

Chapter 20 – Ordering Inventory Online

The Store Purchase Order Menu (POMENU) allows you to do your online inventory ordering for your store and rolls the store's requisition up through the process to the Home Office/Buyer/Purchasing Department.

Your company will have to have set up minimum ship requirements and/or maximum stock levels for purchase order requisitions to be processed within their allowable limits. And the company will have to have established the purchase order parameters necessary to meet their criteria and ordering process.

To get to the Purchase Order Menu, select the option "Inventory" off your Store Menu. See Figure 20-1. Then select Purchase Order Menu or press the F10 key off of any menu and on the command line type in "POMENU". See Figure 20-2.

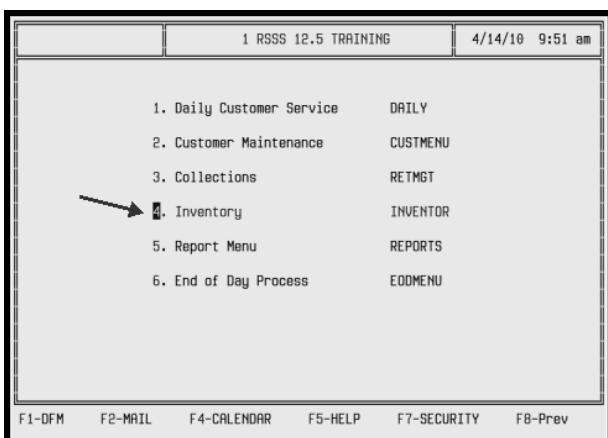


Figure 20- 1 Store Menu

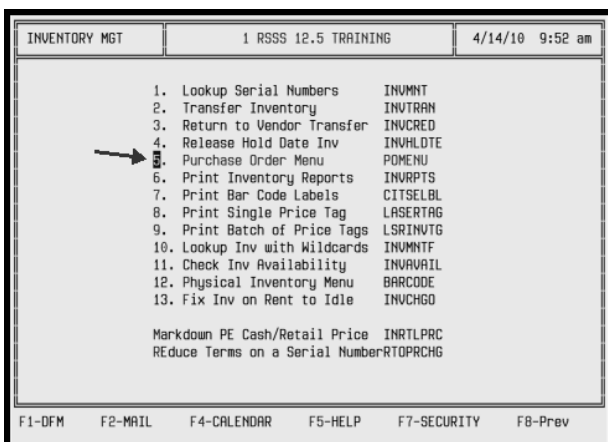


Figure 20- 2 Inventory Menu

Stock Level Report

The Stock Level Report will help guide you in determining what inventory needs to be ordered for your store.

This report will show you all current inventory levels that are idle, on rent/lease, and on order including optimum levels that will help identify any product categories that need to be ordered.

Off the PO Menu, select the option "Stock Level Report" or press the F10 key off of any menu and at the command line type in "STKRERDR" and then press the enter key, see Figure 20-3.

