



# Analyst Version 3.46

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**Main Office**

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An extract from the full Analyst manual containing:

Main Office



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## **Analyst Main Office**

### **Introduction to Main Office**

Analyst Main Office is an additional module to Analyst PoS and Analyst PMR and is used to receive orders from other shops in your group or customers who you supply goods to. Picking lists and transfer advice notes can be printed for these orders as they are processed by staff and dispatched.

The core aspects of the Analyst suite of products are available for use with Main Office. Namely the Purchases and Reports sections. This allows the orders received into Main Office to be consolidated before orders for your suppliers are placed.

Analyst Main Office is designed with the small to medium group in mind who have, or would like to have a single point of supply for the stock of that group. Stock control can be maintained at the Main Office site and separately at the other shops.

Analyst Main Office can accept orders from other Analyst systems, Order Pad systems and any other system capable of sending an order with the AAH, Unichem, Mawdsleys, Cypher or other major transmission protocol.

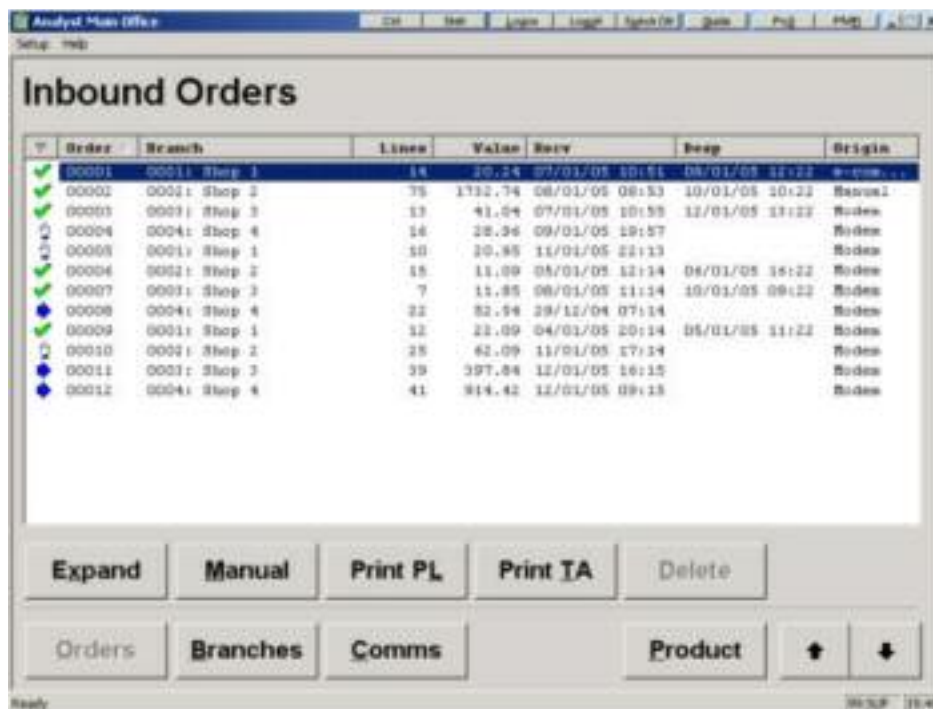
Call the Sales Team on 01257 275800 for pricing details of Main Office and discuss its suitability to your business needs. We strongly recommend the installation and/or dedication of a phone line for the sole use of receiving orders to receive the full benefit and flexibility of Analyst Main Office.

## Launching Main Office

When Main Office has been activated it is launched by clicking the Main Office button in the title bar of the Analyst Main Screen.



The Main Office main screen will then appear.



## Remote System Setup

Only branches you have setup on your Main Office system will be able to place orders with you. If anyone tries to connect to your system without a recognised account code then they will be rejected. Once you have setup your accounts as branches in Analyst you will need to tell the branch to set you up as a supplier.

On *their* system they will need to follow the instructions for setting up a supplier.



