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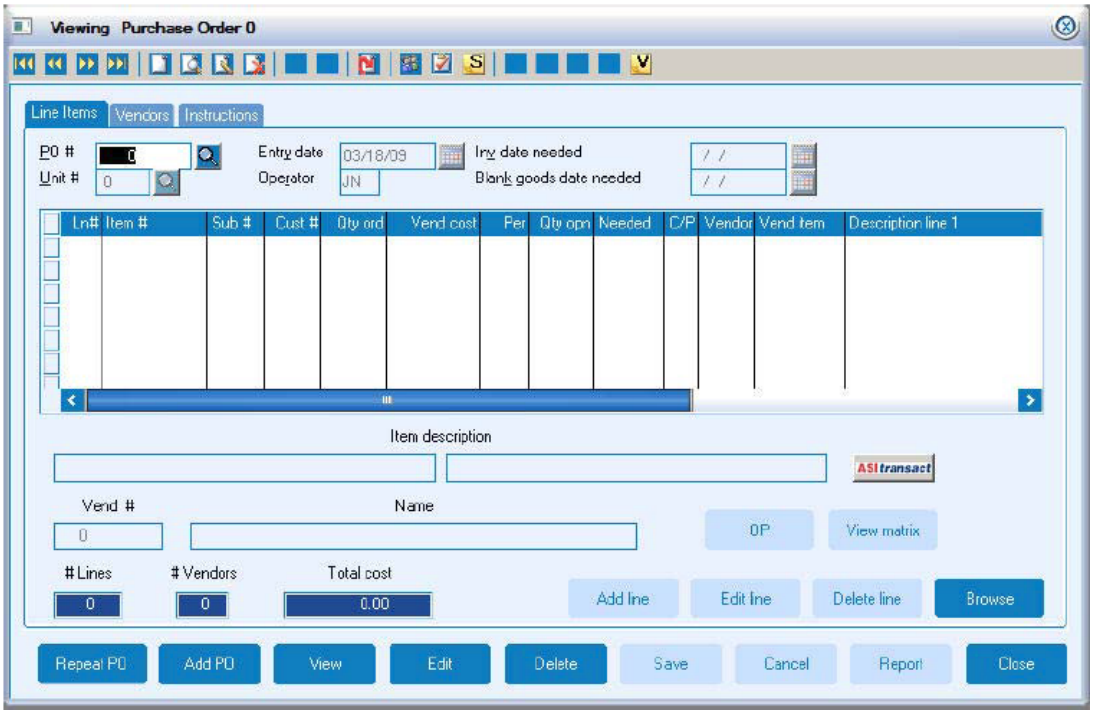
Purchase Order Maintenance

Tammy Mason - 2017-08-24 - in Purchase Order Maintenance

Purchase Order Maintenance

Purchase order maintenance provides a wide range of functions for the Fulfillment Special. It is used to purchase house owned inventory, customer owned, dropship fulfillment orders and non-inventory purchases. The first section of this overview will concern stock purchase orders.

Add-Stock Purchase Order Window



PO

Number assigned to the purchase order. Can be manually assigned per Company Information setup.

Entry date

Default is the machine date, but may be changed if needed.

Inv date needed

Inventory date needed.

Unit

When a different unit number is assigned to a purchase order, the name and address from that unit will

print on the purchase order. See Company Information for additional information about units.

Operator

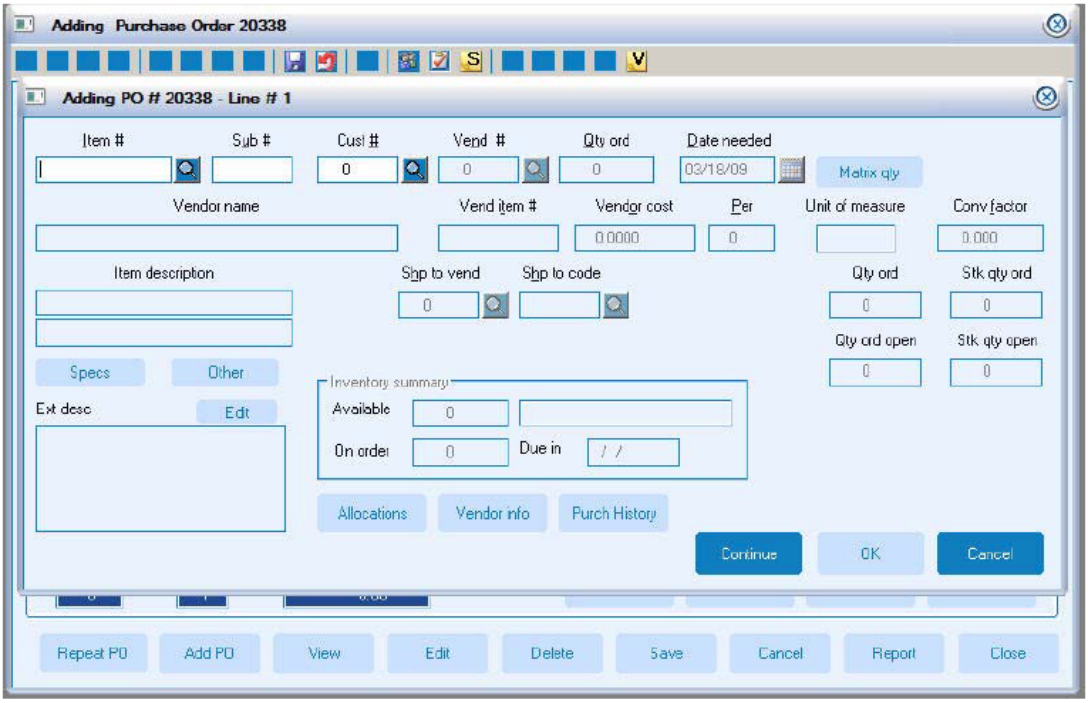
Operator initials. Updated when adding purchase order.

