

ROMAC SERIES 8 PURCHASE ORDER

Version 8.0

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OPERATOR'S MANUAL

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Software License Agreement and Limited Warranty

The Romac Series 8 Purchase Order software and documentation is protected by United States copyright laws and also by international treaty provisions. The Purchase Order software is subject to the following license agreement and limited warranty.

Romac Computer Services, Inc. grants to Purchaser a non-exclusive paid license to use on Purchaser's computer one copy of the software for each license purchased and paid for. Title to the media on which the software is recorded is transferred to the Purchaser, but not title to the software.

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Purchaser may not rent, lease, sell, modify, or otherwise transfer this license except as provided for in this agreement.

Romac Computer Services, Inc. shall have no liability for loss of business or profits caused or alleged to be caused by use of this software. Romac Computer Services, Inc.'s liability shall be limited to correction of any defects reported within sixty (60) days of original purchase date or to refund of purchase price.

This agreement shall be governed by the laws of the State of Tennessee.

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Overview

The Romac Series 8 Purchase Order program is used to create and manage purchase order documents generally used in the structural steel fabricating and similar industries.

The Purchase Order module is used to generate purchase orders for steel and other items including weight and cost extensions. Materials added to the purchase orders can be automatically added to the inventory. All material receipts are noted through the purchase order program.

Romac Series 8 Purchase Order is a Windows programs and is compatible with Windows 95, 98, ME, NT4.0, and 2000. The program must be installed onto each user's workstation. Project data can be shared among users on a network. When used on a network, a lock feature allows only one user to access project data at any one time.

This documentation was written for version 7.0.0 of Romac Series 8 Purchase Orders Package. Later versions of the program may contain features and functions not included in this documentation or may have different implementation methods. Please contact Romac Computer Services, Inc. or refer to our website www.romacinc.com for information regarding the latest versions of the program and documentation.

See the separate Fabrication Package manual for installation instructions.

Software Purchase and Registration

Upon installation of this software, you will be given a 45-day evaluation period that gives you access to most program features.

You may purchase and register the software at any time during or after the evaluation period. Each registration gives you a license to use a single installation of the software in accordance with the Software License Agreement and Limited Warranty.

Each installation will generate a different serial number. This serial number is required for registration. The serial number will be included on the printed registration form (see Maintenance | Software Registration | Print Registration Form) in each application. The serial number is also available at the Help | About dialog box.

Registration numbers can be entered at the Maintenance | Software Registration | Enter Registration Numbers menu option.

For the Windows NT4.0, Windows 2000 and Windows XP operating system, you must be logged in as a user with administrator (or super user) privileges to run the software in evaluation mode or to run the software prior to registration. If you run the programs using these operating systems prior to registration, the evaluation period will expire and the serial number will change.

Once registered, the software can be run by an operator with limited user privileges without problems.

A new registration code may be required if you reformat your hard disk or upgrade to a new computer. Romac Computer Services will transfer your registration to another computer at no charge as long as there is no evidence of violation or abuse of the license agreement.

General Program User Interface

The Romac Series 8 applications generally follow the guidelines published by Microsoft for the user interface. A basic knowledge of the common Windows user interface should be enough to use the programs features.

One deviation from the Windows standard is that our applications can use the ENTER key in addition to the TAB key to exit a data entry field.

For users of our previous steel related applications, we have retained the same methods for entering steel material descriptions and lengths. The redefined fractions keys are still used to enter fractions in descriptions and dimensions.

The Series 8 Fabrication Package programs are multi-user applications. File locks are internally handled by the program. If a user attempts an operation that is in conflict with what another user is working on, the program will advise and not allow the second user to proceed.

Start Up

If the default installation was used; click the Start button, then click on 'Programs', next click 'Romac Applications' and finally click 'Series 8 Purchase Orders'.

Menu Structure Summary

File

- New Purchase Order
- Open Purchase Order
- Delete Purchase Order
- Exit

Reports

- PO Vendor Copy
- Open Orders Report
- Expedite Report
- Current Orders Report
- Job Material Report
- Vendor Listing
- Comments Listing

Maintenance

- Materials Database
 - Edit Materials Database
 - Display Materials Database
 - Synchronize Materials Databases
- Material Specifications
 - Edit Specifications Table
 - Edit Default Specifications
- Edit Vendors
- Edit Ship To
- Edit Comments
- Set Configurations
 - Miscellaneous
 - Data Files Location
 - Inventory Interface
- Software Registration
 - Print Registration Form
 - Enter Registration Number

Help

- Contents
- About

Purchase Order Types

Each purchase order is assigned a Purchase Order Type. The type determines whether the purchase order is posted to inventory, the delivery date name (Delv, Ship, Roll, etc.) for the purchase order and whether a 24 character reference field is included with each purchase order line item. Twenty different type definitions are available. The type description is for your own reference.

