Business Information Systems Essay, Research Paper

GRC Business Solutions

Proposal

Business Information Solution

Over the years, the nature of business has changed drastically. Part of the reason for this is that businesses are no longer “local” in nature in the sense that the business does not necessarily sell only within its locality. It has to obtain goods and services from locations that are remote to it, and the products and services it sells are sold worldwide.

Thankfully, technology has kept up and actually spurred this growth. From the original telephone, to radio and then onto television, computers, Local Area Networks and finally to cable and satellites. We have achieved a truly global “business village.”

Out of necessity, computer systems have deeply woven themselves into the basic fabric of business. The real benefits achieved with a quality computer business system is to allow the business entities, owners, managers, employees, customers and vendors spend more time in the running of the business and less time on the “processing’ portion of the business.

Business is complex. Your job, no matter what your position or relationship to the company, is to focus on making the business profitable and therefore successful.

It is the responsibility of GRC Business solutions through our BIZ-VIEWS and other tools that we provide, to focus on the processing and decision support aspects of the business, so that our tools can run your business. We have a multi-faceted approach that includes hardware, software, training, aids and other devices to do this.

This proposal will focus on a very special set of tools to help you do your job.

Chapter

1

GRC’s Business Plan

General Business Concepts Incorporated Into BIZVIEWS

Diagram of Processing a Simple Order

BIZVIEWS is a program designed to work with many different kinds of businesses, some of which may be very complex and require most or all of the features offered in BIZVIEWS. On the other hand, other businesses may require only the basic features of BIZVIEWS and possibly some options.

The purpose of this page is to introduce you to the BIZVIEWS product and give you some insight on how the product could fit into your business. This section does not provide complete detail on the sales order, but provides a selection of ideas to make your understanding of the more esoteric features of the program easier. Some of these features are only found in programs that cost thousands of dollars more. As we discuss the concepts and features of the program, you can select those features that work for you.

STEP 1: QUOTING CUSTOMERS

With BIZVIEWS, you can produce a quote for your customer of items that you want to sell him. The quote lists the items and prices. One advantage with BIZVIEWS is that you can put an unlimited amount of notes under each item to further describe the item. A quote to a customer should have a time limit as to how long the customer has to accept or reject it. The reason for this is that the costs or the availability of obtaining the products may change after time. In BIZVIEWS, you can set howl long the quote is good for in days in the SET-UP section of the system. You also have the ability to purge (delete) quotes from your program after the time limit has expired.

Stock can be checked to see if you have the product(s) available, or if you will have to create a purchase order.

STEP 2: SALES ORDERS

A quote can be instantly turned into a sales order when the customer indicates acceptance and at that time, if necessary, it can be modified. A sales order is a commitment from a customer to buy the items on the sales order. At the same time, it is a commitment for you to deliver the items to the customer, on time and at the specified price.

STEP 2A: CUSTOMER CREDIT MANAGEMENT

The next step is to determine if the customer is creditworthy. The BIZVIEWS credit management system is one of the most flexible systems on the market. The following features are incorporated into BIZVIEWS:

CREDIT LIMIT. In ACCOUNTS RECEIVABLE / CUSTOMER CREDIT MANAGEMENT you can establish a credit limit for any customer.

CREDIT HOLD. The customer can be put on a total credit hold so that he/she cannot charge any amount to the account. The customer can still make cash, credit card and check transactions.

ADJUSTING CREDIT DURING SALES. BIZVIEWS can be set up to allow the sales person to grant some additional or starting credit for a customer if permission to do so was established in the SET-UP MODULE. In SET-UP, we establish a dollar amount limit that the sales person could grant. For example, a new customer is entered within BIZVIEWS with no credit limit established (CREDIT LIMIT = 0). Previously in SET-UP, a limit of $300 was set for the field INCREASE CREDIT AMOUNT. This means that the sales person has the authority to grant up to $300 in credit or increased credit.

STEP 3A: ALLOCATING SK

While adding an item to a sales order you can view how much stock you have. What if you have 20 pieces in stock and the order is for 5 pieces that the customer wants immediately shipped to him. Can you satisfy the order? The answer is yes. You can ship him the item, but what about other orders in the system for the same item. By shipping him the item you might be taking stock away from other orders promised to other customers. “Allocations” is designed to avoid this situation by automatically displaying what stock is “available” to this sales order after first looking at the other sales orders for the item in the system and subtracting them from the quantity in stock. If there is a balance left, then the balance can be applied to this order for the item. If the quantity available is zero, then you have the option of not accepting the order or accepting it and creating a purchase or manufacturing order to get stock in to cover the order by the time that the order is scheduled to ship. The process of allocations can be violated at any time by shipping an unallocated order for the item. The system will reallocate the orders remaining on the system.

If there are many sales orders on the system, then you can juggle the allocations to the orders and select which sales orders will be satisfied first, second, and so forth. Doing “manual allocations” does this. Additional allocation flexibility is provided by allowing you to allocate stock only up to a specific date, at which time the allocation is automatically released and the released stock is available to be reallocated to other orders. A permanent allocation (or reservation) that cannot be easily changed when conditions change, can be created by giving the allocation an allocation date of 12/31/1999, locking in the allocation, at least ‘til that date.

