

Purchase Order Processing

Purchasing Header Screen

Purchase Order Maintenance - Header Screen

P.O. #: 0001706 GREAT LAKES ELECTRIC POMT01

Placed by: NRS Status: ACTIVE - ITEMS HAVE BEEN ACKNOWLEDGE Direct Ship Ticket #: []

Vendor #: TOP 1-800-666-2852 Cust PO: []

Mail: TOPAZ/EDN
To: PO BOX 72524

Ship: WILLIAMS WHOLESALE SUPPLY
To: 250 SOUTH JEFFERSON AVENUE

CLEVELAND OH 44192
COOKVILLE TN 38501

Acct #: 52590

Entry Date: 19 Sep 2022

Expected Delivery Date: 26 Sep 2022

Shipping Method: Partial Complete

Ship Via Code: 10 BEST WAY

F.O.B.: []

Prepaid P.O.: Y N PREPAY & ALLOW

Mark Ship for: []

Special Instructions: []

Additional Discount: .00

Payment Terms: 02 2% 10 NET 30

# Ordered:	4467	Total Cost:	540.91
# Received:		Total Base:	4,156.21
# Acknwd:		Total Wgt:	410.4
# Billed:		Date Printed:	00/00/2023
		Last Ack Date:	00/00/2023

Cost: Replcmnt Last Cost Weighted

Print?
 Yes
 No

Notes: No Invoices
 Yes Log

[UPDATE] [CANCEL] [ITEMS] [EXIT]

The Purchase Order Header Screen allows entry of such information as the ship-via, ship-to address, and special instructions for the purchase order. The search buttons (magnifying glass) indicate that there is a lookup available for the ship-via, ship-to state, and the terms. The entry and expected delivery dates can also be changed by clicking on the search buttons. The Invoices button will display each invoice that has been posted against this purchase order. The Log button will allow the operator to display the transmission log for the purchase order. To proceed to the line items on the order, click on the <ITEMS> button with your mouse or hold down the <Alt> key and hit an <I>.

Purchase Order Line Items

P.O. Line Item Entry/Maintenance

GREAT LAKES ELECTRIC

POMT03

P.O. #: 0001706
 Vendor: TOP
 TOPAZ/EDN

Cost Minimum: 0.00
 Price Break: 0.00

Additional Discount:
 Total \$: 540.91
 Total Weight: 410.4

Line	Status	Mfgr	Catalog #	Quantity	u/m	Net Cost Requested	Extension	Comments
001		TOP	1662	100	C	4.83	4.83	
			75133818452					3/4 EMT INSG BUSHING
002		TOP	457	100	C	10.15	10.15	
			75133814091					1/2 HIT-LCK CONN
003		TOP	512	1343	C	5.16	69.30	
			75133815620					3/4 1HL EMT STRAP
004		TOP	603	20	C	19.54	3.91	
			75133815850					1-IN COND HGR W/BLT&NT
005		TOP	631S	1000	C	11.00	110.00	
			75133823000					1/2 STL S/SCR EMT CONN
006		TOP	632S	1904	C	18.00	342.72	
			75133823010					3/4 STL S/SCR EMT CONN

ADD ITEMS

ADD ITEM

UPDATE

HEADER

EXIT

Eight line items are displayed on the screen, but if there are more items on the purchase order, a scroll bar will appear and the operator can scroll up and down through the items. After an item has been added, it can be changed by clicking on the line item itself and the next screen will be displayed that allows changes or the entry of comments. When the operator has finished entering the items, they hit the OPTIONS button and are given the options to complete the purchase order.

Purchase Order Detail Line Screen

Purchase Order Maintenance - Line Item Entry

GREAT LAKES ELECTRIC POMLIN

P.O. #: 0001706 Line: 1 Status: Vendor: TOP TOPAZ/EDN

Part: 75133818452 Mfg ID/Catalog: TOP 1662

Description: 3/4 EMT INSG BUSHING UoM: C

Resale Quantity: 100	Cost: 4.83	Extension: 4.83
Purchase Quantity: 1000	customer order:	
Quantity Ordered: 100	Cust Requested Date: 00/00/0000	
Quantity Received:		
Quantity Billed: 0		
Quantity Due: 100		

Options:

- Quantity Help Screen
- Cost Help Screen
- Item Sales History
- Line Item Detail
- Branch Stock Display

Comments:

Print?

Yes

No

New line items can be added to purchase orders on this screen or existing items can be changed. This screen also allows the operator to view more information concerning the item, or to cancel the item. The pull down on the right allows the operator to view the Quantity Help Screen, Cost Help Screen, Item Sales History, the Line Item Detail screen, or the Branch Stock Display. When the operator clicks on <UPDATE>, the changes are updated and they are returned to the Line Items screen above. If they click on the button to display the Quantity Help Screen, the next screen is displayed

Add line items from a Spreadsheet

Purchase Orders - Options to Add Line Items from Spreadsheet POMLNS_OPT

P.O. #: 0001706

Vendor: TOP TOPAZ/EDN

Search by: Mfgr ID House Previous Purchases for this Vendor Most Frequent for this Vendor

Enter Mfgr ID:

Mfgr	Name
TOP	TOPAZ/EDN

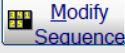
Display: below Line below Order Point All Items

This option is accessed by selecting <Add Items> on the Line Items Screen and it will display a spreadsheet and allow the operator to add many items on the purchase order. The spreadsheet can be built based upon the manufacturer(s), house part #'s, previous purchases for this vendor, or the most frequently purchase items for this vendor. The operator can specify whether only items below line point, or below order point, or all items in the system (even inactive items) should be included.