They will need to click the **Add** button and type in your contact details on the blank supplier page calling you 'Head Office' or however they refer to you.



(This is just an example of the supplier setup. Don't use any of these details)

In the Ordering section at the top right they will need the following information from you:

**Protocol:** They will all work but AAH, Mawdsleys or Unichem all tried tested and reliable.

**Data Phone:** The phone number of the modem you use to receive orders.

**Account:** The branch account number you have setup for them, including any leading zeros e.g. "0001".




## Main Office Detail

### Inbound Orders Screen

This screen is the main screen in Main Office. It displays all of the orders which have been received and are in the process of being picked, dispatched or have recently been dispatched.

Order	Branch	Lines	Value	Recv	Disp	Origin
00001	0001: Shop 1	14	20.14	07/01/05 10:34	08/01/05 12:22	Manual
00002	0002: Shop 2	75	1732.74	06/01/05 08:53	10/01/05 10:22	Manual
00003	0003: Shop 3	13	41.04	07/01/05 10:55	12/01/05 13:22	Modem
00004	0004: Shop 4	16	28.96	08/01/05 19:57		Modem
00005	0001: Shop 1	10	20.95	11/01/05 22:13		Modem
00006	0002: Shop 2	15	11.09	05/01/05 12:14	06/01/05 16:22	Modem
00007	0003: Shop 3	7	11.85	06/01/05 11:14	10/01/05 09:22	Modem
00008	0004: Shop 4	22	52.54	29/12/04 07:14		Modem
00009	0001: Shop 1	12	22.09	04/01/05 20:14	05/01/05 11:22	Modem
00010	0002: Shop 2	23	42.09	11/01/05 17:14		Modem
00011	0003: Shop 3	19	297.84	12/01/05 16:15		Modem
00012	0004: Shop 4	41	914.42	12/01/05 09:15		Modem

The column on the left displays an icon to display the status of the order.

-  Received order not yet picked
-  Order picked but not dispatched
-  Order dispatched

The rest of the columns are:

- Order number, assigned by Main Office not the system sending the order.
- The branch, shop or customer the order is for.
- The number of lines on the order
- The value of the lines in the order at retail price not including VAT.
- The date and time the order was received.
- The date and time the order was dispatched (when the Transfer Advice was printed).
- The origin of the order. This can be Manual or Modem.

From this screen use the buttons at the bottom to **Expand** into an order, manually generate an order, print a picking list or transfer advice note or delete a received order.



The mode of Main Office can be changed by using the **Orders**, **Branches** and **Comms** buttons at anytime without losing any work in the mode you are currently in. The **Product** button is used to search for a product and will display the details in the product editor.

## Branches Screen

This screen displays all of the branches held within Analyst. These are common throughout the Analyst Suite so if a branch is added or modified through Analyst PoS the changes will be displayed here and vice-versa.

Code	Branch	Balance	Limit	Telephone
0001	Shop 1	28.98	1000.00	01234 567891
0002	Shop 2	210.03	1000.00	01234 567892
0003	Shop 3	41.04	1000.00	01234 567893
0004	Shop 4	94.75	1000.00	01234 567894

The icon column indicates whether the branch is within its credit limit.

-  Account under credit limit
-  Account reached or exceeded credit limit

By using the **New**, **Edit** or **Delete** buttons branch accounts can be modified as required. Review the Branch Setup topic [here](#).

## Comms Screen

This screen displays the status of the modem or modems attached to your order reception PC.



This mirrors the behaviour of Batchcom which is the program which monitors the modem(s) and controls the communication through them. For more detail see the section on Batchcom.

## Receiving Orders

Receiving orders is the easiest thing to do with Analyst Main Office! If one of your branches or customers wants to send you an order they can do so at anytime. As long as the computer running Main Office is on and the phone line is working it will automatically validate the request to place an order from those people you have set up and receive it ready for your attention whenever you are ready.