Blank goods date needed

Enter the date that the blank goods must be to the decorator. This is only relevant for (OP) items.

Select “Add line” to continue

Add-Line Item Window



Item

This is the item number that the purchase order is being issued for. This may or may not be an inventory item master.

Sub

This is part of the item number identification for inventory items.

Cust

This is the customer number that this item belongs to if the item is custom for a certain customer

Continue

Once the item#, sub# and cust# are correct, click continue

- **Tip: If the item is a wearable item and matrix is checked on the item master you may use a matrix window to enter the various sizes, colors and quantities to be purchased.**

Vend

Vendor whom you are purchasing the item from.

- **Tip: If purchasing an (OP) item, this field will be disabled.**

Qty ord

Purchase quantity being ordered.

Date needed

Defaults from the previous window, but may be changed if needed.

Matrix qty.

This window is accessible when a base matrix item number is entered on a line item.

Vendor name

Purchasing vendor name.

Vend item

Updated from the item master vendor information tab window. This is the number that prints on the vendor copy of the purchase order. May be modified, if applicable.

- **Tip: If purchasing an (OP) item, this field will be disabled.**

Vendor cost

Updated from the item master vendor information tab window. May be modified, if applicable.

- **Tip: If purchasing an (OP) item, this field will be updated from the (OP) processing screen. This screen is displayed after you select Ok.**

Per

Updated from the item master vendor information tab window. May be modified, if applicable

Unit of measure

Standard unit of measure.

Conv factor

Updated from the item master vendor information tab window. May be modified, if applicable.

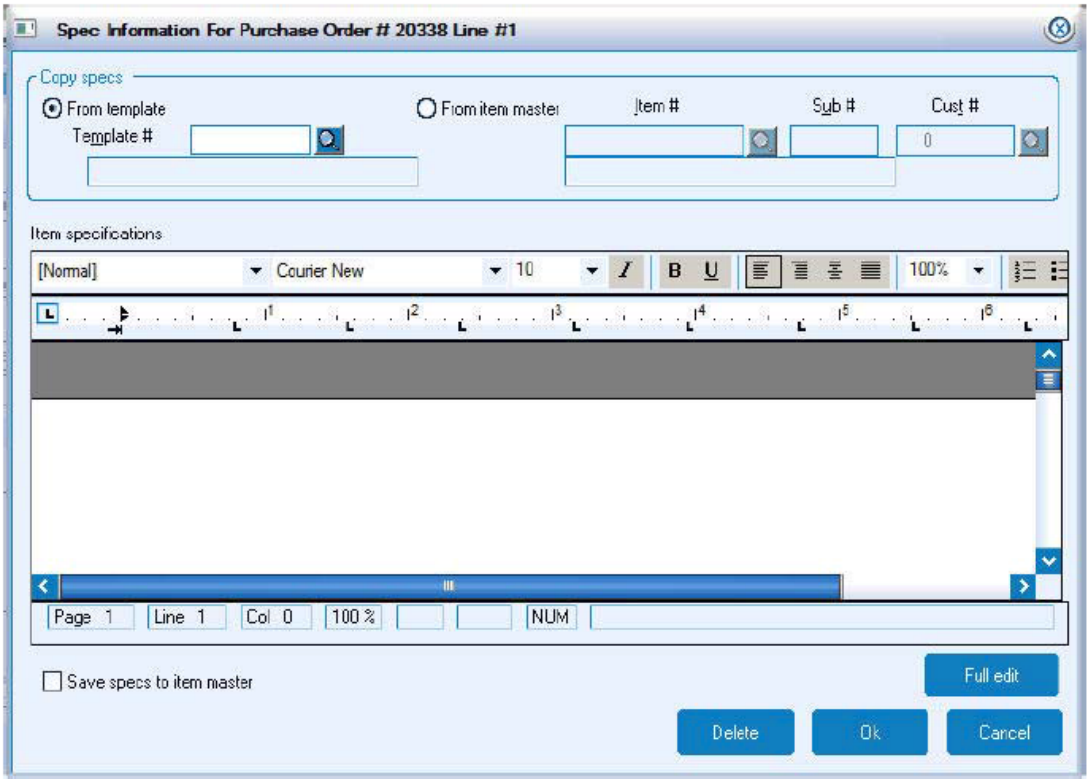
- **Tip: Use the conversion factor to purchase by the dozens, but stock per each unit. In this example the conversion factor will be 12.**

Item description

Updated from the item master. May be changed, if applicable.

