MYOB EXO BUSINESS WHITE PAPER

Style Size Colour

EXO BUSINESS
MYOB ENTERPRISE SOLUTIONS

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Style Size Colour

The Style Size Colour feature enables you to create and process stock in variations of colour and size. A common example of how this might be used is the fashion industry, where a single item is sold in variations of colour and size.

The Style Size Colour feature is available at no extra cost to MYOB EXO Business users. To enable this feature, refer to the section Style Size Colour Feature Profile Settings near the end of this document.

The Size Colour Style feature is only available in MYOB EXO Business 6.185 and later, and only on MSSQL.

Fitness for Purpose

What follows is a brief description of the use of these functions. The feature is limited to the functionality described in this white paper, and no additional (undocumented) functionality is implied. It is widely acknowledged that there are specialised software applications developed to handle Style / Size Colour requirements, these are generally expensive to buy and complex to install and use. Our intention here is to better accommodate MYOB EXO Business users who have an element of style size colour within their product range, or who have found existing specialised software to be an 'overkill', either being too complex or too expensive. It is essential that the users satisfy themselves that the demonstrable capabilities are sufficient for their purposes prior to purchasing MYOB EXO Business or adding this functionality.

Creating Style Size Options

Before you can generate any styles in MYOB EXO Business you will need to establish what sizes will be available across your whole product range. For example you may have some styles which come in only three sizes Small Medium and Large, other styles may come in a more comprehensive range of sizes ranging from sizes 6 through size 14. If you have a style that has an extra dimension to its sizing e.g. Black - Size 10 shoes (wide or narrow fitting), then you will need to create a separate sub style to accommodate the wide or narrow fitting or create specific sizes '10N' and '10W'. MYOB EXO Business only accommodates two dimensions: Size and Colour.

To create style size options, open EXO Business Config and go to Admin > Stock > Style Sizes:
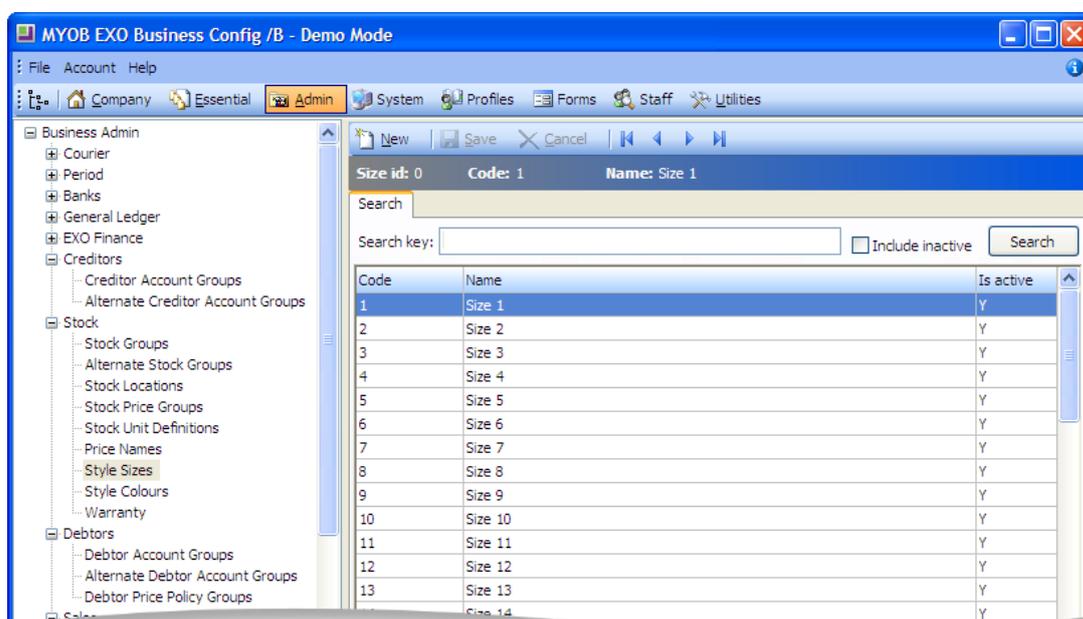
Double-click on a size to edit it, or click **New** to create a new size:
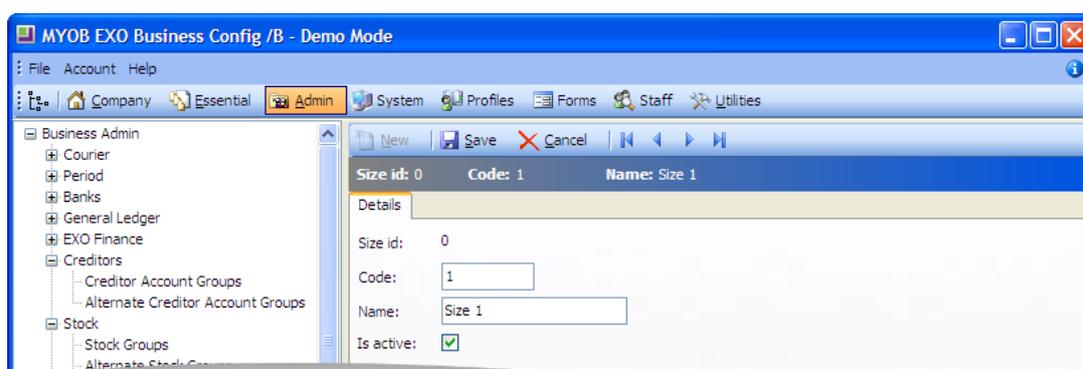
- The **Size ID** is a unique key, assigned by the system. It cannot be altered by the user and is invisible during normal operation.

