

How Do You Enter Customer Owned OP Items? - Fulfillment

Tammy Mason - 2017-09-18 - in Inventory

How Do You Enter Customer Owned OP Items? - Fulfillment

When You Do Not Stock the Blank Item

Step A

- A. Setup a matrix code if the item is a wearable (see the matrix section)
- B. Setup the Blank goods item master.
- C. Setup the item master for the decoration.
- D. Setup up the OP item, the decorated item stored in your warehouse.
- E. Add the colors and sizes
- F. Edit and add up charges to the larger sizes.

Step B

1. To setup the blank item, in the Item Master screen, Click Add.
2. If the item is a wearable or will be ordered in various colors and/or sizes, enter the item number in the base item field. The item number should start with the letter "Z" and can be the vendor's item number for the item. By setting up this way, (with the "Z") lookup by item number will list these items at the bottom of the lookup. If the blank good is not a wearable or won't be ordered in sizes and/or colors, hit tab and enter the item number in the Item # field. Do not enter a customer number.

Note: This base item then is used to create other items that differ in color, size, paper stock or design. This field should be left empty if you do not wish to create additional sub items.

3. If you entered a base item # answer "yes" to create this item as a base item. The system will now repeat your base item in the item number field. If you are not using a base item#, enter a sub number if needed. Do not enter a customer number.
4. Enter the description that you wish your vendor to see. The first line of the description prints on inventory purchase orders and reports and should contain the most pertinent information. If you need more than the two lines of description, once you hit add there will be an extended description button

available.

5. The item type and the method of inventory will be Drop Ship (DS).
6. Leave the program # field blank. By doing so, the item won't print on reports sorted by program.
7. If the item will come in colors and sizes enter the matrix code you set up for this item.
8. Leave the "Owned by" as House.

Note: Use the F1 help feature for field definitions.

9. On the Order info tab, enter the standard material (std mtl) cost of the item. Include an estimate per piece freight charge (std frt). Do not enter a price. The blank item will not be sold to your customer. Enter the appropriate product code, line item code and category. By entering a category on all the items for this program, inventory reports can be run for both the blank and imprinted items.
10. On the vendor tab, click edit vendors and then add. Enter the vendor(s) that you will be purchasing this item from on the Vendors tab. Ninety-nine different vendors may be added. Vendor sequence # 1 will be the default vendor for a purchase order. If a secondary vendor is setup, changing the vendor number on the purchase order will bring in their information. Click Save, Close and Save.

Step C

1. Next, set up the item master for the decoration. This item will not be a base item unless it comes in color and/or sizes that can be entered using the wearable matrix. Again, the item number will start with a "Z". By setting up this way, (with the "Z") lookup by item number will list these items at the bottom of the lookup. . Do not enter a program number or customer number so these items will not show on inventory reports selected by program number. The item type will be Purchased Service (PS) and the method of inventory not applicable (NA). The description will be aimed at the vendor since they will be the only one that will see this description. Leave the Owned by as House.
2. On the Order info tab, enter the standard material (std mtl) cost of the item. Include an estimate per piece freight charge (std frt). Do not enter a price. The decoration will not be sold to your customer. Enter the appropriate product code, line item code and category.
3. On the vendor tab, click edit vendors and then add. Enter the vendor(s) that you will be purchasing this item from on the Vendors tab. Ninety-nine different vendors may be added. Vendor sequence # 1 will be the default vendor for a purchase order. If a secondary vendor is setup, changing the

vendor number on the purchase order will bring in their information. Click Save, Close and Save.

Once you have the blank and decoration item masters entered, the Catalog item that is stocked in your warehouse and sold to your customer is ready to be setup. This step can not be done until you have the components setup that makes up the imprinted item.

Step D

1. Now, add the imprinted item that you stock in your warehouse. Click Add. If the item is a wearable or will be stocked in various colors and/or sizes, enter the item number in the base item field. The item number will be your catalog item number. You may enter the customer number for the customer that owns the product in the cust # field. If you enter a number in this field, it will limit the original look up during any type of order entry, to display just the items that have this customer number on them. (If this customer number is in the ship from customer field on the program master that is used in the order)

Note: Start the item number with the program letters. Items will be grouped together for look up purposes.

2. If you entered a base item# answer" yes" to create this item as a base item. The system will now repeat your base item in the item number field. If you are not using a base item #, enter sub number if needed.

Enter the description that you wish your customer to see. The first line of the description prints on reports and packing lists and should contain the most pertinent information. If you need more than the two lines of description, once you hit add there will be an extended description button available.

3. The item type will be OP (outside processed) and the method of inventory will be ST (stock)

4. Enter the prebill program # in the program field. Any report selected by that program will include this item.

5. If the item will come in colors and sizes enter the matrix code you set up for this item.

6. Change the Owned by to Customer. If you decided against inputting a customer number, answer "Yes" to the question "Items with cust # 0 are usually owned by house. Is customer owned correct?"

Note: Use the F1 help feature for field definitions.

7. On the Order info tab, enter the standard material (std mtl) cost of the item. This will be a combination of the blank goods and the decoration cost. Include an estimate per piece freight charge (std frt). Enter the selling price

for the item.

8. Instead of having a vendor, this item will have a bill of materials (BOM). The BOM will be made up of the items setup in the previous steps (DS and PS). The last item entered in a BOM must always be a PS item. Click Edit BOM and then Add to enter these items. Once you have entered the BOM records the BOM tab will display the the items required for this decorated item.

A minimum of one site and one bin location to track inventory is required. The location site will default in based on the warehouse entered in company information and can be changed.

Click edit bins and add. A lookup is available and will display all available bins for that location site. Click edit site and edit to select a "stored at" site.

Note: See item master maintenance, location tab for detailed information.

Note: Use the F1 help key for additional information.

Step E

8. Save the item.

Click Add and enter the same item number that you just completed, in the Base item # field. Hit tab. If you used a customer number enter it and hit tab. If you did not use a customer number just hit tab. If you entered a matrix code on the item a wearable matrix setup screen will appear. On the matrix window, the colors and sizes will be checked. Clicking process will create item masters for these colors and sizes. If needed, enter a second line of description.

Note: The color/sizes will be created for both the OP and DS items.

Step F

After the sizes and colors are created, make any changes that need to be made for price and cost on the larger sizes. For the catalog item, (OP) on the Order info tab correct the cost and the price to the customer for the larger sizes Edit the item created for the blank item (DS) . On the Order info tab correct the cost. Also, change the vendor cost on the Vendors tab.