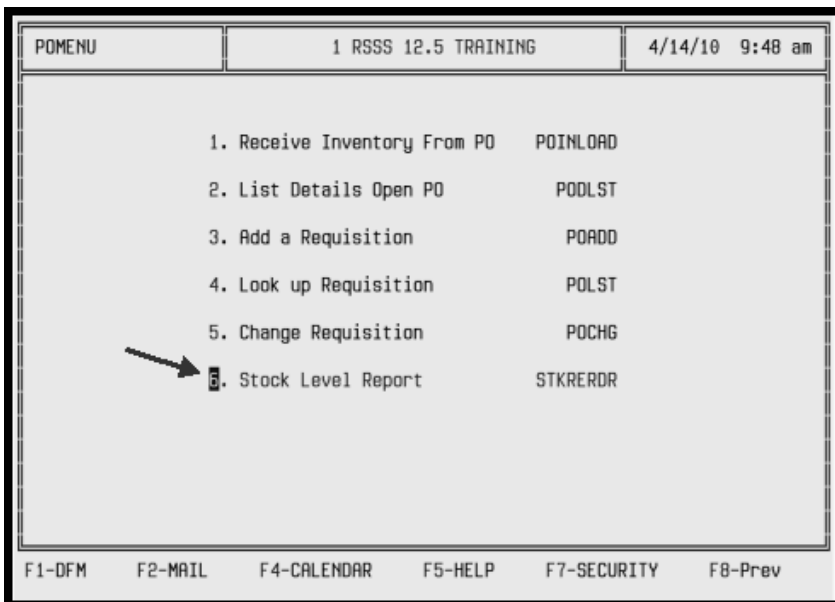


Figure 20- 3 Stock Level Report Option off PO Menu

You will be prompted for printer or file pathname. If you want to print directly to the default printer, press the enter key. If you want this information to print to another printer, type that printer number over the default and press the enter key. See [Introduction to Reports](#) for additional information about the printer/file pathname screen. You will now be prompted for "Separate Locations". Press the enter key to accept the default of N for no and you will see the screen in Figure 20-4.

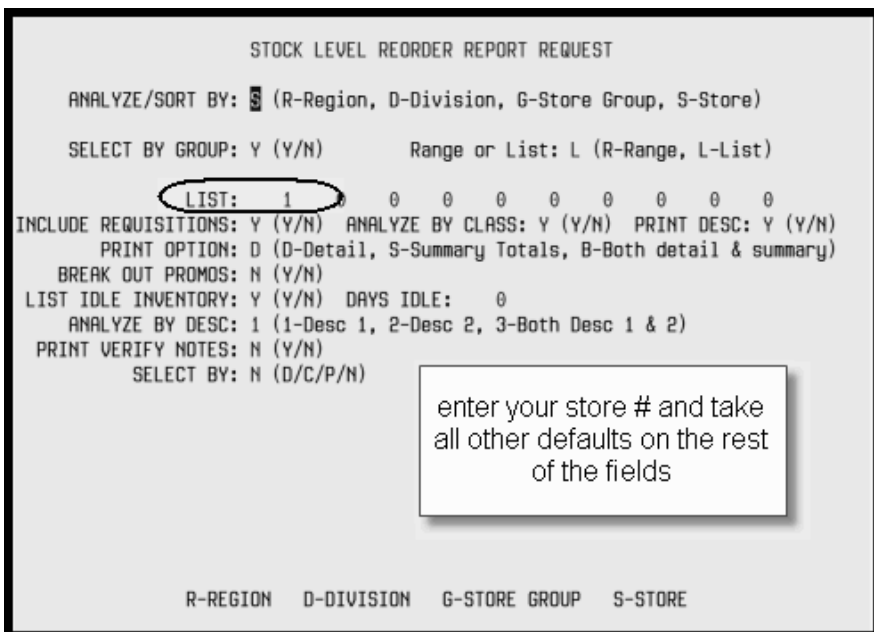


Figure 20- 4 Stock Level Report Screen

ANALYZE/SORT BY

R - REGION

D - DIVISION

G – STORE GROUP

S – STORE (select this option to run the report for your store).

SELECT BY GROUP Accept the default of N to run this report for your store.

RANGE OR LIST Accept the default of L to run this report for your store.

LIST Enter your store number and press F9 to advance to the next field prompt. The Stock Level Report will help guide you in determining what inventory needs to be ordered for your store.

INCLUDE REQUISITIONS Accept the default of Y to include requisitions in your order counts.

ANALYZE BY CLASS Accept the default of Y to analyze by class/sub-class.

PRINT DESC Accept the default of Y to print descriptions on your report.

PRINT OPTION Accept the default of Y to print details on the report.

D - DETAIL

S – SUMMARY TOTALS

B – BOTH DETAIL & SUMMARY

BREAK OUT PROMOS Accept the default of Y to run this store report. This will omit promo items from the total items available. If you accept the Y, you are prompted **ENDING ON OR AFTER**. Leave today's date.

LIST IDLE INVENTORY Accept the default of Y to list a count of idle inventory items. If you accept the Y, you are prompted **DAYS IDLE**. Accept the default of 0 (zero) number of days used to determine if the item is idle. Only change this if you are instructed to do so by your manager.

ANALYZE BY DESC Accept the default of 1 to print description 1.

- 1 – DESC 1
- 2 – DESC 2 (for future development)
- 3 – BOTH DESC 1 & 2 (for future development)

PRINT VERIFY NOTES Accept the default of N for no.