- The size **Code** is a short abbreviation of the size used in the formula to auto generate stock codes for the style.

- The size **Name** is a long description used in the formulation of the descriptions of stock items in this style.

- A size may be set as inactive if it is no longer available.

Creating Style Colour Options

Similarly before you can generate any styles in MYOB EXO Business you will need to establish what colours will be available across your whole product range. If you have a style that has fabric options e.g. Leather or Plastic, then you will need to either create a whole separate sub style to accommodate the different fabric options, or create specific Colour options e.g. 'Red L' and 'Red P'. Again MYOB EXO Business only accommodates two dimensions: Size and Colour.

To create style size options, open EXO Business Config and go to Admin > Stock > Style Colours:
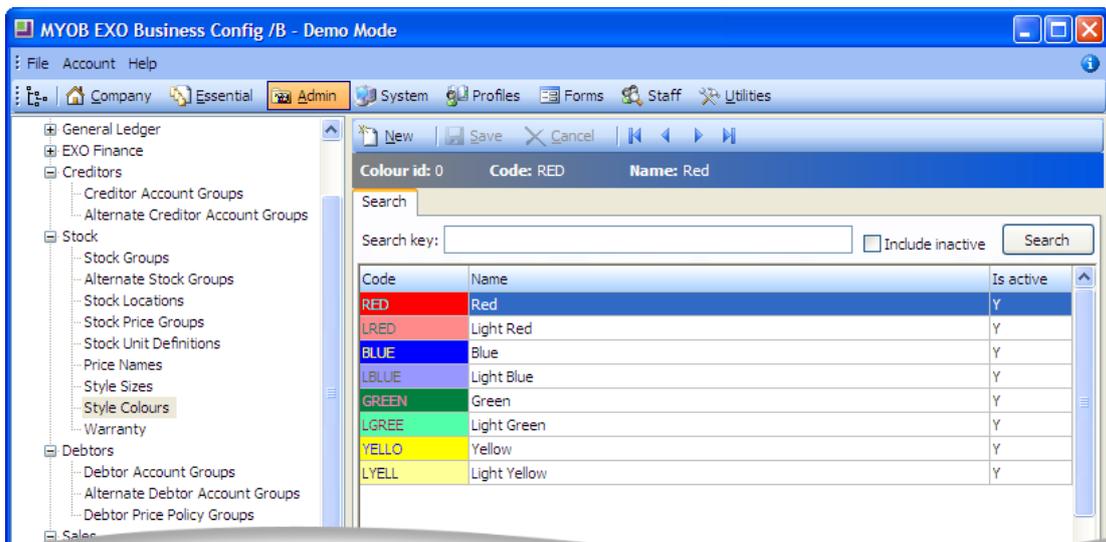
Double-click on a colour to edit it, or click **New** to create a new size:
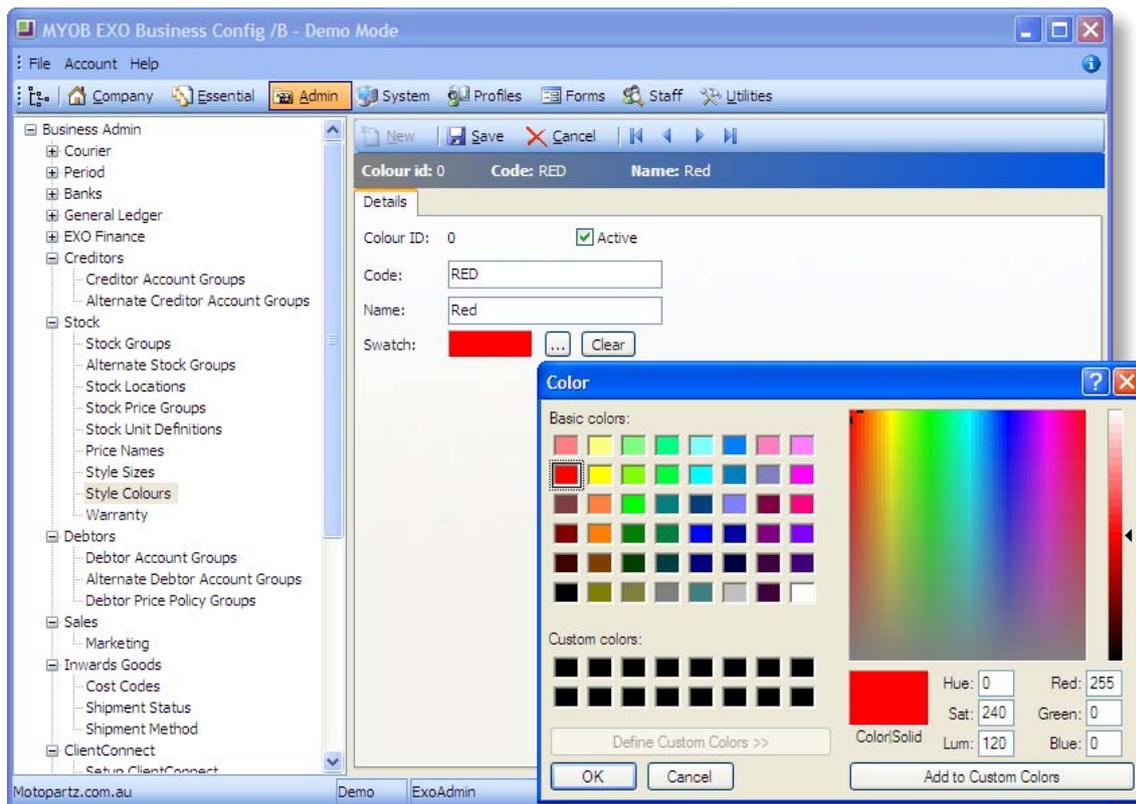
- The **Colour ID** is a unique key, assigned by the system. It cannot be altered by the user and is invisible during normal operation.

