Purchase Orders
Installation Problems
Freight Claims

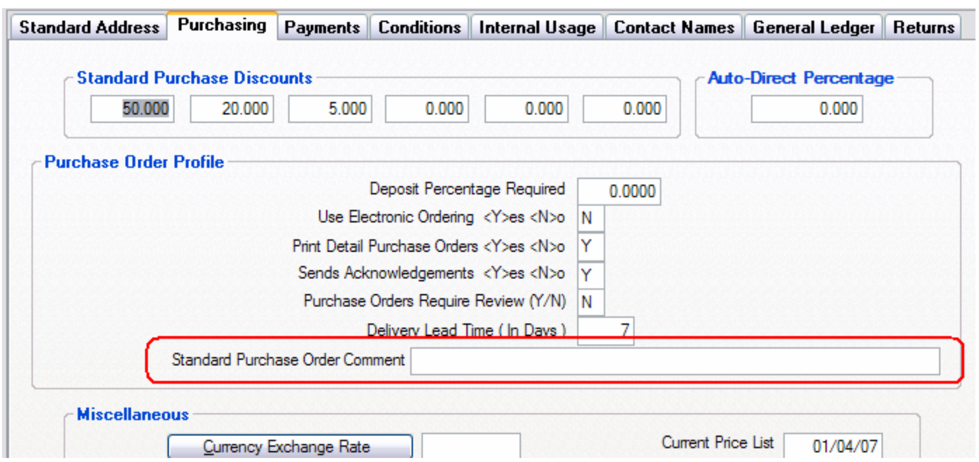
Alternative ways to add comments to Purchase Order, using the Change Purchase Order screen to edit a Purchase Order, adding lines to a Purchase Order, deleting Purchase Orders, dealing with multiple acknowledgements, unreceiving and undelivering and using the Damage Button.

Purchase Order Comments

You can always add comments to a Purchase Order by adding lines to the proposal. Just make sure you pick the same vendor, ship to address and purchase order break as the lines on the Purchase Order. There are a couple of other options though.

Vendors Profile

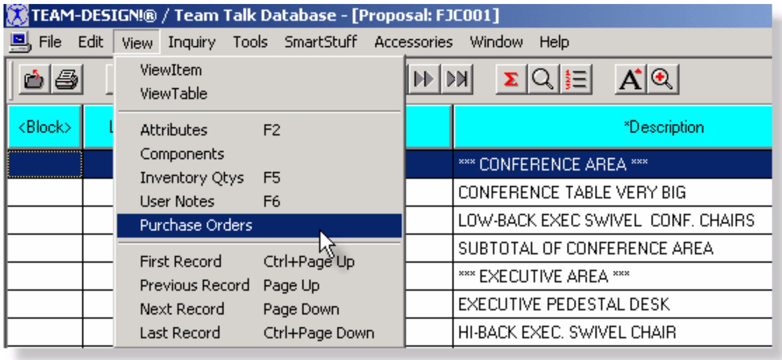
If you have comments or statements that you wish to appear on every purchase order then you can modify the Purchase Order form. If on the other hand you have certain comments that you wish to appear on every Purchase Order for a particular vendor but not on Purchase Orders for other vendors you can set up the comment in the vendor's profile. Go to Vendors | Maintenance, find the Vendor and highlight it and then click. This will open the profile of the vendor. Now go to the Purchasing tab.



Enter your comment in the **Standard Purchase Order Comment** field.

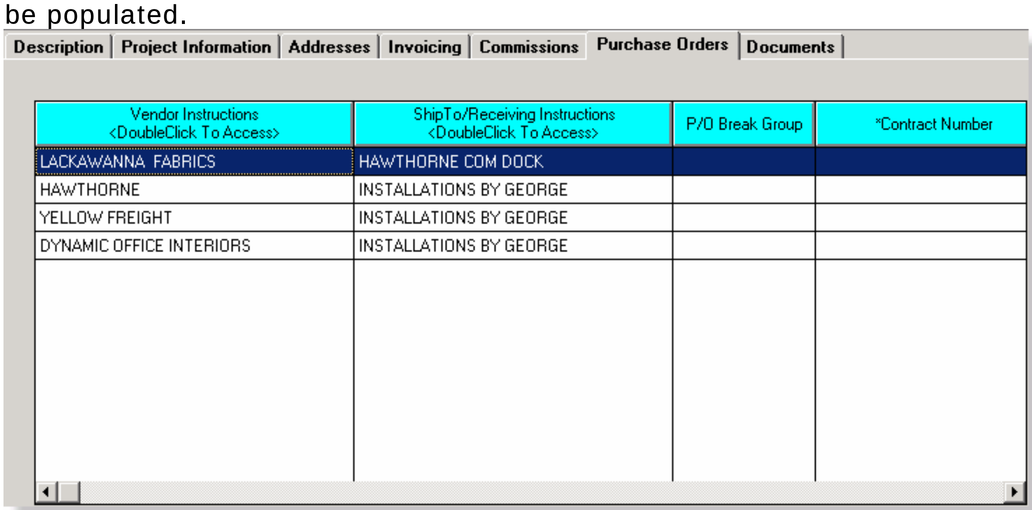
Purchase Order tab in the Proposal Profile

The Purchase Order tab in the Proposal Profile allows you to enter comments that will appear on a purchase order without adding a comment line directly to the proposal. Also, you can have the comments print on the Receiving Ticket just as easily. Go to Proposals | Maintenance. Find and highlight the proposal and then click. This will open the proposal profile. Now go to the Purchase Order tab. This tab includes columns for Vendor Instructions, Ship to/Receiving Instructions, P/O Break group, Contact #, and a requested ship date for all purchase orders that will be created for this proposal. Initially, this tab is blank. To populate and use this tab, first go into the proposal detail (use the F4 key shortcut) and click on *View* and choose *Purchase Orders*.



You should now see a blank Summary screen. Click Okay. The Summary screen will now show the purchase orders for the proposal, and the status (a purchase order# if ordered, or a message that this purchase order has not yet been ordered).

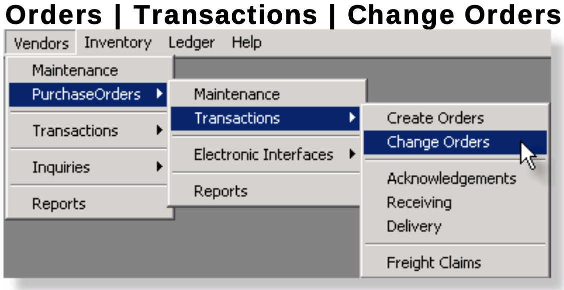
Now you can return to the proposal profile. Unfortunately there is no shortcut to go back to the profile. Hit the to go back to the list of proposals and click the to reenter the proposal profile and move to the Purchase Order tab which should now be populated.



Double click, or click once and hit enter, the a vendor to enter notes that will print on the Purchase Order for that vendor. Double click, or click once and hit enter, the Ship To Address to enter notes that will print on the receiving ticket. You can also change the requested delivery date from what was originally entered in the Proposal Profile under the Project Information tab. Notice that this gives you the ability to specify a different requested delivery date for each Purchase Order. You may also enter a contract number here that will print on the purchase order.

