files are easy to create:

- Create the flat file in a normal Microsoft Excel spreadsheet.
- From the **Files** menu, select **Save As** to display the Save As window.
- In the **Save as type** field, select **Text (Tab delimited) (*.txt)**.

Flat File Data Columns

Include the following columns of information for RDC flat files:

Column	Information
1st column	The part number to identify the product. Part numbers can be any of the following: • Eclipse part numbers defined in Product Maintenance. • Customer/vendor-specific part numbers defined in Customer Maintenance. • UPC number. • User-defined part numbers.
2nd column	The product locations defined on the Customer / Vendor Specific Part Numbers screen. This column of data is not required.
3rd column	The order quantity or levels count for the product in the location. Flat files cannot contain both order and levels quantities. You must create separate flat files for each type of quantity.

Note: When creating the file, do not label the columns of information. Only include the actual values.

See Also:

Processing Flat Files for RDC Replenishment

RDC Replenishment Transfers from Flat Files Overview

Processing Flat Files for RDC Replenishment

If you use flat files in place of Palm devices, you must upload and process the files before using them with RDC Replenishment. After processing the flat files, use the count data to create orders, transfers, or billings of usage, as needed.

To upload a flat file for RDC Replenishment:

1. From the **System > Printers** menu, select **Your Hold Entries** to display the Spooler Control screen.
2. Use the **Upload** hot key to display the Select file window.
3. Browse to the flat file, select it, and click the **Open** button to display the DOS Path Name and Spooler Title prompt.

   The system populates the **Enter DOS Path Name** field with the flat file's directory pathway.
4. In the **Enter Spooler Title** field, enter a name for the flat file, such as **RDC Flat File Upload**.
5. Press **Enter** to upload the file.
6. Press **Esc** to return to the Spooler Control screen.
7. Process the file.

To process a flat file for RDC Replenishment:

1. Upload the flat file to Hold Entries.
2. From the Spooler Control screen, select the uploaded flat file and use the **Process** hot key to display the User Defined Upload Processing screen.
3. In the **Processing Type** field, press **F10** and select **RDC Flat File Import**.
4. Use the **Begin** hot key to display the Customer Entry prompt.
5. In the **Customer** field, enter the customer ID for whom you are processing the data.
6. In the **Processing Mode** prompt, select one of the following modes to use in processing the count data:

Mode	Description
Billings	For consignment sites only, creates a billings of usage for the quantities entered in the flat file.
Transfers	For consignment locations only, creates a consignment transfer for the quantities entered in the flat file.
Billings and Transfers	For consignment locations only, creates both a billings of usage and a consignment transfer for the quantities entered in the flat file.
Levels	For non-consignment locations only, processes the quantities entered in the flat file as a normal levels count.

Mode	Description
Orders	For non-consignment locations only, processes the quantities entered in the flat file as a normal order count.

Note: The **Billings**, **Transfers**, and **Billings and Transfers** modes display only for customers flagged as consignment locations. The **Levels** and **Orders** modes display only for customers who are not flagged as consignment locations.

The system processes the flat file data. If the system comes across any data errors, such as invalid part numbers, it prompts you with the error. Resolve the errors and continue processing the data.

7. Press **Esc** to save updates and exit the screen.
8. Review the processed data for non-consignment or consignment sites, as needed.

See Also:

RDC Replenishment Transfers from Flat Files Overview

RDC Flat File Formatting Guidelines

Reviewing Uploaded RDC Count Information

Reviewing Uploaded RDC Consigned Count Information

Palm RDC Reports Overview

Use the following reports to collect remote order information for both consignment and non-consignment locations:

- RDC Order Review Report – Run to track replenishment orders placed by consignment and non-consignment locations.
- Customer Consignment Report – Run to summarize consignment inventory billings and transfers for a multi-branch network.

See Also:

RDC Order and Stock Level Replenishment Overview

Running the RDC Order Review Report

Use the RDC Order Review Report to track the replenishment orders your customers have placed remotely. This report displays information identical to the Remote Order Entry Review Queue.

For a description of the report, see What the Report Shows below.