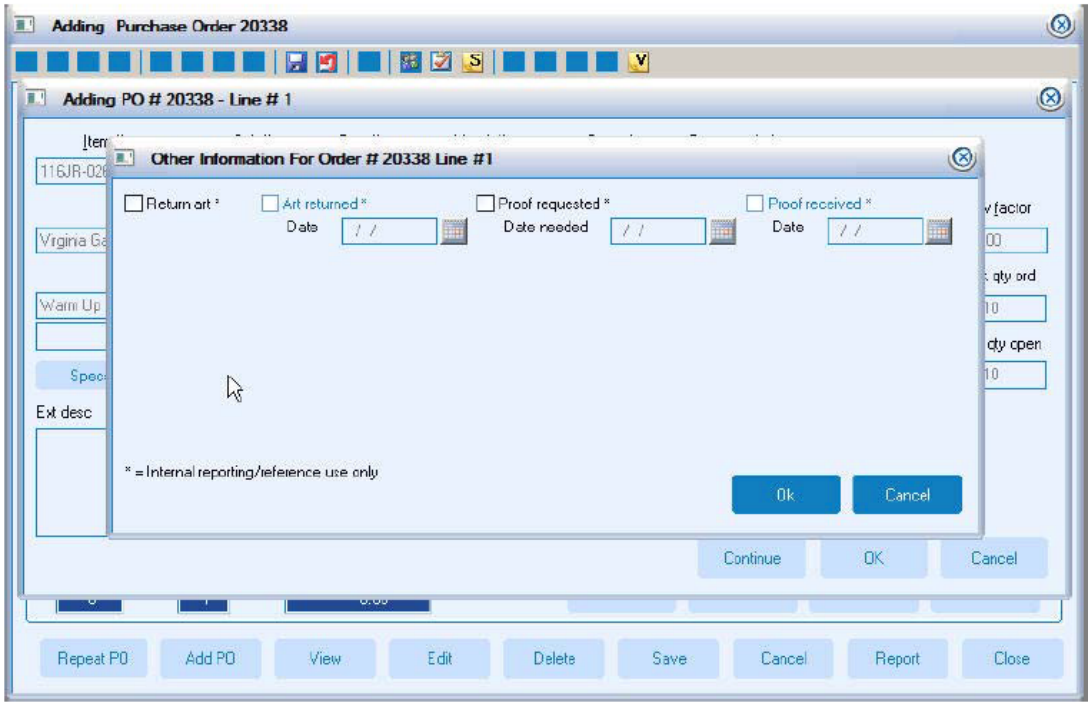
Specs

Updated from the item master, if specs exist. May be entered manually or pulled from templates or another item master.



Other

Updated from the item master, plus screen, if additional specifications exist. May be entered manually. Limited data changes may be optionally updated to the item master.



Ext desc

Updated from the item master; if extended description exists. May be entered manually.

Shp to vend

If the product needs to go to a second vendor for additional processing; enter that vendor number on the line item.

Shp to code

Enter the vendor ship from code if applicable.

Inventory summary

Shows the available, on order, due in date and item type description.

Qty ord

Purchase order quantity.

Stk qty ord

Determined by calculating the quantity ordered multiplied by the conversion factor. This will update the on order quantity in item master.

Qty qty open

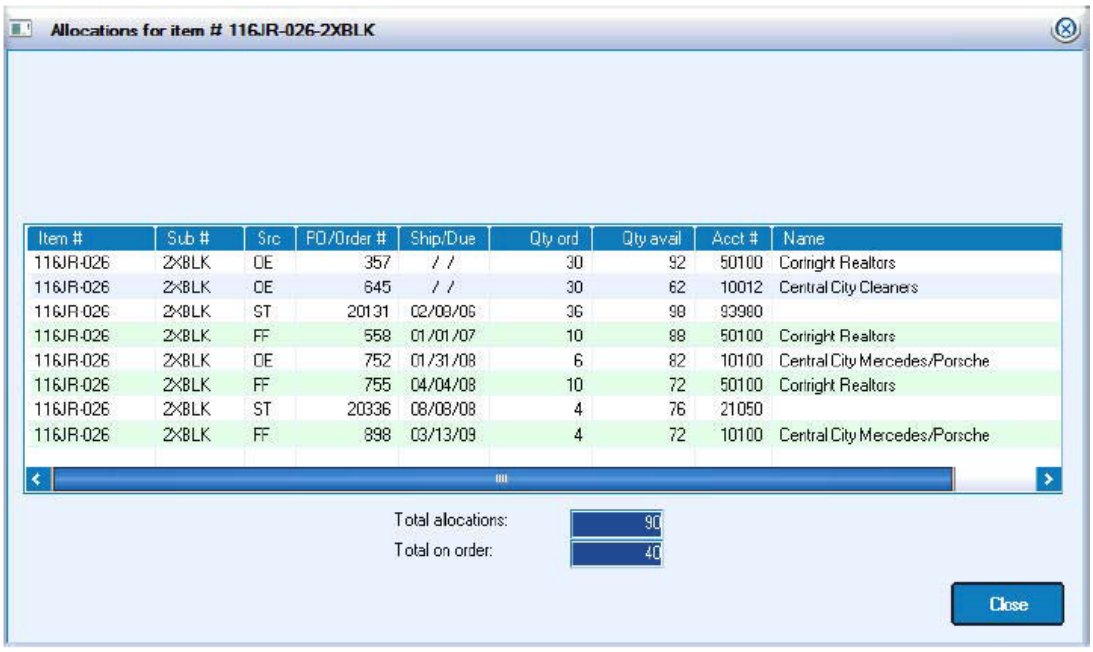
Purchase order quantity that has not been received.

