

Using Purchase Orders Transcript

MARK

Alright, here are the results of the cycle count, what's next?

ANDREW

We'll need to create purchase orders for the products to restock.

MARK

How does that work with something like our lumber that comes in a variety of lengths?

ANDREW

We can specify the lengths using tally counts. There are a few other special cases, like when we sell items one off, but can only purchase them by the case.

Here, why don't you build this purchase order with me, that way you can see it in action.

MARK

I'd like that, lets go!

Pick a topic to follow along with us!

Topics


- Generic Item
- Lumber Item
- Add to Selection Cart
- Manual Order Line Item (MOLT)

Generic Item

Generic products are non-Lumber items such as tools, paint, or housewares and they can have a variety of Units of Measure.

Let's examine them in a purchase order.

We'll create a new PO, choose the Supplier, and add products to it.

On the Find Products window, the hammer  icon identifies Generic products. Double-click a product to insert it into the Quick Entry field. Press Enter to add the item to the Purchase Order.

Use the Properties button to open the Order Line Properties window for a selected item.

Notice the default purchasing UOM next to the Quantity field.

If there are other UOMs available, you can choose one from the drop-down menu.

Enter the Quantity based on the UOM selected.

The Cost price can also have multiple UOMs.

The field changes automatically based on the UOM selected.

Select OK to update the line.

Lumber Items

Adding lumber products to your purchase order is similar to adding generic products.

Where the system uses a hammer icon to indicate generic products, it uses an icon that looks like a stack of lumber for lumber products, and a small rectangle to identify timber sheet products such as plywood.

If you use more than one UOM for lumber and sheet materials, you can select it on the Line Properties window.

Enter the Quantity based on the UOM you selected.

If you know the individual lengths tally at the time of purchasing, you can enter it by selecting the Tally button.

Enter the number of pieces of each length that you're ordering.

Select OK to complete the tally entry.

The system enters the quantity based on the Tally entered and shows the tally lengths.

The system uses the Cost price and Cost UOM to calculate the Total cost.

Select OK to finish.

Add to Selection Cart

You can use the Add to Selection Cart option to pick the products for your PO and enter the quantities all from within the Find Products window.

Put your cursor in the Quick Entry field and press Enter.

In Find Products, select on the Options button.

Choose Add to Selection Cart.

The Find Products window opens the Preview Pane and shows Selections as the active tab.

The system adds a quantity column and shows the default UOM.

Enter a quantity to order for the products shown.

Choose Add Selections when finished.

The items you chose stay in the Selections tab even when you adjust the search criteria.

You can edit the ordered amount by changing the quantity. Use the delete key to remove an item.

Double-clicking a product in the results area adds it to the Selections window with a quantity of one.

For random length tallied products, select the ellipsis icon to enter the tally.

Enter the Tally quantities and choose OK to close.

The system now displays a Tally column.

Finish making your selections and press OK to  add them to the PO.

The Add to Selection Cart setting remains on for both POs and Sales Orders until turned off from the Options menu.

Manual Order Line Type (MOLT)

Occasionally, you'll need to add non-product type charges to the PO, such as a delivery charge.

You'll use the Manual Order Line Type, or MOLT, for these.

Begin by selecting Options and choosing Add Manual Charge Line.

In the New Manual Purchase Order Line window, select the type from the drop-down.

The system shows the code and description for your selection. You can add more to the description if needed.

Then select a value type from the drop-down.

When you select % of Order Total and enter a value, the system calculates the Cost price automatically.

Use the tax group drop-down to select the required tax group.

Enable the appropriate radio button to show whether you'll prorate costs over stock lines or apply them to a GL code.

When you select apply to GL code, the field is available for selecting the code.

Choose OK when complete.

A MOLT on a PO is only a template cost used to automatically add costs to any new Stock Receipts. It does not directly affect the cost of stock until processed on the Stock Receipt.

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