

About PO Create

- As part of a strategic effort to replace all purchasing screens, the primary change in this release is to enhance PO create functionality using a new PO CREATE screen that ultimately will replace the existing PO PROFILE screen. **Note:** R57 is considered “Part 1” of a two phased effort, and R58 is considered “Part 2”.
- The existing PO PROFILE screen will remain “as is” in R57 so that users can manually review existing profiles in order to resave them in the new profile format.
- On the PURCHASING tab of the CONTROLS, STORE, STORE INFORMATION screen, there is a new switch that determines which screen is opened when the NEW PURCHASE ORDER button is clicked on the MAIN PURCHASE ORDER SELECTION screen. The new screen can also be accessed from the regular menu.
- On a new CONTROLS, SYSTEM, PURCHASING SETUP screen, there are new switches to determine if purchase and return timed orders are created in WIP or FIN status, and switches to determine the default purchase and return order methods displayed when the new PO CREATE screen opens.
- Profiles are no longer a drop-down like on the PO PROFILE screen. Instead, there is a new PROFILE button that works for orders similar to how the PROFILE button works on report screens. Profiles can be shared across different stores. Profiles can also be dynamically updated when additional line codes are added or removed on the SUPPLIER LINE CODES screen.
- On the SUPPLIER ORDER SPECIFICS screen, there are many new defaults. There are six new defaults related to Minimum Thresholds so in addition to Cost and Units, you can now use Packs, Weight, Volume and an Alternate Cost (using an exchange rate). There is a default for including core costs in Minimum Cost and a switch to determine whether the order is created (or not) if the minimum is not met.
- The new PO CREATE screen uses the following six tabs; OPTIONS, CRITERIA, STORES, PARTS, SCAN SESSION and SALES. Only the tabs required per order method are displayed.
- On the new OPTIONS tab, all supplier defaults can be viewed and overridden. There are also new options like the ability to order supercede parts instead of the superceded parts, to adjust (e.g. decrease) part order quantities when alternate parts exist that are “overstock” and to ignore the DNR Flag.
- On the new CRITERIA tab, there is the ability to enter multiple Line Code and PN Code criteria values using new multi-select pop-ups. There is also the ability to enter multiple LINE, PN CODE, PN Group, Sales Class1 and Order Type criteria values in a grid like on the SUPPLIER LINE CODES screen. In fact, initially the grid on the PO CREATE screen is copied from the SUPPLIER LINE CODES screen. There is also the ability to enter “Exclude” criteria values and multiple “Exclude” Sales Class values.

PO Create Overview

PWS PartsWatch R57.3

- On the new STORES tab, multiple stores can be selected for an order. Then, on the OPTIONS tab, there is a switch to create a CONSOLIDATED or DISTRIBUTED multi-store order. The DISTRIBUTED order retains the part order quantities per store after the order is created.
- On the new PARTS tab, there is the ability to create a WRITE-IN Purchase Order (PO) or Return Order (RO) by importing a list of parts from a file (e.g., Excel), for either a single or multi-store PO.
- On the new SCAN SESSION tab, there is the ability to create a SCAN-IN Purchase Order (PO) or Return Order (RO) Manifest by selecting a Scan Session (with a list of parts that were previously scanned using a wireless RF Gun).
- On the new SALES tab, the FORCAST PO and REPLENISHMENT (DAYFILL) PO work similar to how they worked in R56.