STEP 3B: LOT CONTROL (ANOTHER WAY TO ALLOCATE SK)

Each item number is unique to itself. It is different from all the other item numbers in the warehouse (unless, by accident, the same item has been put into stock under two different stock numbers). Certain unique items have attributes within the item that may be different and it may be desirable to separate the stock of the item by the characteristic. For example, let us say that we are stocking grade ‘A’ milk under the stock number “MIL-1.” 1000 cartons of the milk have an expiration date of 9/27/1998, 1700 cartons have an expiration date of 10/10/1998 and 2000 cartons have an expiration date of 1024/1998. The milk itself is always identified by its stock number of “MIL-1” and always ordered as such. The problem is that under that stock number it is desirable to segregate the milk by the attribute of “Expiration Date.” This is accomplished by creating three different lots of the milk under the same stock number and segregating the lots. When milk is ordered, you can select the lot that has the oldest “Expiration Date” to ship to the customer. Each lot has a different lot number that is unique. Lots may have more than one attribute that can be tracked. In fact, each lot could have quite a few attributes being tracked. In the case of the milk, fat content percent, date inspected and cream content could also be tracked. Also, whenever one of these attributes change, the change is recorded as a change of ‘level.’ For instance, let us say that the content of cream has changed for half the lot. The lot can be split into two lots; the lot where the cream content has changed would have a different level than the lot that has not changed in cream content.

STEP 3C: TEMPLATES (A WAY TO HANDLE REPETITIOUS ORDERS)

During the process of making a quote or sales order, it is likely at times that customers will be ordering the same long list of materials over and over. This could entail many hours of entering data. In addition, different customers may order a specific product that requires they also order certain items that go along with it. By using templates, much of these efforts can be avoided. Merely save the items as a template while creating a quote or sales order and give them a template name. Whenever these items are required for a sales order, just call or the template name and the items will appear on the sales order.

STEP 4: PROCESSING, TRACKING AND STATUSING ORDERS

Sales Order Control provides the big picture of what is happening to all of your sales orders. You have the ability to decide which order needs to be processed first based upon the due date to the customer. BIZVIEWS is a “Due Date” system and therefore the priority for an order is set by the date due to deliver to the customer. If it is necessary to change the priority of an order, then change the due date to an earlier one.

“THE CONCEPT OF “SLACK”: The topmost first browser screen in Sales Order Control contains a field called ‘Slack.’ Slack is today’s date minus or plus the Committed Due Date for delivery of the order to the customer. For example: Today is June 20, 1998 and the customer was promised delivery on June 15, 1998 (five days ago). The slack is –5. The browser displays the slack value of each order in slack number order. If all the orders had a slack of 0, this would mean that all orders are being delivered on their due date. By processing the orders with the largest negative slacks first, you will be following the proper priority order.

When you click on the order that you want to work on and go to the second screen, you can review each of the items on the order and the progress that has been made towards shipping the order. By pressing the right button on this screen, you are presented a menu of many choices such as CREATE A PURCHASE ORDER, SHIP ITEM, etc. Process the orders through to completion.

STEP 5: INVENTORY – IMPORTANT CONCEPTS

ITEM NUMBERS: The INVENTORY FILE is made up of item records. Each item in the file is a record. In the old days, we would say that inventory was just made up of “parts,” but this is no longer true. We use the term “items” now because there are many different kinds of items in the file. For example, there are “planning” items used in Master Planning, Features, and Options. The are also reference items (item numbers of drawings that represent the part in stock). Specific item numbers are sometimes called “SKU’s” (Stock Keeping Units).

One of the best features in BIZVIEWS is that the description of an item can now be as long as you want for sales orders, purchase orders and invoices. Normally, the DESCRIPTION field in BIZVIEWS is 30 characters long. We have another field in the INVENTORY file called LINE NOTE. This field is 120 characters long. When you print any of the documents described above, the LINE NOTES directly adjacent to the DESCRIPTION field and it looks like one description of 150 characters. In addition to all of this, the ITEM NOTES field prints directly below the LINE NOTES and this gives us an unlimited description.

CATALOGS versus WAREHOUSES: In BIZVIEWS, it is important to understand the difference between CATALOGS and WAREHOUSES. A catalog is a listing of items from a specific source. It could be a listing of all the items that you sell and buy. It could also be a listing of all the items that one of your vendors sells (i.e. a manufacturer, distributor or wholesaler). Each listing is kept in its own separate file called a CATALOG file. A catalog file contains information about each item, such as its description, manufacturing part number, cost, and price. In the SET-UP section of the program, you are asked if the catalog that you set up is also a physical warehouse where a stock balance is kept on the items. Unless you have answered that it is a physical warehouse, you will never be given the opportunity to add or take away stock from that catalog. Items ordered from that catalog have to eventually be put into another catalog that has been designated as a warehouse. Therefore, the same item will be duplicated in both catalogs. To summarize, a catalog provides a listing of items that you can select for orders. A warehouse is a catalog that has associated inventory records with it where stock is stored. You can also select these items for orders, and when the orders are complete, the items quantities are incremented in the associated inventory file.