SELECT BY Accept the default of N for no.

- D – DESCRIPTION
- C – Class/SUB-CLASS
- P – PO
- N – NO SELECTION (ALL)

Once you enter your criteria, press the F9 key and at “Any More Changes” press enter at the N and the report will begin processing and the screen will look similar to Figure 20-5 while it is processing till it completes and returns you to a menu.

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STOCK LEVEL REORDER REPORT REQUEST

ANALYZE/SORT BY: S (R-Region, D-Division, G-Store Group, S-Store)

SELECT BY GROUP: Y (Y/N)      Range or List: L (R-Range, L-List)

LIST: 1 0 0 0 0 0 0 0 0 0 0
INCLUDE REQUISITIONS: Y (Y/N) ANALYZE BY CLASS: Y (Y/N) PRINT DESC: Y (Y/N)
PRINT OPTION: D (D-Detail, S-Summary Totals, B-Both detail & summary)
BREAK OUT PROMOS: Y (Y/N) ENDING ON OR AFTER 4/14/10
LIST IDLE INVENTORY: Y (Y/N) DAYS IDLE: 0
ANALYZE BY DESC: 1 (1-Desc 1, 2-Desc 2, 3-Both Desc 1 & 2)
PRINT VERIFY NOTES: N (Y/N)
SELECT BY: N (D/C/P/N)

ITEMFILE COUNT: 13000  NINVREC COUNT: 15000  GROUP COUNT: 7
LOC-TRAN COUNT: 25     PO-DET COUNT: 22500
RELEASE COUNT: 1

PLEASE WAIT WHILE STOCK REORDER REPORT IS RUNNING
  
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Figure 20- 5 Stock Level Report Screen

Figure 20-6 is an example of a Stock Level Report.

STKRERDR		BOB'S RTO UC DATA										PAGE: 4	
RUN DATE: 04/12/10		STOCK LEVEL RE-ORDER REPORT											
TIME: 14:50:08		ANALYZED/SORTED BY: LOCATION											
		SELECTED BY LOCATIONS: 1											
		ITEMS EXCLUDED FOR PROMOS ENDING ON OR AFTER: 4/12/10											
		LIST COUNT OF ITEMS IDLE FOR: 0 DAYS											
DESCRIPTION 1	LOC	USED INSTK	NEW INSTK	IDLE INSTK	PROMO INSTK	ON ORDER	PROMO ORDRD	TOTAL AVAIL	MIN STOCK	MAX STOCK	ON RENT	SHORT-SURPL+	REORDER/REDISTR
LAUNDRY DRYER FRONT LOAD	1	4	0	4	0	2	0	6	3	3	13	3+	
LAUNDRY DRYER FULL	1	7	0	7	0	5	0	12	4	4	16	8+	
LAUNDRY STAND COMPACT W/D	1	3	0	3	0	0	0	3	2	2	2	1+	
LAUNDRY WASHER COMPACT	1	1	0	1	0	1	0	2	2	2	3	0	
LAUNDRY WASHER FRONT LOAD	1	4	0	4	0	2	0	6	3	3	13	3+	
LAUNDRY WASHER FULL	1	6	0	6	0	2	1	8	4	4	19	4+	
*TOTAL LAUNDRY	1	30	0	30	0	12	1	42	20	20	69	22+	
REFRIGERATOR BEST	1	2	0	2	0	1	0	3	1	1	0	2+	
REFRIGERATOR BETTER	1	0	0	0	0	0	0	0	1	1	1	1-	1
REFRIGERATOR GOOD	1	0	0	0	0	1	0	1	2	2	3	1-	1
*TOTAL REFRIGERATORS	1	2	0	2	0	2	0	4	4	4	4	0	
FREEZER BEST	1	0	0	0	0	0	0	0	1	1	0	1-	1
FREEZER BETTER	1	0	1	1	0	1	0	2	1	1	4	1+	
FREEZER GOOD	1	0	2	2	0	1	0	3	1	1	8	2+	
*TOTAL FREEZERS	1	0	3	3	0	2	0	5	3	3	12	2+	
DISHWASHER	1	1	0	1	0	2	0	3	2	2	10	1+	
*TOTAL DISHWASHER	1	1	0	1	0	2	0	3	2	2	10	1+	
RANGE BETTER	1	1	0	1	0	0	0	1	1	1	2	0	
RANGE GOOD	1	1	0	1	0	0	0	1	1	1	5	0	
*TOTAL RANGES	1	2	0	2	0	0	0	2	2	2	7	0	
AIR CONDITIONER	1	1	0	1	0	0	0	1	0	0	0	1+	
AREA RUGS	1	0	0	0	0	0	0	0	0	0	3	0	
DECOR OTHER	1	0	0	0	0	0	1	0	0	0	1	0	
UNKNOWN	1	0	0	0	0	0	0	0	0	0	1	0	
*TOTAL OTHER MISC	1	1	0	1	0	0	1	1	0	0	5	1+	
TOTAL:		201	25	226	1	48	7	274	170	99999	787	104	ADD STKLVL REC
***** END OF DETAILS *****													
STKRERDR		BOB'S RTO UC DATA										PAGE: 5	
RUN DATE: 04/12/10		STORE WIDE INVENTORY TOTALS											
TIME: 14:50:08													
LOC	LOCATION DESCRIPTION	IN STOCK	PROMO IN STOCK	ON ORDER	PROMO ON ORDER	TOTAL AVAIL	LOC MAX	OVERAGE					
1	STAPLES CENTER	226	1	49	6	275	198	77					
→ WARNING: Surplus - Maximum Store Inventory Exceeded													
***** END OF REPORT *****													
TIME FINISHED: 14:50:10													

