

# Supporting Files/Information

## BILLING PARAMETERS

- Within your billing parameters is where a number of things are set up that cover how your system handles inventory maintenance.
- To access the billing parameters, you want to take menu path **System Utilities > 3. System Setup > 4. Sales Desk > 2. Parts Billing Parameters**. From here, there are a few options:
  - Retain Values in add? – Screen 2 – Field 34: When doing maintenance on multiple items, this will keep all of the values from the previous item as defaults on the next item added.
  - Default Min/Max/ROP – Screen 2 – Fields 35/36/37: These values will be used as the default Min/Max/ROP on new items added to inventory.
  - Auto Update Discount Levels – Screen 4 – Field 14: This option will update the discount level field of Inventory items to match those set by the supplier and/or AMS. This is a global setting, so you must be following, or be willing to follow, all of the discount structures provided by the supplier and/or AMS prior to setting this. Please call into AMS if you plan on changing this field, and have us review your current setup with you.

## CATEGORY FILE

- Category maintenance can be accessed via menu path **Inventory > 1. Data Maintenance > 1. Master Files > 1. Category Master**

COUNTERPOINT - 04 Edition

File Edit View Session Config Special Help

Category: **AME** Change Category Mode

1	Description	<b>AIM PRODUCTS</b>		38	Pricing by Price Point	<b>N</b>	(Y/N)
3	GST/PST Level	<b>1</b>	<b>1</b>	39	Owning Branch		
5	Category Type	<b>P</b>	(PK)	41	Use Purchase Qty	<b>N</b>	(Y/N)
6	Buyer/Vendor/DC			42	Default Class	<b>0000</b>	Unknown class
8	Default Gross Margin %	<b>25.00</b>		44	Use Serial Numbers		

	Br #	Account #	General Ledger Distribution Accounts	
9	Sales	<b>1</b>	<b>5000</b>	<b>SALES - PARTS</b>
12	Inventory	<b>1</b>	<b>1400</b>	<b>INVENTORY - PARTS</b>
15	Cost of Sales	<b>1</b>	<b>6000</b>	<b>PURCHASES - PARTS</b>
18	Levy/Eco Fee	<b>1</b>	<b>2999</b>	<b>LEVY~PAYABLE</b>
21	Discount	<b>0</b>	<b>0</b>	

24	Default Purchase Vendor	<b>000000</b>	Unknown vendor
26	Price Book Vendor	<b>AUTOL</b>	Autoline
28	Catalog Vendor Code	<b>MISC</b>	Miscellaneous Parts
30	Product Reporting Group	<b>MIS</b>	MISC
32	Chaining Sequence	<b>L</b>	
33	Numeric Sequence	<b>Y</b>	
34	GP% Minimum	<b>.0</b>	
35	GP% Maximum	<b>.0</b>	
36	Sell in Tenth		(Y/N)
37	Stocking Line	<b>0</b>	(Y/N)

Any change? **1**.

45	Levy Tax		
46	Levy Tax Codes	<b>0 0</b>	(GST/PST)
47	End User Only	<b>N</b>	

- In order to add an item to inventory within **COUNTERPOINT** an item must be classified within a category. So, if this is a new line that you are bringing it, this should be your first step.
- To ensure pricing will move across when migrating items from pricebook to inventory status, the pricebook vendor (field 26) must be populated. This will also ensure that you get constant pricing updates in future.
- Additionally, you must ensure that the correct catalogue vendor code is assigned to the category in order for the item to show online on either the autoecat or nexpart catalogues. Please Note Fields 26 & 28 for the vendor codes

Revision #5

Created 28 September 2018 15:12:45 by Admin

Updated 4 October 2021 16:37:47 by Jim