



***AutoPoint*<sup>®</sup> Evolution - Renaming Procedures**

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## Overview

This procedure guide applies to both Renames and Recodes, as Recodes are merely Renames executed on more than one item in a single run. Therefore, the steps explained below need to be done for all items in a Recode, just as they need to be done for a single item before it is Renamed.

## Housekeeping Steps before Performing a Rename/Recode

**Note A:** Steps 2 through 8 below are only necessary if you are not keeping the original part number on the system. If you do keep the original items, steps 2 through 8 will be altered to reflect this. For example, you might need to zero out old-item open orders and re-enter them under the new numbers if you intend to fill these orders under the new numbers.

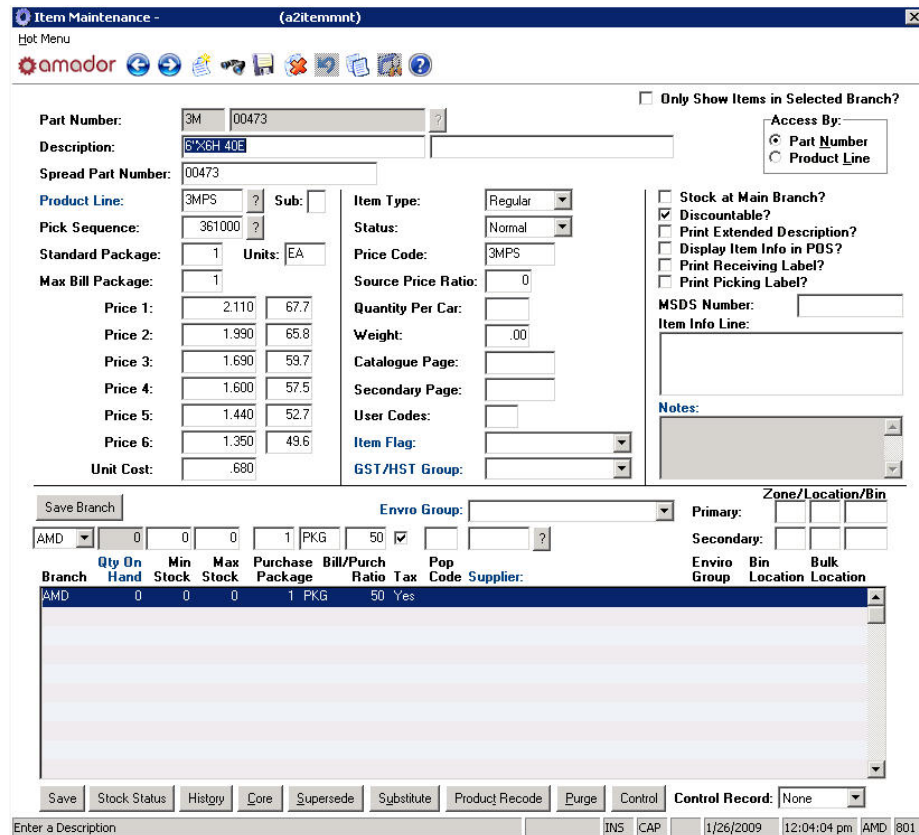
**Note B:** If you are Renaming items in a Serial Tracked product line (field # 28, “TRACEABLE TRACKING” in Product Line Maintenance, is set to “R” or “F”), you should always keep original items on the system. Otherwise, you will defeat the purpose of Serial Tracking that product line.