Stk ord open

Stock order quantity that has not been received.

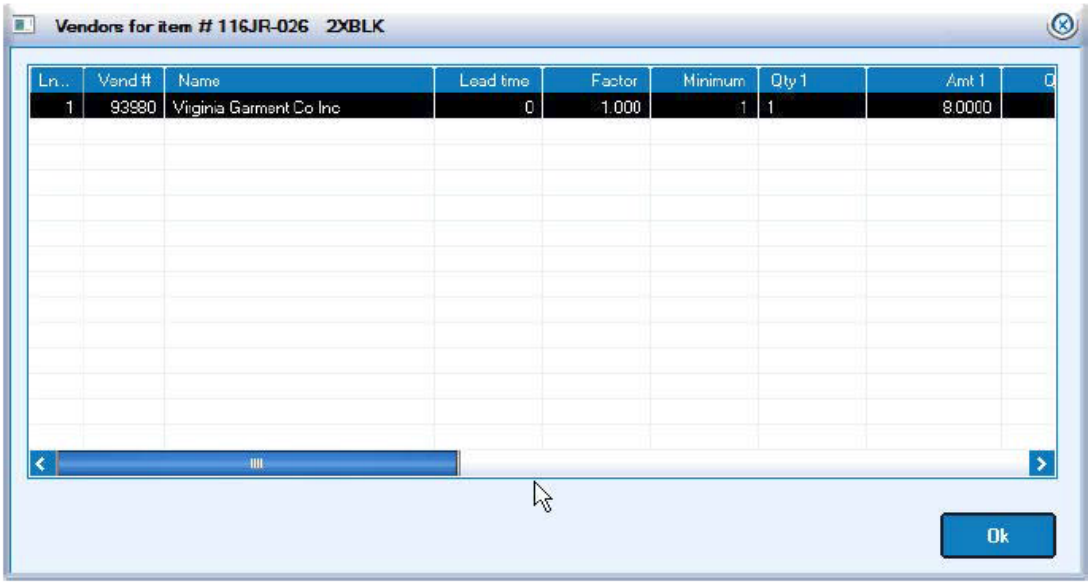
Allocations Window

The allocation window will display inventory requirements and on order information for the item being ordered. Information displayed will include order information with a running balance per expected ship date and quantity. If the running balance reaches a negative amount a suggested date needed will display. This suggested date needed is determined based on the day that the inventory item runs out and the lead time required for this item.



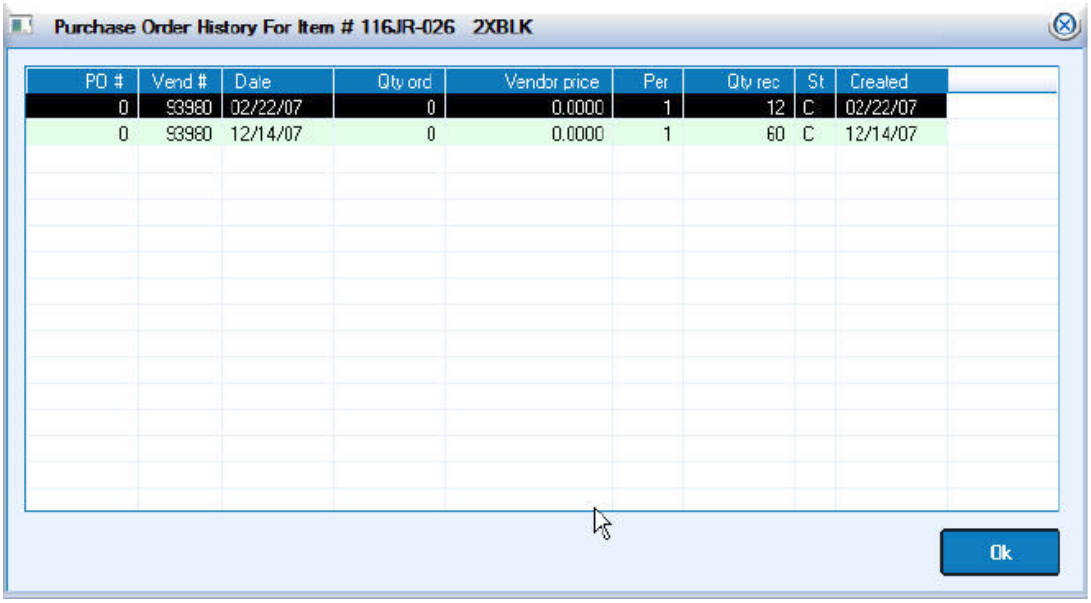
Vendor Info Window

The vendor info window will display the assigned vendors and their purchasing requirements for this item being ordered.



