

□ 14 : PURCHASING

1. MAIN MENU #2
2. PRESS 1 - P.O. CREATE
3. WORKSHEET SELECTION BOX WILL BE DISPLAYED. THIS SHOWS ALL OPEN WORKSHEETS YOU MAY BE WORKING ON.
4. PRESS 1 (OR FIRST OPEN LINE # TO CREATE NEW WORKSHEET OR CHOSE ANYTHING ELSE FROM THE LIST YOU MAY HAVE ALREADY CREATED).
5. CREATE P.O. WORKSHEET MENU WILL BE DISPLAYED.
6. THERE ARE 4 WAYS TO RUN PURCHASE ORDERS :
PRESS 1 TO ORDER BY A SUPPLIER TO ORDER ALL PRODUCT LINES FOR SUPPLIER. (SEE 6 a)
PRESS 2 TO ORDER JUST SPECIFIC PRODUCT LINE(S) (SEE 6 b)
PRESS 3 FOR A REPLENISHMENT PURCHASE ORDER. (SEE 6 c)
PRESS 4 TO ORDER BY A DATE RANGE. (SEE 6 d)
 - a. IF YOU PRESS 1 SUPPLIER LIST WILL BE DISPLAYED. INPUT SUPPLIER CODE OR NUMBER AND PRESS F1 TO EXECUTE. (GO TO #7).
 - b. IF YOU PRESS 2 PRODUCT LINES TO BE ORDERED WILL BE DISPLAYED. INPUT PRODUCT LINE(S) TO BE ORDERED (IF MORE THAN 1 PL TO ORDER SEPERATE BY COMMAS) AND PRESS F1 TO CONTINUE. OPTION TO CHOOSE THE LOWEST PRICE BOX WILL BE DISPLAYED. ANSWER Y / N (YOUR CHOICE) AND PRESS F1 TO EXECUTE. IF YOU CHOOSE “Y” THE SYSTEM WILL AUTOMATICALLY SPLIT THE PO UP FOR THE SUPPLIERS WITH THE LOWEST PRICE ON EACH PART. (GO TO #7).
 - c. IF YOU PRESS 3 THIS WILL CREATE A LIST OF ALL PARTS SOLD SINCE LAST REPLENISHMENT PO WAS RUN. (GO TO #7).
 - d. IF YOU PRESS 4 INPUT THE DATE RANGE YOU WANT TO ORDER BASED ON SALES FROM INVOICES. (GO TO #7).
7. THAT WILL CREATE A WORKSHEET WITH THE PARTS TO BE ORDERED. YOU CAN CHANGE PARTS OR QUANTITIES, ADD OR DELETE PARTS, ETC, BEFORE CHANGING WORKSHEET INTO A PURCHASE ORDER