STEPS 6 & 7: CREATE AND RECEIVE IN PURCHASE ORDERS

PEGGING: The single most important feature of BIZVIEWS that many purchased programs lack is the function called “pegging.” Pegging allows you to relate back from a purchase order or order to be shipped to the original source (sales order) where the requirement was made for a purchase or shipping order. Most systems will tell you that you have to create a purchase order for a specific quantity of a product, but when the items arrive you have no idea which sales order(s) the items should be delivered to. BIZVIEWS always provides information that pegs the sales order to the material that is available. The process that pegs orders is called allocations.

CONSOLIDATED PURCHASE ORDERS: If you have a large volume of sales orders with many items that are purchased from specific vendors who can be identified before-hand in the INVENTORY file, then many hours of purchase order creation can be saved by using consolidated purchase orders. Basically, you run two programs: the first program automatically attaches a vendor name to all of your items that require purchase orders in a few seconds. The second program takes all of these items, consolidates individual purchase orders by vendor, and creates purchase orders for many items almost instantly.

COMPUTER REQUIREMENTS

All our products are written in Visual FoxPro and are IBM compatible. At this time we do not offer Macintosh support. Macintosh products are expected to be released third quarter of this year.

Absolute minimum requirements would be a Pentium class processor with the following:

• 32 MB RAM

• VGA monitor

• Mouse

• Printer supported by Windows

• Windows 95/98/NT recommended. Windows 3.11 require that the configuration file (config.sys) be changed to include:

FILES=200

BUFFERS=30

NOTE: Although the program has been demonstrated to run without any problems on WINDOWS 3.11 in the past, we no longer support this Windows version and do not in any way guarantee that it will run with this version. The on-line HELP text requires at least Windows 95.

The program runs with all The program runs with all standard local area networks. Networks tested to run with this system are: Windows 95, Windows for Workgroups, Windows 3.1, Windows NT, Novell NetWare, Personal NetWare, Banyan VINES 5.0, IBM LAN Server 3.0, Microsoft LAN Manager, and LANtastic 6.0.

STEPS TO IMPLEMENTING A NEW PROGRAM AT YOUR COMPANY

Probably on of the most important and difficult tasks for a company to accomplish is the implementation of a new computer system, such as BIZVIEWS™. The purpose of these chapters is to walk you through the thought processes of what you need to consider in order to successfully install the new product.

The broad steps listed here are not necessarily in the order that they must be performed, but you can base the skeleton of a plan upon. Even if your company is very small you should go through these steps to determine what course of action you plan to take.

STEPS OF IMPLEMENTATION

Determine if your company needs a new computer system.

Create a Project Team.

Determine if outside help is warranted.

Create a Project Plan and schedule.

Review and compare software programs.

Select software and hardware.

Convert files.

Resolve all Issues.

Train personnel.

Cut over to new system.

Review implementation results periodically.

DETERMINE IF YOUR COMPANY NEEDS A NEW BUSINESS COMPUTER SOFTWARE SYSTEM.

Discuss the following with your management team, your co-workers and others that you respect and optionally write down the discussion results.

Are you presently using a single computer system to run your business? In addition, if so, are you starting to outgrow it?

Is it a “legacy” system that is not “state of the art”?

Are you presently using a series of different computer programs to try to run your business such as: spreadsheet programs, word processors, contact management programs, accounting programs, etc.?

As well as you can determine is your competition running their business using a computer system? Are they starting to move ahead of you, or do you feel that they may be getting an “edge” on you?

Do you spend an appreciable amount of your time trying to gauge the health of you business?

Are you missing information that would be helpful in running your business, that you suspect would be available if you had a system with features such as whether you are operating within budget, or that your inventory is increasing while sales are declining?

Do your employees spend a large amount of time, or you on tasks that are better accomplished by the computer. Do you have to do constant or repetitive tasks, make calculations, or copy information from one source to another place?

Make a list before reviewing any software of what features you would expect a new system to have. Make this list as comprehensive as possible. It may be helpful to formulate this list by function to be performed (e.g. Order Entry, Purchasing, etc.). Create another list of expect benefits. Create an ROI (Return on Investment document) that shows both tangible benefits ($) that could be derived from a new system, and intangible benefits (e.g. not working Saturdays).

From all this, you can determine if is of benefit to continue and start a project.

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BIZVIEWS WARRANTY

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CONCLUSION

We at GRC Business Solutions have been serving the Oklahoma City area for over 17 years and have won many awards for our top shelf business solutions. We have made it to the top of our business by being the best in customer support, near flawless implementation, and follow-up support beyond normal business practices. There are many solutions available on the market that will help your business grow and be equally successful. However, GRC Business Solutions will help you to success form start to finish. We guarantee it.