![db distributor]

Custom Item Setup

This module is where detailed item information is maintained. Custom Items are accessed through DB Distributor>Print Management > Custom Item Setup or from within Order Entry. Item information is stored by Customer.
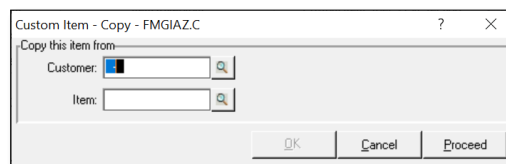
Customer Query buttons

- Left Customer query button accesses list of Customers.
- Right Customer Query button accesses list of all items from all Customers.
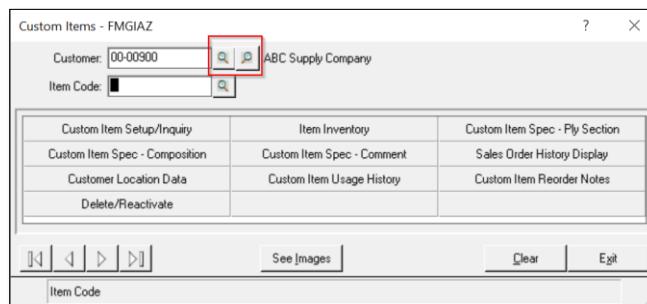
Item Code field

To start, type in the desired Item Code. When the item code matches an existing item, the item record is accessed. If the item ID doesn't match, the Custom Item Copy screen appears,

This screen allows for selecting an item from any customer and copying the item and all its settings into the new custom item, with the newly typed item ID.

To add the item manually, click **Proceed.**

Custom Item menu options

Once an item is selected, the menu options are available.

1. **Custom Item Setup/Inquiry** – standard item setup fields.
2. **Item Inventory** – item inventory setup
3. **Custom Item Spec – Ply Section** – item specification settings.
4. **Custom Item Spec – Composition** – item composition settings.
5. **Custom Item Spec – Comment** – item specification comments.
6. **Sales Order History Display** – item order history.
   a. **Custom Location Data** – item location setup is used for modifying how the item is to be treated at various customer locations, includes setup for counting inventory.
   b. Provides ability to view location transactions and view/create item usage history.

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7. **Custom Item Usage History** – Item usage history by location (if using).
   a. this will allow you to view the same usage history that can be accessed in the Customer Location Data section. Usage history is available by actual usage, cost, or budget.
8. **Custom Item Reorder Notes** – reorder notes and requisition maximum settings.
9. **Delete/Reactivate** – Deletes, de-activates or re-activates item.

Custom Item Setup/Inquiry

This menu option contains 7 tabs for basic item settings. This course reviews each tab and their settings. The minimum required fields from all tabs are: *Product Code, Vendor, Units of Measure, Unit Price and Unit Cost.*

- **Description:** This field allows for 30 characters to describe the item.

1. Setup tab

The Product Code and Vendor fields are required on this tab.

1. **Product Code:** Required field that facilitates reporting and GL Distribution.
2. **Left-Right:** Left to Right printing dimensions.
3. **Top-Bottom:** Top to Bottom printing dimensions.
4. **Plys:** Used only if standard spec template is assigned to the selected product code.
5. **Item Revision:** 6-character text field for revision date or data.
6. **Vendor:** Default Vendor used to produce this item.
7. **Plant Code:** Default Vendor's plant (if applicable).
8. **Spec Code:** The Spec Code is used with the Specification Copy Utility.
9. **Contract Expires on:** Date field for items with production contracts.