Figure 20- 6 Stock Level Report Example

Adding a Requisition

Off the PO Menu, select the option "Add a Requisition" or press the F10 key off of any menu and at the command line type in "POADD" and then press the enter key, see Figure 20-7 and Figure 20-8.

This adding a requisition option allows you to choose the inventory pieces you would like to order for your store following the information provided from the Stock Level Report.

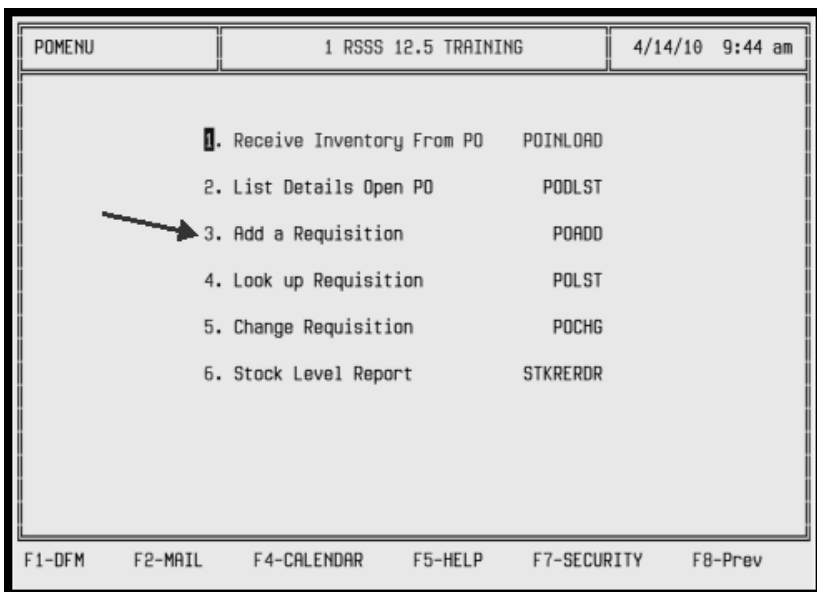


Figure 20- 7 Adding A Requisition Option off PO Menu

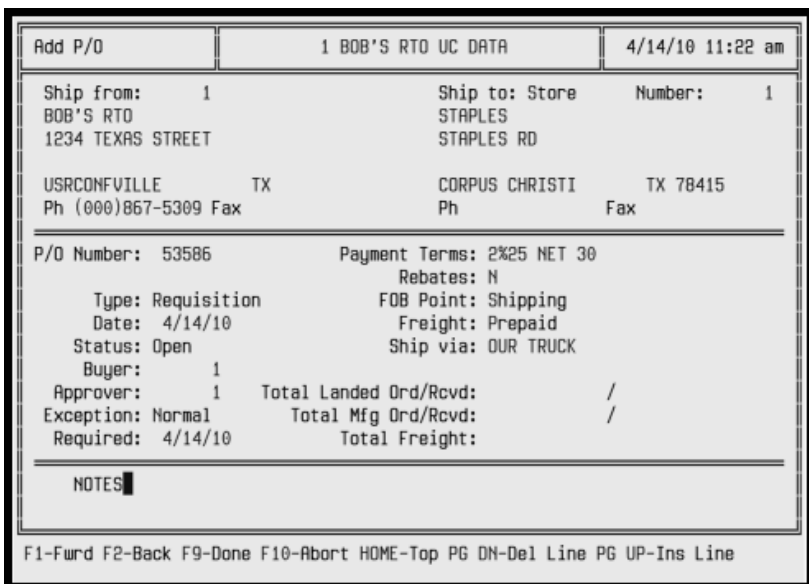


Figure 20- 8 POADD Screen to add a Requisition

P/O NUMBER Press enter to generate the PO number (employee not allowed to enter PO number)

SHIP FROM Enter Vendor number. May be your company number every time if your company allows you to add multiple products from different vendors to the same requisition number. The Purchasing Department in this case will separate them out and send them to the appropriate place once the order is completed.

SHIP TO Enter store number (stores can only enter logged in store number)

TYPE PO program will default to Requisition (stores will not be able to create Purchase Orders)

DATE Requisition creation date, defaults to today's date

STATUS Defaults to Open

BUYER Enter user's employee number

APPROVER Enter Approver's employee number (enter user number to keep Requisition in store)

EXCEPTION Defaults to Normal (stores will not be able to access this field)

REQUIRED Date items are to be in the stores location (includes delivery day from Vendor record)

Can enter notes about the requisition too if needed.

Note: All other fields are not accessible at the store.