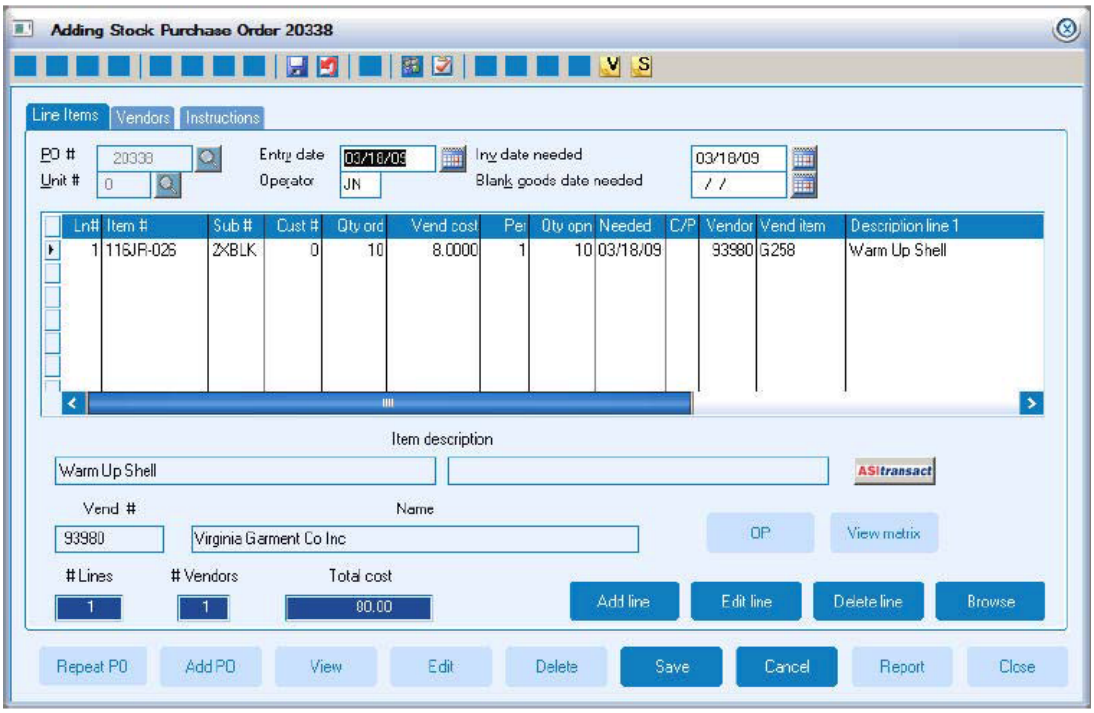
Purchase History Window

The purchase history window will display previous purchase history for the item being ordered on this purchase order. Once the line item is entered; select Ok to proceed to the next line item.



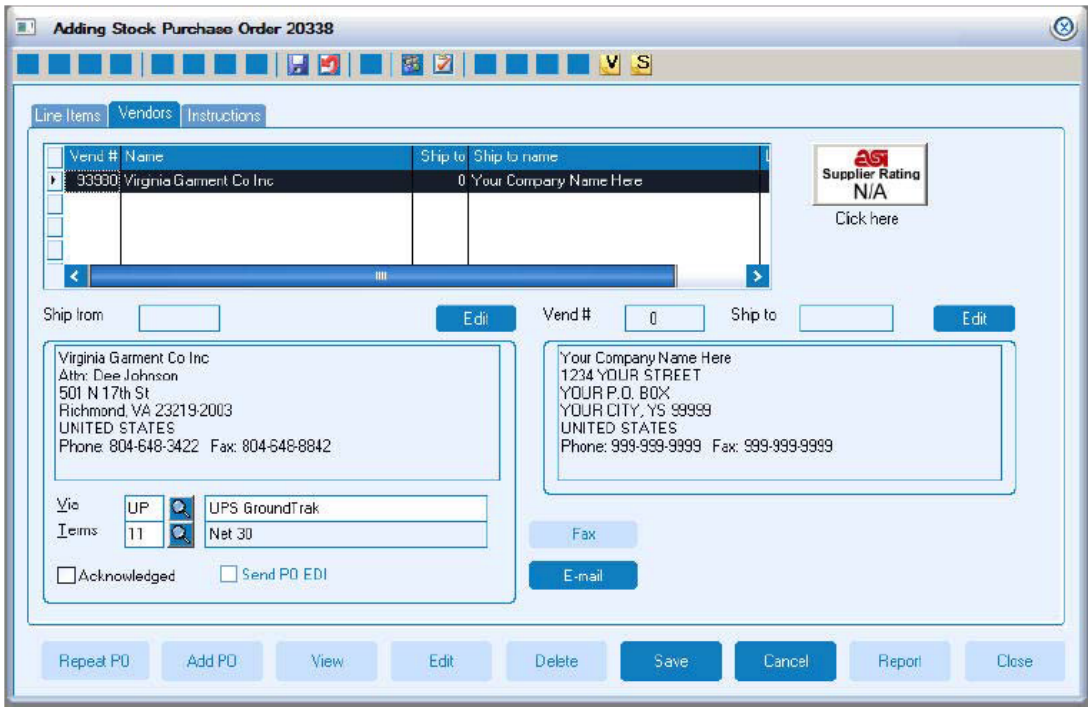
Line Items Tab

Once you have completed entering the line item information. You will return to the line item tab window and a summary of the line items will be displayed.