To run the RDC Order Review Report:

1. From the **Orders > Consignment Inventory** menu, select **RDC Order Review Report** to display the RDC Order Review Report screen.
2. In the **Br/Tr/All** field, enter the branch or territory for which to run this report, or enter **All** to run the report for all branches and territories.
3. In the **Start Date** field, enter the beginning date for the date range on which to run this report.
4. In the **End Date** field, enter the ending date for the date range on which to run this report.
5. In the **Salesperson** field, enter the salesperson on whom to run this report.
6. In the **No. Days to Purge** field, enter the number-of-days-old to designate the orders to delete from the Remote Order Entry Review Queue.

   For example: You want to purge all orders that have been in the queue for 10 days or longer. Enter **10** in the **No. Days to Purge** field to purge those orders from the queue.
7. In the **Source** field, select the source of the orders, such as **RDC** or **WOE**, for which to run the report.

   Use the **Multi** hot key to define multiple sources for which to run the report.
8. Set options, if needed, and generate the report.

What the Report Shows

The RDC Order Review Report displays the date range and branches for which it was run, along with the following information.

Note: The totals and salesperson for each order display below the respective sections. Totals for all orders and salespeople display at the bottom of the report.

Field/Column	Description
Salesman	The salesperson for each order.
Customer	The customer for each order.
Order#	The assigned order number.
Route#	The assigned route number.
PO#	The customer purchase order (P/O) number.

Field/Column	Description
Shipping Instructions	Any shipping instructions attached to the order.
Item No.	The item number for each item on the order.
Description	The item description for each item on the order.
Qty	The quantity ordered for each item.
Price	The price charged for the item if consigned.
Orig. Price	The original item price if consigned.
Comm Cost	The guaranteed costs for the item if consigned.
G.P.%	The gross profit for the item if consigned.
Flg	If the order was for a levels replenishment, the minimum stocking level quantity that the item must fall below in order to be replenished.
Gen	The order generation assigned to the item for the order.
Shp Date	The ship date assigned to the item for the order.
Status	The status assigned to the item for the order, such as **B** - bid.
Error	Any errors assigned to the item.

See Also:

Palm RDC Reports Overview

Reviewing Uploaded RDC Count Information

Reviewing Remote Order Entries

RDC Order and Stock Level Replenishment Overview

Palm RDC Auto Replenishment Overview

Use Auto Replenishment to create RDC orders without pre-defining customers on the Palm device. Auto Replenishment uses unique identifiers to tie individual products to customers so that it is not necessary to define customers on the Palm device. When Palm RDC encounters an auto-replenishment number, it immediately recognizes the customer and applies the correct order information.

> **Note:** You do need to define customers and products for whom you are using Auto Replenishment in the system.

Auto Replenishment is similar to RDC Order and Stock Levels Replenishment. You can create Auto Replenishment orders in Order or Stock Levels mode. With Auto Replenishment, however, you can also create orders to completely replenish stock no matter what the on-hand quantity is. Review, upload, and process Auto Replenishment data the same as you do Order and Stock Levels Replenishment data.

To use Auto Replenishment, perform the following tasks:

- Identify products to order using Auto Replenishment.
- Select Auto Replenishment scanning modes to determine the way in which orders are created.
- Create Auto Replenishment orders.
- Review Auto Replenishment orders before uploading to the system.
- Upload Auto Replenishment orders to the system from the Palm device.
- After uploading Auto Replenishment data to the system, review and process the information depending on the type of customer – either consignment or non-consignment – for whom the Auto Replenishment order is being created.

See Also:

Selecting Scanning Modes for RDC Auto Replenishment

Creating Orders with RDC Auto Replenishment

Identifying Auto Replenishment Products to Count

RDC Order and Stock Level Replenishment Overview

Palm RDC Overview

Selecting Scanning Modes for RDC Auto Replenishment

If you are using Auto Replenishment to create orders, select any of the following to determine how orders will be created:

- **Auto Replenishment** – The system creates orders every time count information is uploaded to the system. The system orders the defined maximum level for each product included in the count upload.