Use the menu selection "Maintenance | Set Configuration | Miscellaneous" to edit Purchase Order Types.

Reference Name – If you need to include secondary information with each purchase order item, this field should contain the title of this secondary information (such as Remark, Marking, etc.). Including a reference name adds a 24 character field for each purchase order line item. Printing of the field on the purchase order vendor copy is optional. If the reference name is omitted, the field is not available on the purchase orders assigned this type.

Delivery Name – A four character delivery name prefixing the delivery date on purchase order headings. For example; "Delv", "Ship", "Roll", or whatever the promise date relates to.

Post To Inventory – Denotes whether the purchase order items are to be posted to the Romac Inventory (if on line). Generally, job and stock material coming into your shop should be posted to the inventory. Items not normally posted to the inventory would be items shipping directly to the job site or maintenance or similar supplies.

Note, a change to a Purchase Order Type does not affect previously created purchase orders.

Update Vendor Information

Before creating a purchase order to a vendor, that vendor must be added to the system. To add or update vendor information, use the menu selection "Maintenance | Edit Vendor". A printed listing of vendors is available at "Reports | Vendor Listing".

Update Vendor Information

Vendor Number: (Adding New Vendor)

Company Name:

Address 1:

Address 2:

City: State: Zip:

Phone: Fax:

Salesman:

Terms:

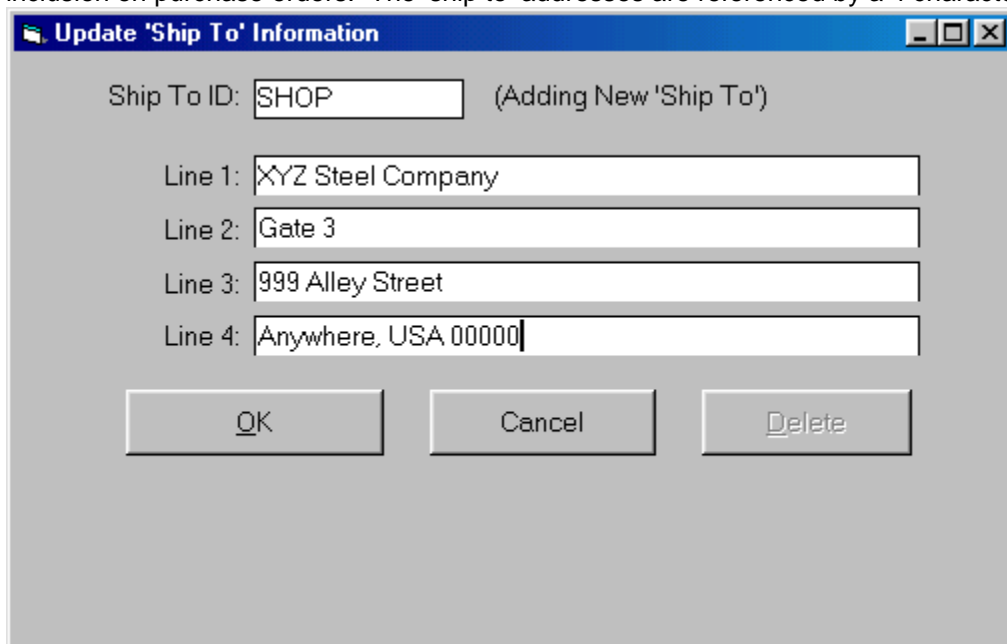
Ship Via: FOB:

The vendor number can be up to 6 characters in length. Any combination of alphanumeric characters can be used for the vendor number.

Update 'Ship To' Information

The purchase order system allows you to pre-enter 'ship to' name and address information for

inclusion on purchase orders. The 'ship to' addresses are referenced by a 4 character ID.



The screenshot shows a dialog box titled "Update 'Ship To' Information" with a blue header bar. The dialog contains the following fields and buttons:

