

EXCELLENCE IN COACHING

UNRAVELING THE MYSTERIES OF INVENTORY CONTROL – PART III

by Jenny Cooper



Technical Level:

Easy

Intermediate

Advanced



EXCELLENCE IN COACHING:



UNRAVELING THE MYSTERIES OF INVENTORY CONTROL – PART II

Agenda/Goals



- ☐ Explain how to create a P.O from the S.O.R
- ☐ Process a P.O
- ☐ Receive a P.O
- ☐ EDI and non EDI vendors

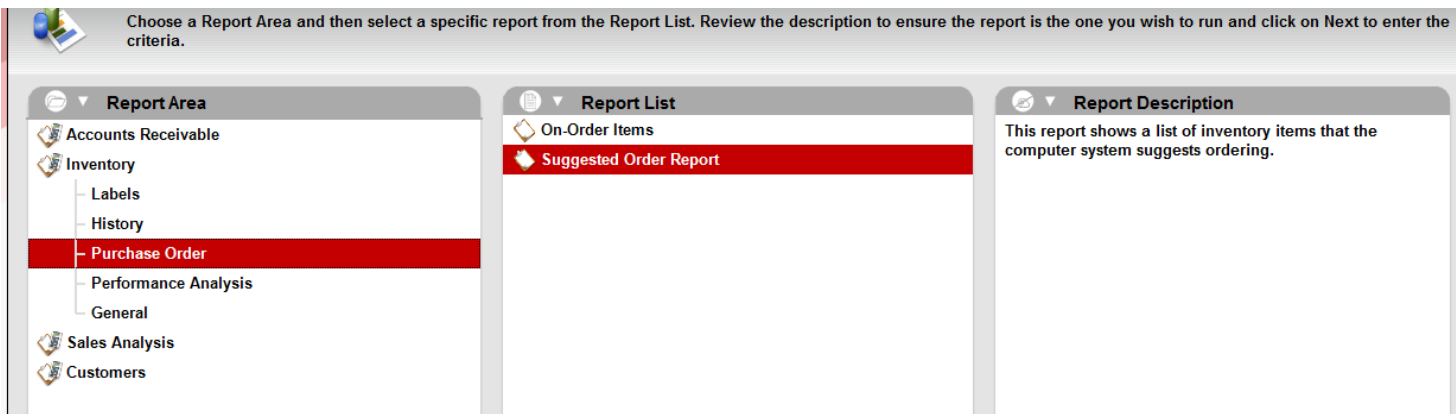


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Creating a P.O from the S.O.R



- ☐ Run the Suggest Order Report
- ☐ Check the box that says create a working P.O



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Opening the P.O from the S.O.R

- ☐ Go into the P.O Module
- ☐ Hit Recall P.O
- ☐ Select the P.O that says Suggest Order

Recall Transaction Cancel

Please select what you wish to recall...

☒ Show For All Accounts

Name	Memo	Date	Emp #	Supplier Id
Autosave-2-Kyle Evans			2	10
Suggested Order -- Paladin Su...			1	0



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Processing the P.O

ready.set.
go!

- ☐ Review the P.O items and cost
- ☐ Hit F8 or confirm
- ☐ Hit F8 or Buy
- ☐ You can print a test copy if need be to see any conversions that will take place



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Receive the P.O

- ☐ Go into the P.O Module
- ☐ Click F5 to get into receive mode
- ☐ Click find P.O
- ☐ Select the P.O needed and hit F12 or Open
- ☐ Adjust any SOH based off of what was received.
- ☐ Hit F8 or process
- ☐ Then hit F1 process again



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EDI vs Non EDI vendors

Anderson Feed & Supply, Inc. Suggested Order Report Page: 1

Selection	Beginning	Ending	Additional Options	Sort Order	Date
Part Number	ALL	ZZZZZZZZZZZZZZZZ	Stock Days: 14	Sort By =	None
Department	ALL	ALL		Order =	None
Supplier	ALL	ALL	Dept Override Enabled = True	Then By =	None
Class	ALL	ALL	Item Override Enabled = True	Order =	None
SubClass	ALL	ALL	Limit report supplier = Any	Then By =	None
Location	10	40		Order =	None
Counted Between	12-Oct-14	13-Oct-15	Create Working PO = No		

Line	Record Number	Order #1	SOH	Sup Ratio	Order #2															
	Description	On Order	Demand	EXT	MFG Number															
	Last Rec'd	Lot Count	Qty Req	Sup Qty																
1	104124	104124	10	1	104124	Ave \$= 252.076	1	0	0	1	0	1	6	0	1	5	1	27	34	
	P3016A CHAIN SAW	967196481	3	9	24	3301FFS/14	Lot \$= 252.460	Min= 0	SugMin= 0	OrdQty= 1	Dept= 9	Sup1= 13	YTDQty= 84							
	05-Jun-14/24	14-Nov-14	5	5	1262.30	Mkt \$= 252.460	Max= 999	SugMax= 32	Ord % =100	Loc = 30	Sup2= 0	YTD\$\$\$= 23825.34								
2	217689	6262588	28	1	217689	Ave \$= 82.340	4	0	0	2	0	60	36	0	2	7	1	11	66	
	295300 WHT VNTY WASTEBSKT	60	13	51	10	23.40	Lot \$= 82.340	Min= 0	SugMin= 0	OrdQty= 1	Dept= 1	Sup1= 13	YTDQty= 202							
	04-Dec-14/7	14-Nov-14	10	10	477338	Mkt \$= 82.340	Max= 0	SugMax= 65	Ord % =100	Loc = 10	Sup2= 0	YTD\$\$\$= 1597.98								
3	2X4X8 NUMBER 2 PREM MCKENZIE	433	1000	22	1067.96	Ave \$= 86.970	Min= 11	SugMin= 0	OrdQty= 1	Dept= 10	Sup1= 13	YTDQty= 2907								
	04-Dec-14/200	07-Dec-13	268	268	1252	Mkt \$= 86.970	Max= 999	SugMax= 0	Ord % =100	Loc = 40	Sup2= 0	YTD\$\$\$= 34169.10								
4	31166 PLUMBERS PUTTY 1402	0	2	31166	Ave \$= 80.960	2	0	0	0	0	0	0	0	0	0	0	0	0	0	
	11-Oct-14/2	05-Dec-13	2	2	1.92	Lot \$= 80.960	Min= 0	SugMin= 0	OrdQty= 1	Dept= 5	Sup1= 13	YTDQty= 2								
	LUM1	LUM1	-16.5	1	LUM1	Ave \$= 82.600	66	0	0	0	0	0	0	0	0	3	0	0	0	
5	2X4X8	0	32.75	1	85.76	Lot \$= 82.600	Min= 11	SugMin= 0	OrdQty= 1	Dept= 69	Sup1= 13	YTDQty= 68.5								
	16-Dec-13/40	07-Dec-13	32	32	Mkt \$= 82.600	Max= 999	SugMax= 82	Ord % =100	Loc = 40	Sup2= 0	YTD\$\$\$= 341.82									
Total Order Value: 3241.34																				