  For example, ABC customer stocks small widgets, which they replenish only when they run out. ABC's defined maximum level for the small widgets is 100. When ABC runs out of small widgets, they scan the pre-defined small widget auto-replenishment ID. Upon upload of the auto-replenishment count information, the system automatically creates an order for 100 small widgets, the defined maximum stocking level.

- **Auto Levels** – The system creates orders every time the uploaded count is below a customer's defined minimum level for a product. The system orders quantity up to the defined maximum level for the product.

  For example, ABC customer performs a cycle count for small widgets. ABC's defined minimum level for the small widgets is 50 and defined maximum level for the small widgets is 100. The cycle count finds that ABC has 75 small widgets on-hand. The system does create an order since the amount of on-hand small widgets is above the defined minimum amount.

  If the cycle count found that ABC had 49 small widgets on-hand, the system would create an order for 51 small widgets because the on-hand quantity is below the minimum. Ordering 51 small widgets would bring ABC back to their maximum level.

- **Auto Order** – The system creates orders when quantity is entered for an item on the RDC Auto Orders screen. The system orders the amount entered.

  For example, ABC customer decides that they need an additional 50 small widgets even though they have their maximum on-hand of 100. ABC accesses the RDC Auto Orders screen and enters a quantity of 50 for the small widgets. Upon upload, the system creates an order for 50 small widgets.

Define a customer's stock levels and auto replenishment numbers from the Customer/Vendor Specific Part Numbers screen.

To select scanning modes:

1. Display the Palm RDC application on your Palm device.
2. Tap the **Menu** screen button to display the Palm RDC menu bar.
3. Tap **Options** and then **Scanning Modes** to display the Scanning Modes screen.

4. Select the following options, as needed:

Option	Function
Auto Replenishment	Select to automatically create an order for product any time it is scanned and uploaded to the system. The system orders the defined maximum level for the product.
Auto Levels	Select to automatically create an order for product any time it is below the customer's defined minimum level. The system orders the amount needed to bring the customer's quantity back up to the defined maximum level.
Auto Order	Select to automatically create an order for product when quantity is manually entered. The system orders the amount entered on the RDC Auto Orders screen.

5. Tap **OK** to save settings and exit the screen.

See Also:

Creating Orders with RDC Auto Replenishment

Identifying Auto Replenishment Products to Count

Customer/Vendor Specific Part Numbers Overview

Palm RDC Setup on Palm Devices Overview

Palm RDC Auto Replenishment Overview

Creating Orders with RDC Auto Replenishment

Use Auto Replenishment to create RDC orders without needing to define customers on the RDC Palm device. Use the following scanning modes to create Auto Replenishment orders:

- **Auto Replenishment** – The system creates orders every time count information is uploaded to the system. The system orders the defined maximum level for each product included in the count upload.
- **Auto Levels** – The system creates orders every time the uploaded count is below a customer's defined minimum level for a product. The system orders quantity up to the defined maximum level for the product.
- **Auto Orders** – The system creates orders when quantity is entered for an item on the RDC Auto Orders screen. The system orders the amount entered.

When creating orders, the system separates products on orders according to their respective customer, purchase order number, release number, and break point combination.

To create an order using the auto replenishment scanning mode:

1. Display the Palm RDC application on your Palm device.
2. Tap the black triangle to display a list of all available scanning modes.
3. Tap **Auto Replenishment** to display the RDC Auto Replenish screen.
4. In the **Item Number** field, scan or enter the auto-replenishment ID for the item you are ordering.

   Note: Remember to include the exclamation point (**!**) at the beginning of the product ID.

5. Tap the **Next Item** button to store the item in the count table and clear the screen for the next entry.
6. Repeat steps 4-5 for each item you want to completely replenish.
7. After scanning all items to replenish, tap the **List Items** button to display the count table for the items.
8. Review and edit the order, if needed.
9. Upload the information to the system.
10. Review and process the information depending on the type of customer – either consignment or non-consignment – for whom the Auto Replenishment order is being created.

To create an order using the auto levels scanning mode:

1. Display the Palm RDC application on your Palm device.
2. Tap the black triangle to display a list of all available scanning modes.

