

Point-Of-Sale Analysis in MACS

Requirements

Operating System: Any
MACS Version: 4.10 or higher
MACS Modules: Order Tracking, Invoicing, Sales Import, and Sales Analysis

Situation

These instructions contained in this memo will allow the setup of files in MACS for POS Reporting.

Solution

Setting up a Manufacturer Type Record (MF\4.15) for OEM (Figure 1) and POS (Figure 2).

At the **MACS Main Menu screen** enter **4** to select the **Master File option**.

In the **Master File screen** enter **15** to select **Mfg Type <M> Maintenance option**. The **OEM Record screen** will be opened. Enter the required data to define the OEM record.

MF\4.15-F/M	Manufacturer Type File Maintenance ADD
1-Table ID	M
2-Mfg Type<M>	OE
8^Mfg Type Desc	OEM (Original Equipment Manufacturer)____
	3 z4
	4 Maint Dt*Fst
	5 Maint Dt*Lst
	6 Sys Flgs
	7 Sys Delete
ADD (Y/N) or Field No. to Change Y	

Figure 1 OEM Record

At the **MACS Main Menu screen** enter **4** to select the **Master File option**.

In the **Master File screen** enter **15** to select **Mfg Type <M> Maintenance option**. The **POS Record screen** (Figure 2) will be opened. Enter the required data to define the POS record.

File these instructions in the MACS Software User's Manual

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```

MF\4.15-F/M           Manufacturer Type File Maintenance
                        ADD
1-Table ID           M
2-Mfg Type<M>       PS
8^Mfg Type Desc     POS (Point of Sale)

3 z4
4 Maint Dt*Fst
5 Maint Dt*Lst
6 Sys Flgs
7 Sys Delete

ADD (Y/N) or Field No. to Change Y
  
```

Figure 2 POS Record

Setting up a Manufacturer Master Record in Manufacture File Maintenance screen as in Figure 3. (MF\4.6)

At the **Main MACS (MM)** menu screen enter **4** to select the **Master Files (MF)** screen. In the **Master Files screen** enter **6** to select the **Manufacture File Maintenance (MF) screen**. The **Manufacture File Maintenance screen** (Figure 3) will be opened.

```

MF\4.6-F/M           Manufacturer File Maintenance
                        ADD
1-Record ID         M
2-Mfg Code          LJM

5^Mfg Name          Lee Jacob Mfg
6 Addr Line2        20070 Idlewood Drive
7 Addr Line3        South Euclid, OH
8 Addr Line4
9 Addr ZipCd        44159
10 K/C Name         Mr. James Morgan
11 K/C Salutn       Jim
12 K/C Title        V.P. Sales
13 Phone No         2166963939
14^Mfg Abrv Name    LEE JA
15^Mfg Status       A
16 Maint Dt*Fst
17 Maint Dt*Lst
18 Sys Flgs
19 Sys Delete

20 Mfg Comm%       5.00
21^Mfg Type<M>     OE
22 Mfg /Related
23 Mfg MiscCst
24^Mfg MoYrEnd     12
25 Mfg MoCutOff
26 Mfg Days        30
27 Mfg OrdOP
28 Mfg SlsOP
29 Mfg ComOP
30 Fax No          2166960045
31 Reserved
OEM
3 z1
4 z5

ADD (Y/N) or Field No. to Change
  
```

Figure 3 Manufacturer File Maintenance Screen

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Definition of Required Field Entries

Field No.	Name	Definition
2	Mfg Code	Enter the MANUFACTURER code.
21	Mfg Type <M>	Enter the OEM Mfg Type code.

Setting up a Distributor (as a MACS Customer) using Customer File Maintenance screen as shown as Figure 4. (MF\4.1)

At the **Main MACS (MM)** menu screen enter **4** to select the **Master Files (MF)** screen. In the **Master Files** screen enter **1** to select the **Customer File Maintenance (MF)** option. The **Distributor Setup** screen (Figure 4) will be opened.

```

MF\4.1-F/M                Customer File Maintenance
                          ADD
1-Record ID              C
2-Cst Code                ABCD00      Enter Name Code <F5>Chg
3-Cst/ LocCode

5^Cst Name                ABC DISTRIBUTOR      20^Cst Smn          20
6 Addr Line2              309 E Euclid Avenue    21^Cst St/Reg<S>  OH101
7 Addr Line3              Arlington Heights, IL    22^Cst Type<C>   Z
8 Addr Line4
9 Addr ZipCd              60004          23^Cst ABC<A>    A
10 K/C Name
11 K/C Salutn
12 K/C Title
13 Phone No               7087973211     24 Cst Divsn<D>
14*Cst Alpha              ABC DI         25 Cst/ Related  _____
15^Cst Status             A              26 Cst Lists<L>
16 Maint Dt*Fst
17 Maint Dt*Lst
18 Sys Flgs
19 Sys Delete

                          4 z1

<F1>F/M                < >
  
```

Figure 4 Distributor Setup

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(If applicable) **Setting up each Distributor Location (as a MACS Customer) shown in Figure 5. (MF\4.1)**

NOTE: If **POS Reports** (received from the Manufacturer) are **broken down by Distributor location**, each **Distributor location must be setup here as a separate Customer record**.