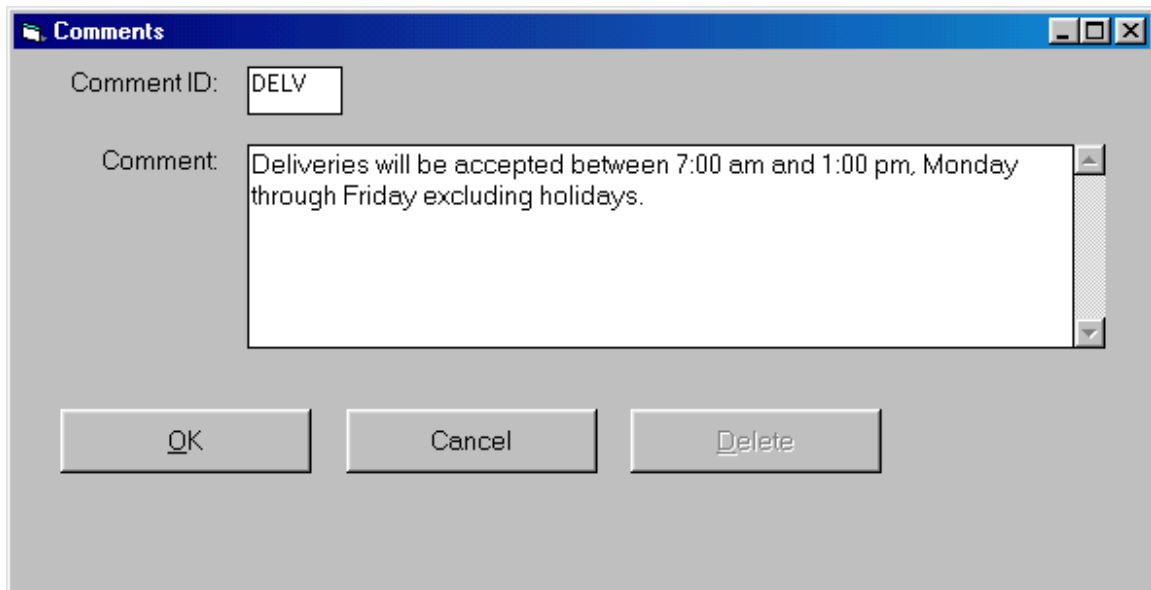
- Ship To ID: (Adding New 'Ship To')
- Line 1:
- Line 2:
- Line 3:
- Line 4:

At the bottom of the dialog are three buttons: , , and .

Comment Text

The purchase order program allows comment text (or notes) to be placed on the purchase order. Comment text can be placed at the beginning and/or end of the purchase order or comment text can be added to each line item on the purchase. The size of the comment text is unlimited. Realizing that some comments are standard and are used over and over, the Series 8 Purchase Order program allows you to pre-enter these comments into a file for recall and reuse. Each comment is given a 4 character ID.

Use menu selection “Maintenance | Comments Listing” to enter or edit these pre-entered comments. The Comments text editor does not contain any text formatting capabilities. You can use <Enter> to start a new line.



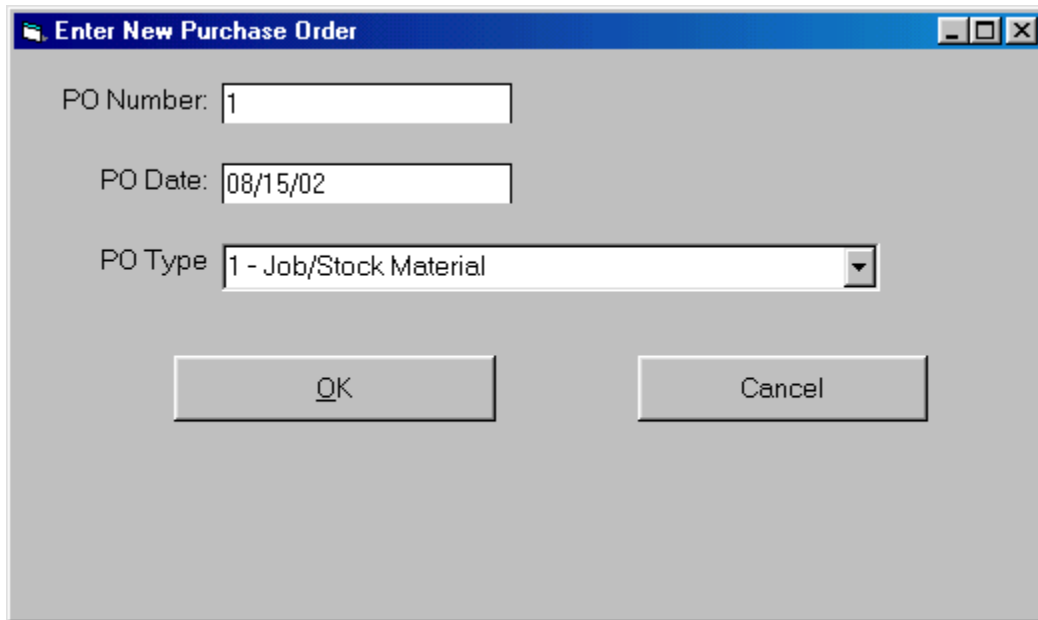
The screenshot shows a window titled "Comments" with a blue title bar. Inside the window, there is a "Comment ID:" label and a text box containing "DELV". Below that is a "Comment:" label and a large text area containing the text "Deliveries will be accepted between 7:00 am and 1:00 pm, Monday through Friday excluding holidays." At the bottom of the window are three buttons: "OK", "Cancel", and "Delete".