3. Tap **Auto Levels** to display the RDC Auto Levels screen.
4. In the **Item Number** field, scan or enter the auto-replenishment ID for the item you are ordering.

   Note: Remember to include the exclamation point (**!**) at the beginning of the product ID.

5. In the **Quantity** field, scan or enter the on-hand quantity for the product.

   Note: If you selected the **Allow Quantity Scans** box on the RDC Preferences screen, you can scan the quantity for the product.

6. Tap the **Next Item** button to store the item in the count table and clear the screen for the next entry.
7. Repeat steps 4-6 for all items.
8. After counting all items, tap the **List Items** button to display the count table for the items.
9. Review and edit the order, if needed.
10. Upload the information to the system.
11. Review and process the information depending on the type of customer – either consignment or non-consignment – for whom the Auto Replenishment order is being created.

To create an order using the auto orders scanning mode:

1. Display the Palm RDC application on your Palm device.
2. Tap the black triangle to display a list of all available scanning modes.
3. Tap **Auto Orders** to display the RDC Auto Orders screen.
4. In the **Item Number** field, scan or enter the auto-replenishment ID for the item you are ordering.

   Note: Remember to include the exclamation point (**!**) at the beginning of the product ID.

5. In the **Quantity** field, scan or enter the quantity to order for the product.
6. Tap the **Next Item** button to store the item in the count table and clear the screen for the next entry.
7. Repeat steps 4-6 for all items.
8. After ordering all items, tap the **List Items** button to display the count table for the items.
9. Review and edit the order, if needed.
10. Upload the information to the system.
11. Review and process the information depending on the type of customer – either consignment or non-consignment – for whom the Auto Replenishment order is being created.

See Also:

Palm RDC Auto Replenishment Overview

Selecting Scanning Modes for RDC Auto Replenishment

Identifying Auto Replenishment Products to Count

Reviewing Products Counted with Palm RDC

Uploading Count Information from Palm RDC

Reviewing Uploaded RDC Count Information

Reviewing Uploaded RDC Consigned Count Information

Palm RDC Cycle Counting Overview

Use Palm RDC to cycle count inventory at your warehouse branches. By collecting cycle count data with Palm RDC, you can automate some of the Eclipse cycle counting functionality.

For example, you do not need to manually populate the Physical Count Load-In screen. Instead, upload and process the RDC cycle count data to have the system automatically populate this screen.

To use the Palm device for cycle counting inventory at your warehouse branches, do the following:

- Verify that the User Defined Upload Processing Routine has been defined.
- Define branches in which to perform RDC cycle counts.
- Generate a count control file.

  Note: It is not necessary to generate a count control file prior to performing a cycle count with Palm RDC. You can create the count control when you process the collected cycle count information.

- Cycle count products with the RDC Palm device.
- Upload the cycle count data to the system.
- Process the cycle count information by either mapping it to the existing count control file or by creating a new count control file with the uploaded count data.
- Review the processed cycle count data.
- Run the Count Variance Report to find any quantity discrepancies.
- Update physical on-hand quantities.

See Also:

RDC Duplicate Handling Report Data

Palm RDC Overview

RDC Order and Stock Level Replenishment Overview

Palm RDC Setup Overview

Cycle Counting Products with Palm RDC

Use the Palm device to cycle count products at your warehouse branches. Cycle counting with the RDC Palm device is much like performing stock levels replenishment counts, except that you are counting for a branch instead of a customer. Either while performing or after completing a cycle count, you can review and edit the collected counts for each item on the Palm device. When you have completed the cycle count, upload the gathered count data to the system so that it can be processed.

Before cycle counting, make sure that you have all branches for which you are performing the cycle count defined on the Palm device, as well as verifying that the User Defined Upload Processing Routine is defined in the system.

To cycle count products with Palm RDC:

1. Display the Palm RDC application on your Palm device.
2. Tap the black triangle to display a pick list of all branches set up for cycle counting.
3. Tap **Counts at Branch** for the appropriate branch to display the Cycle Counting screen.

   Note: The **Header** button is not available on the Cycle Counting screen.

4. In the **Location** field, enter or scan a location to cycle count, if necessary.

   Note: If you selected the **Skip Location Field** box on the RDC Preferences screen, you do not need to enter a location.

