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How Do You Enter Customer Owned OP Items? - Fulfillment/Plus

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Setting Up a Customer Owned OP Item When You Do Stock the Blank Item

Step A

Setup a matrix code if the item is a wearable (see the matrix section)

A. Setup the Blank item, that you stock in your warehouse
B. Setup the item master for the decoration
C. Setup up the OP item, the decorated item.
D. Add the colors and sizes
E. Edit and add up charges to the larger sizes.

Step B

1. 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 can be the vendor’s item number for the item. If the blank good is not a wearable or won’t be stocked in sizes and/or colors, hit tab and enter the item number in the Item # field.

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 a sub number if needed.

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

4. The item type will be FG (finished good) and the method of inventory will be VA (variable).

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

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

for this item.

7. Leave the Owned by as House.

Note: Us the f1 help feature, in Profitmaker, for field definitions.

8. On the Order info tab, enter the standard material (std mtl) cost of the item. Include an estimate per piece freight charge (std frt). Enter a price if the blank item will be sold to your customer. Enter the appropriate product code and category.

9. 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.

10. On the Activity tab, enter the minimum and maximum you want to stock in your warehouse

11. 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, in Profitmaker, for additional information.

12. Save the item by clicking 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 colors and/or sizes that can be entered using the wearable matrix. The item number will start with a “Z”. By setting up this way, lookup by item number will include these items at the bottom of the lookup. Do NOT enter a program number or customer number. These items will not show on inventory reports sorted by program number. The item type will be Purchased Service (PS). 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 setup. This step cannot be done until you have the components entered that make 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.

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

2. Enter the description that you wish your customer to see. The first line of the description prints on the packing list and reports. 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, in Profitmaker for field definitions.

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.

7. 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 (FG 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 items required for this decorated item.

8. 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, in Profitmaker, for additional information.

Step E

9. Save the item so you can add the color and sizes.

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 the number in the customer number field and hit tab. If you did not use a customer number just hit tab. If you entered a matrix code on the item 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 the FG 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.