- A colour may be set as inactive if it is no longer available.

- The colour **Code** is a short representation of the colour used in the formula to auto generate stockcodes for the style.

- The colour **Name** is a long description used in the formulation of the descriptions of stock items in this style.

- The **Swatch** allows you to pick a colour to act as a visual cue when picking this style on an order. Click the edit button to open a colour picker window.

Creating a New Style

A style is a collection of Stock codes that are common but with minor variations. These variations are typically Size and Colour. The Size and Colour variations are two common problems for businesses that deal in styles. These are creation of a new style (maybe involving a hundred-or-so stock codes), and representation of the style in a visually compact fashion using a matrix where size is represented by the X-Axis and Colour on the Y-Axis.

In MYOB EXO Business a Style is analogous with a Stock Group, you can set the name of product group as *'Style'* using the display names option in EXO Business Config. Stock Groups can be grouped under parent grouping Stock Group 2. For example sales of various styles of socks might be reported under the collective stock group 2 'Socks'.

Also the Price Groups function can be used as a useful method of controlling discounts of promotional pricing across a whole style at once.

Not all product groups are required to have style attributes:

- A sports equipment shop may sell all sorts of sports equipment, but only sports apparel and sports shoes have style size colour requirements.

- A furniture store may sell furniture and bedding, but only Bed sheet product lines have a size colour attributes.

For this reason there is a flag on each product group indicating that this product group has Style attributes.
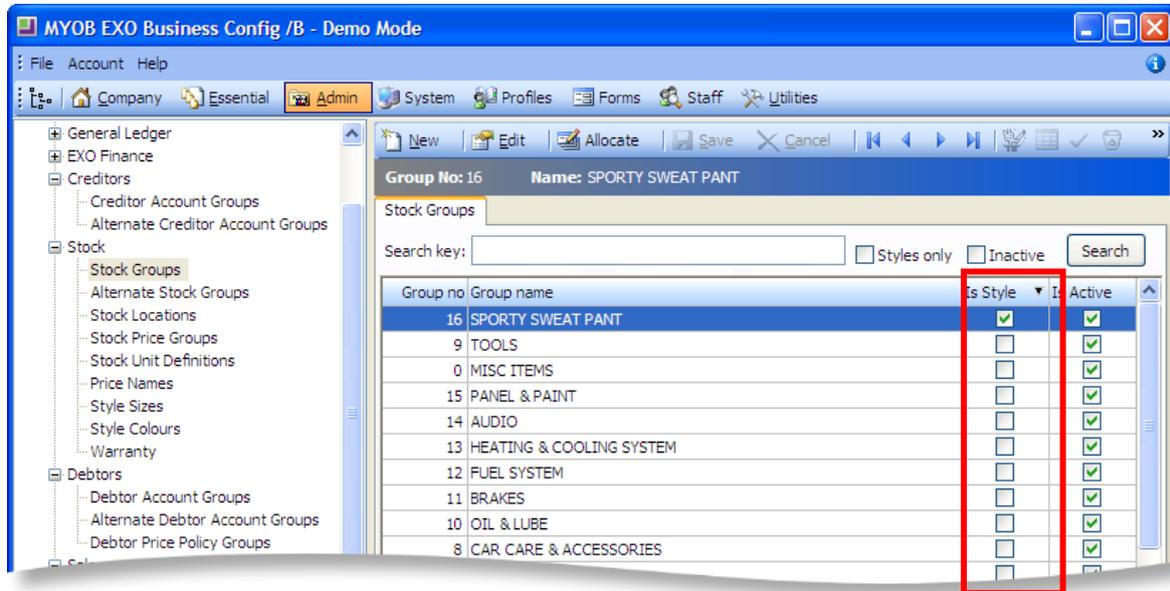
Click **New** on the screen above to create a new stock group, then set up the stock group in the normal manner.

When the Style option is enabled, three new tabs are enabled:
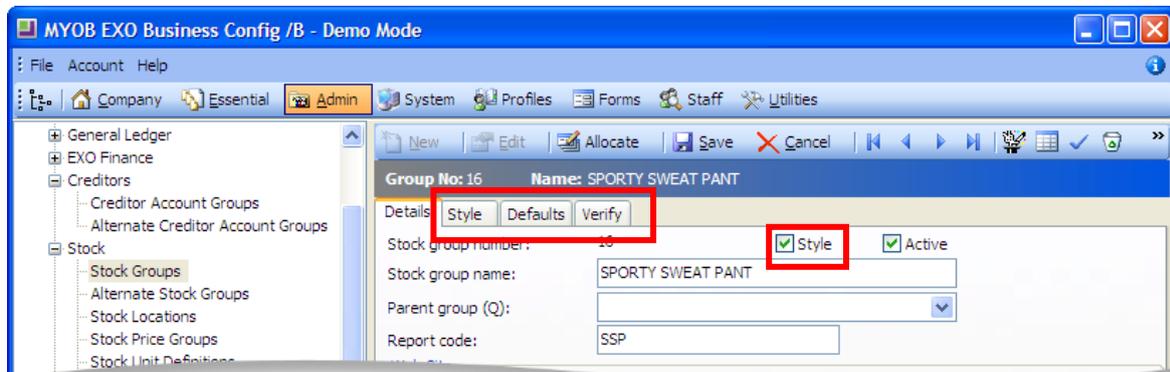
The **Parent group (Q)** is taken from the Alternate Stock Group, e.g. brand name.

