

# Quick Quotes Inventory Imports Stock Purchase Orders

## Online Training Syllabus

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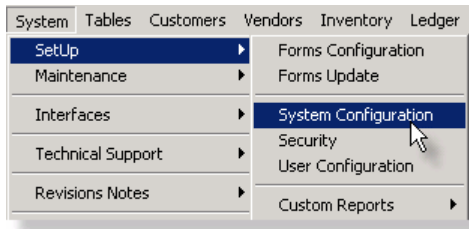
# Quick Quotes

## What is a Quick Quote?

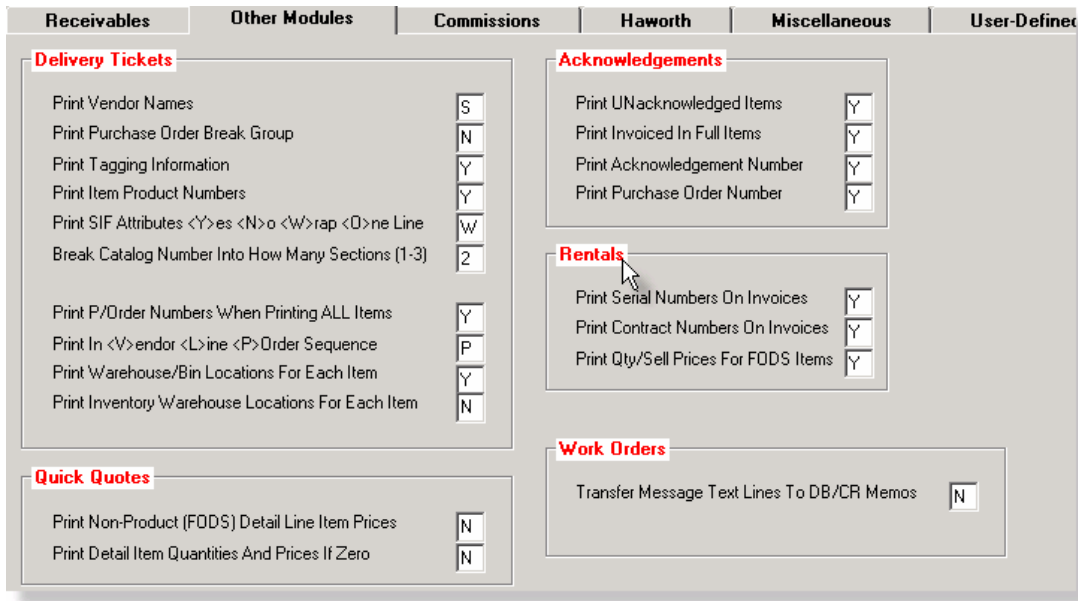
Quick Quotes allows the showroom salesperson to create a very rapid quotation for stocked inventory that the potential customer can take with them. Upon later acceptance of the Quick Quote, these items can be rapidly "imported" into the primary **TEAM-DESIGN!™** project management and accounting modules

## Getting Started

Before creating a Quick Quote you should first answer a few questions in System Configuration. From the main screen select System | Setup | System Configuration.



This will open System Configuration. Select the Other Modules Tab.



There are two questions in the Quick Quotes section of this tab.

**Quick Quotes/Print Non-Product (FODS) Detail Line Item Prices** – Typically, when line items for Freight, Delivery, Design, etc. are printed on Quick Quotes, only the description of the line item is printed. The other detail, such as quantity, sell price, extended sell price, etc. is NOT printed. This is because subtotals are printed at the bottom of the Quick Quote reflecting the dollars associated with Freight, Delivery, Design, etc. and it can be confusing to your Customer to see it appear twice on the Quick Quote.