That means that you don't need someone standing over the machine all the time or you can only receive orders at set times during the day.

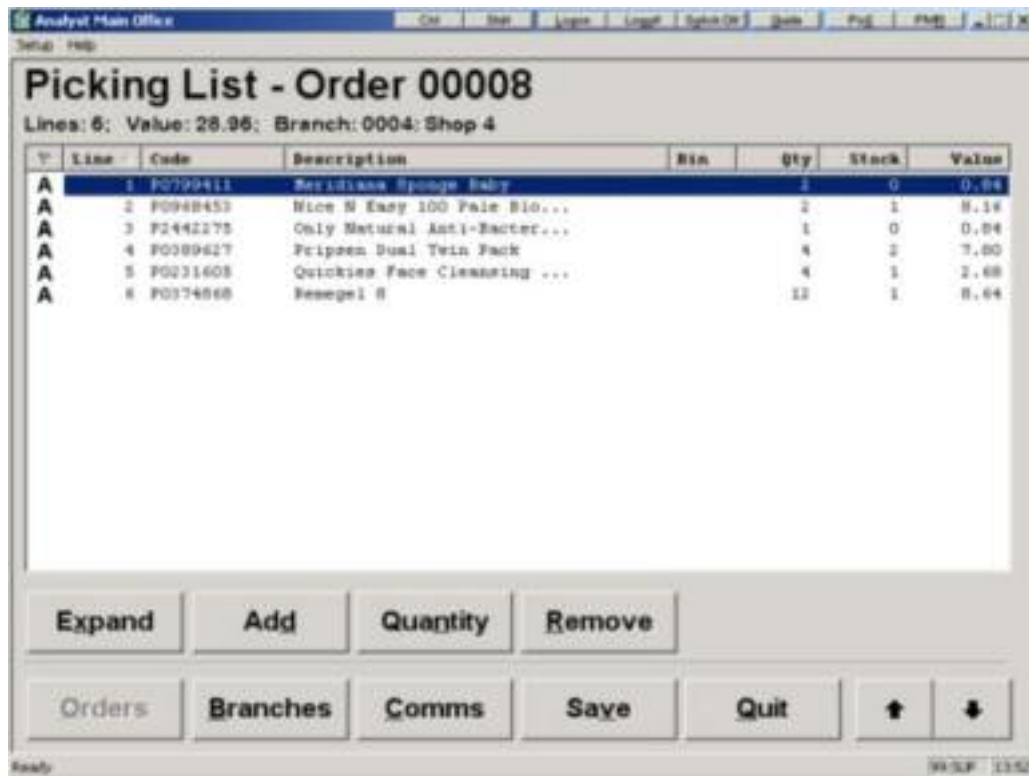
## Viewing Orders

Once an order has been received it is displayed on the Inbound Orders screen with a blue arrow next to it. The branch the order has been received from, the lines in the order, value and the date and time received are also displayed.

Received orders should be viewed before printing a picking list to correct any obvious problems.

Order	Branch	Line	Value	Recv	Ship	Origin
00001	0001: Shop 1	14	20.14	07/01/05 10:51	08/01/05 12:22	e-com...
00002	0002: Shop 2	78	1732.74	08/01/05 09:53	10/01/05 10:22	Manual
00003	0003: Shop 3	13	41.04	07/01/05 10:55	12/01/05 13:22	Nodes
00004	0004: Shop 4	16	28.96	09/01/05 19:57		e-com...
00005	0001: Shop 1	10	20.95	11/01/05 22:13		Manual
00006	0002: Shop 2	15	11.09	05/01/05 12:14	06/01/05 16:22	e-com...
00008	0004: Shop 4	22	32.54	20/12/04 07:14		Nodes
00010	0001: Shop 2	25	42.09	11/01/05 17:14		Nodes
00011	0003: Shop 3	39	397.84	12/01/05 16:15		Nodes
00012	0004: Shop 4	41	914.42	12/01/05 09:15		Nodes

Highlight the order and click **Expand** to view the detail of the received order.