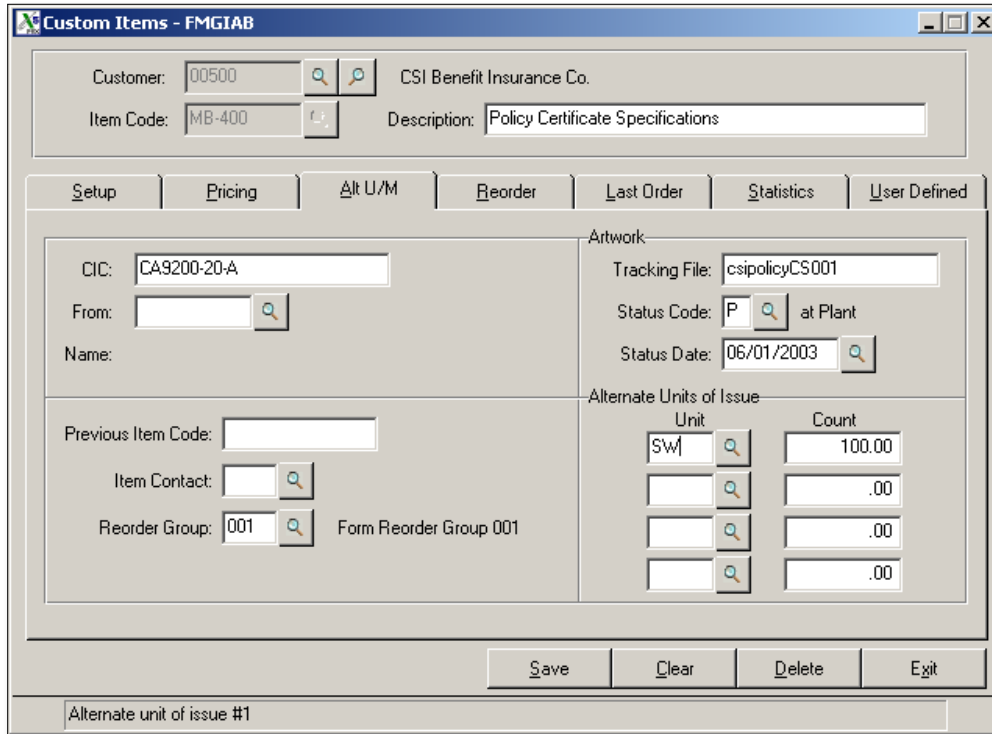*Note: Minimum of Product Code and Vendor required!*

2. Pricing tab

The cost, price and unit of measure information is required on this tab.

1. **Price Row**
   a. **Unit** – The 'selling' unit of measure. Query available.
   b. **Quantity Per Unit** – The quantity per unit. Fixed UOMs will auto fill with the quantity.
   c. **Amt/Unit** – The price per unit.
2. **Cost Row**
   a. **Unit -** The 'purchasing' unit of measure. Query available.
   b. **Quantity Per Unit** – The quantity per unit. Fixed UOMs will auto fill with the quantity.
   c. **Amt/Unit** – The cost per unit.
3. **Numbering** – Check this box for numbered items. When checked, a starting number is required during order entry and an ending numbering when you receive the item.
4. **Stock Item** – Alerts the system to check your general stock inventory for this item.
5. **Carton Weight –** Weight for the typical shipping unit. This can print on the delivery ticket and there's an option to print the total weight for all items in that shipment.
6. **Carton Pack –** This item's standard carton pack.
7. **Combination Quantity –** Used when product ordered in combination with other similar items, the total order quantity would be shown here for reference.
8. **Function Code –** This field was originally designed for referencing the function of this item in your customer's organization. Now it's commonly used as a reporting work-around.
9. **IMS** – Check to set as 'Print Management' item. It defaults for Print Management Customers.   Uncheck to disable feature.
10. **IMS Price** – Used to charge their locations a price other than the actual price they paid price. The first field is a set price, the second field is a percentage. Example: the customer wants to charge their using locations 110% of the sell price. **Best Practice:** This setting results in less maintenance as your sell prices change. *Note*: % pricing is option in customer Defaults.
11. **Feature Driven Pricing** – Used to automatically estimate prices and costs based upon rules established. See the Estimating and Quotation Documentation.
12. **Finder's Fees** – or Royalties
    a. **Type** – Basis of the fee: Sales, Gross Profit, Cost or Fixed.
    b. **Vendor** – Vendor that receives the Finder's Fee.
    c. **Rate** – Rate used for fee calculation.

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Custom Item – Alt UOM Tab

This tab contains Alternate Units of Measure setup and additional optional settings.

1. **CIC:** Customer Item Code. An alternate item ID of up to 20 characters (Item Code max is 10 characters). Once configured it can be used in order entry and reporting.
2. **From:** Used to pull the item from another customer (shared inventory).
3. **Name:** Auto fills when 'From' customer selected.
4. **Previous Item Code:** Used as a reference when Item Codes are changed, either with the DBD Custom Item Code Change program or entered manually.
5. **Item Contact:** Overrides Customer's Print Management Contact.
6. **Reorder Group:** Used when items are ordered in combination with like items. See Reorder Grouping Setup document.