## Quick Quotes – Inventory Imports – Stock Purchase

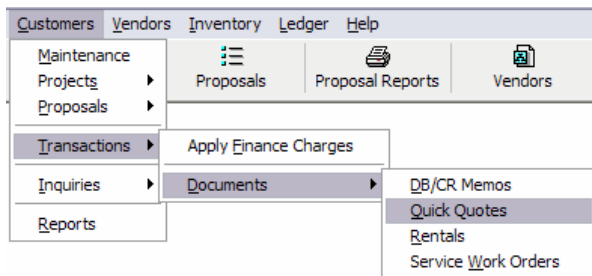
- Enter a “Y” in this field if you want the Complete Detail Information for FODS Records to be printed on the Quick Quote.
- Enter an “N” in this field if you do NOT want the Complete Detail Information for FODS Records to be printed on the Quick Quote.

**Quick Quotes/Print Detail Item Quantities and Prices If Zero** – You may have some items on your Quick Quote that have no quantities and prices. The system prints zeros in the quantity column and pricing column.

- Enter a “Y” in this field if you want items with zero quantities and prices to print the zeros on your Quick Quote.
- Enter an “N” in this field if you do NOT want items with zero quantities and prices to print the zeros on your Quick Quote.

## Creating a Quick Quote Document


To create a Quick Quote document go to Customers | Transactions | Documents | Quick Quotes.

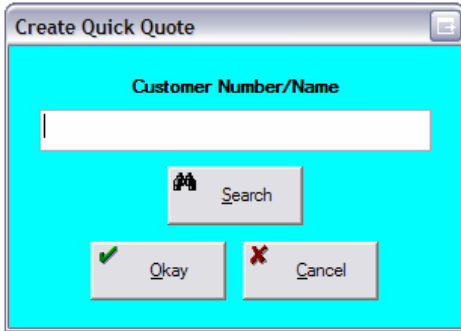


This will open the Quick Quotes Maintenance Screen. You will see a list of all the Quick Quotes that have been prepared in the system.

The screenshot shows the Quick Quotes Maintenance Screen with a toolbar at the top containing icons for search, print, grid, navigation, and zoom. Below the toolbar is a table with the following data:

Quote#	Customer	SLS#	Quote Date	Valid Thru	Product
1001	Clovis Consolidated	000	07/25/03	08/24/03	1,841.32
1002	Sharp Dressed Men's Shop Reg Office	012	09/14/07	10/14/07	0.00
1003	Sirius Cybernetics Corporation	042	09/14/07	10/14/07	2,300.00
1004	Vogon Heavy Industries	000	09/14/07	10/14/07	5,600.00
1005	Mega Doo Publishing	000	09/14/07	10/14/07	3,500.00

To create a new Quick Quote document click on the add icon  or click on Edit/Add. Then a new screen will pop up. Enter the customer number for the Quick Quote if it is known or click on the Search button to go select the customer from the a list.



**TEAM-DESIGN!™ Tip**

If you start to type in the Customers name before you click the search button. The Customers List will be sorted by the letters you typed in.

For example: if you are creating a Quick Quote for Hawthorne, type in “haw” then click Search. The Customer List displayed should start with any customers that start with HAW.

Once you have selected a Customer the Profile for the Quick Quote will be displayed.

**Quick Quote: 1006**

Header		
Detail List	Summary	
<p><b>Bill To Address</b></p> <p>Hawthorne 1854 Feathertop Dr Salem, MA ATTN:</p>	<p><b>Ship To / Install At Address</b></p> <p>Search Ship To Addresses</p> <p>Hawthorne 1854 Feathertop Dr Salem, MA</p>	<p><b>Commission Description</b></p> <p>SalesPerson 000 Commission Rate 0.0000 Commission Code</p>
<p><b>Tax Description</b></p> <p>&lt;T&gt;axable &lt;N&gt;onTaxable &lt;I&gt;nclusive T</p> <p>VAT/GST/Sales Tax Table</p> <p>Invalid Sales Tax Code</p>	<p><b>Invoice Description</b></p> <p>Date Of Quote 10/01/07 Quote Valid Thru 10/31/07 Payment Terms Customer P/O #</p>	

**Bill To Address** - This information defaults from the Customer Master. You can add or edit data in the ATTN: line if required.