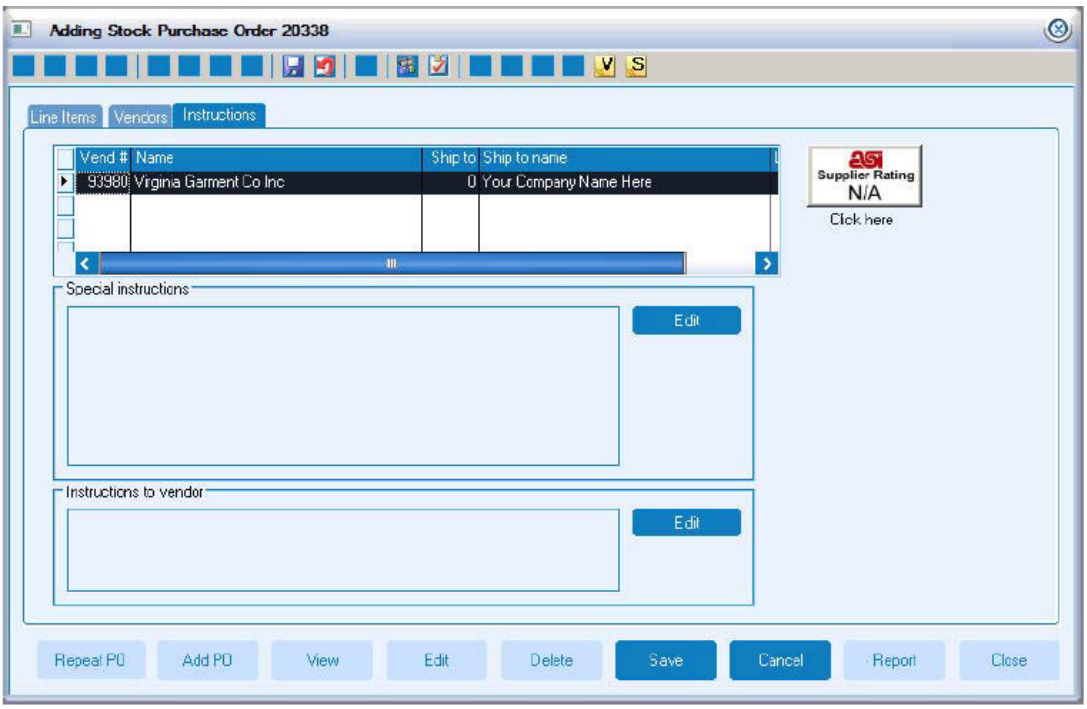
Vendors Tab

The vendor tab window has already been updated based on the line item information entered. You may review and modify this information if necessary.



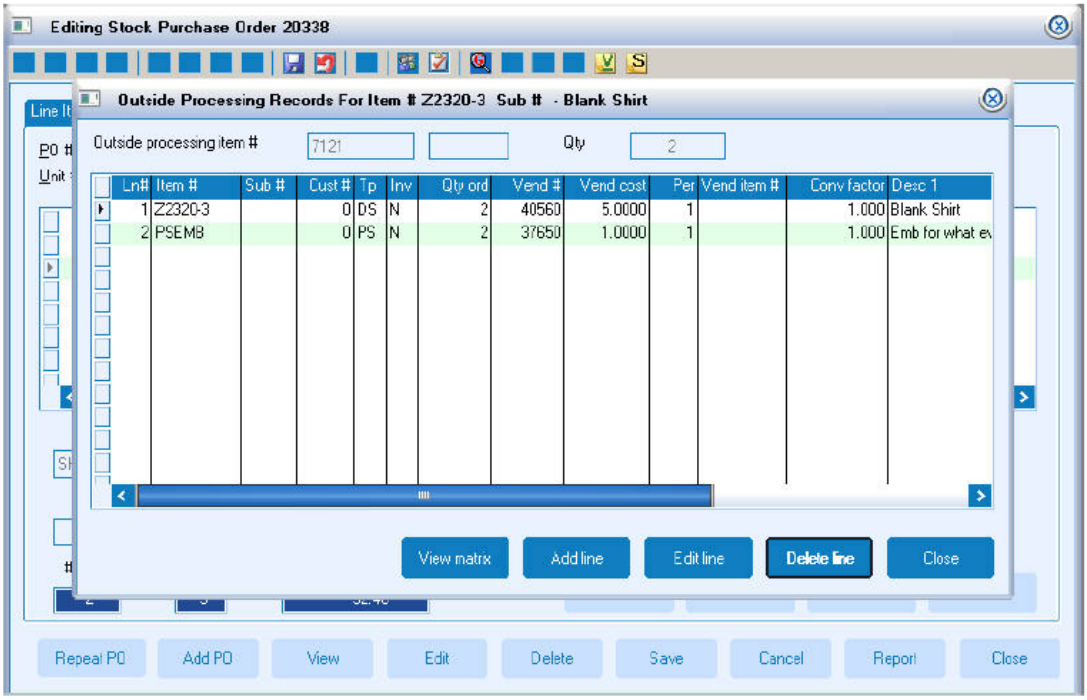
Instructions Tab

The instructions tab window allows you to enter special instructions or instructions to vendor. Special instructions may include information related to decorating. Instructions to vendor may include special packaging, shipping or other relevant instructions. Templates are available for common instructions. Once all of the information has been entered select save to update this purchase order.