1. **Check Branches and Companies** - Before you begin preparing items for renaming, you need to define the scope of the rename so you do not leave out any branches or companies in the checks that follow. Unless you share the Item Master among multiple companies, renames will need to be done once for all branches, from the main branch of the company in which items need to be renamed. If you share the item master among multiple companies, then you must first rename in each non-main company, selecting each active branch one at a time. After the non-main companies’ renames are all completed, the last rename is done in the main company, selecting all branches at once. **If you do not proceed this way when sharing the Item Master among multiple companies, you will permanently lose the Detail Sales data from the non-main companies.**
2. **Check Open Orders** - Confirm that there are no Open Orders for the item that is to be renamed. Stock Status screens tabs “Quantity” and “Current Branch” should show 0 under the “Reserved” column and should not list any open orders under the “On Reserve Details” window for this item for all branches. If this is not the case, you must zero the order quantity of this item on each open order on which it appears and be prepared to re-enter it under its new part number on an open order for the same customer. Otherwise, the rename must wait until open orders containing this item are closed or voided and End-of-Day has been run. If the item you wish to rename shows with TYPE = KIT in Stock Status, you should close or void this open order and have End-of-Day run before doing the rename.
3. **Check Outstanding Purchase Orders** - Confirm that there are no outstanding supplier side P.O. line items, which have not been completely received, for the item that is to be renamed. Stock Status tab “Quantity”, should show no P.O. details for “On Order” quantities. If it shows P.O. details, you must zero the order quantity of this item on each P.O. on which it appears and be prepared to re-enter it under its new part number on a P.O. to the same supplier. This could require Unreceiving and/or Unreleasing the P.O.’s on which the item appears. Otherwise, the rename must wait until P.O. line items for this item are Completely Received or Voided.
4. **Check Customer Backorders** - Confirm that there are no outstanding Customer Backorders for the item that is to be renamed. Stock Status tab “Quantities”, should have no customer backorders listed. If it lists customer backorders, you must delete these and be prepared to re-enter them for the same customer under the new part number. Otherwise, the rename must wait until all customer backorders for this item have been converted to open orders and then invoiced or voided.

5. **Check PO Recommendations** - Confirm with Purchasing that no P.O. Recommendations or new P.O.'s for the item to be renamed are currently being worked on in any branch.
6. **Check Physical Inventory File** - Confirm that the item to be renamed, as well as the item to which it will be renamed, do not currently exist in any Physical Inventory File at any branch. If the product line(s) involved in the rename are actually having Physical Inventory done on them and the Physical Inventory File cannot therefore be deleted, it is better to count the item under the part number it is already in and address the need to rename it after the Physical Inventory is completed and the Physical Inventory File has been deleted.
7. **Check Non-Expired Quotes** - The ability to check for an item on non-expired quotations is likely to arrive in a future revision of *AutoPoint*®. In the meantime, proceed with the rest of the renaming procedure. However, at the time a quote is converted into an open invoice, it is important to check the stocking status and on-hand availability of each line item on this open invoice before printing the customer's packing slip. At that time, <F11> Item Find should be used to search by description for items that come up as "not on file", as they have most likely been renamed.
8. **Check Special Cross-References** - Gather any Interchange (AM051306), UPC (AM051307), Part Web Cross Reference (AM05130802) and Secondary Catalogue Page Maintenance (AM0532) information that may exist for the item to be renamed. These types of cross-references do not follow the rename and will need to be re-entered under the new part number after the rename.
9. **Check Stock Status Inquiry** - Confirm whether the destination item (to which you are renaming) already exists, using Stock Status Inquiry. This will determine how you will answer the rename questions. It may also cause you to re-think the rename.
10. **Check Normal Cross-References** - If the destination item already exists, check it for Cores (AM051301), Supersedes (AM051302), Substitutes (AM051303), Related Items (AM051305), Customer Part Numbers (AM0525), Extended Item Description (AM0526) and Item Information Maintenance (AM0527). Any of these types of cross-references that already exist for the destination item will not be overwritten by would-be replacements coming from the item being renamed. You will need to edit them as required after the rename.
11. **Check Customer Pricing** - Confirm that the Price Code you will have on the new item is already set up in Customer Price Maintenance anywhere that the Price Code of the old item is set up. Doing this before the rename helps ensure that customer pricing will remain accurate while the rename is being prepared and executed.

## Performing the Rename/Recode

12. Using Item Maintenance, display the item to be renamed and click on the “Rename” icon in the menu bar (for a recode, click on the “Product Recode” button at the bottom of the window) to start the rename process.



**Item Maintenance - (a2itemmnt)**

Hot Menu

Part Number: 3M 00473

Description: 6"X6H 40E

Spread Part Number: 00473

Product Line: 3MPS ? Sub: ?

Pick Sequence: 361000 ?

