

Cross References: How and Why

Product Activity data is received from Distributors on a regular basis. Within these transactions, the Distributor can identify items at the Location level by what they believe to be the Supplier's Catalog ID, the Supplier's UPC value, and/or their internal Buyer Part Number. Ultimately, each of the items transmitted must be matched up against an item in the Supplier Inventory Master. As the data is processed, Datalliance attempts to find a matching Supplier item for each Location item reported. This matching can be accomplished using Catalog ID (stripped of spaces/dashes/special characters), UPC, both Catalog ID & UPC, or by using a Cross Reference that has been established. Regardless of the matching option selected, every item will essentially be cross-referenced to a specific Supplier item. The matching can be very straight forward if the Distributor inventories and sells items using the Supplier's Catalog ID. However, what happens when a Distributor uses their own part number to identify an item that does not match with the Supplier's Catalog ID or if they inventory and sell an item under the individual Catalog ID but buy the item under a bulk Catalog ID? Hopefully the tips below will provide answers to these questions.

As said earlier, every Location/Item combination has a cross reference to a Supplier item. Typically, a Distributor sends in an item and the cross-reference just happens to be the identical part number in the Supplier Inventory Master (ex. Part ABC from the Distributor matches to part ABC on the Supplier's end). These types of cross-references are created automatically during the matching process and don't require manual intervention. So, what do you do when the Distributor wants to report inventory and sales under one part number but have it replenished with a different Supplier's part number? The automatic cross-reference needs to be changed in this situation. So how do you do this?

From the main Inventory Management page, you will need to click on the Location Job Workbench, as shown below:

The screenshot shows the 'datalliance' logo at the top left. Below it, the page is titled 'Inventory Management' and 'EDM Manager accessing Training Instance'. The main content area is divided into five columns: Configuration, Inquiry, Replenishment, Reports, and Errors. Each column contains a list of links. In the 'Replenishment' column, the link 'Location Job Workbench' is highlighted with a mouse cursor. Below the columns, there are three bullet points: 'Documentation', 'Logout', and 'Change Password'. To the right, there is an 'Assigned User Selection' dropdown menu. At the bottom, there are two informational notes: one about the 'information' icon and another about the 'top' icon. The footer text reads: 'This site best viewed in 1024x768 pixel screen resolution, using small fonts'.

From the Job Workbench – Location page, you’ll select the Location where the reported item exists, select Change Cross Reference from the Job drop-down list, and hit submit.

The screenshot shows the 'Job Workbench - Location' page. At the top, there is a title 'Job Workbench - Location' and an information icon. Below the title, there is a table with two columns: 'Job' and 'Location Name'. The 'Job' column has a dropdown menu with 'Change Cross Reference' selected. Below the table, there is a 'Location Name' field with the text 'Hall - CDC (18552707)' and '+' and '-' buttons. At the bottom, there is a 'Submit' button.

You will be taken to a page that has 4 pieces of information: Dist Cat ID, Dist UPC, New Supplier Cat Id, and New Supplier UPC. This is where you will tell the system that when a Location sends in a specific part number in the Product Activity file, it should be matched to a specific Supplier part number. Click on the “+” sign on the field labeled Dist Cat ID or Dist UPC and you will be presented with an item lookup screen. Search for and find the item you wish to change the cross reference for and select it. Remember, this is how the Distributor reports the item in the Product Activity transaction. This will populate the Dist Cat Id and Dist UPC fields with your selection, as shown below:

Job Workbench - Change Cross Reference

Dist Cat ID	<input type="text" value="00025"/>	<input type="button" value="+"/> <input type="button" value="-"/>
Dist UPC	<input type="text" value="80206000698"/>	<input type="button" value="+"/> <input type="button" value="-"/>
New Supplier Cat ID	<input type="text"/>	<input type="button" value="+"/> <input type="button" value="-"/>
New Supplier UPC	<input type="text"/>	<input type="button" value="+"/> <input type="button" value="-"/>