Change Orders

Once purchase orders have been created for line items on a proposal, changes to those line items must be made through the "Change Orders" function, **Vendors | Purchase Orders | Transactions | Change Orders**



You can locate a specific purchase order by using the .

By: Sls#-Project-Number - enter the salesperson number (hyphen) project number (hyphen) and actual purchase order number (example: 030-000101-00004002) will group the purchase order screen by the salesperson number and then by project number and then by actual purchase order number. Entering the whole number, with or without proceeding zeros (30-101-4002), will group the entire list of records and highlight the actual number entered. You can also use this option to search by just the salesperson's number.

By: Vendor Number/Name - The entry of a vendor number will group the purchase order maintenance screen by vendor. If you do not know the vendor number, entering a vendor name will provide a list of vendors to choose. After selecting the correct vendor name or number, the purchase orders will be grouped accordingly.

By: Customer Number/Name - The entry of a customer number will group the purchase order maintenance screen by customer. If you do not know the customer number, entering a customer name will provide a list of customers to choose. After selecting the correct customer name or number, the purchase orders will be grouped accordingly.

By: Proposal - The entry of a proposal number will group the purchase order maintenance list by proposal number and will highlight the proposal number entered.

By: Customer P /O - The entry of the customer's P/O number will group the purchase order maintenance list for all purchase orders by customer purchase order numbers and will highlight the first entry of the number entered.

By: Acknowledgement - The entry of the vendor's acknowledgement number will group the purchase order maintenance list for all purchase orders by the acknowledgement number and will highlight the first entry of the number entered.

By: Actual P/O Number - The full TeamDesign® purchase order number is seventeen digits long consisting of the three-digit salesperson number, the six-digit project number and an eight-digit actual purchase order number. The entry of just the eight-digit portion will group the purchase order maintenance list by purchase order number and will highlight the number entered. You can enter the full eight-digit number or eliminate the preceding zeros when using this search option.

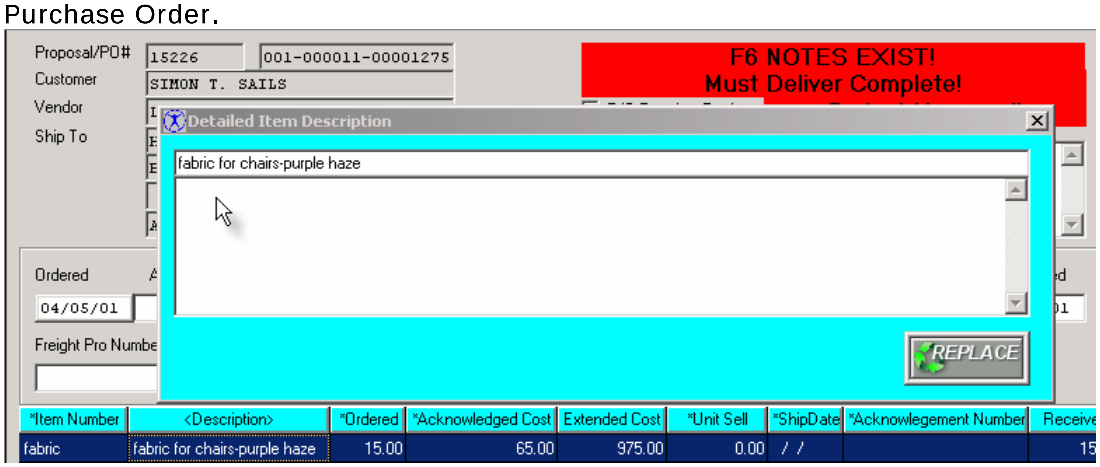
Editing the Purchase Order

Once you have found the Purchase Order either hit the F4 key or double click on it to enter the detail screen. From the detail screen of the Purchase Order you can change the values for a variety fields. Any changes made here will update the proposal.

All fields preceded by an asterisk (*) in the column heading of the data browser can be edited by clicking once in the field and pressing the Enter key or by double clicking in the field depending on the way your User Configuration is set up. This would include the quantity, unit cost/sell, item#, ship date, and tagging as the following screenshot illustrates.

*Item Number	<Description>	*Ordered	*Acknowledged Cost	Extended Cost	*Unit Sell	*ShipDate	*Acknowlegement Number
fabric	fabric for chairs-purple haze	15.00	65.00	975.00	0.00	/ /	
cmt	Please scotchgard fabric befo	1.00	0.00	0.00	0.00	/ /	

Double click in the description column for any line item on the purchase order and the "Brief Description" and "Detail Description" for that particular line item appears. You can change either of the descriptions and click "**Replace**". This will change the description on the purchase order, as well as update the proposal once you exit the Purchase Order.



Changing Vendor or Ship to Address

The vendor and ship to address are integral parts of the Purchase Order. As such they can not be changed very easily. It is much easier to correct a wrong vendor or ship to address before the Purchase Orders are printed. Running reports like the Proposal Edit and Analysis (File | Print Reports, from the line item screen of the proposal) make it easy to check for these types of errors.

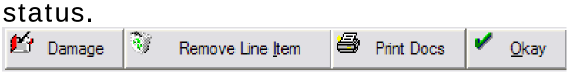
If the ship to or vendor number is incorrect and needs to be changed on a line then the line must be returned to an unordered status. To do this the line can either be removed from the Purchase Order or the whole Purchase Order can be deleted. If it is only one or two lines that need to be corrected then removing the individual lines from the Purchase Order is probably the easiest solution. If the vendor or ship to must be changed for the whole Purchase Order then the Purchase Order should be deleted.

When can you remove a line or delete a Purchase Order

To remove a line or to delete a Purchase Order the lines must be undelivered and unreceived. The line must not have already been invoiced to the customer and no payables may have been entered against the Purchase Order. If you have the proper security (the purchase/order/credit/halt override box is checked) then you can remove lines or delete a Purchase Order that has had payables entered against it otherwise any payables will have to be backed out, and any customer invoices reversed.

Removing a line from the Purchase Order

Use the “Remove Line” button at the bottom of the Purchase Order detail screen to remove a line from the Purchase Order. This will return the line in an unordered status.



Deleting a Purchase Order

Use the 🗑 to delete the Purchase Order.

Removing a line from a purchase order or deleting a purchase order will not remove lines from the proposal. It only returns them to an unordered status. At this point you can edit and change the lines from the proposal as if purchase orders had never been cut.