Press F9 to advance to the 2nd screen.

Enter the inventory you want to order for your store. See Figure 20-9 for an example order.

Add P/O		1 BOB'S RTO UC DATA		4/14/10 11:22 am		
Ship from: 1 BOB'S RTO 1234 TEXAS STREET USRCONVILLE TX Ph (000)867-5309 Fax		Ship to: Store Number: 1 STAPLES STAPLES RD CORPUS CHRISTI TX 78415 Ph Fax				
		PD Nbr/Date: 53586 4/14/10				
QTY	MODEL NUMBER	FAB COL	MFG COST	LANDED COST	REQUIRED	SHIPTO C
1	FLASH1114335		259.000	259.000	4/14/10	1 N
3	FEP0901-82		196.000	196.000	4/14/10	1 N
2	FLWASPLUM S/L		440.000	440.000	4/14/10	1 N
6	ALAMMNAV2335AWW		230.000	230.000	4/14/10	1 N
6	ALAMMALE331RAW		300.000	300.000	4/14/10	1 N
DRYER				On Hand/Order: 4 0		
F1-Next F2-Prev F3-Chg F4-Del F5-Insert F6-Allocate F7-Duplicate F9-Done						

Figure 20- 9 POADD 2nd Screen to place inventory order

QUANTITY Number of items to order

MODEL NUMBER Search by model number or description. You can enter a few characters of the model number or description and then select the item off the inventory search list using the F1 page forward and F2 page back keys. Highlight the item you want off the list and it will appear in this field.

FAB/COL Stores not allowed to adjust these fields

LANDED COST Stores not allowed to adjust this field

REQUIRED Date for items need to be in the store (includes delivery day from vendor record)

SHIP TO Location for item to be delivered to

C 'Y' to enter comment for this item; 'N' for no item comment

Once you enter the items you want to place on this requisition, press F9 twice to save and be given the option to submit your inventory order for approval. See Figure 20-10.

