

Using Purchase Orders

Products are typically categorized as Generic or Lumber.

This course explores the options for creating Purchase Orders for both types.

You will also be shown how to use the 'Add to Selection Cart' method and add a MOLT to a PO.

Generic products are non-Lumber merchandise.

These include items such as tools, paint, or housewares.

They can have a variety of Units of Measure.

Create a new PO, choose the Supplier and begin to add products to it.

On the 'Find Products' window Generic products are identified by the 'hammer' icon.

Select a product.

Open Line Properties and view the default purchasing UOM beside the 'Quantity' field.

Clicking the drop down shows the additional UOMs when they are available.

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.

Click 'Ok' to complete the line.

The generic product is added to the PO

Add a dimensional lumber random length product to your purchase order.

On the 'Find Products' window Lumber products are identified by the icon that looks like a stack of lumber.

'Timber Sheet' products, such as plywood, are identified by the Sheet icon.

Open the line properties and view the other UOMs that can be used.

Enter the 'Quantity' based on the UOM selected.

If the 'Tally' of individual lengths is known at the time of purchasing these can be entered by clicking the 'Tally' button.

Specify the number of pieces of each length being ordered.

Click 'OK' to complete the tally entry.

The 'Quantity' is filled in based on the 'Tally' entered.

The 'Tally' lengths are shown.

The 'Cost price' and Cost UOM are used to calculate the 'Total cost'.

Click 'OK'.

Use the 'Add to Selection Cart' option to pick the products for the PO and enter the quantities all from within the 'Find Products' window.

On 'Find Products' click on the 'Options' button.

Choose 'Add to Selection Cart'

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

A 'Qty' column has been added.

The default 'UOM' is shown.

Enter a 'Qty' to order for the products shown.

Click the 'Add Selections' button or press the 'F11' key.

To edit the amount being ordered click on the 'Qty' and change the value.

Double clicking on a product in the results area adds it to the Selections window with a quantity of 1.

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

Enter the 'Tally' quantities and click 'OK' to close.

A 'Tally' column is shown.

To finish the Selections, click on 'OK' or press the 'F12' key.

The products and quantities are added to the PO lines tab.

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

Manual Order Line Types or 'MOLTs' are used to add non-product charge lines such as delivery charges to a PO.

At the 'Lines' tab click on the 'Other Options' button. Select 'Add Manual Charge Line'.

Select the 'Type' by clicking on the drop down.

The 'Code' and 'Description' for the MOLT is shown. Further 'Description' can be entered if needed.

The 'Value Type' can be a 'Fixed Amount' or '% of Order Total'.

When a '% of Order Total' is selected and 'Value' entered, the 'Cost price' is automatically calculated.

Change the 'Tax Group' as required.

Indicate whether the costs should be prorated over the stock lines on the PO or applied to a GL code. When the latter is selected, the dialog box is available for selecting a GL code.

Click '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.

You should now be able to creating a purchase order and add Generic and Lumber products to it along with a MOLT.

Using the 'Add to Selections Cart' option is an effective way to populate your order and keep your inventory at an optimum level.

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