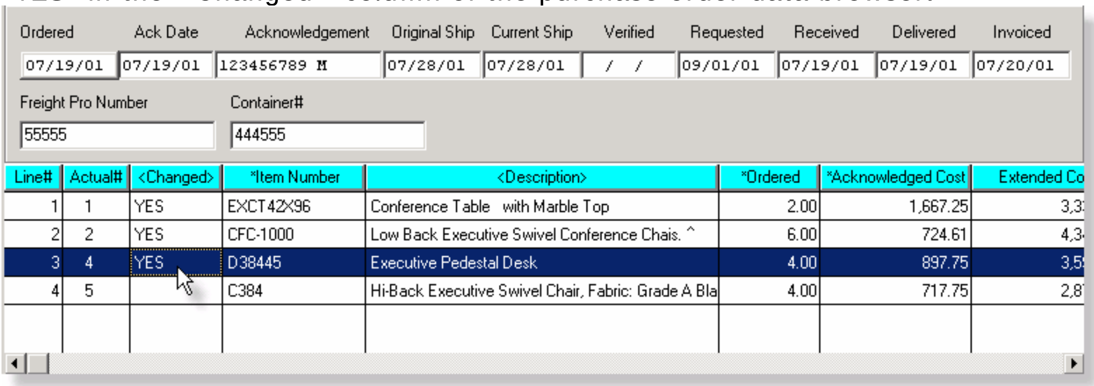
Adding items to Purchase Order

Once you have made the changes needed to the now unordered line items you will need to get them back to an ordered status. You could create a Purchase Order just for this unordered line or if there is a existing Purchase Order with matching vendor and ship to address you could add the line to that existing Purchase Order.

If the line with the unordered status has the same Vendor, Ship To number and Purchase Order Break as a current purchase order, then you would enter the Change Order screen for the purchase order and simply reprint the Purchase Order.

Printing a changed Purchase Order

From the main menu, select **Vendors | Purchase Orders | Transactions | Change Orders**. Double-click on the purchase order number to be re-printed. If changes have been made since the last printing of the purchase order there will be a "YES" in the <Changed> column of the purchase order data browser.

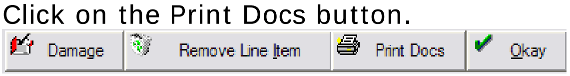


Line#	Actual#	<Changed>	*Item Number	<Description>	*Ordered	*Acknowledged Cost	Extended Co
1	1	YES	EXCT42X96	Conference Table with Marble Top	2.00	1,667.25	3,3
2	2	YES	CFC-1000	Low Back Executive Swivel Conference Chais. ^	6.00	724.61	4,3
3	4	YES	D38445	Executive Pedestal Desk	4.00	897.75	3,5
4	5		C384	Hi-Back Executive Swivel Chair, Fabric: Grade A Bla	4.00	717.75	2,8

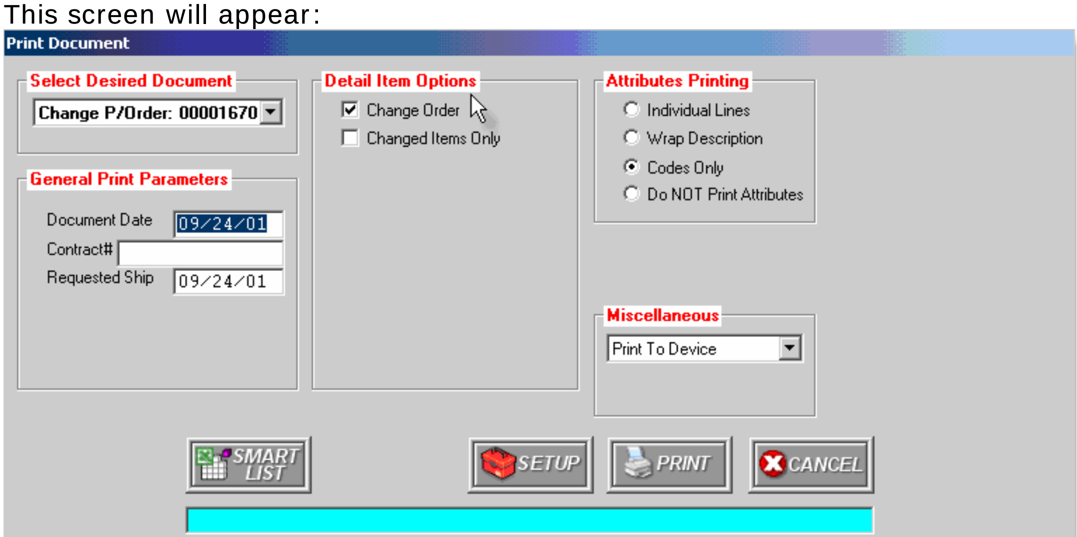
If you re-print the purchase order, the changed item is printed with a message stating, "The Following Item Is Changed". If you do not wish for this message to print, double click in the <Changed> field. The system removes the "YES" and the message will not print on the purchase order.

When you reprint the Purchase Order TeamDesign® examines each line on the proposal. If it finds an unordered line then it will compare the vendor, ship to address and purchase order break of the line to those of the Purchase Order. If they match then TeamDesign® will pull the unordered line onto the Purchase Order. They will be preceded by "Following Item is New". If you do not want this message to print on the Purchase Order that you send to the vendor uncheck the "Change Order" box before you reprint the Purchase Order.

Click on the Print Docs button.



This screen will appear:



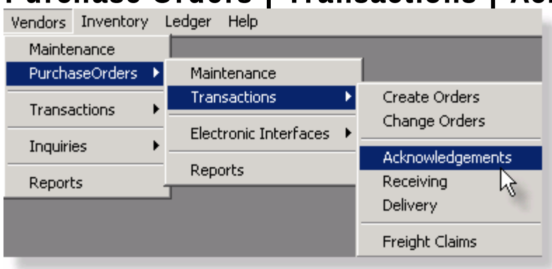
When reprinting a purchase order, the system defaults a checkmark in the box "Change Order" box indicating to the system to print a message on the purchase order stating "Change Order – Do Not Duplicate". If you do not wish this message to print on the purchase order, de-select the checkmark. A checkmark in the Changed Items Only box indicates to the system that you wish to print only those items that have been changed on your purchase order.

Reversing the deletion of a Purchase Order

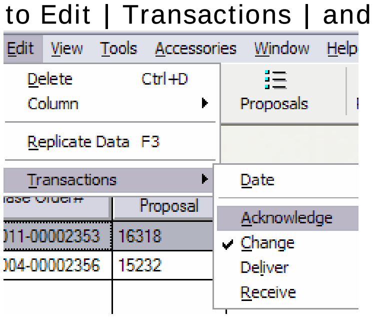
Even though a purchase order is deleted, TeamDesign® maintains a record of the purchase order in the system. When you are viewing the purchase order listing, you will see a deleted purchase order noted as deleted but you are still able to access the purchase order. To re-activate a deleted purchase order, simply reprint the purchase order following the instructions above. If the items are still on the proposal as active, un-ordered items, and the vendor, ship to number and purchase order break group has not changed, the purchase order will reprint and become an active purchase order again.