Add P/O	1 BOB'S RTO UC DATA	4/14/10 11:22 am
Ship from: 1 BOB'S RTO 1234 TEXAS STREET USRCONFVILLE TX Ph (000)867-5309 Fax	Ship to: Store STAPLES STAPLES RD CORPUS CHRISTI TX 78415 Ph Fax	Number: 1
PO Nbr/Date: 53586 4/14/10		
QTY	MODEL NUMBER	FAB COL MFG COST LANDED COST REQUIRED SHIPTO C
1	FLASH1114335	259.090 259.090 4/14/10 1 N
3	FEPRO901-82	96.000 4/14/10 1 N
2	FLWASPLUM S	40.000 4/14/10 1 N
6	ALAMMNAV233	30.000 4/14/10 1 N
6	ALAMMALE331	00.000 4/14/10 1 N
Submit for Approval? <input checked="" type="checkbox"/> N		
Approver: 99		
DRYER On Hand/Order: 4 0		
Enter 'Y' to submit for approval		

Figure 20-10 Enter Y to submit and place inventory order

If you don't want to send your order for approval, enter "N" and the requisition will close (saved) allowing you to comeback and adjust it in the future. If you answer "Y", it processes the order and you will see a message appearing at the bottom of the screen that it is processing.

The order will now go and search all the items listed based on your company's criteria that was set by your Home Office/Buyer/Purchasing Department.

If the order meets all the criteria, a message will appear similar to Figure 20-11.

Add P/O	1 BOB'S RTO UC DATA	4/14/10 11:22 am
Ship from: 1 BOB'S RTO 1234 TEXAS STREET USRCNFVILLE TX Ph (000)867-5309 Fax	Ship to: Store STAPLES STAPLES RD CORPUS CHRISTI TX 78415 Ph Fax	Number: 1
PO Nbr/Date: 53586 4/14/10		
QTY	MODEL NUMBER	FAB COL MFG COST LANDED COST REQUIRED SHIPTO C
1	FLASH1114335	259.090 259.090 4/14/10 1 N
3	F	4/10 1 N
2	F	4/10 1 N
6	A	4/10 1 N
6	A	4/10 1 N
<p>ORDER IS APPROVED AND SUBMITTED FOR PROCESSING. PRESS ENTER TO CONTINUE</p>		
DRYER	On Hand/Order: 4 0	
<p>ORDER HAD NO VALIDATION ERRORS; PRESS 'ENTER' TO CONTINUE</p>		

Figure 20-11 Order approved and submitted for processing

Print a copy of the requisition to keep with your records of all inventory ordered at your store. This way follow-up is much easier with the information readily available.

If there are any discrepancies/error with the order and it is not approved, an error message will appear. Please contact your Manager or Purchasing Department for assistance with requisitions that are not approved.

Changing a Requisition

Off the PO Menu, select the option "Change Requisition" or press the F10 key off of any menu and at the command line type in "POCHG" and then press the enter key, see Figure 20-12.

1 BOB'S RTO UC DATA	4/14/10 4:33 pm
<p>1. Receive Inventory From PO POINLOAD 2. List Details Open PO POOLST 3. Add a Requisition POADD 4. Look up Requisition POLST 5. Change Requisition POCHG 6. Stock Level Report STKRERDR</p>	
<p>F1-DFM F2-MAIL F4-CALENDAR F5-HELP F7-SECURITY F8-Prev</p>	

Figure 20-12 Change Requisition Option off PO Menu

On the first screen, enter the P/O Number or Requisition Number you want to change and press enter. Once the first screen appears, press the F9 key three times and the second screen will appear. See Figure 20-13.

Change P/O		1 BOB'S RTO UC DATA		4/14/10 4:41 pm	
Ship from: 1 BOB'S RTO 1234 TEXAS STREET USRCONVILLE TX Ph (000)867-5309 Fax		Ship to: Store STAPLES STAPLES RD CORPUS CHRISTI TX 78415 Ph Fax		Number: 1	
PO Nbr/Date: 53586 4/14/10					
QTY	MODEL NUMBER	FAB	COL	MFG COST LANDED COST	REQUIRED SHIPTO C
1	FLASH1114335			259.000 259.000	4/14/10 1 N
3	FEPRO901-82			196.000 196.000	4/14/10 1 N
2	FLWASPLUM S/L			440.000 440.000	4/14/10 1 N
6	ALAMMNAV2335AWW			230.000 230.000	4/14/10 1 N
6	ALAMMALE331RAW			300.000 300.000	4/14/10 1 N
				4,907.09	4,907.09
SOFA LOVE				On Hand/Order: 0 0	