**Ship To\Install At Address** - Enter the address where the product will be delivered. The standard four lines provide a line for suite number. It is not necessary to skip a data line if there is no suite.

**Commission Description/Salesperson** - The system automatically pulls in the assigned Salesperson from the Customer Master file. You may over-write this data as required. Changing this data only affects this record. Click on the Salesperson button to access the



## Adding Lines to a Quick Quote

There are three ways to add a line item to a Quick Quote:

- Creating the line item manually,
- Importing a SIF file,
- Importing lines from another document

### Creating a Line Item Manually

Click the add button at the bottom right of the Detail List tab screen. This will bring you to the Detail Line Item screen.

**Line #** - Identifies where in the list of detail items this item is placed.

**Class** – This field is a critical identification for the line item as it pertains to its usage throughout **TEAM-DESIGN!**™® The Line Item Classification determines whether an item is taxable or non-taxable, whether it is commissionable and how it will print on your documents. The default class designation is "I" (Item). All products are classified as items. Other services like freight, design, delivery, etc., have their own classifications.

- **I** – The record is a product item. Its tax status is related to the tax status/code assigned to the Rental Contract in the Header tab window.
- **N** – The record is a product item. However, no sales tax will ever be calculated regardless of the tax status/code assigned to the Rental Contract.
- **F** - The record is a freight item. Its tax status is related to the tax status/code assigned to the Rental Contract in the Header tab window.
- **O** - The record is an "Other" type of item. Its tax status is related to the tax status/code assigned to the Rental Contract in the Header tab window.

## Quick Quotes – Inventory Imports – Stock Purchase

- **D** – The record is a Delivery and Installation type of item. Its tax status is related to the tax status/code assigned to the Rental Contract in the Header tab window.
- **M or C** – The record is a message or comment type item. This line can be used to put notes on the Rental Contract for the customer.

Enter the appropriate Line Item Classification in this field.

**Quantity** - Enter the quantity of the item you wish to invoice to your customer.

**Item Number** - This field contains the Vendor Catalog Part number. If the item is coming from your inventory, click on the Item Number command button to access the 'Inventory Search' window.

**Vendor** – Key in your Vendor number, or click the Vendor button to access the 'Vendor Search' window and select a Vendor. The Vendor number and name is placed in the appropriate fields on the 'Detail Line Item' window.

The 'Vendor Search' window allows for a search using two options.

- Clicking on the Vendor button opens the 'Vendor Search' window. The Vendor list initially displays in alphabetical order, but provides a search box in which to place the Vendor Number. Once a Vendor number is entered, the system highlights in the 'Vendor Search' window the closest if not exact match to the number entered.
- Entering a portion of the Vendor name and then clicking on the Vendor button opens the 'Vendor Search' window and highlights the closest if not exact alphabetical match to your entry.

### Updating Inventory

If you are pulling this item from inventory, you must enter the correct Vendor number here in order to affect inventory quantities. Typically, that will be your internal Vendor number.

**Description** – This is a 66-character field to briefly describe the item.

**Description (2nd field)** – This is a secondary description text box that provides the ability to enter extensive additional data. Within the description, you can enter a ^ character that the print program interprets as a carriage return/line feed. The word following the ^ symbol starts a new line of text. Be sure to use a space before and after the ^ symbol.

**List Price** – This field is used to enter the standard retail price of the Rental Contract Line Item.

**Pricing Options/Percent** – This field is where you identify a pricing such as 60% off List. The format for this field is entered in decimal (.60).