Acknowledgements

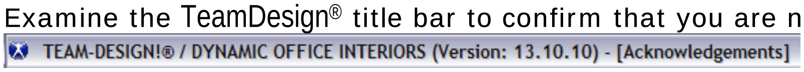
It is a simple process to enter acknowledgement information for purchase orders. To get to the Purchase Order Acknowledgement screen you can go to **Vendors | Purchase Orders | Transactions | Acknowledgements.**



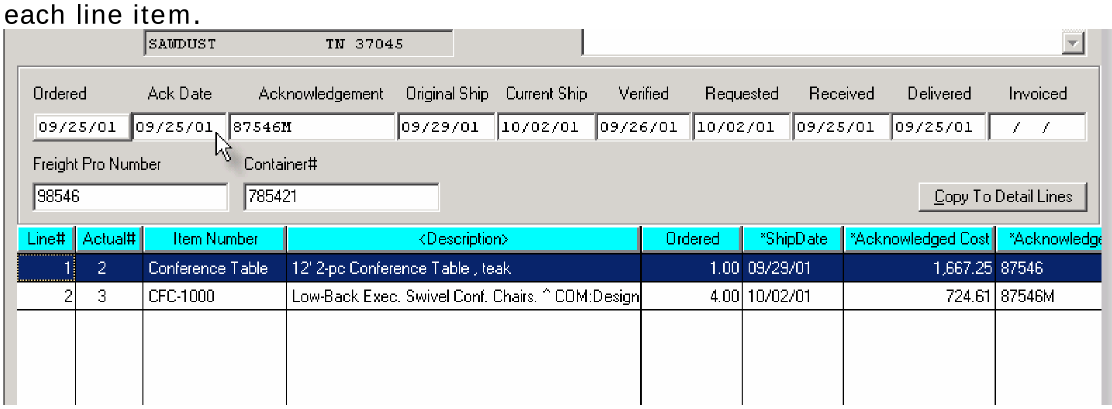
If you are already in one of the Purchase Order screens, such as the Change Order screen, Purchase Order Receiving screen, or the Purchase Order Delivery screen then there is a shortcut you can use. From one of the Purchase Order screens just go up to Edit | Transactions | and pick which screen that you wish to move to.



Examine the TeamDesign® title bar to confirm that you are now in the proper screen.



There are header fields in the center of the Acknowledgment screen where you can easily enter the acknowledgement data. After entering the data into the header fields, simply click on the "Copy to Detail Lines" button. The data entered in the current ship and acknowledgement number fields will automatically be copied to each line item.

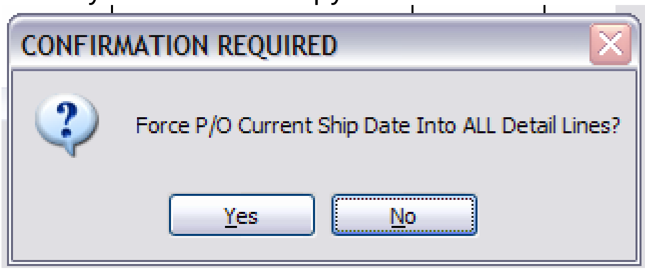


Productivity Tip:
Let the system do the work for you. If you have 50 line items on this purchase order and 45 are shipping on one date, and five are shipping on another date, enter the information in the Header that applies to the 45 line items. Copy the information from the header to the detail lines. Then alter or delete the ship dates on the five lines that are different. Remember that all data browser columns with an "*" can be edited.

Multiple acknowledgement dates and/or numbers

In some circumstances, you might receive multiple acknowledgments for the same purchase order. In this event, insert the important information from the first acknowledgement into the Purchase Order Notes (as well as the F6 notes if you choose). Then add the newly received information from the subsequent acknowledgment in the header fields. Add an "M" to end of the second acknowledgement number, update the current ship and verified dates, verify the cost figures, and then copy to the detail lines. The "M" will serve as notification on project management reports that this purchase order has multiple acknowledgement information as most reports only pull the data that is currently in the header fields of the purchase order.

When you click the "Copy To Detail Lines" button you get a pop up.



If you answer "Yes" any date in the Current date field will be copied into the Ship Date columns of all of the line items. The acknowledgment number will only be copied to lines that have an empty acknowledgment field. If you answer "No" then the date in the current date field will be copied only to lines that have an empty Ship Date field.

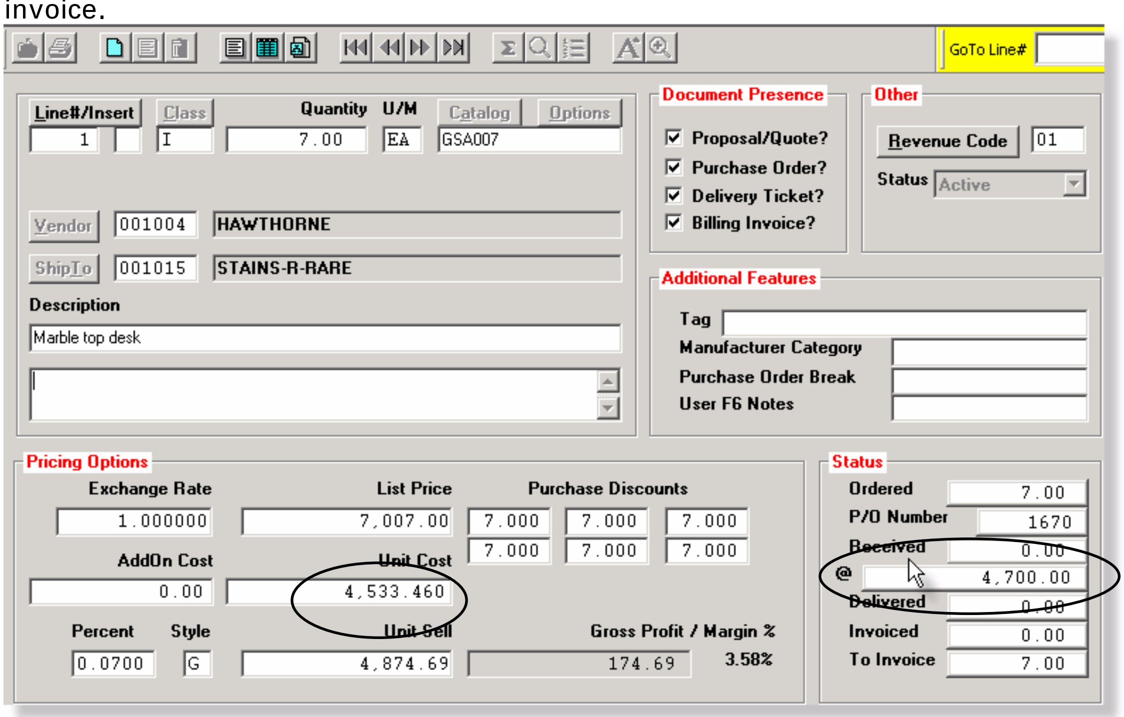
Productivity Tip:
In using the prior example of 50 line items on a Purchase order, if you receive an updated acknowledgment and you need to alter the first 45 line items where you have previously copied to detail you do not have to alter the lines individually. Again, let the system do the work for you. Delete the acknowledgement number and the current ship date in the header. With the information deleted, choose to copy to detail lines. The acknowledgement and ship date will now be blank for ALL the detail line items. You can then add the new acknowledgement information and copy to detail and then manually change or delete the other 5 line items acknowledgement information.