F1-Next F2-Prev F3-Chg F4-Del F5-Insert F6-Allocate F7-Duplicate F9-Done

Figure 20-13 2nd Screen where you make your changes

- F3-CHG** Update a current item on PO
- F4-DEL** Delete an item on PO
- F5-INSERT** Insert a line for new item on PO
- F6-ALLOCATE** Allocate a customer for this item (See Figure 20-14)
- F7-DUPLICATE** Duplicate PO line
- F9-DONE** F9 to save changes and proceed

Inventory On Order Maint				04/14/10	
Starting Values:	PO Nbr:	53586	Cust Nbr:	000100555	Status: 0
	Entered Date:	4/14/10	Model Nbr:	FLASH1114335	
Starting Purchase Order Number					

F1-PO # F2-Cust # F3-Model # F4-Status F5-Help F6-Date Entrd F7-Lst Model #

Figure 20-14 POCHG F6- Allocate Customer for Item Screen

Look Up a Requisition

From the PO Menu, select the option "Look Up Requisition" or press the F10 key off of any menu and at the command line type in "POLST", see Figure 20-17.

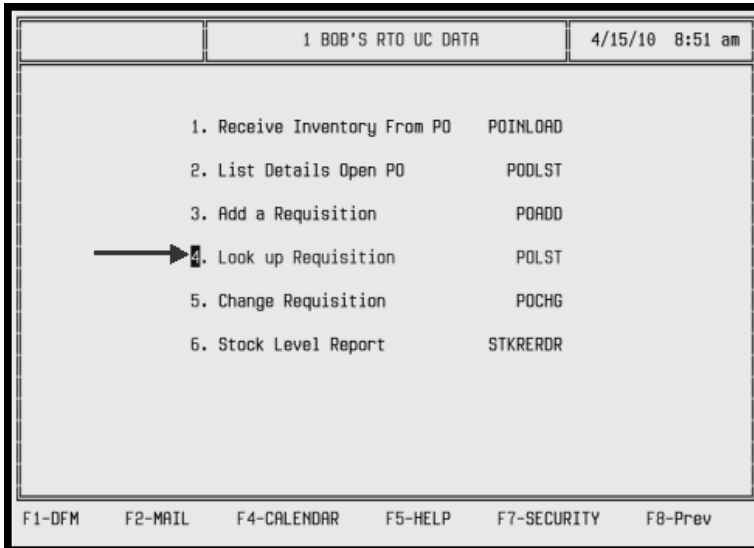


Figure 20-17 Look Up Requisition Option off PO Menu

You will see a screen similar to Figure 20-18.

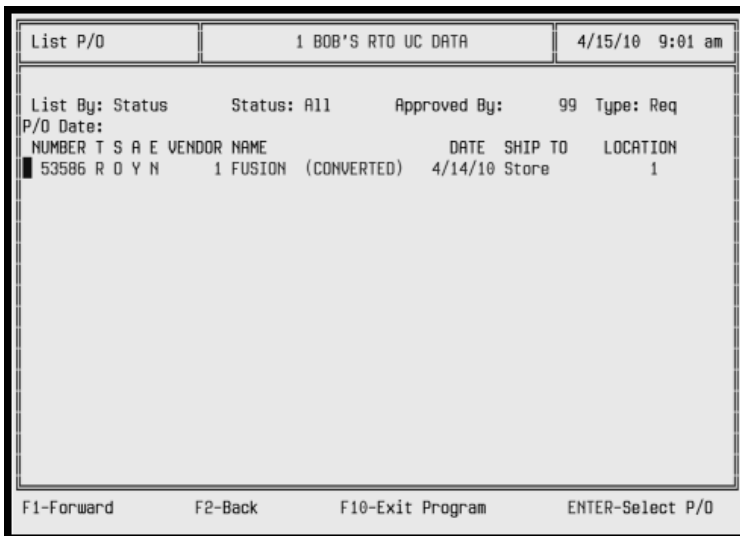


Figure 20-18 Look Up Requisition Option off PO Menu

LIST BY : STATUS Accept default of **S** for **Status** in most cases. Unless you want to list by **P** for **Purchase Order Number** or list by **V** for **vendor**.