Outside Processed Purchase Order

Items that are purchased and processed by several vendors, such as decorated garments, may be processed as an (OP) purchase order. An (OP) purchase order will follow the same steps as previously described; except for an additional screen that will display after the line item is entered.



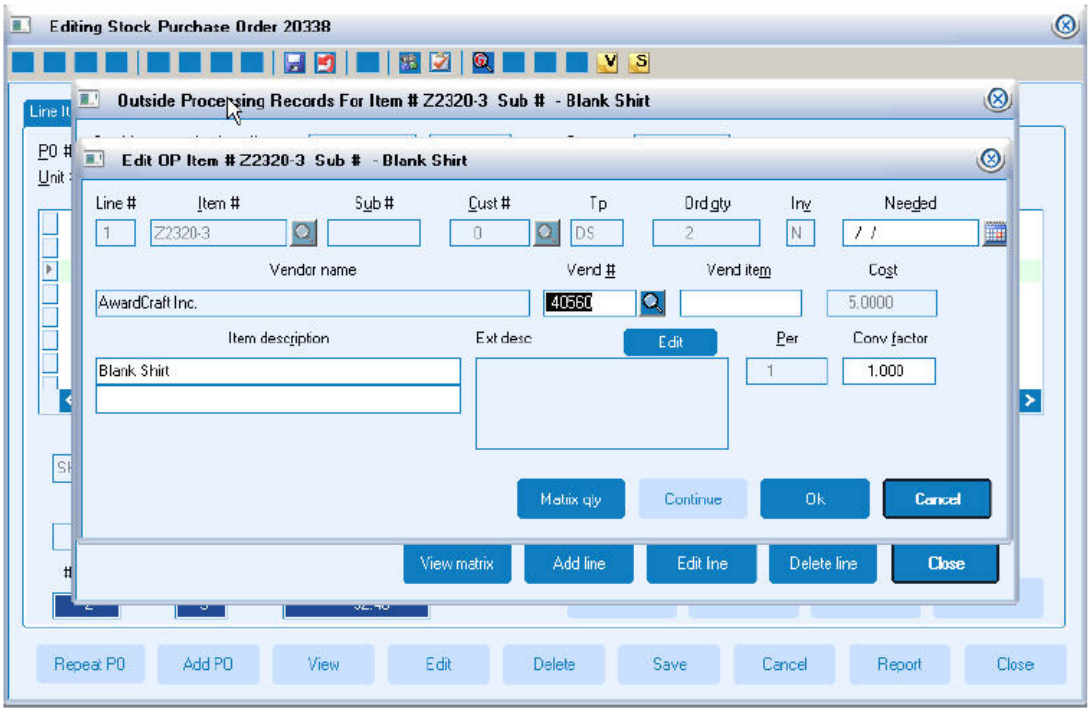
On the line item window several of the fields that relate to the vendor information will be disabled when an (OP) item is entered. In the following example a decorated sweatshirt is being purchased for inventory. Since the item type is an (OP) item the vend #, shp to vend, shp to code, vend item #, vendor cost and vendor info button is disabled. This information will be accessed through another window for each vendor required to purchase and process this item.

Select Ok.