Importance of updating pricing during the Acknowledgement process

Updating Acknowledged cost is critical for WIP purposes. If the Acknowledged Cost field reflects a different cost for a line item than the Vendor Acknowledgement, make sure the cost is changed at this time so the proper dollar amount is credited to the

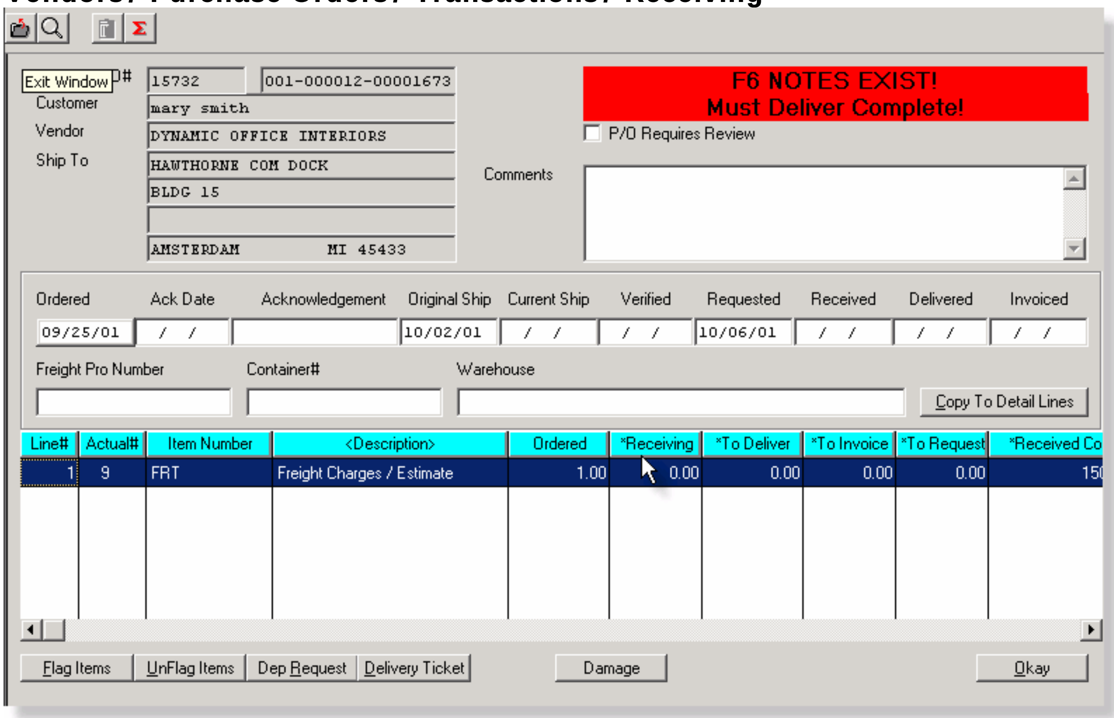
"WIP" account entered in the Revenue Posting Code. The amount that is credited to "WIP" when the accounts receivable invoice is posted is based on the received cost. The received cost is the acknowledged cost at the point that the item is received.

Changing the Acknowledged cost in acknowledgements or change orders will NOT change the estimated cost on the actual line item, but will be reflected in all purchase order screens as well as the detailed data entry screen of the proposal. As you see below, the unit cost has remained the same but the cost of the line item under the status box reveals a change has been made at some point. It is the cost listed in the status box that will be credited to the WIP account (or any other account entered for WIP in the selected revenue code). Accuracy at this stage insures that the AP invoice from the vendor that is distributed to the WIP account (for most job related products) as a debit matches the credit generated by the accounts receivable invoice.

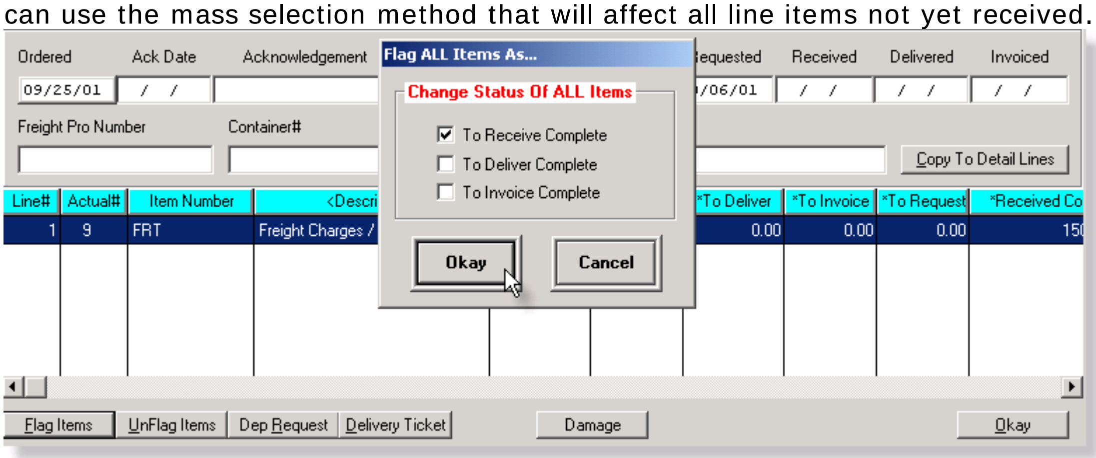


Receiving

Vendors / Purchase Orders / Transactions / Receiving



You may manually fill in quantities to be received in the "Receiving" column. Or you can use the mass selection method that will affect all line items not yet received.



If you choose the mass selection, once the "Flag Items" button is selected you will have the option to Receive, to Deliver, and to Invoice ALL items on the purchase order. Ordered quantities that have NOT yet been received, delivered, etc. will be inserted into the applicable columns. Remember this only flags items to be invoiced if chosen, it does not create the invoice. Also remember you must hit "Okay" to exit the screen and properly save all changes. Notice that after all items on a purchase order have been received, the header data field for the received date is automatically populated.

Again, let the system do the work for you. If you have 50 line items on this purchase order and you are receiving, setting up to deliver and and/or to invoice 45 of the items today, check all three options. Then, make changes to the individual items as necessary.

Reversing Receiving Activity

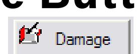
Once you have successfully recorded the receiving of line items on a purchase order, reversing the received activity must be performed if the data related to the items needs to be changed or if the line items need to be deleted from the purchase order. This would be necessary if items were flagged as “Received” by mistake or any number of other reasons.

If you will recall when items were flagged to receive, positive quantity entries were created in the “Receiving” column of the data browser on the receiving screen. Once you click the Okay button, the quantities were then transferred to the “received” column. To reverse this process, instead of clicking on the "flag items" button, you would click on the "Unflag Items" button. Once the “Unflag Items” button is selected, you will have the option to Un-receive and to NOT invoice ALL items on the purchase order. Ordered quantities that have been received or flagged to invoice will be inserted into the applicable columns. Or you can manually enter the negative quantities. Just remember, you must click the “Okay” button to accept the changes. The negative quantities will update the “received” column. Be aware that if you had flagged the line items to be delivered and invoiced, you would need to FIRST choose to un-deliver thru the Delivery Screen. If there are quantities in the “to Deliver” or “to Invoice” columns that exceed the total of the “Receiving” and “Received” columns (including both positive as well as negative quantities) you will receive an error message.

