M E M O

To: PROMPT User's

From: PROMPT Business System Support

Subject: How to get started with the new PROMPT Purchasing Software

Date: 09/01/02

1. Go to **IC** and chose Option **2** – Display Purchasing Menu

2. Select Option **11** – Maintain Terminal Controls
   This feature is just like Sales Order Processing in that you must set up a record for each terminal that will be allowed to process Purchase Orders. A record is included in our release for the main terminal (#SYSLOG) and it should be okay except the buyer number might not suit you. Purchasing Order entry defaults the buyer number based on the terminal control record of the user entering the PO.
   Also, you might wish to override the default printer in a terminal control record to cause the PO to print on a printer close to the user entering the PO.

3. To access the Buyer master file go to **IC 5** and select option **17.**
   We suggest you enter a buyer name like this: **Buyer: John Doe**
   Yes, we do mean to put the text "Buyer:" in front of the buyer name. Remember to also enter the buyer number in each terminal control file as explained in 2 above. When a PO is entered the buyer number is defaulted form the terminal control file, but you can override it if desired.

4. Next go to **IC 2**, **12** to review the session control record provided with the release. If you do not want users to add vendors on line in the PO entry program change the question "Add Vendors On Line?" to **N**.
   You might wish to the printer name where PO's print to a different printer. You will note that the form is called "Invoice" but it is the PO and will be found in the forms setup (option 13) as form I R.

5. You are now ready to go to **IC 2**, **3** and try out the new software.
   First go to look at held orders. The terminology for **Held** is a purchase order that all lines have not been fully received. **Closed** is a purchase order where all lines are fully received. Unlike Sales Order Entry, in Purchase Order entry you do not **close** an order. The receiving program **IC 1**, **1** automatically closes a purchase order when all lines have been received.

6. The explanation in 5 above raises the question of what the Purchase Order program is doing on the Purchase Order Settlement screen when you get to the last entry on the screen and it puts a **C** beside the text "Complete & Return" ? This is simply the end of the process and a print will occur if you retain the setup provided with the software release. A comma entered at the SKU line on the first page also prints a PO.
The two prints are currently the same, but do not have to be. For example if you sometimes want to print a PO with no prices, and at other times want a PO with prices, you could make these two prints different!

7. Next you need to visit **IC 1**, **1** to see the changes to the receiving program. Option 1 that used to be "Order" is changed to **Order Search.**
We suggest you go to option **0 –** Receive and use the **F5** =Order Search From here so you will return to the receive screen after the search. Obviously this is the exact same search found in Purchase Order Entry.

8. The receiving function works like it did prior to the release with the now search added. However after a line has been received it can **never** be viewed again on the #BINTEP3 screen, as this function is now provided in **F5** =Order Search with the added ability to press **F6** for a detail search where you can view the full PO a page at a time. The primary view shows the quantity ordered and by pressing **F4** you get the remaining on order quantity (reduced by quantity received).

9. Remember you have the same features as sales order entry when you are on the Purchase Order Detail Generic Search screen you can use **F5** for Previous Vendor Order, or **F6** for next vendor order.

10. Also, remember when you are entering a PO using option **IC 2**, **3** you can press **F2** when the cursor is on PC and get the price you paid for this SKU the last time the product was ordered from this vendor.

11. In AP on program option 5 Invoice entry there is a new screen field "Due Date if Disc Lost" that is an optional entry for terms such as 1% Prox 10, net 30. Prior to this modification we never provided a way to track the second due date if the terms were lost on the 1st due date.

    To effectively use this feature you must modify all **PROX** terms using the menu option **AP 4, 4.** The terms file maintenance program values are to be entered as follows on PROX terms:

    The value to be entered in "If paid by no. of days" is the discount days For example in 1% PROX 10 days, net 30 terms, you would enter 10

The value to be entered in “Days to 1st Due Date” is the number of days if discount is not taken.
For example in 1% PROX 10 days, net 30 terms, you would enter 30

The same approach is now required in entry of any other terms with two discount dates such as 2% 10 net 30. Go to the AP 4,4 terms menu or AR 4, 6 terms menu (It is the same file accessed from two different places) and modify these terms accordingly.

Some Miscellaneous information about using the new software

How the ship to window works

Default data
The default ship to address shown in the ship to window the first time it appears on a purchase order will be the warehouse address based on the warehouse number used to create the purchase order.

If any shipping instructions appear, they are coming from the vendor purchase order address file. We do not have shipping instructions associated with a warehouse, they are associated with a vendor.

Drop Ship address from OP
If a sales order has been entered in Sales Order Processing and there is a ship to record associated with this customer, you can use F4 - Maintain Ship to, on the purchase order settlement screen to modify the ship to data.

When in the ship to window use F3 to scroll to the desired customer number and sales order number then press enter and this ship to address from OP becomes the ship to address for PO. This includes the associated shipping instructions, if any.

The shipping address and associated instructions, if any, entered into OP cannot be changed using the purchase order program. They can only be changed in OP.

Create your own shipping address and/or shipping instructions
When in the ship to window you will always see some numbers and possibly a letter to the right of "Ship-To". For example if the default is shown and the warehouse number is 1, you will see 1 0 on the "Ship-To" line.

To create your own unique shipping address and or instructions that relate only to the PO you are currently processing simply change the first number to -1 then type over what ever you wish to change in the address or shipping instructions and press enter.

If you should change your mind after you have entered a -1 set of shipping instructions and want to go back to the ship to window to change what you previously typed, no problem, just change what you desire and press enter to modify.

Using Order reference on the Settlement Screen

Order Reference is now in the same window as Ship Via, Ship date, Freight and Other charges. This means you use **tab** when in this area to get to reference and only press enter after all data has been entered in these fields.

Refreshing prices after *MERGE

The *MERGE command works the same as in sales order entry, but the command LC=* is not used in Purchase Order Entry. After a *MERGE if you have merged an old PO and want the vendor prices (your cost) updated use the global command **PC=9**.

This global command will update the purchasing price for all SKU's except non stock items. This includes gathering prices, with quantity breaks from POXRFFLE (the Vendor cross reference price file located at IC 5 19) if applicable.

Sales History Inquiry

The sales history inquiry that was in the old purchasing software has been implemented as option 14 in the new Purchase Order entry program. You can also access this screen from the SKU entry line by entry of **H** as an SKU number.