The Style tab is the key to creating a whole style and its constituent stock items in one step.
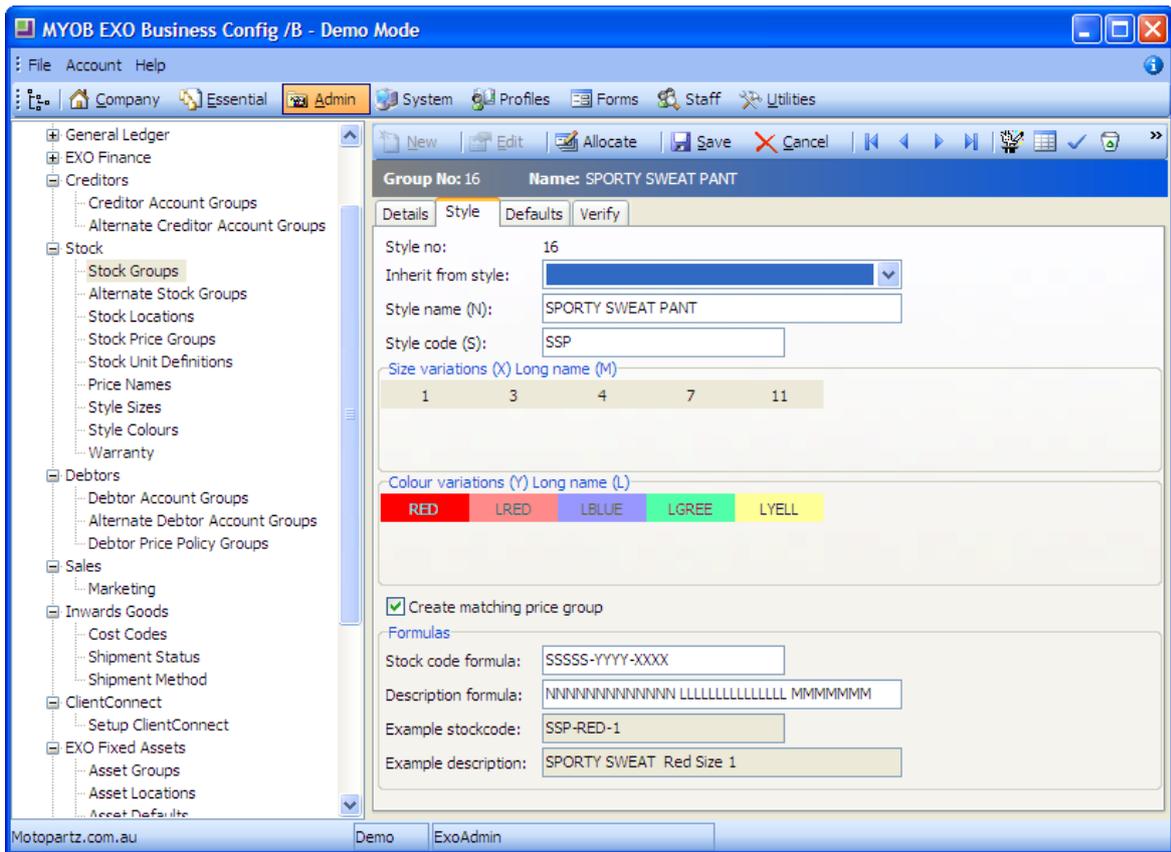
> **Note:** See the formulas later in this section for the meaning of the letters in brackets.

- **Inherit from Style** - You can inherit the properties of a similar style already created in your system. This is a very fast way to set up a style based on a style from last season. The new style need not be an exact duplicate. You may change attributes after copying.

- **Style Name (N)** A long description of this style (equivalent to product group description) used in the formulation of Stock Item descriptions.

- **Style Code (S)** Equivalent to Product group report code used as an abbreviated for of the style in the formulation of Stock codes.