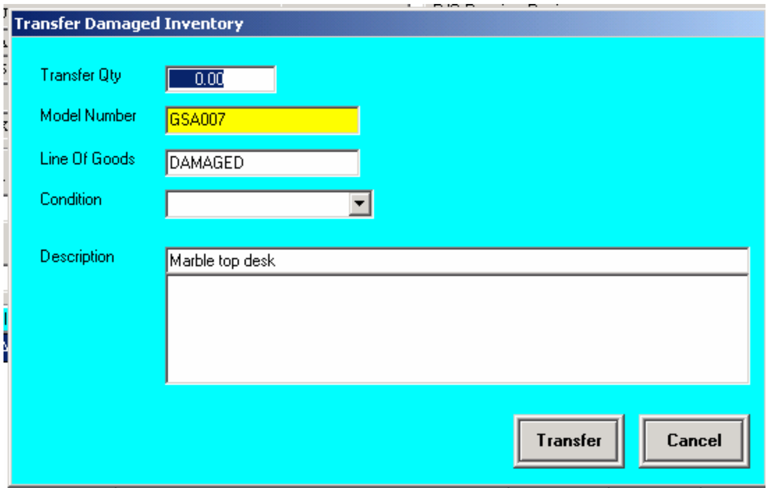
Warehouse Location

Warehouse locations can now be added to the line items of a purchase order for printing on a Delivery Ticket. The Receiving screen allows for the entry of a warehouse location for all items on the purchase order by entering the location, then clicking the “Copy to Detailed Lines” button. Or, you can manually enter data in the appropriate field for each line item if there are different warehouse locations for different lines.

Damage Button

You can use 

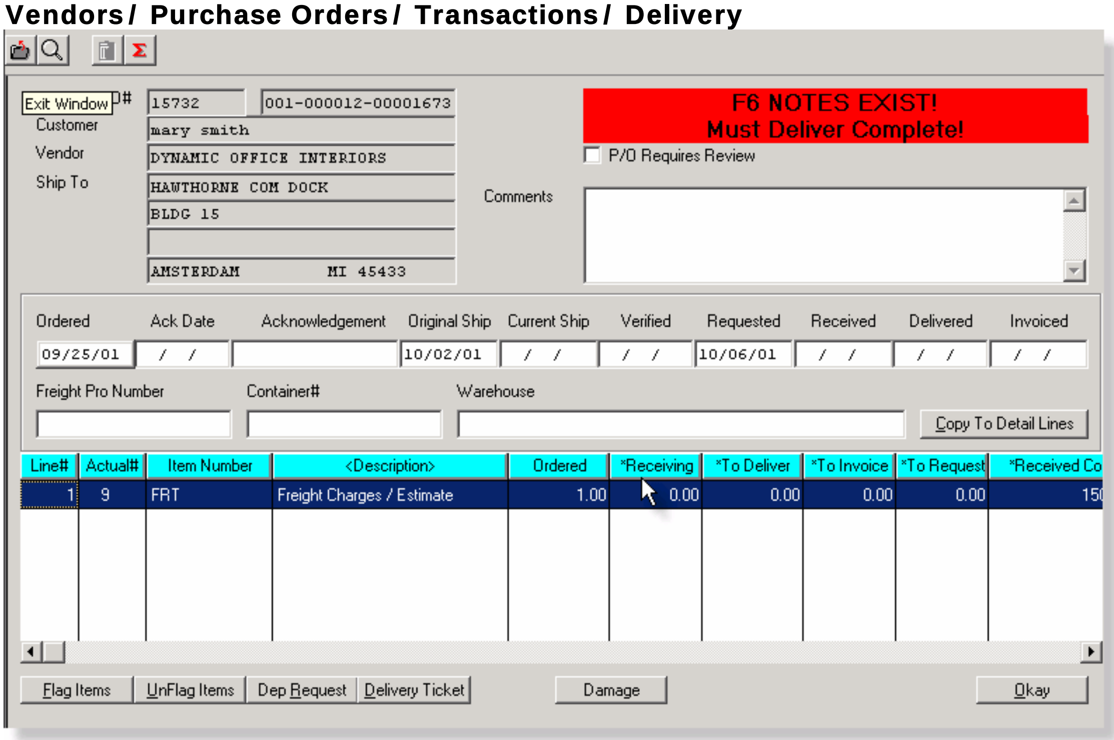
to transfer damaged items to your inventory from the Receiving or Delivery purchase order transaction screens. First access the correct transaction screen for the purchase order with the damaged product. Then you would click button located at the bottom of the screen. The following screen will appear:



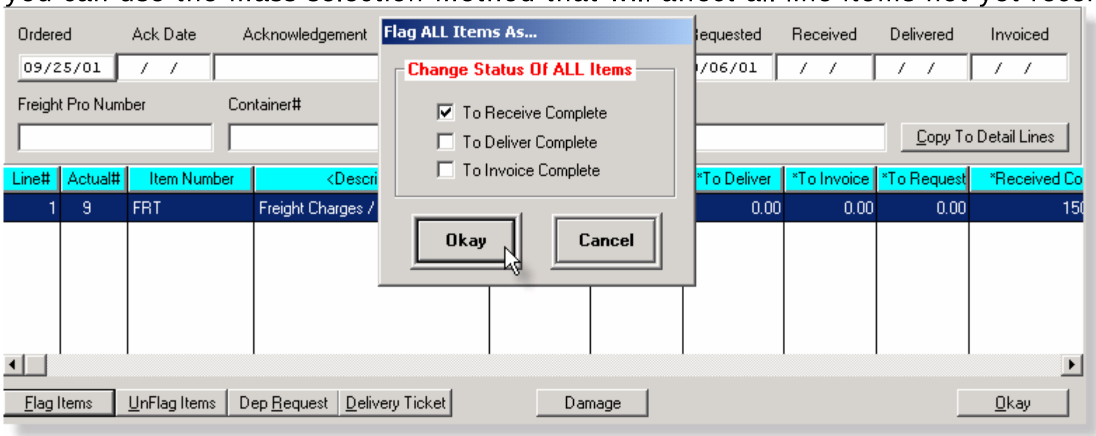
TeamDesign® will automatically bring forward the Model #, the Description (both Brief and Detailed), as well as assign the Line of Goods as “Damaged”. The attributes associated with this line item will also be carried over to the newly created Inventory Item. You will need to enter the quantity and condition, and then click transfer. This will create a record in your TeamDesign® inventory of the line item. This process does not re-order items, make any general ledger accounting entries, or fill in any of the data fields in the newly created inventory item's profile.

Delivery

Vendors/ Purchase Orders/ Transactions/ Delivery



You may manually fill in quantities to be Delivered in the “To Delivery” column. Or you can use the mass selection method that will affect all line items not yet received.



If you choose the mass selection, once the “Flag Items” button is selected you will have the option to Receive, to Deliver, and to Invoice ALL items on the purchase order. Ordered quantities that have NOT yet been received, delivered, etc. will be inserted into the applicable columns. Remember this only flags items to be invoiced if chosen, it does not create the invoice. Also remember you must hit “Okay” to exit the screen and properly save all changes. Notice that after all items on a purchase order have been delivered, the header data field for the delivered date is automatically populated.

Again, let the system do the work for you. If you have 50 line items on this purchase order and you are receiving, setting up to deliver and and/or to invoice 45 of the items today, check all three options. Then, make changes to the individual items as necessary.