Standard Package: 1 Units: EA

Max Bill Package: 1

Price 1: 2.110 67.7

Price 2: 1.990 65.8

Price 3: 1.690 59.7

Price 4: 1.600 57.5

Price 5: 1.440 52.7

Price 6: 1.350 49.6

Unit Cost: .680

Item Type: Regular

Status: Normal

Price Code: 3MPS

Source Price Ratio: 0

Quantity Per Car: .00

Weight: .00

Catalogue Page:

Secondary Page:

User Codes:

Item Flag:

GST/HST Group:

Access By:   
☒ Part Number  
☐ Product Line

☐ Only Show Items in Selected Branch?

☐ Stock at Main Branch?

☒ Discountable?

☐ Print Extended Description?

☐ Display Item Info in POS?

☐ Print Receiving Label?

☐ Print Picking Label?

MSDS Number:

Item Info Line:

Notes:

Save Branch

Envro Group:

Zone/Location/Bin

Primary:

Secondary:

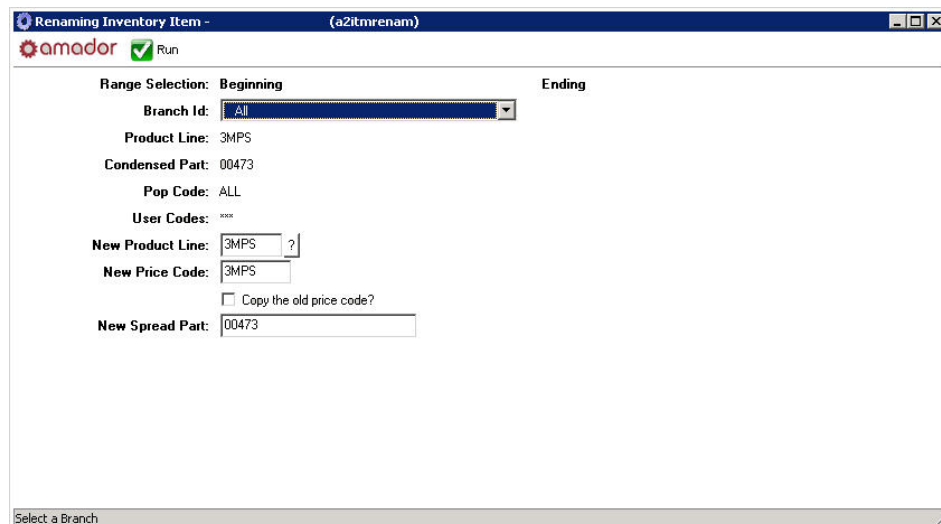
Enviro Bin Bulk  
Group Location Location

Branch	Qty On Hand	Min Stock	Max Stock	Purchase Package	Bill/Purch Ratio	Tax	Pop Code	Supplier
AMD	0	0	0	1 PKG	50	Yes		

Save Stock Status History Core Supersede Substitute Product Recode Purge Control Control Record: None

Enter a Description

INS CAP 1/26/2009 12:04:04 pm AMD 801



**Renaming Inventory Item - (a2itmrenam)**

Run

Range Selection: Beginning Ending

Branch Id: All

Product Line: 3MPS

Condensed Part: 00473

Pop Code: ALL

User Codes:

New Product Line: 3MPS ?

New Price Code: 3MPS

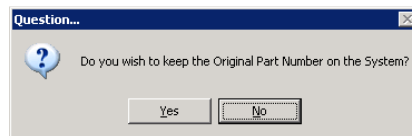
☐ Copy the old price code?

New Spread Part: 00473

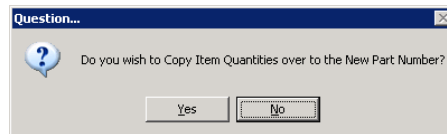
Select a Branch

Select all branches and enter the product line and part number to which you are moving this item. Enter the Price Code you will use on this item under its new part number (most often, this will be the destination product line code). To copy the old price code to the new one, check the box next to “Copy the old price code?”. Click on the “Run” button when you are ready to run the rename.