Artwork Section

7. **Artwork Tracking File:** Reference field for current name of artwork file.
8. **Status Code:** User defined field for tracking artwork.
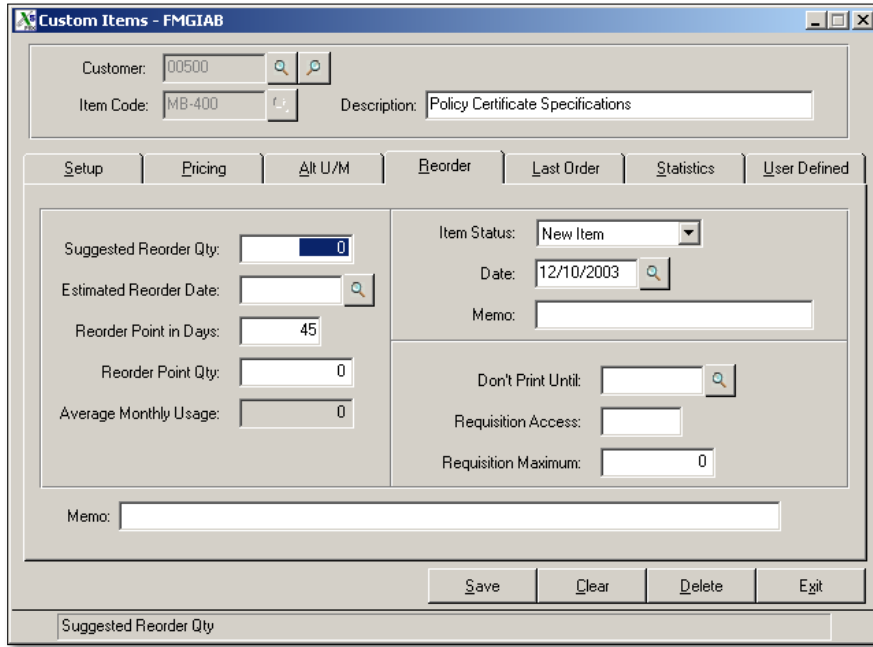9. **Status Date:** Date the Status Code was set.

Alternate Units of Measure

Set up to 4 possible alternate units of measure for use with Print Management Reports, Reorder Notices, Counted Print Management Items and Physical Count Sheets. Up to two of these units can be printed on the Physical Count Sheets in addition to the item's selling unit of measure.

1. **Unit:** Select from Query
2. **Count:** Total quantity in the unit.

Custom Item Setup – Reorder Tab

Items have several Reorder points available, Estimated Date, Time in Days and Quantity and the Don't Print Until date. The reorder report analyzes current inventory and usage to the various reorder points, and if the item is on the report then it's reached one or more of its reorder points.

1. **Suggested Reorder Qty:** This suggested quantity prints on the reorder notice.
2. **Estimated Reorder Date:** Estimated date of reorder.
3. **Reorder point in Days:** Calculation is Average Monthly usage, divided by 30 days, times the number of days in this field. * Related System Parameter setting
4. **Reorder Point Qty:** Compares to quantity in warehouse.
5. **Average Monthly Usage:** Current calculated average monthly usage.
6. **Item Status:** Current reorder status.
   a. **New:** No order history.
   b. **Reorder Notice:** Notice sent to customer.
   c. **Sales Order:** Order entered for item.
   d. **OK:** Sales order complete.
7. **Date:** Date of Item Status.
8. **Memo:** Prints on Reorder Notice.
9. **Don't Print Until:** Hard date – overrides other settings.
10. **Requisition Access:** Custom, item restrictions in Web.ec module.
11. **Requisition Maximum:** Maximum release quantity per order.
12. **Memo:** Display field, 60-character limit.

Custom Item Setup – Last Order Tab

Information on this screen is updated automatically as orders are processed.

Custom Item Setup – Statistics Tab

Information on this screen is updated automatically as orders are processed.

Custom Item Setup – User Defined Tab

User defined fields are designed by your company and used with custom reporting. Fill in as your company policy dictates.

This completes Custom Item Setup.