- **Size Variations (X) and (M)** – You can right mouse-click and select **Add** or double-click in this area to pick from the list of available sizes. You can add these instantly by double-clicking on the size or highlighting it and click **OK**. Generally, the double-click combination is the quickest method for adding these size variations.
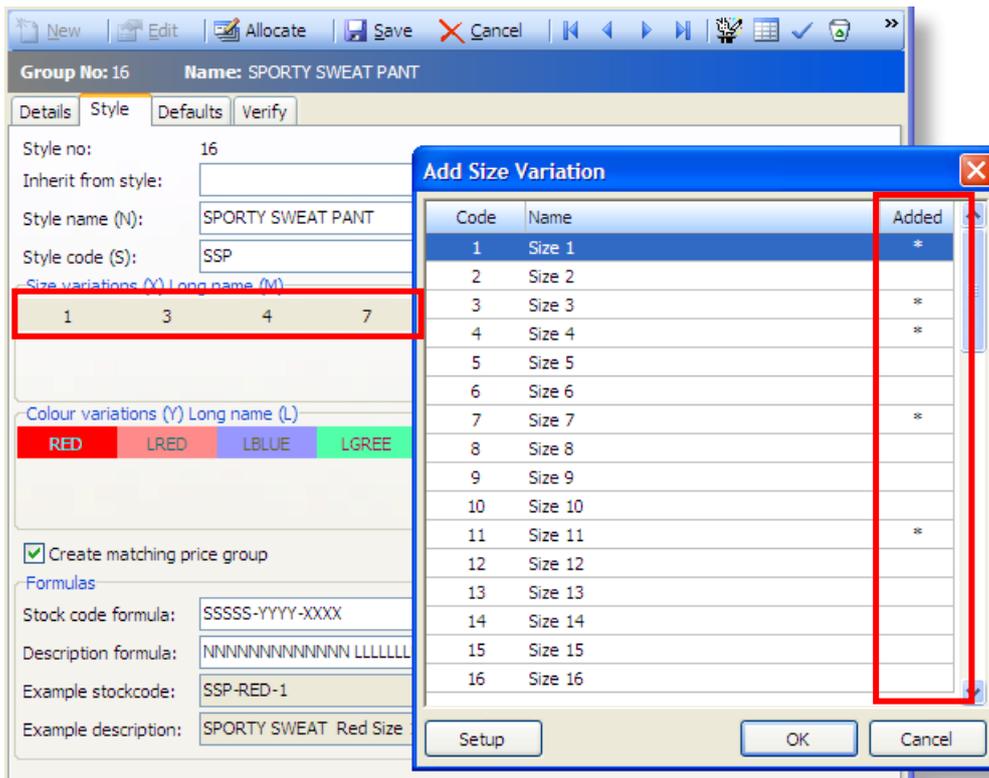
You can delete a size option that you added by mistake prior to generating a style. To delete the size option, move the cursor over the size text and right mouse-click on it, choose **Delete** from the menu. You can also add a new size option to the style at a later date, after the original style stock codes were generated. If you attempt to add a size that is already selected for this style (see * already added column) you will receive a warning.

- **Colour Variations (Y) Long Name (L)** You can use right mouse-click and **Add** or double-click in this area to pick from the list of available colours. You can add these instantly by double-clicking on the colour or highlight it and click **OK**. Generally the double-click combination is the quickest method for adding these colour variations.
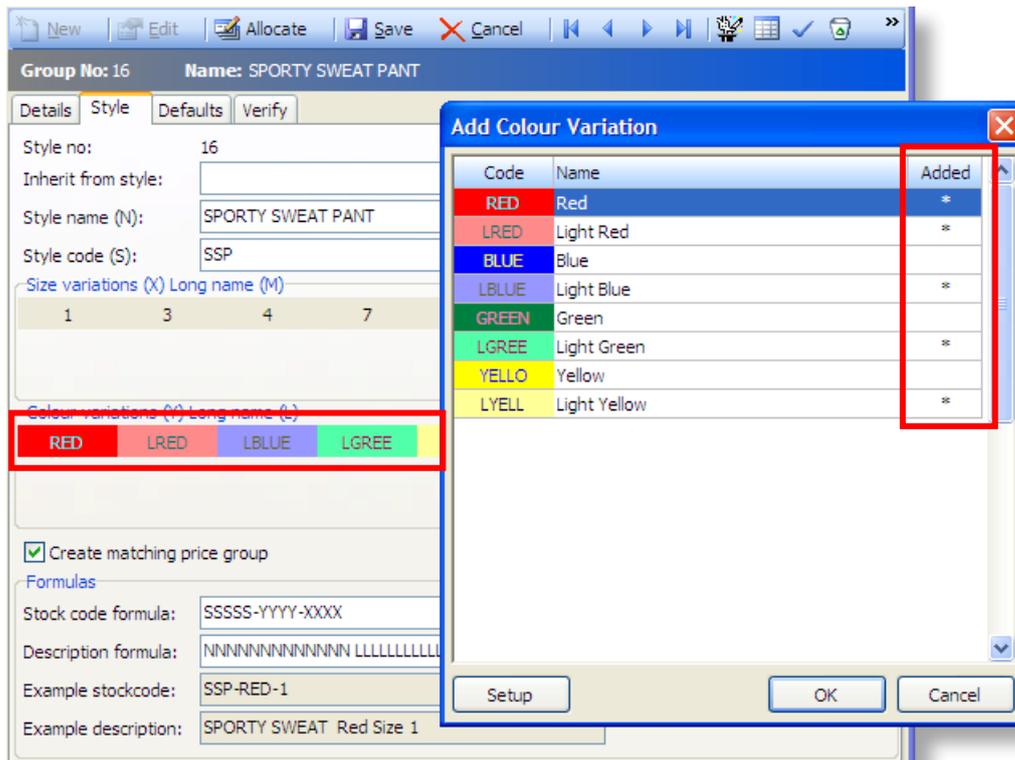
When you click **OK**, these colours are shown against the style. You can delete a selected colour that you added by mistake prior to generating a style. To delete the colour option, move the cursor over the colour and right mouse-click on it, choose **Delete** from the menu or press **D** on the keyboard. You can also add a new colour option to the style at a later date, after the original style stock codes were generated.

If you attempt to add a colour that is already selected for this style you will receive a warning.

- **Create matching price group** – To facilitate easy maintenance of price rules for promotions or discounting of all products in the style you can automatically generate a stock Price group to match the style. Check this option if you wish to create a matching price group for this purpose.

- **Formulas and masks** – MYOB EXO Business allows you to automatically build consistent stock code details using a 'mask' or template. The example section gives you an illustration of how the stock codes and descriptions might appear when created. If you change the formula, you will see the examples change as you do so. The letters used in the formulae correspond to the letters in brackets on the style creation screen.