Next you need to tell the system to which Supplier item the Location item you selected should be matched up using the same process above. This time, however, your search/select will be done using either New Supplier Cat Id or New Supplier UPC. Once your selection is made, the Job Workbench – Change Cross Reference page will look like that shown below:

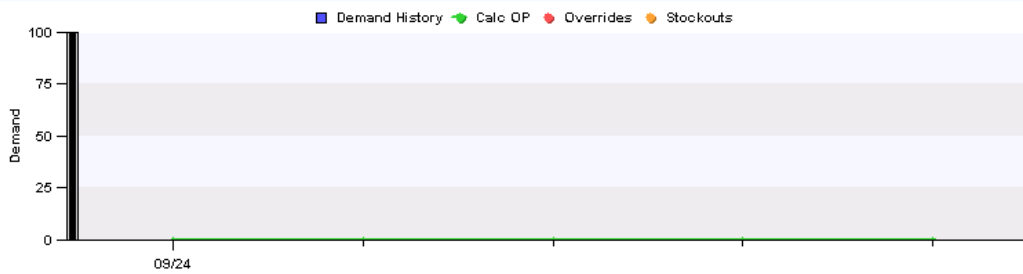
Job Workbench - Change Cross Reference

Dist Cat ID	<input type="text" value="00025"/>	<input type="button" value="+"/> <input type="button" value="-"/>
Dist UPC	<input type="text" value="80206000698"/>	<input type="button" value="+"/> <input type="button" value="-"/>
New Supplier Cat ID	<input type="text" value="00071"/>	<input type="button" value="+"/> <input type="button" value="-"/>
New Supplier UPC	<input type="text" value="80206002890"/>	<input type="button" value="+"/> <input type="button" value="-"/>

When you click on the Query button at the bottom of this page, the system will create a new cross-reference for the selected Location/Item. This means that when Dist Cat ID = 00025 is reported, it will be matched up to and replenished by Supplier Cat ID = 00071. You'll need to make doubly sure that this is *really* what you want to happen.

A good way to see the impact of the cross-reference change is to navigate to Item Details for the changed item. From the Item Details page, you will see that the Dist Cat Id field and Supplier Cat ID field are consistent with the cross-reference change you just submitted, as shown in the example below:

Item Detail for Hall - CDC (18552707)



Dist Cat ID	00025	Supp Cat ID	00071	Supp UPC	80206000698	Desc	INSTRUMENT,INSTALLING
Calc OP	0	Calc OQ	1	Used OP	0	Used OQ	1
Item Status	Do Not Stock	Plan Grp	10	Big Week	0	Big Week2	0
Daily Forecast	0	NQA	0	Price	\$3,926.49	Dist UOM	EA
Ann Demand	0	Ann Freq	0	Avg Order	0	Supp Whse	Stock
26 Wk Demand	0	26 Wk Freq	0	OP Timeframe	52	SQA	0

The above also works if a Distributor wants to report sales and inventory for an item under the single part number but buy it under a bulk part number. You would go through the same steps shown above, using the single part number that the Distributor is reporting currently in the Dist Cat ID field and the bulk part number in the New Supplier Cat ID field.

Both scenarios above require a few things to be true:

- 1) The Dist Cat Id must have been reported by the Distributor for the Location for which the change is desired
- 2) The Supplier item to which the Dist Cat ID is being crossed to is not currently tied to another item for the Location. So for instance, if we wanted to take Distributor item ABC and cross it to the Supplier item 123, no other item for the Location can be crossed to Supplier item 123. Using our other example where a Location wants to report inventory/sales for an item using the single part number EFG but buy the bulk part number EFG-BULK, this cannot be done if they have reported both EFG and EFG-BULK in their Product Activity transactions. If this is the case, call the Customer Care Line to discuss how best to manage this.

As always, we are here to help in any way possible. Don't hesitate to call!