5. In the **Item Number** field, scan or enter the Eclipse part number for the item you are counting.
6. In the **Quantity** field, enter the quantity of the product at the location.

   Note: If you selected the **Allow Quantity Scans** box on the RDC Preferences screen, you can scan the quantity for the product. If you selected the **Default Quantity to 1** box on the RDC Preferences screen and the quantity is one, skip this field. If the quantity is more than one, edit this field.

7. Tap the **Next Item** button to store the item in the count table and clear the screen for the next entry.
8. Repeat steps 4 - 7 until you have counted all the items.
9. Tap the **View Counts** button to review and edit the gathered cycle count data.
10. Upload the information to the system.

See Also:

Processing the Palm RDC Cycle Count File

Palm RDC Cycle Counting Overview

Processing the Palm RDC Cycle Count File

After cycle counting a branch and uploading the count information to the system, process the Palm RDC cycle count data to automatically populate the Physical Count Load-In screen.

Before processing cycle count data, determine the following:

- When to create the count control file.

  When processing uploaded count data, indicate the material that was counted by either:

- Creating a control file prior to the cycle count and then mapping the uploaded data to the existing count control file.
- Creating a new count control file with the uploaded data.

  Use the count control file to do the following:

- View the uploaded data on the Physical Count Load-In screen.
- Run the count variance report for the uploaded data.
- Update on-hand quantities in the system for the uploaded data.
- Whether to force users to count all locations for a product.

  Indicate if you want to force users to count all locations for a product at the defined branch. By forcing users to count all locations for one product, all count data for the product at the branch is consolidated in the same count control file.

  For example:

  A user counts only one location for a product with multiple locations. After processing the count data, you review the count data. You see that the product actually has multiple locations, but the user counted only one of the product's locations. Send another user back to count each location for the product. You then reprocess the new count data using the same count control file. The system adds together the counts for all of the product's locations so that all quantities for the product exist in one count control file.

- How to handle duplicate counts.

  Duplicate counts occur when your users or third party firm users count the same product at different locations and scan different IDs for the product.

  For example:

  A user is counting ABC bolts, which are kept in three different boxes. In the first box, the user scans the UPC number to identify the bolts, and enters a quantity of 10. In the second box, the user scans the Eclipse product ID to identify the bolts, and enters a quantity of 15. In the third box, the user scans the user-defined ID to identify the bolts, and enters a quantity of 20. Upon upload, the system recognizes that the three counts are for the same product, even though different IDs were scanned. When you process the count data, you must decide how to handle the duplicate counts for the ABC bolts.

  Following are your options for handling duplicate counts:

- **Add All** - The system adds all duplicate counts together into one quantity for the product.

  Using the above example, the system would add the quantities of 10, 15, and 20 together, to give a total count of 45 for the ABC bolts.

- **Overwrite All** - The system overwrites all preceding count quantities with the most recent count quantity.

  Using the above example, the system would overwrite the first quantity of 10 with the second quantity of 15 when it processes the second count. It would then overwrite the second quantity of 15 with the third quantity of 20 when it processes the third count. The system would process 20 as the final total count for the ABC bolts.

- **Skip All** - The system skips any duplicate count quantities, and records each count for the product.

  Using the above example, the system would process all three quantities – 10, 15, and 20 – separately at each location for the ABC bolts.

- **Handle Individually** - While processing the count data, the system prompts you each time it discovers a duplicate count. At the prompt, indicate how you want the duplicates handled – to add the duplicates together, to overwrite the last count with the current count, or to skip all duplicates and to process each individually.

  After processing third party cycle counting data, the system generates the Duplicate Handling Report with the processed data. Review this report for detailed information on any duplicate counts.

Processing Cycle Count Data

To process cycle count data:

- Review the uploaded count control file before processing the data.
- Process the file.
- Review the processed data in the Duplicate Handling Report or from the Physical Count Load-In screen.

To review the uploaded Palm RDC cycle count control file before processing:

1. From the **System > Printers** menu, select **Your Hold Entries** to display the Spooler Control screen.

   Note: You must be the RDC Administrator for the shipping branch to access the control file from Your Hold Entries.