Outside Processing Records Window

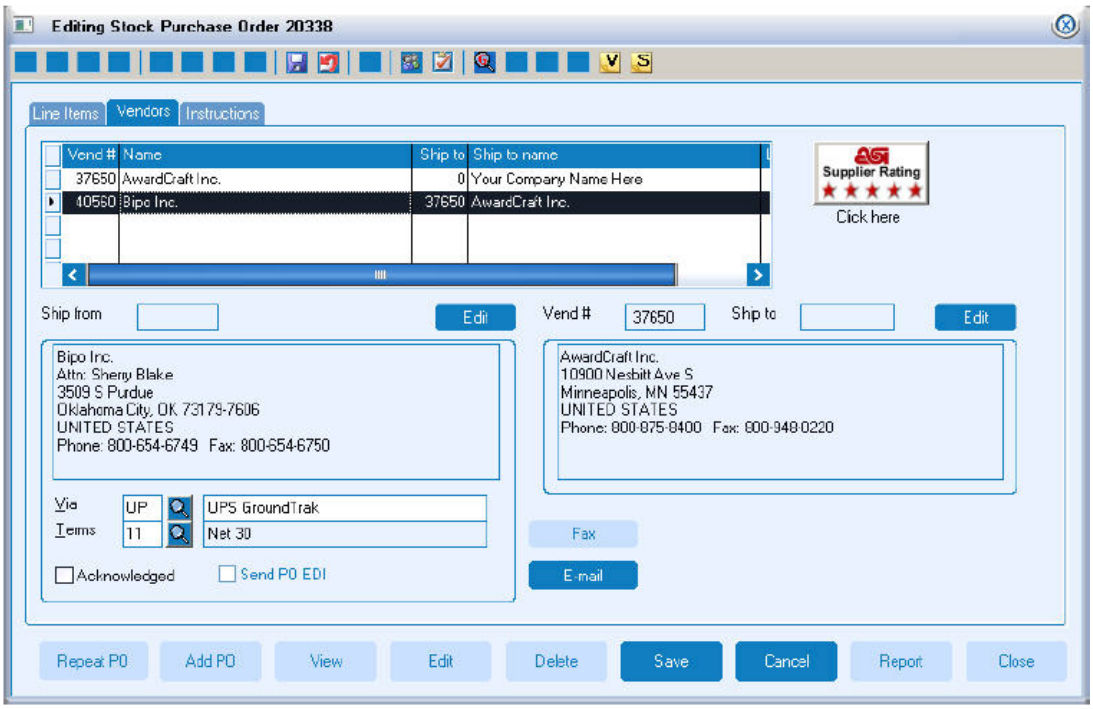
This window will display the information from the bill of material master for the item being purchased. In this example a printed form is being purchased from vendor 40560. This printed form is shipped to vendor 7650; which is performing the additional processing to this item. Once complete it will be shipped and received into stock.

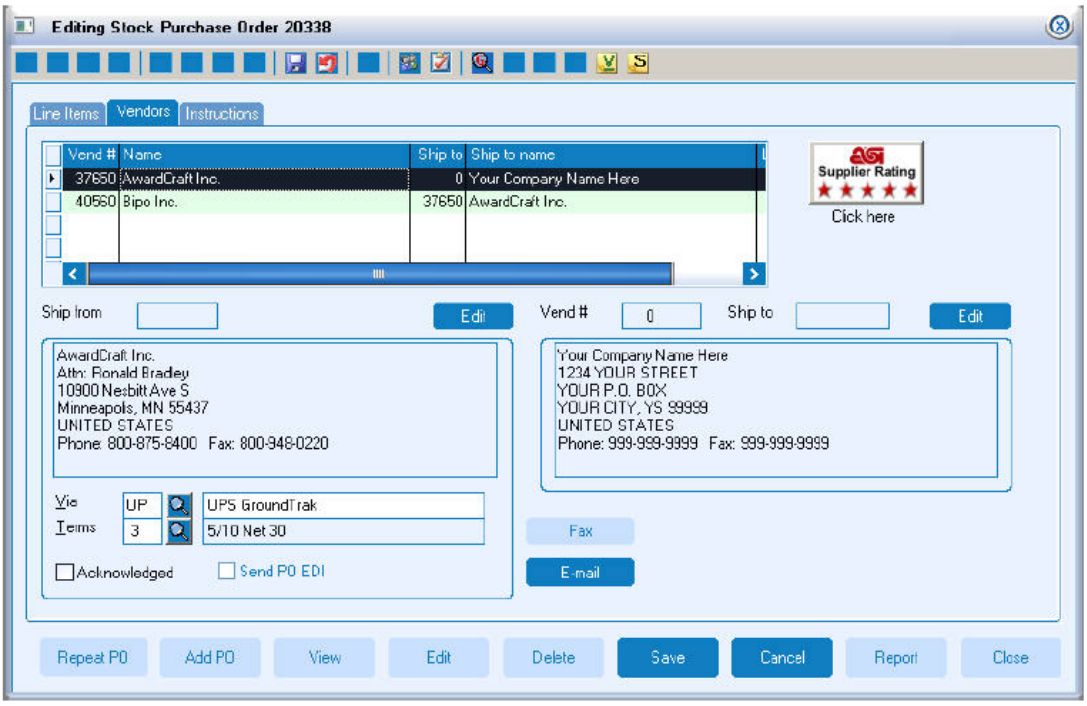
Select Edit to display the details related to the printed form being ordered. The information being displayed is similar to the standard purchase order line item. It will include the quantity ordered and vendor purchasing information.



If this information is correct select OK or Cancel.

One of the unique abilities related to the (OP) item is the routing of the addresses. Based on the sequence of the item in the bill of materials, the system will create the vendor address records with the appropriate ship from and ship to information. In this example the blank good is shipping from vendor 40560 to vendor 37650.





Prebilling/Fulfillment Dropship Purchase Orders

The Fulfillment Special uses the purchase order system for both Prebilling and Fulfillment Orders which contain dropship items. For more information regarding these options please review the appropriate sections in this manual.

Purchase order maintenance is limited for both of these order types. Modifications to the quantity ordered, vendor # and address information cannot be changed on purchase orders that are created from Fulfillment. For purchase orders which are created through Fulfillment, line items cannot be deleted or added to the purchase order. You must modify the Fulfillment Order; which in turn will update the purchase order record.