When adding comment text to a purchase order, you can recall using the ID or if the comment is specific to that purchase order, you can use “MISC” as the comment ID then enter the comment text without setting it up with an ID first. Also, if the required comment is close to something you have on file, you can recall the comment from the file then change the ID to “MISC”, this will retain the text and allow you to edit it within the purchase order.

A purchase order can contain unlimited beginning and ending comments but can include only one comment per line item.

New Purchase Order

If the “Auto Generate PO Number” feature is turned on, the system will generate the next available order number. You can accept the auto generated number or change it to a different number. If the auto generate feature is not turned on, you must enter the new purchase order number. In either case, the system will not permit duplicate purchase order numbers.



The screenshot shows a dialog box titled "Enter New Purchase Order". It contains three input fields: "PO Number" with the value "1", "PO Date" with the value "08/15/02", and "PO Type" with a dropdown menu showing "1 - Job/Stock Material". At the bottom are two buttons: "OK" and "Cancel".

The PO date and PO type are entered on the first screen. The date can be changed prior to issuing the purchase order but the PO Type cannot be changed after it has been selected from this screen.

The purchase order uses five tabbed screens to enter various areas of data. The five tabs are:

General – Includes general purchase order title information.

Item(s) List – Contains the actual purchase order line items. Each purchase order can contain up to 999 line items.

Beginning Comments – Any comments (or notes) that will appear after the heading but before the listing of the line items can be added here. Note, these are comments that will appear on the printed purchase order.

Ending Comments – Any comments that you wish to appear at the end of the line items listing can be entered here.

Extra Charges – Any extra charges that apply to the overall purchase order can be entered here. Extra charges would be shipping charges, taxes, etc.

General

PO Number: 1 To: Ace Steel Supply
Type: 1 Not Issued
Item Count: 0 Total Weight: 0 Total Cost: \$0.00

1) General | 2) Item(s) List | 3) Beginning Comments | 4) Ending Comments | 5) Extra Charges

PO Date: 08/15/02 Ordered By: ABC
Vendor: ACE Browse Ship To: SHOP Browse
Ace Steel Supply
1234 Industry Ave.
Anywhere, ST 00000
XYZ Steel Company
Gate 3
999 Alley Street
Anywhere, USA 00000

Rqn No: Rqn By: Job No: 999
Ship Via: BEST WAY FOB: DESTINATION Delv Date: 8/30/02
Terms: USUAL Salesman: Joe Expd Date:
Phone: 000-000-0000 Vend Fax: 000-000-0001

Close Print Vendor Copy

The Vendor is selected by Vendor ID. The vendor must have been pre-entered into the system.

Ship to can be selected by Ship to ID or if "MISC" is entered at Ship to, you can enter the ship to address information directly into the purchase order.

PO Data, and Vendor data cannot be changed after a purchase order has been issued.

Ordered By, Rqn No, Rqn By, Ship Via, FOB, Terms, Salesman, Phone, and Vend Fax fields are all optional and self-explanatory. Data in these fields can be changed at any time until the purchase is received complete and closed.

If the entire purchase order is for a single job or all items are being purchased for stock, enter the job number (or STOCK) into the Job No field on the General tab. If the purchased material is for more than one job, leave the Job No field on the General tab blank – you will then be prompted to enter a job number for each line item of the purchase order.

The Delv Date is handled similarly to the job number. If the entire purchase order is placed for one delivery date, enter that date on the General tab. If the purchase order is placed with various delivery dates, leave Delv Date blank on the General tab then enter the delivery date for each line item.

Job vs. Stock Material

Job No is used to denote if material is purchased for a specific job. If the material is not purchased for a specific job, you can enter 'STK', 'STOCK', or leave the field blank. If the purchase order is posted to inventory, job material will be flagged in the inventory as status RES (reserved) for the specified job, stock material will be flagged as status STK.

Within the inventory, materials that are ordered for a job and materials that are ordered for stock are noted and tracked differently. Materials that are ordered for a job are tracked and reported as "Job Ordered" material. In the inventory listing, "Job Ordered" material is noted with an asterisk (*) following RES or ALC in the status column. Materials that are ordered as stock are tracked and reported as "Job/Stock" material. Any "Job Ordered" materials left over after a job is completed can be transferred to stock status. The transferred material will be shown on the "Materials Transfer" report.