The icon column will display an "A" icon if it has been received automatically or a face icon to indicate that the line has been added manually. Each line is numbered for reference and the code and description are displayed. The 'Bin' the item is stored in is shown if the information has been entered into the Location field of the item. The quantity required by the customer and the stock level of the item that you hold are in the next columns. Finally the value of the items on that line are shown on the right.

Below is an explanation of the button below the order detail.

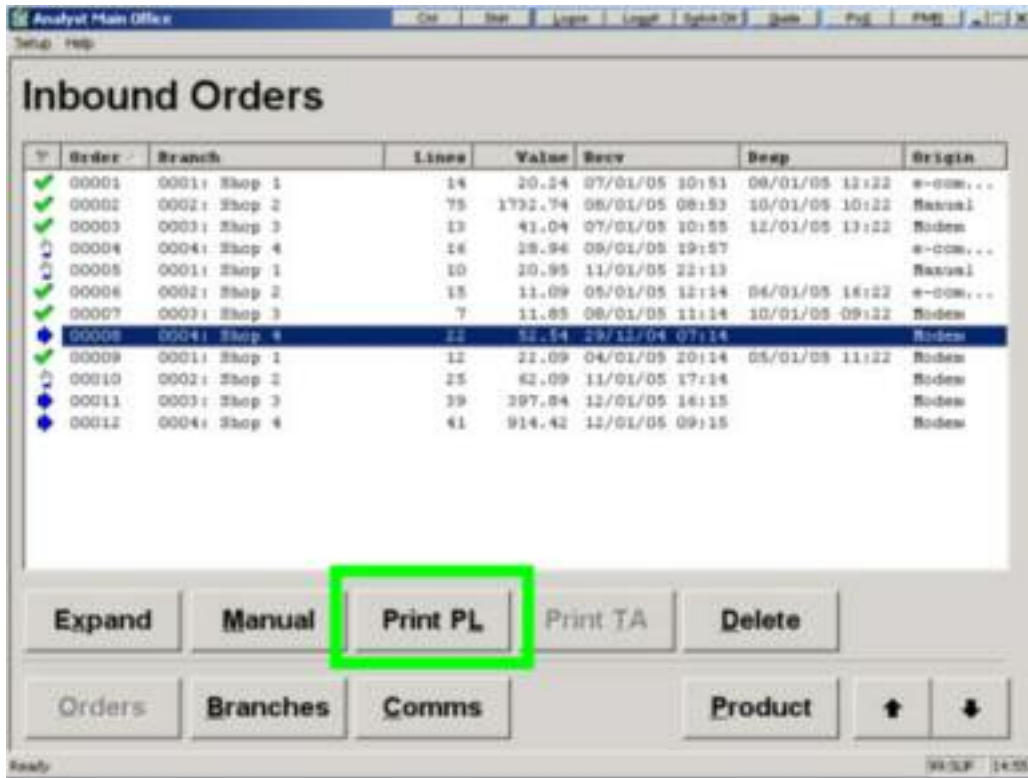
<b>Expand</b>	Expands into the Product Editor of the highlighted line.
<b>Add</b>	Displays a search dialogue to manually add a line to the order.
<b>Quantity</b>	Changes the quantity of the highlighted order.
<b>Remove</b>	Removes the highlighted line from the order.*
<b>Branches</b>	Switches to the Branches screen.
<b>Comms</b>	Switches to the Comms screen.
<b>Save</b>	Saves the order.
<b>Quit</b>	Quits the order.

\*Removed lines will not be displayed on picking lists or transfer notes and may result in a re-order from the customer. It is recommended that instead you modify the quantity to zero and provide a substitute where possible.