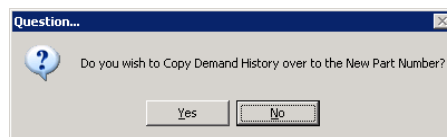
13. A series of questions will follow. If you are moving an item to a new part number and do not need to keep the old part number, answer them as follows:
  - A. Do you wish to keep the original part number on the system?: Click on “No”.



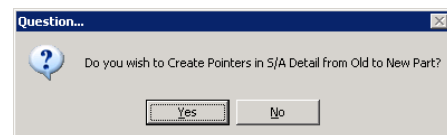
- B. Do you wish to copy item quantities over to the new part number?: Click on “Yes”.



- C. Do you wish to copy demand history over to the new part number?: Click on “Yes”.



- D. Do you wish to create pointers in detail sales analysis history?: Click on “Yes”.



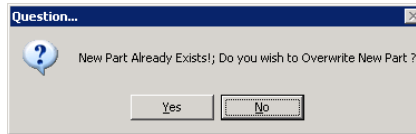
\*\*\* Please see the “Detail Sales Analysis History Pointers Note” below. \*\*\*

14. If the destination item is not already on the system, the rename will proceed and display a summary of what it did. Click on “OK” to return to the Item Maintenance screen.

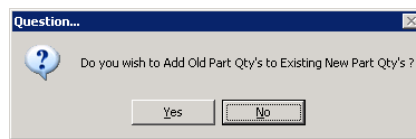
Rename Inventory Item Totals - (a2itmrenam)				
	Read	Deleted	Copied	Created
Inventory Items:	1	1	0	1
Branch Records:	22			
Branch Items:	1	1	0	1
Demand History Items:		0	0	0
Sale History Items:	0	0		2
Misc Cross Refs:	0	0	0	
Cross References:		0	0	0
<div>Ok</div>				

15. If the destination item is already on the system, two more questions will follow. Normally, you would answer them as follows:

A. New part already exists!; Do you wish to overwrite new part?: Click on “No”.



B. Do you wish to add old part qty's to existing new part qty's?: Click on “Yes”.



16. This will merge quantity and demand history from both items.
17. Whether the new part was already on the system or not, verify that the new or merged item is now correctly priced before using it. If the new item did not already exist on the system, the pricing from the old item will be on it. If the new item did exist on the system before the rename, the prices of the new item will be on it and not those of the old item (if you answered “No” to the “New part already exists!; Do you wish to overwrite new part?” question).

## Housekeeping Steps after Performing Rename/Recode

18. Whether the new part was already on the system or not, verify any of the cross-references checked above which may be needed for the item and add/edit/delete these cross-references for this item as needed. It is best to do this right away to ensure valuable information about the item is not lost.
19. Resume normal use of the item.
20. If the Price Code of the old item will no longer be in use, remove it from wherever it may appear in Customer Price Maintenance.

## Detail Sales Analysis History Pointers Note

When recoding/rename items in and out of product lines, do not answer “Y” to the “Do you wish to create pointers in detail sales analysis history?” question if you are moving the item(s) to a product line whose item abbreviation it/they has/have already used. For example, if you have recoded a product line ABCD (when it had item abbrev ABC) out to a product line XXX (using item abbrev XXX), you would answer “Y” to the “create pointers” question, because the item abbrev of the destination product line is different from that of the origin product line.

Suppose you then changed the item abbrev on the empty ABCD product line to ABB and then recoded the XXX product line back into it: then also you would answer “Y” to the “create pointers” question, because the item abbrev on the destination line is different **and mainly because the ABB item abbrev has never before been used by the items being moved.**

If you then decided to recode the ABCD product line (now using item abbrev ABB) to another product line called AAAA, **which used item abbrev ABC, you would want to answer “N” to the “create pointers” question, as the ABC item abbrev was previously used by these items. If you answered “Y”, it would make all the detail sales history invisible on these items once they were moved, because these items have already existed under item abbrev ABC.**

You can use screen 10 in Stock Status Inquiry before the rename/recode to try and determine which item abbrevs have previously been used by the item(s) to be moved. **If the item abbrev of the product line to which you are going to move it/them has already been used by it/them, answer “N” to the “create pointers” question. If it has not, answer “Y”.**