Working with a spreadsheet:



The spreadsheet allows the operator to add items to the Purchase Order by filling in the “Order Qty” column.

Purchase Orders - add Line Items from spreadsheet

P.O. #: 0001706 Cost Minimum: 800.00 Total \$: 540.91
 Vendor: TOP TOPAZ/EDN Price Break: 0.00 Total Weight: 410.4 POMLNS 

	?	Min Purch	Order Qty	u/m	Qty Avail	Mo Usage	Due to Cust	Due from P.O.	NetTransfers	UPC #
TOP 08	<input type="checkbox"/>	5000	0	C	0	0	0	0	0	75133810041
TOP 100	<input type="checkbox"/>	500	0	C	99	0	0	0	0	75133810340
TOP 1002	<input type="checkbox"/>	50	0	C	35	0	0	0	0	75133870270
TOP 1005	<input type="checkbox"/>	50	0	C	46	0	0	0	0	75133870300
TOP 101	<input type="checkbox"/>	250	0	C	350	27	100	0	0	75133810350
TOP 102	<input type="checkbox"/>	100	0	C	43	6	0	0	0	75133810360
TOP 103	<input type="checkbox"/>	50	0	C	36	5	0	0	0	75133810370
TOP 104	<input type="checkbox"/>	40	0	C	12	8	0	0	0	75133810380
TOP 104M	<input type="checkbox"/>	50	0	C	0	1	0	0	0	75133810540
TOP 105	<input type="checkbox"/>	5	0	C	9	9	0	0	0	75133810390
TOP 105M	<input type="checkbox"/>	5	0	C	0	0	0	0	0	75133810550
TOP 106	<input type="checkbox"/>	5	0	C	10	5	0	0	0	75133810400
TOP 106M	<input type="checkbox"/>	5	0	C	0	0	0	0	0	75133810560
TOP 107	<input type="checkbox"/>	5	0	E	0	1	2	0	0	75133810410
TOP 108	<input type="checkbox"/>	2	0	E	1	0	0	0	0	75133810420
TOP 108M	<input type="checkbox"/>	2	0	E	0	0	0	0	0	75133810580

blue=cancelled
black=active

If the user needs to review more information to decide on the quantity to order, then they can click on the box in the question “?” column. This screen shows the purchasing information for the items, the quantity sold in the last twelve months, and it gives different ways of selecting the quantity to purchase: Use Recommended, use Purchasing Package, use Rounded Purchasing Package, or the user can go back to the spreadsheet screen without entering a quantity if they decide not to purchase the item.

Purchasing Information

GREAT LAKES ELECTRIC

POMLNS_DTL

Part #	MFG ID / CATALOG #	cost / uom
75133811000	TOP 151	29.70 C
1/2 BX-FLEX STRT SQZ CONN		lead time: .30
ORDER POINT:	15	CURRENT MONTH: 0
LINE POINT:	23	1 MONTH AGO: 0
EOQ:	210	2 MONTHS AGO: 10
LOCK FLAG:		3 MONTHS AGO: 52
TOTAL ON HAND:	1,183	4 MONTHS AGO: 60
DUE TO CUST:	950	5 MONTHS AGO: 75
DUE FROM PO:	0	6 MONTHS AGO: 0
PENDING TRANS:	0	7 MONTHS AGO: 0
MONTHLY USAGE:	33	8 MONTHS AGO: 0
PURCH PKG:	250	9 MONTHS AGO: 136
RESALE PKG:	25	10 MONTHS AGO: 87
RECOMMENDED:	0	11 MONTHS AGO: 0
QTY TO PURCH:	<input type="text" value="0"/>	

Quantity Help Screen

Purchase Order Quantity Help Screen

GREAT LAKES ELECTRIC

POQHLP

Part #	MFG ID / CATALOG	U/M:	
75133818452	TOP 1662	C	
3/4 EMT INSG BUSHING			

----- purchasing information -----	
Total on Hand:	164
Open to Sell PO's/Tr:	114
Location:	
Qty due to customers:	150
Qty due from P.O.'s:	100
Header Status Code:	
Detail Status Code:	
Replacement Cost:	4.83
Last Cost Paid:	4.83
Date Detail Entered:	10/12/2009
Last Customer Order:	03/19/2010
Comments:	

Usage Rate per Month:	73
Lead Time:	.07
Order Point:	8
Line Point:	26
EOQ:	218
Purchase Info Lock:	
Inventory Class:	11
Vendor Review Cycle:	.25
Date Last Review:	04/02/2023
Date Next Review:	04/10/2023
Standard Pkg Resale:	100
Standard Pkg Purchasing:	1,000

Lead Time History

Purchase Orders

Stock Item Inquirv

Committed Cust

Customer Orders

BACK

This screen shows the inventory status on the left side of the screen and the purchasing information on the right. The operator can also view other screens of information by clicking the buttons on the far right

Purchase Order Output Screen


Purchase Order Output Selection POCTR4

Purchase Order: 0001706
Vendor: TOP TOPAZ/EDN

*** Purchase Order Output ***

E-Mail
 Print and E-Mail
 Print Only
 No Output

	Vendor	This P.O.
Base \$\$ Minimum:	1,200.00	4,156.21
Cost \$\$ Minimum:	800.00	540.91
Weight Minimum:	0	410
Package Minimum:	0	
Price Break 1:	0.00	
Price Break 2:	0.00	



When documents are updated, whether it is orders, acknowledgments, quotes, or purchase orders, an output screen is displayed with options for how the document should be delivered. In the case of purchase orders, this screen also recaps the dollars on the purchase order compared to the minimums for the vendor to pay the freight. If the system is configured for faxing or EDI, then those options will be included in the choices.