### Printing a Picking List

Once an order has been received and initially checked a picking list must be printed to progress the order through the system. This can be taken through to the warehouse or wherever the items are kept for ease of picking.

Highlight the order on the Inbound Order and click the **Print PL** button at the bottom. A picking list will be produced through your A4 printer.



This is what a picking list will look like...



The icon next to the order on the Inbound Orders screen now changes to a 'picking' icon.

The order needs to be physically picked now. If any lines cannot be satisfied but an alternative replacement can be supplied, write in the code of the substitute item and the number picked of that item. If any other problems arise with the pick make a note on the sheet.

When the picking is complete, or as complete as it can be, return to the computer and enter any discrepancies that have been marked on the picking list sheet.

There are a few printing options available on the Main Office tab of the system configuration which can be found by clicking **Setup** and **System Configuration**.

## Reserving Stock

In the system configuration of Main Office there is the option to reserve stock for orders that have not yet been picked. This is especially useful if there are several shops ordering from you as items which have had all their stock reserved (or used) will return an 'out-of-stock' reply to the branch encouraging them to order something else immediately rather than being disappointed when the delivery arrives.

Turn on the stock reservation option on the Options tab of the Main Office system configuration.

Stock will now become reserved as orders for the items arrive into the system. This is on a first come, first served basis. The reserved amount of an item can be viewed by opening the product editor. This can be done by expanding an item or using the Product button on the main screen.

The screenshot shows the 'Product Details (163)' window. The 'Reserved' field is highlighted with a green box. The 'Product Information' section on the right contains the following data:

Product Information	
Created	28/07/98 00:00
Last sold	06/07/05 16:52
Last counted	06/07/05 16:51
Last ordered	06/07/05 10:43
Avg daily sales	0.06
Max daily sales	0
Max daily demand	0
Prog daily sales	0.05

The system will function as normal until the amount reserved equals or exceeds the stock level of the item. Further orders for the item will then be rejected with an 'out-of-stock' message.

When the picking list is printed the amount reserved for that order is deducted from the stock level and that reserved amount cleared.

## Substituting Items






There will invariably be occasions where the exact item ordered cannot be supplied, but a suitable alternative is used to replace it. In order for your stock control to be correct and for the customer to adjust their systems correctly the Transfer Advice note you produce must be accurate.

**Expand** the order that has been picked and make the necessary changes. By default the Despatched amount column is set to satisfy the order completely so you only need to change it when it does not.

Line	Code	Description	Min	Req	Day	Stock	Value
1	P0001851	Arret Caps 6		1	1	0	2.94
2	P2400508	Benadryl Lotion 125ML		2	2	1	6.04
3	P0389759	Cotton Wool Absorb Sp Pr...		4	4	4	3.28
4	P0071274	Dentural 250ML		3	3	12	3.90
5	P1040887	Elastoplast Fabric Dress...		8	8	4	6.72
6	P1840643	Fragrant Mist-Energy		1	1	1	1.69
7	P0088169	Gaviscon Liq Antacid (100)		1	1	94	1.63
8	P2459423	Happinose 140		3	1	2	2.94
9	P0074492	Infacol 500ML		2	2	1	5.20
10	P0478008	Jolen Stripwax		1	1	1	4.21
11	P2085157	Kotex Ultra Normal 16		5	3	5	4.83
12	P0160283	Lillete Super Plus 10		1	1	7	1.80
13	P0523548	Movelat Cream 100G		2	0	2	0.00
14	P2467488	Nurofen Advance 10		4	4	2	3.60
15	P0129148	Or. Deodorant Body Spray...		2	2	2	4.24
16		Movelat Gel 100G		2	2	1	12.42

Use the **Quantity** button to amend the amounts of the ordered items. If the despatched quantity is less than the required quantity you will need to set whether the remainder of the items will be despatched at a later date or not. This is done by using the **To Follow** button which toggles the line between the status of 'balance to follow' or 'balance not to follow'. Any additional or substitute items can be appended to the end of the order by clicking the **Add** button and searching for the additional items.