There are two company level profile settings that are used to set the default formulas: SIZE_COLOUR_CODE_FORMULA and SIZE_COLOUR_DESC_FORMULA.

Note: If a style is inherited then the formula will be inherited as well.

Stock code Formula - can only use P, S, Y and X characters. These represents Alternate Stock Group ReportCode (P), Style Code (S), Colour Code (Y), Size Code (X)

Description Formula – are limited to Q, N, L and M characters. These represents Alternate Stock Group Name (Q), Style Name (N), Colour Name (L), Size Name (M).

The Stock code is generally set to 23 characters and stock descriptions to 40 characters. If you need more than 40 characters, you can add additional descriptions in the notes field of

the stock item. It is recommended to keep descriptions limited to 40 characters so that they can be properly viewed on reports and Invoices. Also, ensure that you have enough characters to accommodate the longest size and colour codes / descriptions before creating the style.

Setting Other Default Values

Before creating the stock items that will make up my style, you can predefine default settings for these stock items.
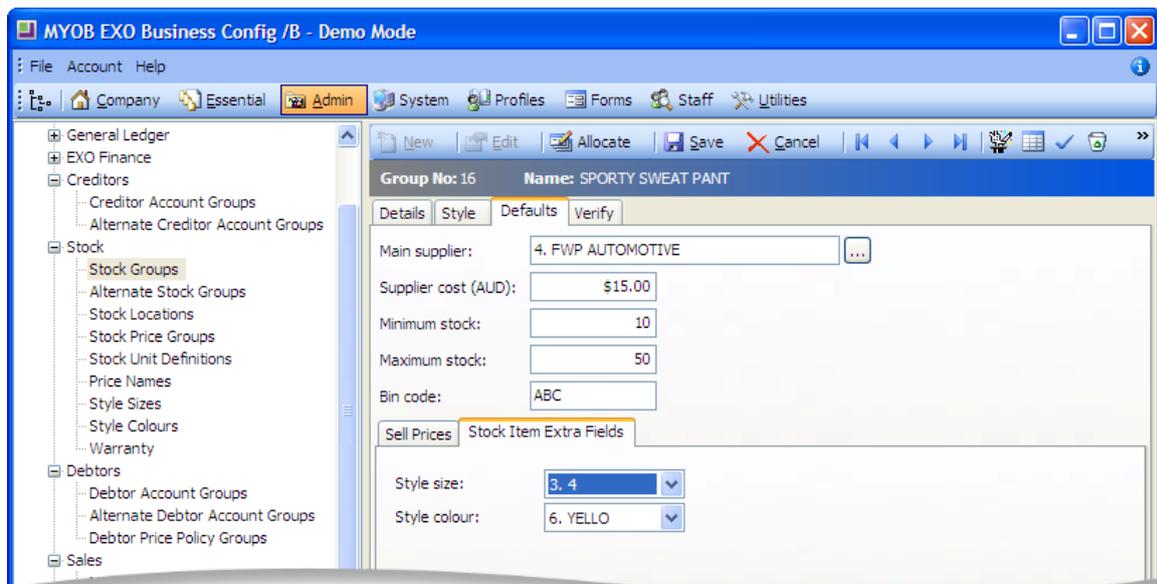
> **Note:** The secondary stock group for each of these stock items is set at the stock group level.

You can also preview the style before you create it clicking the **View/size colour matrix** button on the toolbar ( ).
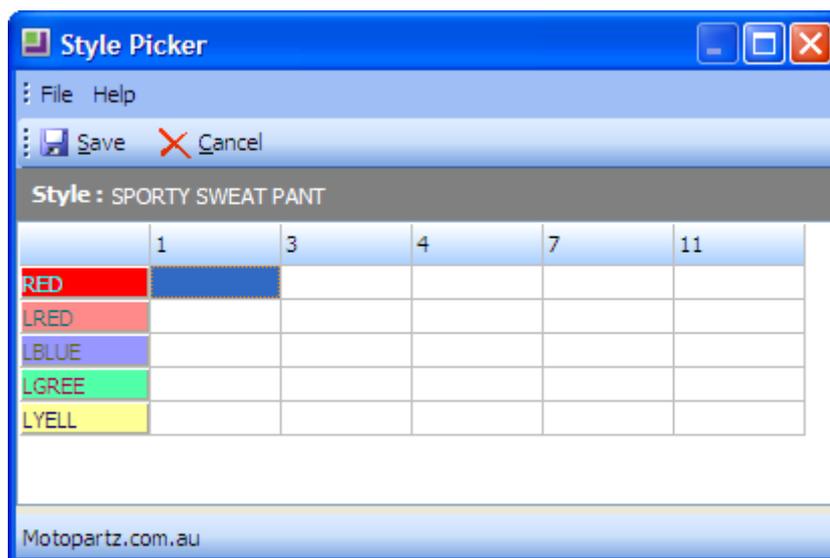
You can save the description of this style without generating associated stock items.

You can verify the style description by clicking the Verify style button on the toolbar or clicking the **Verify** button on the Verify tab.

