

Customer: Cascade Orthopedic Supply
Consultant: Jeff Stritar
Engagement Type: End User Training
Start Date: 1/18/2016

Overall Rating:  4
Technical Rating:  5

1. Overall Impressions:

Cascade was acquired by an existing Prophet 21 client. The company is being added to the existing database.

2. Topics Addressed:

- Basic Navigation
- Quotes
- Order Entry
- RMA's
- Sales pricing
- Pricing Service
- Imports
- Overview of French Translations
- Pick Tickets
- A/R
- A/P
- General Ledger
- 28 item punch list jean generated.

3. Issues/Risks/Recommendations

Common Issues – Choose if Applies

- | | |
|---|--|
| <ul style="list-style-type: none"> • Client was unaware of LMS Classes for training. • French forms | <ul style="list-style-type: none"> <input checked="" type="checkbox"/> LMS Courses not being taken <input type="checkbox"/> Employees not engaged in training <input type="checkbox"/> Core Data Issues/Concerns/Missing <input checked="" type="checkbox"/> Static Data Issues/Concerns <input checked="" type="checkbox"/> Dynamic Data Issues/Concerns <input type="checkbox"/> Possible Customization/Rule Requirement <input checked="" type="checkbox"/> Form Changes Required <input type="checkbox"/> Additional Reporting Requirements <input type="checkbox"/> Infrastructure/Hardware related problems |
|---|--|

4. Process/Work Flow – Notes/Actions

- French translation forms and database features are not installed. A script should be obtained and run.
- Legacy IDs for customers and vendors can be imported and setup in search windows.
- Search window for shipto's needs to include customer. This can be accomplished via dyna change screen design.

- Pricing updates may need to include future price and date fields for automated extraction for price imports. These functions will encompass Price 1-10 on the item records.
- Computed field for US Products on current cost needs to be put in various functional Screens. Order entry and item maintenance have been identified but are not limited to those applications.
- Pick tickets will be run on schedule for 10 minute intervals (pick scan).
- Bar Codes on Pick Ticket are required.
- Issue with back orders on packing list. One company wants back orders shown. The other does not.
- Shipping window mapping for third party software.
- Alert for tracking number ... plan for alert at allocation???
- Sort order of pick ticket by bin number (companies are different).
- Unapproved receipts for border crossing.
- Will need to add user defined fields.
- Landed cost drivers need to be created. – Bruce Langston (Controller) is to set up.
- Unapproved PO receipts
- Question ... is new user interface.
- Item Quantity's do not include bin locations.
- Physical count is auto approved.
- Items do not have a tax category (group).
- RMA Receipts clearing g/l not in company MAINTANCE. Almost no G/L's
- Landed Cost Tax Drivers are not set up.
- PORG needs to be dyna changed for buyers on the items, specials and directs tabs.
- SQL Query for exchange rate times pricing fields.
- No Bank Accounts
- No rebill reason CODES
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5. System/User Settings – Notes/Actions

- French language by user can be created.
- Portals to be set up by user or by role.

6. Data – Notes/Actions

1. Due to exchange rate concerns, a request for Price Service tool was requested. I provided the following:

```
-- Find Items by Supplier
-- Jeff Stritar
-- January 21, 2016
```

```
DECLARE @supplier int, @location int, @currency int, @2currency int,
@cur_date date
```

```
-- Update Supplier and Location Variables here
SET @supplier = 100060
```

```

SET @location = 100000
SET @currency = 1
SET @cur_date = '2003-01-01'
SET @2currency = 3

SELECT      inv_mast.item_id as Item_ID,
            currency_line.exchange_rate as rate,
            inv_mast.price1 AS Price_01,
            inv_mast.price2 AS Price_02,
            inv_mast.price3 AS Price_03,
            inv_mast.price4 AS Price_04,
            inv_mast.price5 AS Price_05,
            inv_mast.price6 AS Price_06,
            inv_mast.price7 AS Price_07,
            inv_mast.price8 AS Price_08,
            inv_mast.price9 AS Price_09,
            inv_mast.price10 AS Price_10,
            inv_loc.standard_cost as Std_Cost,
            inventory_supplier.cost as Cost,
            inventory_supplier.list_price AS List

FROM      inv_mast
JOIN      inv_loc
        ON  inv_mast.inv_mast_uid = inv_loc.inv_mast_uid
JOIN      inventory_supplier
        ON  inv_loc.primary_supplier_id =
inventory_supplier.supplier_id and
            inventory_supplier.inv_mast_uid = inv_loc.inv_mast_uid
JOIN      supplier
        ON  supplier.supplier_id = inventory_supplier.supplier_id
JOIN      currency_line
        ON  currency_line.currency_id = supplier.currency_id
JOIN      currency_hdr
        ON  currency_line.currency_id = currency_hdr.currency_id
WHERE     inv_loc.primary_supplier_id = @supplier AND
            inv_loc.location_id = @location and
            currency_line.currency_id = @currency and
            currency_hdr.delete_flag <> 'Y' and
            currency_line.exchange_date > @cur_date and
            currency_line.to_currency_id = @2currency
    
```

2. Issues with G/L defaults not being assigned were observed. Contacted jean and provided the following information:

There are approximately 18 different applications in the system that default g/l numbers. They are:

- ✓ Company Maintenance
- ✓ Customer Defaults Maintenance / Customer Maintenance
- ✓ Vendor Defaults Maintenance / Vendor Maintenance
- ✓ Item Defaults Maintenance / Item Maintenance
- ✓ Transfer Days Maintenance
- ✓ Product Group Maintenance
- ✓ Freight Code Maintenance
- ✓ Location Maintenance (Inter-Company)
- ✓ Inter-Company Default Maintenance

- ✓ Jurisdiction Account Maintenance
- ✓ Technician Maintenance
- ✓ Process Maintenance
- ✓ Adjustment Reason Code Maintenance
- ✓ Payment Type Maintenance
- ✓ Cash Drawer Maintenance
- ✓ Bank Account Maintenance
- ✓ Account Allocation Maintenance
- ✓ System Settings

3.

7. Complementary Product Recommendations/Notes/Actions

- Business rules – discussed functionality. Client would like to implement in a future phase of implementation.

8. Forms/Reports – Notes/Actions

Crystal reports need to be created for the following process areas:

- Pricing Service

9. Hardware/Technical – Notes/Actions

None

10. Customer may benefit from additional assistance with:

- **Additional LMS training**
- **Service and Maintenance**
- **Element**