Purchase Order Items

The purchase order items are entered, edited, and receipt quantities noted from the “Item(s) List” tab. A purchase order can contain up to 999 line items. Line items are numbered 001 through 999. A purchase order line consists of the following:

Quantity

The quantity unit method will always be pieces with a maximum quantity of 9999 pieces. The quantity for an item can be changed at any time as long as the line item has not been received complete.

If the quantity is changed to 0 prior to purchase order issue, the item will be taken out of the purchase order when issued and all line numbers will be adjusted to maintain contiguous line numbering.

After a purchase order has been issued, the quantity can be changed if the item has not been received complete. The quantity can be increased or decreased but cannot be decreased to a lesser quantity than has been received.

To take an item out of the purchase order after it has been issued but before any receipts are made, change the quantity to 0. The item will remain in the purchase order but with the 0 quantity and thus effectively removed.

If the purchase order is posted to inventory, any quantity changes after the purchase order is issued will be reflected in the inventory.

The screenshot shows a software window titled "PO Number: 1" with the following details:

- PO Number: 1
- To: Ace Steel Supply
- Type: 1
- Not Issued
- Item Count: 0
- Total Weight: 0
- Total Cost: \$0.00

Navigation tabs: 1) General, 2) Item(s) List, 3) Beginning Comments, 4) Ending Comments, 5) Extra Charges

Append Mode

Line	Qty	Description	Width: N/A	Len: ft-in	Spec
001	12	W 36 x 300		6-7 1/2	A992

Wt Unit	Cost Unit	Cost Meth	Delv Date	Job No	Remark
300	.29	Lb.	08/30/02	999	Cut to length

Total Wt	Ext Cost	Posted Recv Qty	Total Recv Qty
23850.0	6916.50	0	0

Comment ID: MISC

Cut per sketch SK-1 dated 6/14/02.

Buttons: OK, Cancel, Display, Close

Material Description

The material description entry is made by entering the shape code followed by [ENTER] (or the space bar) then the description. Width and length (if applicable) are entered in separate fields. For most entries, if the description contains fractions, the fraction entry is made using re-defined fractions keys. This allows you to make fraction entries using one keystroke. The re-defined fraction keys are:

W=1/16, E=1/8, R=3/16, T=1/4, Y= 5/16,
U=3/8, I=7/16, O=1/2, S=9/16, D=5/8,
F=11/16, G=3/4, H=13/16, J=7/8, K=15/16

The shape codes and corresponding description formats are:

Note, these examples are based on US standard description entry. Metric description entries are similar except fractions are not applicable. Depending upon whether you are updating a US standard or metric item, the appropriate Description Type at the upper right of the window must be checked.

W, WT, C, MC, S, ST, M, MT, & HP - (Structural shapes as per AISC designations).

Description is entered by typing in the shape followed by [ENTER] (or space) then the depth, then X, then the weight per foot followed by [ENTER]. Spaces are automatically inserted before and after the 'X'. Use the decimal point where required. Optionally, the '+' key can be used rather than 'X'.

Example: W 10 x 22

L – (Angles). Input is in inches and inch fractions. Description is entered by typing in the shape followed by [ENTER] (or space) then leg 1, then X, then leg 2, then X, then the thickness followed by [ENTER]. Fractions must be entered using the redefined single key. Spaces are inserted by the computer where required for clarity.

Example: L 3 1/2 x 3 1/2 x 5/16

PL - (Plate). Input is in inches and inch fractions. Description is entered by typing in the shape followed by [ENTER] (or space) then the thickness followed by [ENTER]. Maximum thickness is 9 15/16". Fractions must be entered using the redefined single key. Spaces are inserted by the computer where required for clarity.

Example: PL 1/2

BR - (Flat bar). Input is in inches and inch fractions. Description is entered by typing in the shape followed by [ENTER] (or space) then the thickness, then X, then the width followed by [ENTER]. The maximum width/thickness is 99 15/16".

Example: BR 1/2 x 4

SQ - (Square bar). Entry is in inches and inch fractions. The description is entered by typing in the shape followed by [ENTER] (or space) then the bar dimension followed by [ENTER]. Maximum dimension is 9 15/16". Fractions must be entered using the redefined single key.

Example: SQ 1/2

RD - (Round rod). Entry is in inches and inch fractions. The description is entered by typing in the shape followed by [ENTER] (or space) then the diameter followed by [ENTER]. Maximum diameter is 9 15/16". Fractions must be entered using the redefined single key.