2. Select the **RDC-CYCLE COUNT GENERATION** file and use the **View** hot key to display the count data.

3. View the following information to verify that the count is complete:

Field	Description
Branch	The branch in which the cycle count was performed. This branch also displays as **PALMPILOT~nnn** between the headings and the count information, with **nnn** indicating the branch number.
PN#	The product ID for the item counted.
Location	The location where the item was counted.
Qty	The quantity counted for the item at the indicated location.

Note: The count information is separated on the report using the tilde (~) delimiter.

4. Press **Esc** to return to the Spooler Control screen.
5. Process the Palm RDC cycle count control file.

To process the uploaded Palm RDC cycle count control file:

1. From the **System > Printers** menu, select **Your Hold Entries** to display the Spooler Control screen.

   Note: You must be the RDC Administrator for the shipping branch to access the control file from Your Hold Entries.

2. Select the **RDC-CYCLE COUNT GENERATION** file and use the **Process** hot key to display the User Defined Upload Processing screen.
3. In the **Processing Type** field, press **F10** and select **RDC Cycle Count Upload**.
4. Use the **Begin** hot key to display the RDC Cycle Count screen.
5. Enter the following information, as needed:

Field	Description
Control #	Assign a count control file to the count data. • If you created a count control file prior to counting, enter the existing control file number. The system populates the **Title** field with the title already assigned to the count control file. • If you are creating a count control file with the collected data, enter **New**. The system assigns the next available control file number to the count control file.
Title	Assign a title to the count data. • If you created a count control file prior to counting, the system populates the **Title** field with the title already assigned to the count control file. • If you are creating a count control file with the collected data, enter a title for the count control file.
Branch	The system displays the branch in which the count occurred. Edit the branch in which the count occurred, if needed.
Count Date	The system displays the current date for the count date. Edit the date the count occurred, if needed.

Field	Description
Force All Location Counts	Enter **Y** to force users to count all locations for a product at the defined branch.
Duplicate Handling	Select how to handle duplicate count: • **Handle Individually** - Handle each duplicate count as the system discovers it by pressing **F10** at the duplicate prompt and selecting the handling method. • **Add All** - Add all duplicate counts together into one quantity for the product. • **Overwrite All** - Overwrite all preceding count quantities with the most recent count quantity. • **Skip All** - Skip any duplicate count quantities, and record each count for the product.
Report Sort By	Select how you want the processed data to sort in the Duplicate Handling Report: • **Description by Location** • Location by Description • Upload Notes by Description • Upload Notes by Location

6. Use the **Begin** hot key to process the count data.

   The system generates the Duplicate Handling Report and populates the Physical Count Load-In function with the processed count data.

   Note: While processing the count data, the system prompts you each time it discovers a duplicate count if you selected to handle duplicate counts individually.

7. Press **Esc** to save updates and exit the screen.
8. Review the processed count data either from the Duplicate Handling Report or on the Physical Count Load-In screen.

See Also:

Selecting Count Control Files

Entering the Inventory Counts

Cycle Counting Products with Palm RDC

RDC Duplicate Handling Report Data

Reviewing Processed RDC Cycle Count Data

Palm RDC Cycle Counting Overview

RDC Duplicate Handling Report Data

Use the Duplicate Handling Report to view any duplicate counts that were processed with a Palm RDC cycle count. In addition to displaying duplicate counts, the report displays the following:

Column	Description
Description	The Eclipse product description of the product counted.
Location	The location for the product counted.
Upload Product	The scanned ID of the product counted. For example, this ID could be a UPC number, Eclipse product ID, or user-defined ID.
Part Number	The Eclipse product ID of the product counted.
Upload Quantity	The quantity counted at the corresponding location for the product.
Recorded Quantity	The quantity recorded for the product. Depending on how duplicate counts were handled, this number may represent quantities at all locations for the product, the last quantity counted for the product, or the quantity at each corresponding location for the product.
Upload Notes	Any system notes explaining how the product, location, and quantity were processed. These notes include any duplicate handling or forced location counting.
Process Summary	Totals for the following: • Duplicates counts that occurred. • Part numbers not found. • Items processed.

