

WMS: Did You Know?

From Professor Merlot

Purchase Order Processes – which one to use?

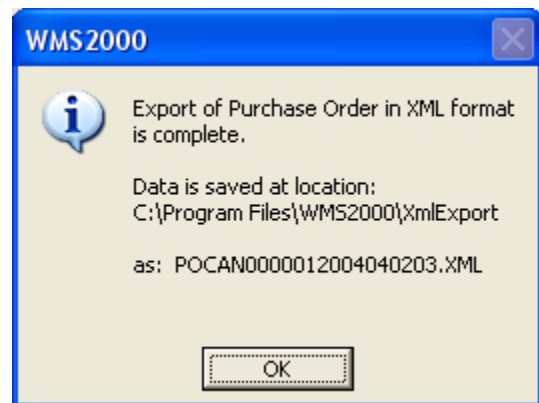


Purchase Order processes available within WMS have been expanded to make the movement of products between Suppliers and other WMS businesses easier to track; hence the introduction of the Transfer Out, the Transfer In and the Normal Purchase Order. Using these methods will maintain your inventory status as well as for those businesses that receive your transfers (assuming they are using WMS).

The following are the processes for the three types of Purchase Orders: **Normal**, **Transfer Out** and **Transfer In**.

Purchase Order Transfer Out:

1. Enter a unique number into the PO Id field on a new Purchase Order. (It is recommended you use a year-month-day identifier for this field). For example, 2005070901 would be for July 9th, 2005 #1 PO for that day. The numerical system allows you to sort the PO s using the Ascending/Descending toolbar, should you choose.
2. Select the name of the supplier (say “Winexpert” as an example) whose product you wish to transfer to another wine store. The **Supplier Type** code for this supplier must have been set as **Internal** (in the Supplier Information form in the Purchasing Switchboard).
3. Next select **Transfer Out** in the **Order Type** field.
4. Enter the product to ship to another wine store. Similar to the Invoice, you may now view the products by Name or by Product Number simply by pressing the toggle button **By Name/By #**. This will open the Prod Id. Field in the sequence you selected.
5. Complete the PO as normal, filling the **Shipping Info** tab and selecting the name of the wine store you want to send this PO and product (“Where to ship this PO...”). This information comes from the Customer Information screen.
6. Complete the **Supplier Info** tab as per usual.
7. Complete the **Billing Info** tab with the name of the company who will pay for this Transfer. This information comes from the Customer Information screen.
8. Once all of the details have been completed, press the **WEB PO** button to initiate the export of the XML file into the "XMLExport" folder on your PC.
9. This screen will confirm the export of the product to the file used to send to your receiving store. The message is comprised of your PO number in the file name. The location of this file is also indicated.
10. To remove of the inventory from your store fill the **Recd** checkbox for each item. Your **On Hand** quantity will be reduced, but the **On Order** quantity will remain the same.
11. You may email this PO to the other store or print a copy of this file by opening Internet Explorer and double clicking on the file in the ... XmlExport folder.



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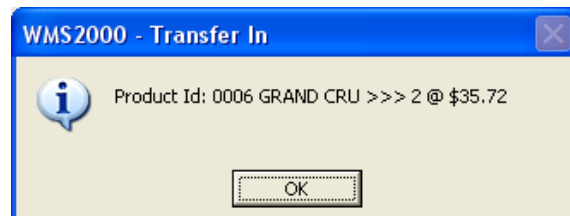
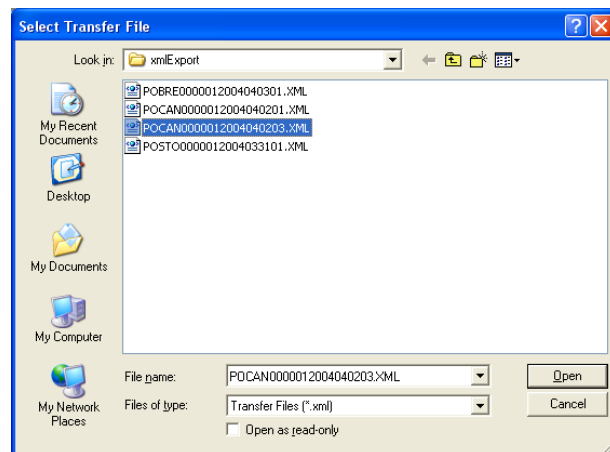
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Purchase Order Transfer In:

1. Enter a unique number into the PO Id field on a new Purchase Order.
2. Select the name of the supplier (say “Winexpert” as an example) whose product you wish to receive from another wine store. The **Supplier Type** code for this supplier must have been set as **Internal** (in the Supplier Information form in the Purchasing Switchboard).
3. On the **Order Entry** Tab of this form, select **Transfer In** as the **Order Type** drop down field.
4. Complete the PO as normal, filling the **Shipping Info** tab and selecting the name of the wine store you want to send this PO and product (“Where to ship this PO...”). This information comes from the Customer Information screen.
5. Complete the **Supplier Info** tab as per usual and the **Billing Info** tab with the name of the company who will pay for this Transfer. This information comes from the Customer Information screen.
6. Once all of the details have been completed, press the **Transfer In** button. This will open the **Select Transfer File** screen, on the right, to find the XML file that has been sent, via email, to the destination store.
7. Select the file that contains the names of all the products you will be receiving from the other store and press **Open**.
8. The following screen(s) displayed will confirm the product number, the quantity transferred in and the Cost Price for each item that is being imported into this Purchase Order.
9. Once all of the products have been transferred into the new Purchase Order, you must complete the PO as usual by receiving all of the items. Press the **Rec'd** checkbox for each item to update your inventory. . Your **On Hand** quantity will be updated.



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Normal Purchase Order:

1. Enter a unique number into the PO Id field on a new Purchase Order.
2. Select the name of the supplier. This supplier may be an **Internal** or **External** type in the **Supplier Type** field (Supplier Information form).
3. On the Billing Info Tab of this form, the **Order Type** field will automatically be set as **Normal Purchase Order**. If your supplier is an **Internal** Supplier type, you will have to select **Normal Purchase Order**.
4. Enter the products you request from your supplier.
5. Complete the PO as normal, filling the **Shipping Info** tab. This information comes from the Customer Information screen.
6. Complete the **Supplier Info** tab as per usual.
7. Complete the **Billing Info** tab with the name of the company who will pay for this PO. This information also comes from the Customer Information screen.
8. Once all of the details have been completed, press the **WEB PO** button to initiate the export of the XML file that you can email to your supplier. The message is comprised of your PO number in the file name and its location.
9. You now have 2 options:
 - You may create an email to your supplier and attach this file “POCAN0000120404203.XML” found in the XmlExport folder under WMS7. Your supplier can simply open the email and double click on the attached file to view it in their Internet Explorer application (and print it for the order to be processed).
 - Print the PO using the Printer button on the form and then fax it to your supplier.