The icons that appear on the left are:

-  Items despatched in full.
-  No items despatched. The balance will not follow.
-  Not all items or no items despatched. Balance will follow.
-  Not completely despatched. Balance will not follow.
-  Item not on original order. Added manually

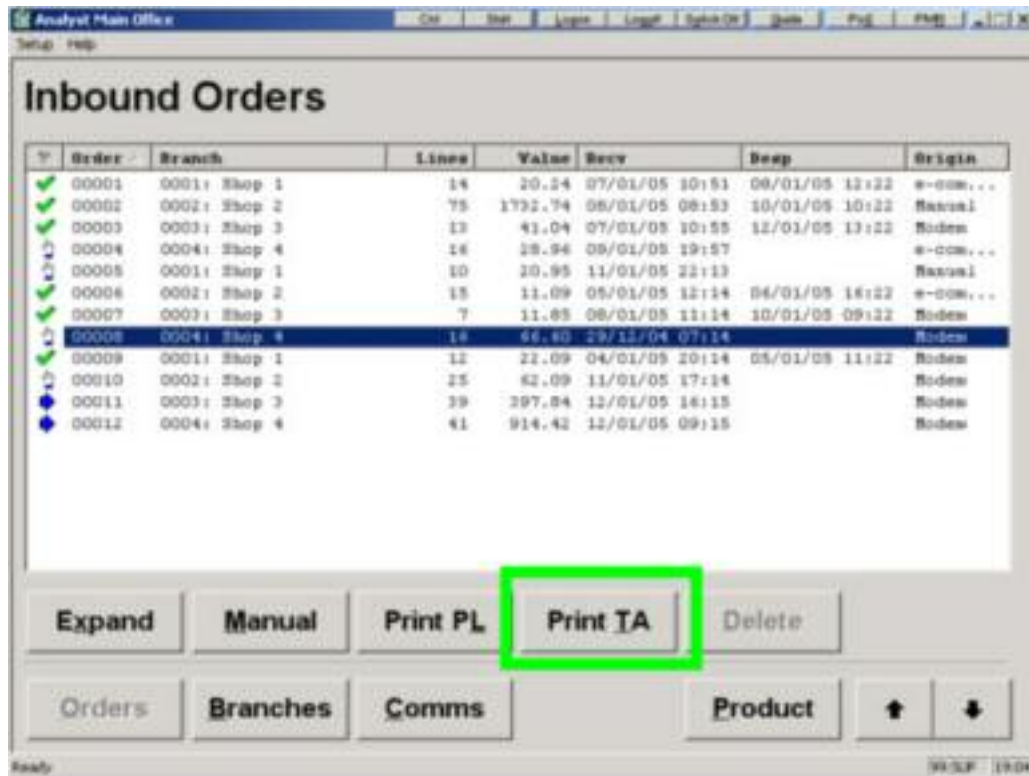
The **Remove** button is used to delete any of the manually added lines. It cannot be used to remove lines from the original order. These should have their quantity reduced to zero.

When complete the **Save** button will return you to the Inbound Orders screen where you can print a Transfer Advice Note.

## Printing a Transfer Advice Note

The Transfer Advice Note or TA will act as a delivery note at the customer's end so is confirmation of what you have picked and despatched to them as described in the Substituting Items topic.

When you have amended the details of the order if any changes have been made from picking the TA can be printed. Highlight the order and click the **Print TA** button.



This is what it will look like...