STATUS Accept the default of **A** for **all** or you can list by

O – Open

P – Paid

H – Hold

- R – Received**
- B – Back**
- C – Cancelled**

APPROVED BY Enter the employee number you want the list to display for. In this example in Figure 20-18 we are listing for employee number 99 which is the “Approver’s” employee number.

TYPE Change the default of **P for Purchase Order** to **R for requisition** or if you want to display both purchase orders and requisitions, change this field to **A for all**.

DATE Enter the starting for the purchase order/requisitions to start listing by or you may leave it blank and press enter.

T/S/A/E columns displayed on the listing are Type, Status, Approved, Exception respectively.

The list will display based on your selection criteria for the listing.

Listing Details for an Open PO

To list purchase order and be able to view the details on that purchase order, from the PO Menu, select the option “List Details Open PO” or press the F10 key off of any menu and at the command line type in “PODLST”, see Figure 20-19.

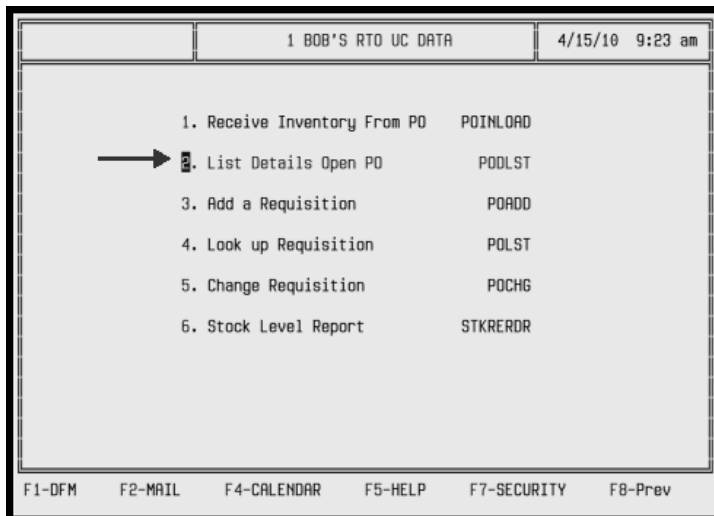


Figure 20-19 List Details Open PO Option off PO Menu

You will see a screen similar to Figure 20-20.

1 BOB'S RTO UC DATA		4/15/10 9:47 am
List By: <input type="text" value="P"/>	Stat: & Vend:	Loc: Model: P/O:
P/O Date:		
List by: (M)odel Number or (P)/O Number		

Figure 20-20 List Details for an Open PO

LIST BY: STATUS Accept default of **P for Purchase Order** in most cases. You can also list by **M for Model Number**.

STAT Accept the default of **& for open and back ordered** or you can list:

- O - Open**
- P - Paid**
- R - Received**
- B - Back**
- C - Cancelled**
- A - All**
- D - Deleted**

VENDOR Enter the vendor number you want the listing for or leave it blank and press enter. If you do not know the vendor number, enter 999999 and the vendor list will appear where you can highlight and accept the vendor number you want the listing for.

LOCATION Enter your store number.

MODEL NUMBER If you are listing by model number, then enter the model number here that you want the list to start with or you may leave it blank and press enter.

P/O If you are listing by purchase order number, then enter the PO number here that you want the list to start with or you may leave it blank and press enter.

P/O DATE Enter the starting date you want the purchase order detail list to start with or you may leave it blank and press enter.

The list will display based on your selection criteria for the listing. Figure 20-21 is an example listing of a purchase order detail list.

T/S/A/E columns displayed on the listing are Type, Status, Approved, Exception respectively.

1 BOB'S RTO UC DATA		4/15/10 9:47 am	
List By: M Stat: & Vend:	Loc: 1	Model: FLASH	P/O:
P/O Date:			
		LAST RCV	=== QTYS ===
NUMBER T S A E VENDOR ITEM	DATE	DATE	LOC ORD REC CAN
53586 R O Y N 225 FLASH1114335	4/14/10		1 1 0 0
53586 R O Y N 1840 FLWASPLUM S/L	4/14/10		1 2 0 0
53551 P B N N 334 JNCMJ4N90532	2/06/10		1 15 0 0

F1-Next Page F2-Prev Page F10-Exit

Figure 20-21 PO Detail Listing Example