```

MF\4.1-F/M                               Customer File Maintenance
                                         ADD
1-Record ID          C
2-Cst Code           ABCD00             Enter Name Code <F5>Chg
3-Cst/ LocCode      CI

5^Cst Name           ABC DISTR - CLEVELAND      20^Cst Smn           2
6 Addr Line2
7 Addr Line3
8 Addr Line4         Cleveland OH              21^Cst St/Reg<S>    OH101
9 Addr ZipCd         60004                    22^Cst Type<C>     Z
10 K/C Name
11 K/C Salutn
12 K/C Title
13 Phone No          7087973211                23^Cst ABC<A>      A
14*Cst Alpha         ABC DI                    24 Cst Divsn<D>
15^Cst Status        A                        25 Cst/ Related
16 Maint Dt*Fst
17 Maint Dt*Lst
18 Sys Flgs
19 Sys Delete
HARD COPY (Y/N/NH)  _                        26 Cst Lists<L>
                                         27 Fax No
                                         28 Reserved
                                         4 z1

```

NOTE: If distributor locations are setup here, a separate **POS Manufacturer record must be also be setup** for each of the distributors locations.

Setting up a POS Manufacturer as shown in Figure 6. (MF\4.6)

The POS manufacturer code is arbitrarily assigned from **aaa-zzz** and **001-999**.

NOTE: A single POS Manufacturer record should be added if the Manufacturer/ DISTRIBUTOR has only one location. If the Manufacturer /DISTRIBUTOR more than one locations, a POS file for each location is required.

At the **Main MACS (MM)** menu screen enter **4** to select the **Master Files (MF)** screen. In the **Master Files screen** enter **6** to select the **Manufacture File**

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```

MF\4.6-F/M                Manufacturer File Maintenance
                          ADD
                          1-Record ID      M
                          2-Mfg Code      aaa

5^Mfg Name                LJM/ABC Dist-Cleveland      20 Mfg Comm%                3.00
6 Addr Line2
7 Addr Line3
8 Addr Line4
9 Addr ZipCd
10 K/C Name
11 K/C Salutn
12 K/C Title
13 Phone No
14^Mfg Abrv Name          LJM
15^Mfg Status             N
16 Maint Dt*Fst
17 Maint Dt*Lst
18 Sys Flgs
19 Sys Delete

                          21^Mfg Type<M>          PS
                          22 Mfg /Related          LJM
                          23 Mfg MiscCst          ABCD00CI
                          24^Mfg MoYrEnd                12
                          25 Mfg MoCutOff
                          26 Mfg Days
                          27 Mfg OrdOP
                          28 Mfg SlsOP
                          29 Mfg ComOP
                          30 Fax No
                          31 Reserved                POS
                          <M> POS (Point of Sale)
                          Mfg/R Lee Jacob Mfg
                          Cust ABC DISTR - CLEVELAND

ADD (Y/N) or Field No. to Change
  
```

Figure 6 POS Manufacturer Record

Definition of Required Field Entries

Field No.	Name	Definition
2	Mfg Code	Enter the arbitrarily assigned POS Manufacturer code here.
5	Mfg Name	Enter two spaces in positions 1 through 2 (for indenting). Then, enter the Mfg/Distributor caption as desired to print on MACS Sales Analysis reports.
21	Mfg Type<M>	Enter the Manufacturer Type to identify the manufacturer as a POS manufacturer.
22	Mfg /Related	Enter the MANUFACTURER code.
23	Mfg MiscCst	Enter the DISTRIBUTOR code.
31	Reserved	Enter "POS" in uppercase (reserved for MACS programs).

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Setting up a Manufacturer/Customer Cross-Reference as shown in Figure 7 (MF\4.18)

NOTE: The setup of this record is required only if MACS' Sales Data Import module is installed and this is a POS manufacturer. Otherwise, this record is not needed for this feature.

At the **Main MACS (MM)** menu screen enter **4** to select the **Master Files (MF)** screen. In the **Master Files** screen enter **18** to select the **Mfg/Customer Cross Reference File Maintenance** option. The **Mfg/Customer Reference File Maintenance** screen (Figure 7) will be opened.

```

MF\4.18-F/M           Mfg/Customer Cross Reference File Maint
                        ADD
                        1-Record ID      X
                        2-Mfg Code       LJM           Lee Jacob Mfg
                        3-Cst Code       ABCD00        ABC DISTR - CLEVELAND
                        4-Cst/ LocCode   CI

5*Mfg/Cst Code LJM1035           19 Disc %
6 Comm Exp%                20 Disc Ind
7 Smn Code                 21 M/P Brk Code
8 Smn2                     22 M/P Brk Leve
9 Smn3                     23 Cntrct Ind
10 Smn Splt%              24 B/O Ind
11 Smn2 Splt%            25 Price Ind
12 Smn3 Splt%            26 Credit Ind
13 Xrf Source      zzzaaa      27 Pymnt Trms<P
14 Xrf Status      A           28 Shp ViaCd<V>
15 Maint Dt*Fst
16 Maint Dt*Lst
17 Sys Flgs
18 Sys Delete
ADD (Y/N) or Field No. to Change Y

