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How Do You Set Up A House Owned OP Item? - Fulfillment

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How Do You Set Up A House Owned OP Item? - Fulfillment

When You Do Not Stock the Blank Item

1. To setup the blank item, in the Item Master screen, Click Add.

2. Set up the blank item that will be receiving the decoration. It will be a base item and the item number will start with the letter "Z". By setting up this way, lookup by item number will include these items at the bottom of the lookup.

3. Answer Yes to create this item as a base item. The system will now repeat your base item in the item number field. If this item comes in color/sizes that can be entered using the wearable matrix, enter Matrix code. Do NOT enter a program number or customer number so these items will not show on inventory reports sorted by program number. The item type will be Drop Ship (DS). DS items do not track on hand quantities. The Method of inventory will be Drop Ship (DS). 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. See F1 Help for field definitions.

4. On the Order info tab, enter the cost of the item. Include an estimate per piece freight charge. Do not enter a price. The blank item will not be sold to your customer. Enter the appropriate product 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.

5. Enter the vendor(s) that you will be purchasing this item from on the Vendors tab. 99 different vendors may be setup. Vendor sequence # 1 will be the default on the 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.

6. 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. Again, 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 so 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.

7. On the Order info tab, enter the cost of the item. Include an estimate per piece freight charge. Do not enter a price. The decoration will not be sold to your customer. Enter the appropriate product 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.

8. Enter the vendor(s) that you will be purchasing the decoration from on the Vendors tab. 99 different vendors may be setup. Vendor sequence #1 will be the default on the purchase order. If a secondary vendor is setup, changing the vendor number on the purchase order will bring in their information. Click Save and Close.

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 can not be done until you have the components entered that make up the imprinted item.

9. Click Add. This item will be a base item and item number will be the catalog item number or number you use when the customer orders the item.

10. Answer Yes to create this item as a base item. The system will now repeat your base item in the item number field. If this item comes in color/sizes that can be entered using the wearable matrix, enter Matrix code. Enter the program number on this item so these items will show up on inventory reports sorted by program number. The item type will be Outside Processing (OP). The description will be aimed at the customer, this will be the description they will see on their packing list and invoice. Leave the Owned by as House.

11. On the Order info tab, enter the price of the item. If there is a price increase for larger sizes and special colors, do not enter that at this time. Product code and category should be entered. By entering a category on all the items for this program, inventory reports can be run for both the blank and imprinted items. If you have checked "Rollup cost", do not enter a cost. When the color and sizes are created using the wearable matrix, the standard cost will default in based on the cost of the items on the bill of materials. This is the cost that will default on the line item during Fulfillment Order Entry and is used to calculate commission if the salesperson is paid on a percentage of gross profit. Make any other changes that are necessary.

Ex: Taxable item and commission.

12. 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 in a BOM must always be a PS item. Click Add to enter these items. Once the creation of the BOM records is complete a display will list the items in the BOM.

13. Once the OP item is setup, you can add the color and sizes. Click Add and enter the OP item number in the Base item # field. If you the OP item was checked for Matrix, the wearable matrix will appear on the screen after you hit the tab key. On the matrix window, enter the color the comes in. If needed, enter a second line of description. Check the sizes the item comes in. After all the colors and sizes are entered, click Process.

TIP: *The colors/sizes will be created for both he OP and FG items*

After the sizes and colors are created, any changes that need to be made for price and cost on the larger sizes can be made. 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. The catalog item (OP) will need to be corrected. On the Order info tab correct the cost and the price to the customer.

When You Do Stock the Blank Item

1. To setup the blank item, in the Item Master screen, click Add.

2. Enter the vendor's item number in the Base Item # field.
3. Answer Yes to create this item as a base item. The system will now repeat your base item in the item number field. If this item comes in color/sizes that can be entered using the wearable matrix, enter Matrix code. Enter a program number so these items will show on inventory reports sorted by program number. The item type will be Bought as Finished (FG). FG items track on hand quantities. The Method of Inventory will be Variable (VA). 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.

See the F1 (Help) for field definitions.

4. On the Order info tab, enter the cost of the item. Include an estimate per piece freight charge. Do not enter a price. The blank item will not be sold to your customer. Enter the appropriate product 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.

5. On the Vendors tab, click Edit vendors. Click Add and enter the vendor(s) that you will be purchasing this item from on the Vendors tab. 99 different vendors may be setup. Vendor sequence # 1 will be the default on the purchase order. If a secondary vendor is setup, changing the vendor number on the purchase order will bring in their information.

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

7. Save the item by Clicking Save.

8. 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.

9. On the Order info tab, enter the cost of the item. Include an estimate per piece freight charge. Do not enter a price. The decoration will not be sold to your customer. Enter the appropriate product 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. Enter the vendor(s) that you will be purchasing the decoration from on the Vendors tab. 99 different vendors may be setup. Vendor sequence #1 will be the default on the purchase order. If a secondary vendor is setup, changing the vendor number on the purchase order will bring in their information. Click Save and Close

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 can not be done until you have the components entered that make up the imprinted item.

11. To setup the outside processed (OP) item, click Add. This item will be a base item and item number will be the catalog item number or number you use when the customer orders the item.

12. Answer Yes to create this item as a base item. The system will now repeat your base item in the item number field. If this item comes in color/sizes that can be entered using the wearable matrix, click Matrix. Enter the program number on this item so these items will show up on inventory reports sorted by program number. The item type will be Outside Processing (OP). The description will be aimed at the customer, this will be the

description they will see on their packing list and invoice. Leave the Owned by as House.

13. On the Order info tab, enter the price of the item. If there is a price increase for larger sizes and special colors, do not enter that at this time. Product code and category should be entered. By entering a category on all the items for this program, inventory reports can be run for both the blank and imprinted items. If you have checked "Rollup cost", do not enter a cost. When you create your color and sizes using the wearable matrix, the standard cost will default in based on the cost of the items on the bill of materials. This is the cost that will default on the line item during Fulfillment Order Entry and is used to calculate commission if the salesperson is paid on a percentage of gross profit. Make any other changes that are necessary. Ex:

Taxable item and commission.

14. Instead of having a vendor, this item will have a bill of materials (BOM). On the Bill of Matl tab, click Edit BOM. The BOM will be made up of the items setup in the previous steps (FG and PS). The last item in a BOM must always be a PS item. Click Add to enter these items.

15. Once the OP item is setup, you can add the color and sizes. Click Add and enter the OP item number in the Base item # field. If the OP item was checked for Matrix, the wearable matrix will appear on the screen after you hit the tab key. On the matrix window, enter the color the comes in. If needed, enter a second line of description. Check the sizes the item comes in. After all the colors and sizes are entered, click Process.

TIP: *The colors/sizes will be created for both the OP and FG items*

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