Reversing Delivery Activity

Once you have successfully recorded the delivery of line items on a purchase order, reversing the delivered activity must be performed if the data related to the items needs to be changed or if the line items need to be deleted from the purchase order. This would be necessary if items were flagged as “Delivered” by mistake or any number of other reasons.

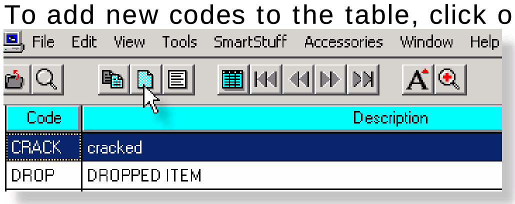
If you will recall when items were flagged “To Deliver”, positive quantity entries were created in the “To Deliver” column of the data browser on the delivery screen. Once you click the Okay button, the quantities were then transferred to the “Deivered” column. To reverse this process, instead of clicking on the "flag items" button, you would click on the "Unflag Items" button. Once the “Unflag Items” button is selected, you will have the option to Un-receive and to NOT invoice ALL items on the purchase order. Ordered quantities that have been received or flagged to invoice will be inserted into the applicable columns. Or you can manually enter the negative quantities. Just remember, you must click the “Okay” button to accept the changes. The negative quantities will update the “delivered” column.

INSTALLATION PROBLEMS

Should problems arise during the installation that you would like to record in TeamDesign® you can do so in the installation problems section located under PROPOSALS, TRANSACTIONS. In order to accurately describe these problems and track them there is a special table to define codes for such problems. You can find it under TABLES on the main menu of TeamDesign®.

Adding a Problem Code to the Table

To add new codes to the table, click on the ADD button at the top of the screen.

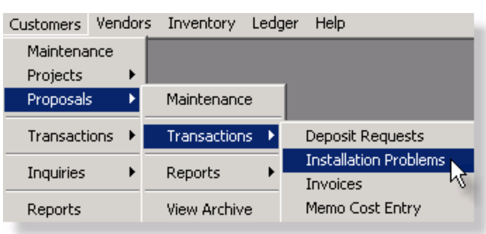


The Problem code can be up to 5 characters in length. It can be alpha or numeric. This code will be selected on the problem entry window.

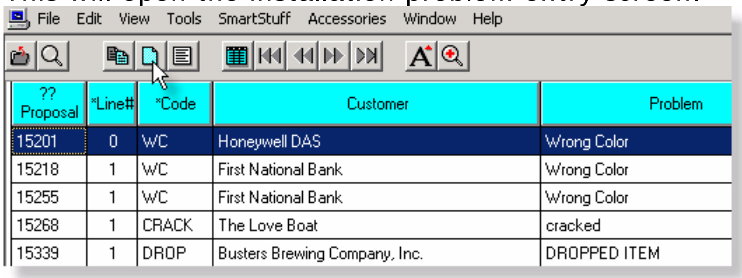
The Description field holds the detailed explanation of the code.

Adding Problems to Proposals

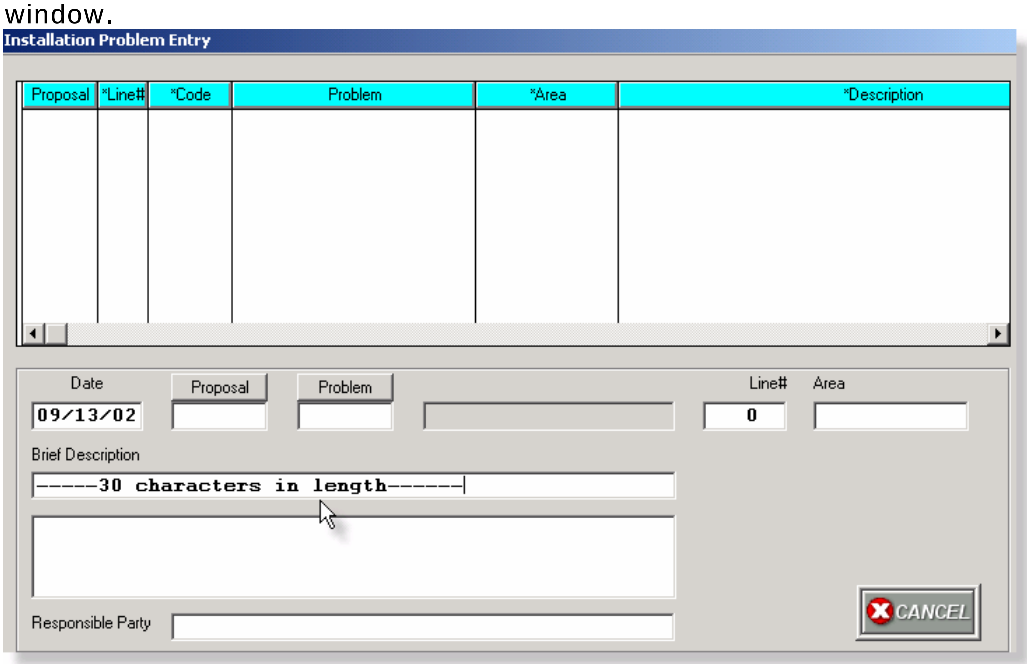
From the main screen of TeamDesign® click on PROPOSALS, select TRANSACTIONS and then INSTALLATION PROBLEMS.



This will open the installation problem entry screen.

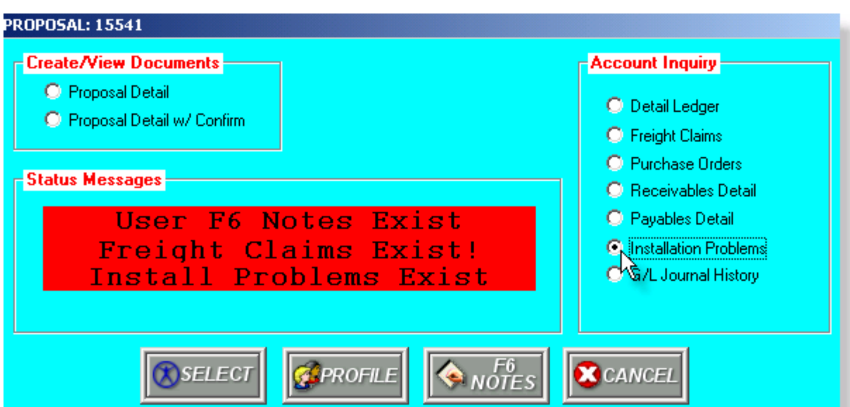


Clicking the ADD icon at the top of this window will open the new problem entry window.



Here you may begin entering the problem that has occurred. Clicking the ACCEPT button will clear the screen and a new problem may be entered.

You may also view problems only related to a specific proposal by choosing the proposal and selecting the installation problems radio button.