Example: RD 3/4

RB - (Rebar). The description is entered by typing in the shape followed by [ENTER] (or space) then the bar size followed by [ENTER]. Allowed bar sizes are 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 14, and 18.

Example: RB 4

GA - (Gauge material). The description is entered by typing in the shape followed by [ENTER] (or space) then the gauge thickness followed by [ENTER].

Example: GA 11

FP - (Floor Plate). Entry is similar to plate (PL).

Example: FP 3/8

TS - (Square and rectangular tube). Entry is similar to Angle. The wall thickness must always be the last entry. If the wall thickness entry is 7 - 28, then a gauge wall thickness is assumed.

Example: TS 4 x 4 x 1/4

TO - (Round tube). Entry format is shape followed by [ENTER] (or space) then the outside diameter in inches and inch fractions), X, then the wall thickness. The wall thickness must always be the last entry. If the wall thickness entry is 7 - 28, then a gauge wall thickness is assumed.

Example TO 4 x 1/2

PI - (Pipe). Schedule pipe can be entered using this Shape code. The entry format is Shape, [ENTER] (or space), diameter, <X>, then the schedule followed by [ENTER].

Example: PI 4 x 40

PS, PE, and PD - (Pipe). Standard (PS), Extra strong (PE), and Double extra strong (PD) pipe can be entered using these Shape codes. The entry format is Shape, [ENTER], then the diameter followed by [ENTER].

Example: PS 4

PE 4

PD 4

CB - (Bar Channel). Entry is similar to Angle.

Example: CB 1 1/2 x 1/2 x 1/8

TB - (Bar Tee). Entry is similar to Angle.

Example: TB 1 1/2 x 1 1/2 x 3/16

BTH - (High strength Bolt). Enter the shape then [ENTER] (or space), diameter, then X, then the length followed by [ENTER]. All entries are in inches and inch fractions.

Example: BTH 3/4 x 2 1/2

BTM - (Machine Bolt). Enter the shape then [ENTER] (or space), diameter, then X, then the length followed by [ENTER]. All entries are in inches and inch fractions.

Example: BTM 3/4 x 2 1/2

BTN - (Nut). Enter the shape then [ENTER] (or space), diameter in inches and inch fractions followed by [ENTER].

Example: BTN 3/4

WHF - (Flat Washer). Enter the shape then [ENTER] (or space), diameter in inches and inch fractions followed by [ENTER].

Example: WHF 3/4

WHB - (Bevel Washer). Enter the shape then [ENTER] (or space), diameter in inches and inch fractions followed by [ENTER].

Example: WHB 3/4

WHL - (Load indicator Washer). Enter the shape then [ENTER] (or space), diameter in inches and inch fractions followed by [ENTER].

Example WHL 3/4

BTE - (Expansion Bolt). Enter the shape then [ENTER] (or space), diameter, then X, then the length followed by [ENTER]. All entries are in inches and inch fractions.

Example: BTE 3/4 x 4

BTW - (Wedge insert). Enter the shape then [ENTER] (or space), diameter in inches and inch fractions followed by [ENTER].

Example: BTW 3/4

AB - (Anchor Bolt). Enter the shape then [ENTER] (or space), diameter, then X, then the length followed by [ENTER]. All entries are in inches and inch fractions.

Example: AB 3/4 x 12

SC -(Shear Connector). Enter the shape then [ENTER] (or space), diameter, then X, then the length followed by [ENTER]. All entries are in inches and inch fractions.

Example: SC 1/2 x 4

GR - (Bar Grating). Enter the shape then [ENTER] (or space) then the bearing bar depth, then X, then the bearing bar thickness followed by [ENTER]. All entries are in inches and inch fractions.

Example: GR 1 1/4 x 3/16

REM - (Regular Expanded Metal). Enter the shape then [ENTER] (or space) then the diamond SWD, then X, then the gauge thickness followed by [ENTER].

Example: REM 3/4 x 16

FEM - (Flattened Expanded Metal). Enter the shape then [ENTER] (or space) then the diamond SWD, then X, then the gauge thickness followed by [ENTER].

Example: FEM 3/4 x 16

SI - (Special item with weight calculated per each or item). Used for entries such as castings where the weight is calculated by the item. SI can also be used for items that do not have a weight. At Shape type SI [ENTER], then a 24 character description followed by [ENTER]. Redefined fraction keys are not available for the description part of this entry.

Example: SI #101 CASTING

SA - (Special item with weight calculated by Area). Used for items such as grating where weight is calculated by area. At Shape type SA [ENTER], then a 15 character description followed by [ENTER]. Redefined fraction keys are not available for the description part of this entry.