NOTES

8. AFTER ALL CORRECTIONS HAVE BEEN MADE, PRESS F2 AND WORKSHEET TITLE BOX WILL BE DISPLAYED. DEFAULTED AS TO THE TYPE OF WORKSHEET, BUT YOU CAN NAME IT ANYTHING YOU WANT.
9. PRESS F2. CREATE PO WORKSHEET MENU WILL BE DISPLAYED.
10. PRESS C - CREATE PURCHASE ORDER(S). WORKSHEET SUPPLIER SUMMARY WILL BE DISPLAYED. IT SHOWS TOTALS FOR ALL THE DIFFERENT SUPPLIERS ON THAT WORKSHEET. (REMEMBER THAT MULTIPLE PO's CAN BE CREATED FROM A SINGLE WORKSHEET).
11. PRESS F1 - CREATE P.O. INFORMATION SUMMARY BOX WILL BE DISPLAYED.
12. PRESS F1 - CREATE P.O. PO PRINT SELECTION BOX WILL BE DISPLAYED.
13. PRESS F1 – CONTINUE. TRANSMIT THE PO Y/N WILL BE DISPLAYED. ANSWER “Y” TO TRANSMIT OR “N” TO VIEW. IF YOU ANSWER “N” THE PO WILL NOW BE DISPLAYED.
14. YOU CAN NOW EITHER PRESS F1 TO PRINT - PRESS F2 TO CANCEL OUT - OR PRESS F3 TO FAX TO SUPPLIER
15. WHEN THE PARTS ARE SHIPPED AND YOU NEED TO RECEIVE PO MAIN MENU #2 - PRESS 2 - P.O. RECEIVE. PO SELECTION MENU WILL BE DISPLAYED AND YOU CAN SEE ALL OUTSTANDING PO's
16. ARROW DOWN AND HIGHLIGHT THE PO TO RECEIVE AND PRESS ENTER OR PRESS F1 AND INPUT PO NUMBER AND PRESS ENTER - THE PO WILL SHOW ON SCREEN AND YOU CAN MAKE ANY CHANGES NEEDED.
17. WHEN DONE EDITING PRESS F2 - ADDITIONAL FREIGHT COSTS OR EXTRA DISCOUNTS BOX WILL BE DISPLAYED. YOU MAY INPUT CHARGES IF YOU WANT.
18. WHEN FINISHED PRESS F1 TO CLOSE PO OR PRESS F2 TO PLACE PO BACK ON HOLD.
19. IF YOU PRESS F1, IT WILL ASK IF YOU WANT A CLOSE OUT REPORT Y/N (A FINAL EDITED VERSION OF THE PO) - AND IT WILL UPDATE INVENTORY AND CLOSE PO - IF YOU CHOSE F2, REPEAT STEPS 15 THRU 18 TO RETRIEVE AND CLOSE LATER.

NOTES

20. TO REPRINT OR REFAX, FROM THE PURCHASING MENU PRESS 5
PO RE-PRINT. ALL OPEN PO's WILL BE LISTED.
21. ARROW DOWN AND HIGHLIGHT THE PO TO BE REPRINTED AND
PRESS ENTER.
22. THE PRINT SELECTION BOX WILL BE DISPLAYED. PRESS F1 AND
THE PO WILL BE ON THE SCREEN. PRESS F1 TO PRINT OR F3 TO
FAX.
23. IF YOU NEED TO REPRINT A CLOSE OUT REPORT, FROM THE
PURCHASING MENU PRESS 6
24. ENTER THE CLOSE OUT PO BOX WILL BE DISPLAYED. THE
CLOSEOUT PO # IS THE SAME AS THE ORIGINAL PO #. INPUT THE
NUMBER AND PRESS ENTER.
25. THE PRINT PO SELECTION BOX WILL BE DISPLAYED. PRESS F1
TO CONTINUE. THE FINAL EDITED VERSION OF THE PO WILL BE
DISPLAYED ON SCREEN. PRESS F1 TO PRINT.
26. IF YOU HAD CREATED A BACK ORDER FROM THE ORIGINAL PO
AND WANTED TO REPRINT THE CLOSEOUT REPORT FOR THE
BACK ORDER, YOU WOULD INPUT THE ORIGINAL PO# THEN A
COMMA AND 1. (EXAMPLE FOR PO 262 WOULD BE 262,1 FOR
THE FIRST BACKORDER CREATED FROM THE ORIGINAL PO# 262)
27. IF YOU NEED TO CANCEL A PURCHASE ORDER THAT WAS
ALREADY CREATED, FROM THE PURCHASING MENU PRESS 7.
28. ALL THE PO's WILL BE DISPLAYED. ARROW DOWN TO
HIGHLIGHT THE PO TO CANCEL. PRESS ENTER AND THE PO
WILL BE DISPLAYED ON THE SCREEN.
29. PRESS F2 AND THE CANCEL PO BOX WILL BE DISPLAYED.
ANSWER "Y" AND THE PO WILL BE CANCELED.

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