The verification checks the style description you have made, and checks any existing stock items that are attached to this style (created manually) that do not have size or colour specified. The full list of possible errors is as follows:

No style code specified

No style name specified

No size variations specified

No colour variations specified

No matching price group found

Matching price group found but 'Create matching price group' unselected

No stock code formula specified

The stock code formula contains no style mask (S)

The stock code formula contains no colour mask (Y)

The stock code formula contains no size mask (X)

No description formula specified

The description formula contains no style mask (N)

The description formula contains no colour mask (L)

The description formula contains no size mask (M)

No style stock items exist - select 'Generate' button

No style stock items with size/colour exist - select 'Generate' button

These style stock items don't have size or colour specified:

These style stock items have inactive flags:

These style stock items don't follow the code/desc formula specified:

These style stock items don't have the matching price group:

These style stock items have the matching price group when shouldn't:

There is not ONE ONLY style stock item for these size/colour combos:

Generation of the stock items is a separate task performed when you click the ⬚ button on the toolbar. When you click this icon you will see a progress box appear as the stock items are created. Once the style is created a window displaying the results will be displayed.

Stock Items

If you search your stock items list, you should now see all the constituent stock codes created by the style generator as illustrated below:

If you examine one of these items you will see that there are two extra fields that contain the stock items size and colour attributes. These are the key to building the onscreen style picker matrix.
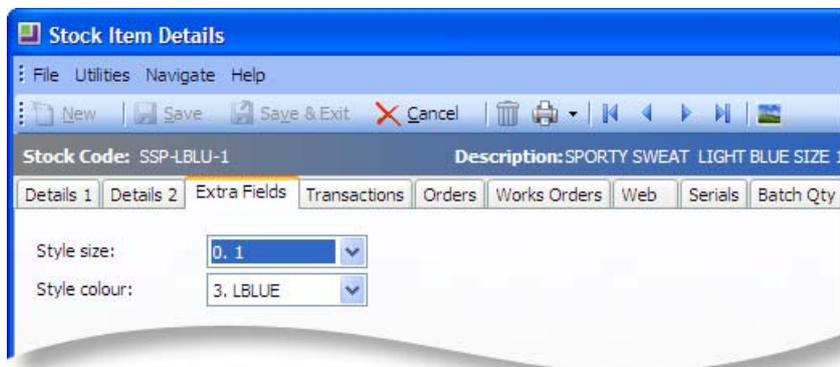
Processing Styles using the Style Picker

While you can treat a stock item that belongs to a style as a unique stock item, (e.g. point of sale where you may scan a barcode on the product) the style picker is used as an aid to selecting multiple stock items from the same style. An example is when you are ordering various sizes and colours from suppliers or if you are distributing a variety of colours and sizes to your customers.

The style picker is available in Sales order Entry and Purchase order entry screens only. In the same way you use a dot (.) to signify you are entering a Kit code, you can use the forward slash (/) to indicate you want to use the Style Picker.
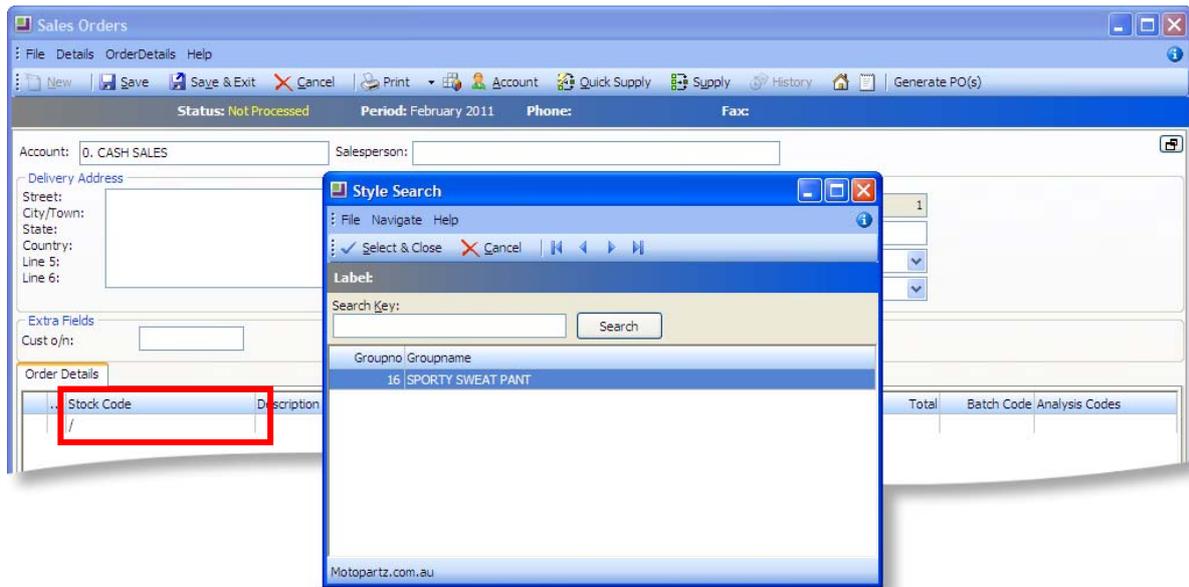
Double-click on a style (or highlight a style and click **Select & Close**) to open the Style Picker.
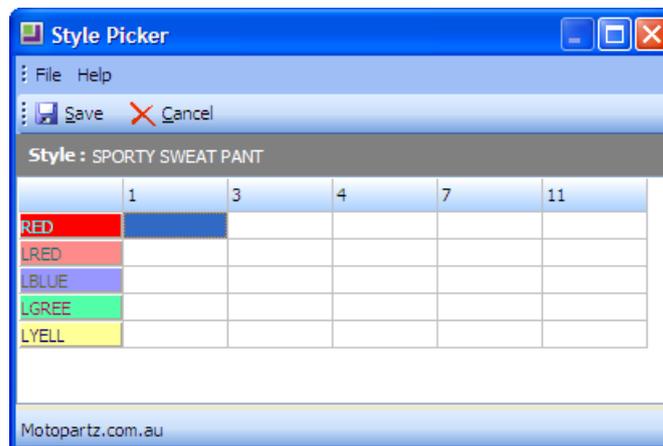
A light yellow cell indicates that a particular size/colour combination is not available. You can set an item as unavailable by making the stock item inactive or by removing the size or colour extra field settings. The system also blocks you in entering data on a yellow cell.