```

Figure 7 Manufacturer/Customer Xref

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Definition of Required Field Entries

Field No.	Name	Definition
2	Mfg Code	Enter Parent MANUFACTURER code here.
3	Cst Code	Enter the DISTRIBUTOR code setup as a MACS customer.
4	Cst/ LocCode	Enter the Distributor's location code (if applicable).
5	Mfg/Cst Code	Enter the code the <i>manufacturer</i> has assigned to identify this distributor on the manufacturer's system. (i.e. Disty1)
13	Xrf Source	Enter "zzz" (lowercase) in positions 1 through 3. Enter the POS Manufacturer code Enter spaces in positions 7 through 8 (i.e. hit space bar twice).

Printing POS List of Mfg's and Distributors SF\3.13

At the **Main MACS (MM)** menu screen enter **3** to select the **Supervisory Function (SF)** screen. In the **Supervisory Function** screen enter **13** to select the **Run a Report** option (**SF 3.13**). The **Run a Report** screen (Figure 8) will be opened.

In the **Run a Report** screen enter the report name at prompt (shown in Figure 8).
R170AC <ENTER>

```
MRPC00          RUN an 'Rnnnxx'  Report
Enter Report Number (Ex: R179BA ) R170AC
```

Figure 8 Run a Report Screen

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The **Special Selection** screen shown in Figure 9 will be opened

```

R170AC SF\3.13                MACS Sample Data Base
07/25/2013 17:16 T0          POS List of Mfg's and Distributors

  POS                               Manufacturer           Distributor
Code Description              Code Name                Code      Nam

SELECT PRINTER:  1 2 3 4 5 6, (D)Display or (F)File or (W)MWP  or **
(**) Option  (Re-enter a code to turn it off)
(SS) Special Selection
(SO) Sort Sequence
(LP) Lines/Page  (66,51,88 or 68)   66
  
```

Figure 9 Special Selection Screen

At the select printer prompt enter **SS**, then enter **1** to select the printer option **<enter>**.

The **POS List of Mfg's and Distributors** screen shown in Figure 10 will be opened

```

R170AC SF\3.13                MACS Sample Data Base
07/25/2013 16:17 T0          POS List of Mfg's and Distributors

  POS                               Manufacturer           Distributor
Code Description              Code Name                Code      Nam
2 Mfg Code                   12 K/C Title             22 Mfg /Related    30 Fax No
5 Mfg Name                   13 Phone No              23 Mfg MiscCst     31 Reserved
6 Addr Line2                 14 Mfg Abrv Name         24 Mfg MoYrEnd
7 Addr Line3                 15 Mfg Status            25 Mfg MoCutOff
8 Addr Line4                 17 Maint Dt*Lst         26 Mfg Days
9 Addr ZipCd                 19 Sys Delete            27 Mfg OrdOP
10 K/C Name                  20 Mfg Comm%             28 Mfg SlsOP
11 K/C Salutn                21 Mfg Type<M>          29 Mfg ComOP

F# SELECT BY:                From                Thru
21 Mfg Type<M>              PS                  PS                <RET>Include  <E>Exclude

Enter No. of field for selection, or <F4>END
  
```

Figure 10 POS List of Mfg's and Distributors screen

Select 21 to select the **Mfg Type<M>** option then enter **PS <enter>** then accept the next **PS** by using **<enter>** key again. The following is an example printout (Figure 11).

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R170AC SF\3.13	Any Sales Agency, Inc.				PAGE 1
07/25/13 09:48	POS List of Mfg's and Distributors				
	Seq: Mfg /Related / Mfg MiscCst /				
POS	Manufacturer	Distributor	Type		
Code Description	Code Name	Code Name	CD Description	Resvd	
aad IRC/XYZ Distributors		IRC	Isle Restoring Co.	XYZD00-	
	XYZ Distributors			PS POS	
	POS				
aaa LJM/ABC Dist-Clv		LJM	Lee Jacob Mfg		
	ABCD00-CL	ABC Distribution/Clevelan	PS POS	POS	
aac MNC/ABC Dist-AnnArb		MNC	MNC Company	ABCD00-AA	ABC
Distribution/Ann Arbo	PS POS		POS		
aab MNC/ABC Dist-Clv		MNC	MNC Company		
	ABCD00-CL	ABC Distribution/Clevelan	PS POS	POS	
aae MNC/XYZ Distributors		MNC	MNC Company	XYZD00-	
	XYZ Distributors			PS POS	
	POS				
5 Records					
(Mfg Type<M>=PS)					

Figure 11 Example Printout