- This process can be done with both EDI and non-EDI vendors
- Keep in mind with EDI vendors, you will be getting an electronic version as well of this order
- For non-EDI vendors a copy of the P.O will print out for you to do what you need to with



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Other resources

Anderson Feed & Supply, Inc. Suggested Order Report Page: 1

Selection	Beginning	Ending	Additional Options	Sort Order	Date
Part Number	ALL	zzzzzzzzzzzzzzzz	Stock Days= 14	Sort By = None	Run on= 12-Oct-15
Department	ALL	ALL		Order = None	
Supplier	ALL	ALL	Dept Override Enabled = True	Then By = None	At= 4:11 PM
Class	ALL	ALL	Item Override Enabled = True	Order = None	
SubClass	ALL	ALL	Limit report supplier = Any	Then By = None	By= 1
Location	10	40		Order = None	
Counted Between	12-Oct-14	13-Oct-15	Create Working PO = No		

Line	Record Number	Order #1	SOH	Sup Ratio	Order #2															
	Description	On Order	Demand	EXT	MFG Number															
	Last Rec'd	Lot Count	Qty Req	Sup Qty																
1	104124	104124	10	1	104124	Ave \$= 252.076	1	0	0	1	0	1	6	0	1	5	1	27	34	
	P3016A CHAIN SAW	967196481	3	9	24	3301FFS/14	Lot \$= 252.460	Min= 0	SugMin= 0	OrdQty= 1	Dept= 9	Sup1= 13	YTDQty= 84							
	05-Jun-14/24	14-Nov-14	5	5	1262.30	Mkt \$= 252.460	Max= 999	SugMax= 32	Ord % =100	Loc = 30	Sup2= 0	YTD\$\$\$= 23825.34								
2	217689	6262588	28	1	217689	Ave \$= 82.340	4	0	0	2	0	60	36	0	2	7	1	11	66	
	295300 WHT VNTY WASTEBSKT	60	13	51		Lot \$= 82.340	Min= 0	SugMin= 0	OrdQty= 1	Dept= 1	Sup1= 13	YTDQty= 202								
	04-Dec-14/7	14-Nov-14	10	10	23.40	Mkt \$= 82.340	Max= 0	SugMax= 65	Ord % =100	Loc = 10	Sup2= 0	YTD\$\$\$= 1597.98								
	477338	477338	299	1	477338	Ave \$= 86.970	0	0	0	1	1	0	0	0	0	3	300	110	120	
3	2X4X8 NUMBER 2 PREM MCKENZIE	433	1000	22		Lot \$= 86.970	Min= 11	SugMin= 0	OrdQty= 1	Dept= 10	Sup1= 13	YTDQty= 2907								
	04-Dec-14/200	07-Dec-13	268	268	1067.96	Mkt \$= 86.970	Max= 999	SugMax= 1252	Ord % =100	Loc = 40	Sup2= 0	YTD\$\$\$= 34169.10								
	653055	653055	0	1	653055	Ave \$= 80.960	2	0	0	0	0	0	0	0	0	0	0	0	0	
4	31166 PLUMBERS PUTTY 140Z	0	2	31166		Lot \$= 80.960	Min= 0	SugMin= 0	OrdQty= 1	Dept= 5	Sup1= 13	YTDQty= 2								
	11-Oct-14/2	05-Dec-13	2	2	1.92	Mkt \$= 80.960	Max= 999	SugMax= 4	Ord % =100	Loc = 10	Sup2= 0	YTD\$\$\$= 03.04								
	LUM1	LUM1	-16.5	1	LUM1	Ave \$= 82.600	66	0	0	0	0	0	0	0	0	3	0	0	0	
5	2X4X8	0	32.75	1		Lot \$= 82.600	Min= 11	SugMin= 0	OrdQty= 1	Dept= 69	Sup1= 13	YTDQty= 68.5								
	16-Dec-13/40	07-Dec-13	32	32	85.76	Mkt \$= 82.600	Max= 999	SugMax= 82	Ord % =100	Loc = 40	Sup2= 0	YTD\$\$\$= 341.82								
Total Order Value: 3241.34																				

- ❑ There are some KBA's on how to process Purchase Orders
- ❑ Suggest Order KBA's are being worked on as well
- ❑ Can be found inside Paladin under the help menu



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End

Recording available at:
paladinpointofsale.com/webinars

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