Example: SA 1/8" PERF. PL

SL - (Special item with weight calculated by Length). Used for items such as extrusions or aluminum sections. At Shape type SL [ENTER], then a 24 character description followed by [ENTER]. Redefined fraction keys are not available for the description part of this entry.

Example: SL #101 EXTRUSION

Width

For items that require a width entry (such as plates, sheet, SA, etc), you will be prompted to enter the width. The width entry is in inches or millimeters depending upon the size method (US standard or metric). Re-defined fraction keys are used to enter fractions for US standard item entries.

Length

For items that require a length entry, you will be prompted to enter the length. If the size method is metric, the length entry will always be millimeters. If the size method is US standard, the length entry will be in inches if a width entry was also required or the length entry will be in feet and inches if a width entry was not required. Re-defined fraction keys are used to enter fractions for US standard item entries.

Material Spec

The Spec field will be automatically filled in with the default specification based on the shape. If this is correct for the item, you can tab or enter to the next field. A different spec can be selected from the specification table or you can enter the material code (1 – 99) relating to the actual specification. Regardless of which method is used to enter the specification, it must exist in the specifications table.

Weight Unit

The program will check the inventory (if online) and the materials database for the item's description/specification. If it is found in either of the areas, the weight unit field is filled in using the lookup data. If the item is not found, you will be prompted to enter the weight unit. The weight unit is optional for some shapes such as SI, SA, SL, and bolts.

Most steel sections will be in the materials database. If the item is a steel shape and you are prompted for a weight unit, check your description entry for a typo error. If the description is correct, you might want to make a note of it and add to your materials database at a later date.

Weight units are per each for all bolt shapes (BTH, BTM, TC, BTN, WHF, WHB, WHL, BTE, BTW, AB, SC) and SI shapes.

Weight units are per area (square foot or square meter) for PL, GA, FP, GR, REM, and FEM shapes.

Weight units are per length (foot or meter) for all other shapes.

Cost Unit and Cost Method

The cost unit entry is optional. If for some reason you do not want to include costs on the purchase order, cost unit and cost method can be skipped.

Available cost methods are per lb., per cwt., per lin. ft, per sq. ft., per each, and per lot. Depending on the description, some methods may not be available for the item. Per lot is a total price for the line item regardless of quantity.

The cost unit and method can be changed at any time until the line item is received complete. If a change is made after the purchase order is issued and posted to the inventory, the change may not be reflected in the inventory until receipts are posted for the item. If a cost unit or method change is made to an item that has been partially received, the cost change will not be reflected in the inventory for the items previously received. A variance report is available to show any differences in costs on the purchase order versus costs posted to the inventory.

Delivery Date

If the delivery date is entered on the general tab, this field will be automatically filled in and cannot be changed. If not entered on the general tab, the entry is optional for each line item. Format is mm/dd/yy.

Job Number

If the job number is entered on the general tab, this field will be automatically filled in and cannot be changed. If not entered on the general tab, the entry can be made here. If omitted, the job number will default to STOCK.

Item remark field

If defined by the purchase order type used for this purchase, an optional 24 character entry can be made for each line item. This field is not transferred to the inventory. Printing of this field is optional on the vendor copy therefore it could be used for information passed to the vendor or could be for internal use.

Item Comment

A comment can be added to each purchase order line item. Regularly used comment text can be added to the Comments file and the recalled by ID. Single use comments can be added by entering "MISC" as the comment ID then entering your comment text. If a cataloged comment needs minor editing, you can recall the comment then change the ID to "MISC", this will retain the text and allow you to make edits.

Comment text is printed on the purchase order vendor copy report.

Comment text length is unlimited but only one comment is allowed per line item.

Deleting or Revising Items

Other than cases where the delivery date or job number have been entered on the general tab, any field can be changed prior to issuing the purchase order.

After issue, the fields can be revised if receipts have not been entered for the item. Changes made after an item has been posted to inventory will be reflected in inventory.

After partial receipts have been made for an item, the only changes allowed are quantity changes. After an item has been received complete, no changes are allowed.

To delete a purchase order item, change the quantity to 0. All 0 quantity items will be removed when the purchase order is issued. If the purchase order has been issued, the quantity can be changed to 0 if it has not been received but the item number will remain on the purchase order.

Beginning and Ending Comments

A purchase order can contain comment text that is listed before and after the line items. Similar to line item comments, regularly used comment text can be added to the comments file and the recalled by ID. Single use comments can be added by entering "MISC" as the comment ID then entering your comment text. If a cataloged comment needs minor editing, you can recall the comment then change the ID to "MISC", this will retain the text and allow you to make edits.

The beginning comments tab and ending comments tab are used to enter these comments.