Transfer Advice Note - Order 00008							
Order Number: 00008				Despatch to: Market Street			
Branch: 0004: Shop 4							
Received: 29/12/04 07:14							
Despatched: 19/01/05 19:05							
Code	Description	Req	Disp	Unit	Total	VAT	Notes
P000651	Anti Caps 6	1	1	2.54	2.54	1	
P2002788	Beauty/Lotion 125ML	2	2	3.02	6.04	1	
P000779	Cotton Wool Absorb Dip Prepap (5x5) 15g	4	4	0.81	3.24	1	
P001274	Deonat 250ML	3	3	1.10	3.30	1	
P2000007	Disinfect Fabric/ Dyeing 50% 1140	8	8	0.84	6.72	1	
P204003	Fraxon Mini-Energy	1	1	1.89	1.89	1	
P000369	Garrison Lin Alcohol (100)	1	1	1.81	1.81	1	
P207923	Happiness 140	3	1	2.94	2.94	1	(3)
P007492	Infant 30ML	2	2	2.60	5.20	1	
P047008	Isobutirpex	1	1	4.23	4.23	1	
P200117	Kates Ultra Normal 30	3	3	1.44	4.32	4	(2)
P000263	Lifen Super Plus 10	1	1	1.80	1.80	4	
P002168	Morval Cream 100G	2	0	4.21	0.00	1	(3)
P2067488	Nasobol Advance 10	4	4	1.40	5.60	1	
P0129148	Or. Dondrasa Body Spray (150ML)	2	2	2.12	4.24	1	
	Morval Gel 100G	2	2	4.21	11.47	1	(4)

**Notes**

- 1 - Balance to follow when available
- 2 - Quantity despatched differs from quantity ordered
- 3 - Line cancelled from order
- 4 - Line not on original order

**VAT Analysis**

Description	Rate	Net	VAT	Gross
1 Standard	17.50%	59.97	10.54	70.51
2 Low Rate	5.00%	6.67	0.33	7.00
<b>TOTAL</b>		<b>66.64</b>	<b>10.87</b>	<b>77.51</b>

Underneath the main body of the TA are the notes which are referred to in the last column on the TA and a VAT analysis of the order.

There are a few printing options available on the Main Office tab of the system configuration which can be found by clicking **Setup** and **System Configuration**.

## Sending Replies & EDI Delivery Notes

Replies and EDI Delivery Notes can be sent to systems ordering from Main Office. A reply is an immediate indication of what you are unable to provide the branch with based upon your stock level. A delivery note is produced after picking and reflects exactly what has been shipped.

Order	Ref	Supplier	Lines	Received	Accepted
00711		Phoenix	10	28/05/03	
00705		Phoenix	34	28/05/03	
00700		Phoenix	35	27/05/03	
00499		Phoenix	35	27/05/03	
00498		Phoenix	35	27/05/03	
00496	ABC123	Hauldeleys - Dispensary	7	08/05/03	
00496	ABC123	Hauldeleys - Dispensary	7	08/05/03	
00496	ABC123	Hauldeleys - Dispensary	7	08/05/03	
07893	243454	Hauldeleys - Dispensary	0	07/04/03	
07894	243526	Hauldeleys - Dispensary	1	07/04/03	
07894	243527	Hauldeleys - Dispensary	1	07/04/03	
07893	243452	Hauldeleys - Dispensary	1	07/04/03	
07893	243453	Hauldeleys - Dispensary	11	07/04/03	
07893	243454	Hauldeleys - Dispensary	8	07/04/03	
07894	243526	Hauldeleys - Dispensary	1	07/04/03	
07894	243527	Hauldeleys - Dispensary	1	07/04/03	
07893	243452	Hauldeleys - Dispensary	1	07/04/03	
07893	243453	Hauldeleys - Dispensary	11	07/04/03	

The replies can have automatic responses set to them. Details can be found in the Automated Replies Processing topic.

The delivery notes can be viewed separately or can be synchronised with the order so that all the changes are made automatically and it can be accepted once checked as correct.

Both options to send these are contained within the system configuration of Main Office on the Options tab.

The replies will automatically be received by the branches as they order but the delivery notes will need some configuration at the branches in the supplier setup on the Settings tab.



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