You can double-click on any available cell in the grid to view a summary of the stock on hand availability for that stock item across all locations.

Enter the required quantities using the Style Picker matrix:

Click **Save** and the order will be populated with the required quantities of each stock item:

From this point, the lines are independent stock codes and the order is processed as it would be normally.

Style Size Colour Feature Profile Settings

Enable Style Size Colour Features
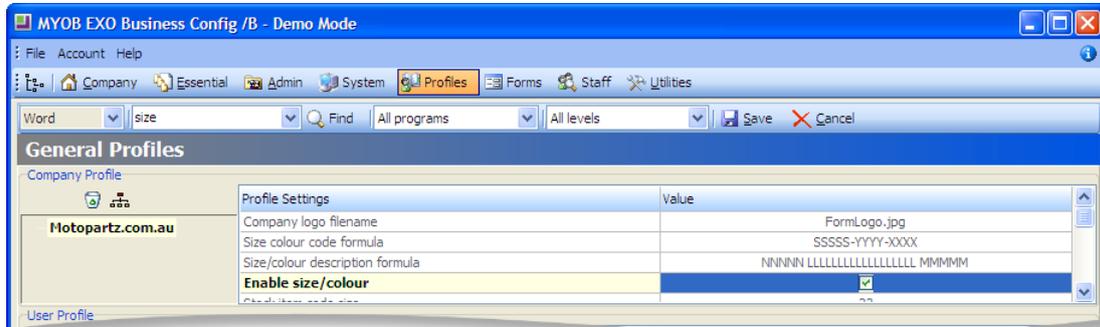
To enable Style Size Colour features, open MYOB EXO Config, select profiles and search for size. Check the **Enable size/colour** option and click **Save**. Close any instances of MYOB EXO Business and Config and restart for this feature to be enabled.

Style Colour Picker Swap Axis

To swap the style colour picker axis, open MYOB EXO Config, select profiles and search for swap. Check the **Style colour picker swap axis** option and click **Save**.
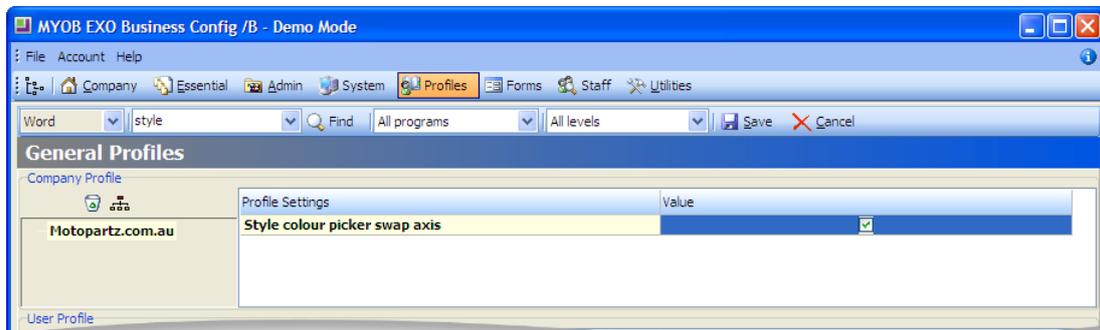
The appearance of the Style Picker changes depending on the values of this setting:
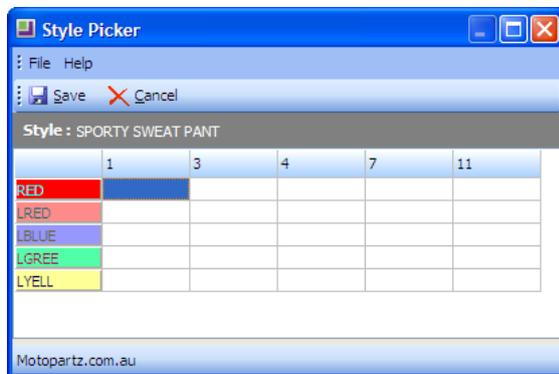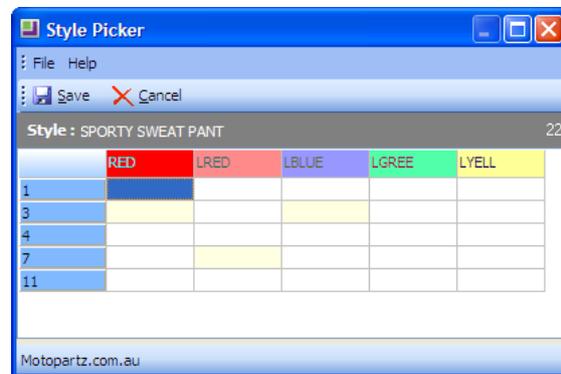
Disabled   Enabled

Style Size Colour Stock Formulas

To change the formatting of the Style colour code and/or description formulas, open MYOB EXO Config, select profiles and search for formlua. Highlight the Value field and change as necessary.