You can have an unlimited number of comments at the beginning and end of the purchase order. All comments are printed on the purchase order vendor copy report.

Extra Charges

The extra charges tab allows you to enter charges such as shipping or tax that apply to the entire purchase order.

PO Number: 1 To: Ace Steel Supply
 Type: 1 Not Issued
 Item Count: 3 Total Weight: 56,850 Total Cost: \$15,333.57

1) General | 2) Item(s) List | 3) Beginning Comments | 4) Ending Comments | 5) Extra Charges

Material List Total			15,496.50
Extra Charges:			
Delivery charges	150.00	/Lot	150.00
Discount	-2.00	%	-312.93
Extra Charges Total			-162.93
Vendor PO Total			15,333.57

3rd Party Freight

The amount can be positive or negative. Negative amounts are deducted from the purchase order totals. Cost unit methods are per lb., per cwt., per lot and percent.

When posting to inventory, these extra charges are prorated to each item thus adjusting the item unit cost listed in the inventory. When prorating extra charges to line items, charges based on weight (per lb. and per cwt.) are allocated only to items that have weights. Per lot and percent extra charges are prorated to all items on a percent basis.

Extra charges are included on the purchase order vendor copy.

If you will have freight charges that are not paid to the purchase order vendor, these can be added as "3rd party freight". These charges will not be printed on the purchase order vendor report but will be prorated to each item and added to the inventory cost. Cost methods and prorating are handled identically to extra charges.

Issuing the Purchase Order

Once a purchase order has been entered and checked, it should be issued. The issue option is on the General tab.

Issuing the purchase order will make it part of the reports that are generated by the program. If the purchase order is to be posted to the inventory, issuing the purchase order will post the items to the inventory.

Issued items posted to the inventory will be marked as on order in the inventory. Within inventory, the location column will be noted with 'ord' (lower case) for all on order items posted from the inventory. On order inventory items can be reserved and allocated to jobs but cannot be used until it has been received.

Purchase Order Receipts

Material receipts entered and posted from each individual purchase order.

The screenshot shows a software window titled "PO Number: 1" with the following details:

- PO Number: 1 To: Ace Steel Supply
- Type: 1 Issued: 08/22/2002
- Item Count: 3 Total Weight: 56,850 Total Cost: \$15,333.57
- Open Count: 2 Open Weight: 56,850

Navigation tabs include: 1) General, 2) Item(s) List, 3) Beginning Comments, 4) Ending Comments, 5) Extra Charges.

The "Receipts Mode" section contains a table with the following data:

Line	Qty	Description	Width: N/A	Len: ft-in	Spec
002	12	W 24 x 55		50-0	A992

Wt Unit	Cost Unit	Cost Meth	Delv Date	Job No	Remark
55	.26	Lb.	08/30/02	999	

Total Wt	Ext Cost	Posted Recv Qty	Total Recv Qty
33000.0	8580.00	0	8

The "Receipts:" section contains a table with the following data:

Quantity	Loc	Heat Number	Remark	Date Received
8	LC1	123456789		08/17/02

Buttons at the bottom include: Ok, Cancel, Clear Item Receipts, Display Mode, and navigation arrows.

When entering receipts, the receipt quantity cannot exceed the open quantity for that item. If the receipt quantity exceeds the open quantity, you must increase the purchase order item quantity before the excess receipt quantity can be entered. If you must enter excess receipts for an item that has been previously received complete, your only option is to add the item to the end of the purchase order.

The receipts location, heat number, and remark fields are optional. Data entered into these fields will be posted to the inventory. If the date received is left blank, the current date will be inserted.

Up to three receipt data items can be entered for each line item. This will allow you to enter receipts with more than one heat number for a single purchase order item. If you require more than three receipt data items, you can enter the first three items, post those receipts then enter the balance of the receipts.

The post receipts option is available on the General tab.

When the purchase order program attempts to access inventory for issuing or posting data, there may be times another user has the inventory item tied up. When this happens, the purchase order program skips the in use item will issue or post the data at a later date. If an item or post does not show up in the inventory, go back to the purchase order and retry the issue or post operation.

Purchase Order Vendor Report

Reports

Purchase Order Number: 1
Vendor: Ace Steel Supply

Purchase Order Vendor Copy

- Print Cost Units/Extensions
- Print Weight Extensions
- Print Item Remark
- Print Item Job Number
- Print Item Delivery Date

Copies to print:

- Original
- Vendor

Printer Setup

Cancel

OK (Print)

Up to 6 copies of a purchase order can be printed with a different “Copy For” message at the bottom of each copy. Use “Maintenance | Set Configuration | Miscellaneous” to enter the “Copy For” messages.