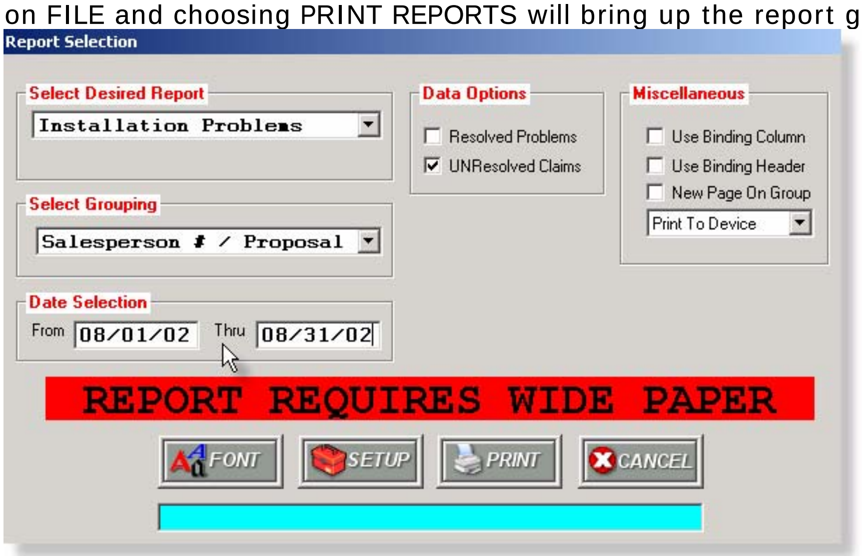
Resolved vs. Unresolved

Once the problem has been resolved, record this information on the installation problem screen. Here you will find the problem associated with this proposal that you wish to mark as resolved. Using the scroll bar search for a column heading labeled RESOLVED. The "*" beside this heading indicates that the column is editable from this screen. To mark the problem resolved, double click or click and hit enter on the resolved cell. Placing a date here will reflect that the problem has been resolved on installation problem reporting.

NOTE:
Since the Installation problems section within *TEAM-DESIGN!* is not considered a transaction, which means they do not affect job costing in any way, there is no way to institute security for these notes. Anyone with access to view proposals will be able to see these problems.

Installation Problem Report

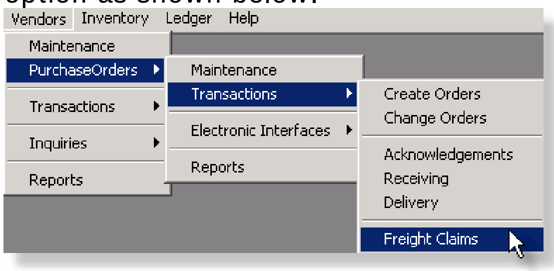
The installation problem report can be found on the problem entry screen. Clicking on FILE and choosing PRINT REPORTS will bring up the report generation screen.



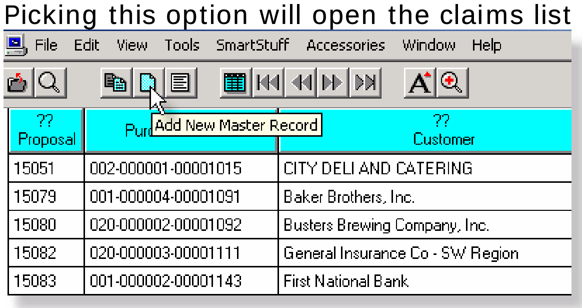
This report lists the problems that were entered between certain dates. It provides the line number from the proposal, the problem code from the table, the date of resolution and the problem comments.

Freight Claims

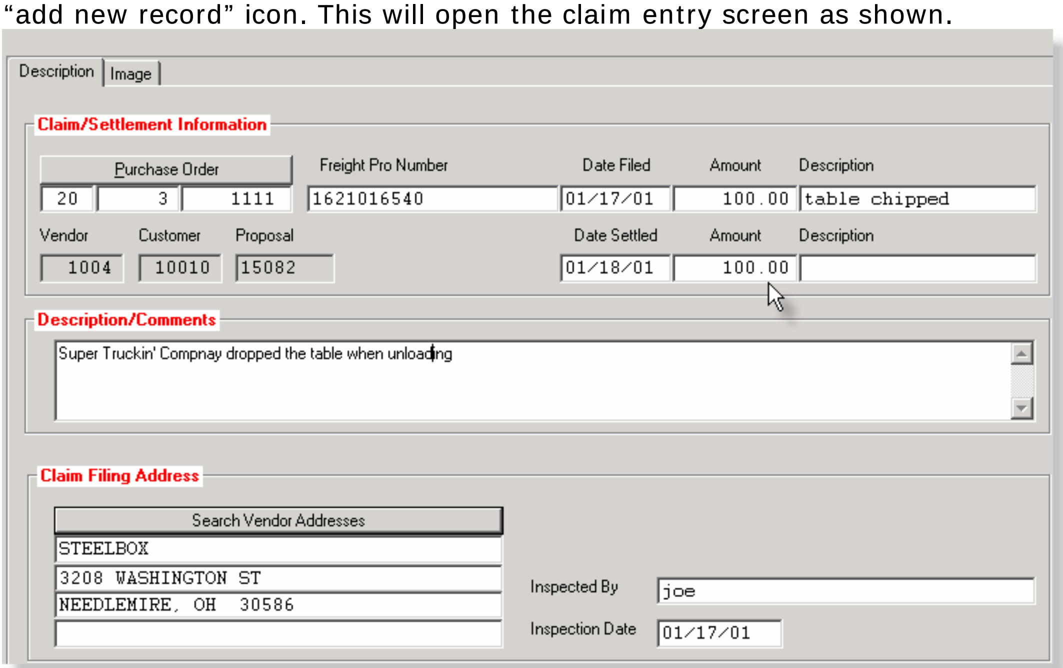
The FREIGHT CLAIMS module of TeamDesign® can be located by clicking on VENDORS and selecting PURCHASE ORDERS and choosing the FREIGHT CLAIMS option as shown below.



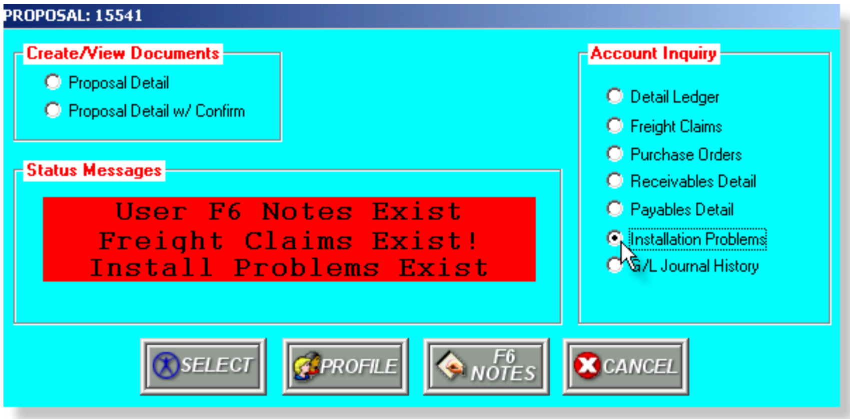
Picking this option will open the claims list screen.



Adding a new claim is done as in all other areas of TeamDesign® by clicking on the “add new record” icon. This will open the claim entry screen as shown.



You may also view claims related to a specific proposal by choosing the proposal and selecting the Freight Claims radio button.



Reporting

Reporting based on FREIGHT CLAIMS can be found on the same screen as the claims list. If you click on the FILE menu option and choose PRINT REPORTS the claim report screen will appear as shown.