To generate a Duplicate Handling Report, follow the steps in Processing the Palm RDC Cycle Count File.

Note: When locating the Duplicate Handling Report from Your Hold Entries, it will be named using the title specified in the **Title** field of the RDC Cycle Count screen.

See Also:

Processing the Palm RDC Cycle Count File

Reviewing Processed RDC Cycle Count Data

Palm RDC Cycle Counting Overview

Reviewing Processed RDC Cycle Count Data

After processing the Palm RDC cycle count control file for the uploaded count data, review the count data on the Physical Count Load-In screen.

This screen displays the quantity and location for each item counted at the defined branch. If the **Force All Location Counts for Each Product** field was set to **Y** on the RDC Cycle Count screen, this screen also displays all uncounted locations for the products at the defined branch. You can send users back to the branch to count remaining locations, and then consolidate the counts for all of the products' locations.

After reviewing the uploaded count data, run the Count Variance Report to find quantity discrepancies between the quantity in the system and the actual counted quantity.

> **Note:** To review duplicate handling data, use the Duplicate Handling Report.

To review RDC cycle count data on the Physical Count Load-In screen:

1. From the **Phys** menu, select **Physical Count Load-In** to display the Physical Count Load-In screen.
2. In the **Count ID #** field, enter the control file number for the count control file for which you want to review counts.

   The system populates the **Title** and **Br#** fields with the count control file's assigned title and branch.
3. Review the following count information:

Column	Description
Cnt Date	The date assigned to the count control file when processed.
Description	The description of the product that was counted.
Location	The product location that was counted. If the **Force All Location Counts for Each Product** field was set to **Y** on the RDC Cycle Count screen, this field also displays all uncounted locations for the products at the defined branch.
Count	The quantity of the product counted at the location.
Ctrl #	The control number assigned to the line item.

4. Press **Esc** to exit the screen.
5. Run the Count Variance Report.

See Also:

Resolving RDC Cycle Count Discrepancies Using the Count Variance Report

On-Hand Quantities and RDC Cycle Counts

RDC Duplicate Handling Report Data

Resolving RDC Cycle Count Discrepancies Using the Count Variance Report

After processing and reviewing uploaded RDC cycle count data, run the Count Variance Report to find quantity discrepancies between what the system has stored as on-hand quantity prior to the inventory count, and the actual on-hand count.

If the report shows that quantity discrepancies exist, re-count the product with the variance. Then re-run the report to make sure all discrepancies have been resolved.

For information on running the report, see Running the Count Variance Report.

To resolve quantity discrepancies using the Count Variance Report:

1. Send a user – different from the first user to count – to recount the products with quantity discrepancies.
2. Upload the new cycle count data to the system.
3. Process the new count data using the same count control record as used for the first count.
4. Review the new processed count data checking for uncounted locations.
5. Run the Count Variance Report again to see if the quantity discrepancies are resolved.
6. Repeat this process until you are comfortable with the collected cycle count data.
7. Update on-hand quantities.

See Also:

On-Hand Quantities and RDC Cycle Counts

Reviewing Processed RDC Cycle Count Data

Processing the Palm RDC Cycle Count File

Cycle Counting Products with Palm RDC

Palm RDC Cycle Counting Overview

On-Hand Quantities and RDC Cycle Counts

After viewing your cycle counts and checking for variances, update the on-hand quantities for the products you counted using the Update Physical On Hand screen.

When you update on-hand quantities, differences between an item's current and previous on-hand generates an inventory adjustment:

- If the count was greater than the previous on-hand quantity, the system posts an "In" quantity to the inventory history ledger.
- If the count was less than the previous on-hand quantity, the system subtracts an "Out" quantity.

  Note: The system indicates a product was cycled counted in the item's Product Activity Log, even if the on-hand quantity did not change.

For information on how to update on-hand quantities, see Updating Your On-Hand Quantities.

See Also:

Resolving RDC Cycle Count Discrepancies Using the Count Variance Report

Reviewing Processed RDC Cycle Count Data

Palm RDC Cycle Counting Overview

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