**Pricing Options/Style** – This field is used to calculate a price to the Customer. A selection must be made from the following provided options:

- **Off of <L>ist**                      Sell price = off of list price by percent listed
- **<A>ctual**                              Sell price entered manually

**Unit Sell** – This field is calculated based on the Percent and Style fields, but may be overwritten if required. Overwriting the Unit Sell field will zero out the percent, force the Style to <A>ctual.

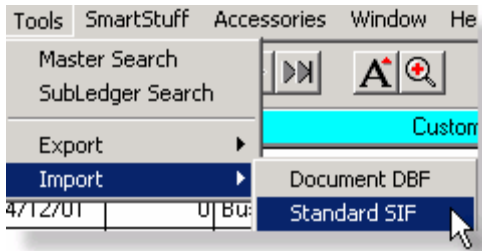
**Revenue Code** – The Revenue Posting code is the link between this item and the General Ledger. The Revenue Code may be entered in the Vendor Master and then when a Vendor is selected, the proper code is brought forward. If the default Revenue Code is not brought forward from the Vendor Master, click on the Revenue Code command button and make a selection from the existing Revenue Code list. Select by clicking on the Revenue Code to highlight. Click on the Select button to move your selection into your Detail Line Item.

**Status** – Make this selection by clicking on the down arrow to open the drop down list options. Click on the desired selection. That selection is placed in the Status field. A selection must be made from the list provided. Available options are as follows:

- <A>ctive – This status field defaults to Active.
- <D>elete – This selection will delete the line from the Work Order once the save button is clicked.

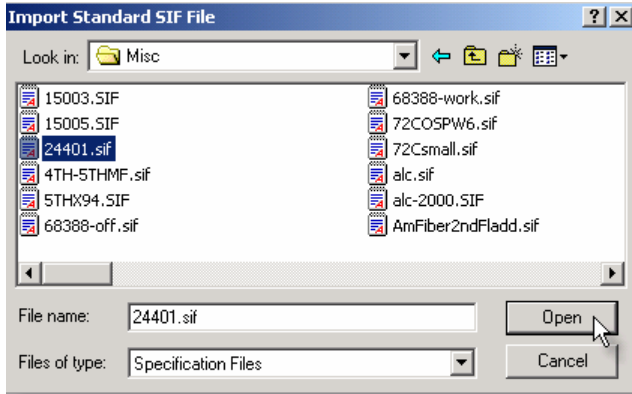
**Create line items by importing a SIF file**

From the master list of Quick Quotes, highlight the Quick Quote that will receive the SIF import. Click on Tools | Import | Standard SIF



This will present a screen that allows the search for the SIF file on the computer or network.

Once the file is highlighted click the open button as illustrated

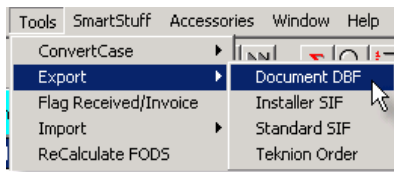


### Create line items by importing lines from proposals (or other documents)

Open the line items in a proposal or document and block the lines by double clicking on the line item in the block column, as illustrated.

<Block>	Line #	*Quantity	Item Number	*Description
Block	1	1.00	PE3648	Power Panel Frame, 36"h x 48"w
Block	2	1.00	TRRCN2430	Rectangular Return (1 C-Leg), 24"d x 30"w
Block	3	1.00	TRBSM3060	Bullet Return (Monoleg), 30"d x 60"w

Once the line items are blocked in a proposal, click on Tools | Export | Document DBF.



Then go to the Quick Quote listing (Customer | Transactions | Documents | Quick Quotes) and highlight the Quick Quote that the lines need to be imported into. Once it is highlighted click on Tools | Import | Document DBF.

To import lines from a document (DB/CR memo, Service Work Order, Stock PO) you must first block the lines like in a proposal. To export the lines; however, you must be at the maintenance screen viewing the document list. Highlight the document that the lines are going to be exported from. Then click on Tools | Export | Document DBF. Import the lines into the work order by using the previous step.

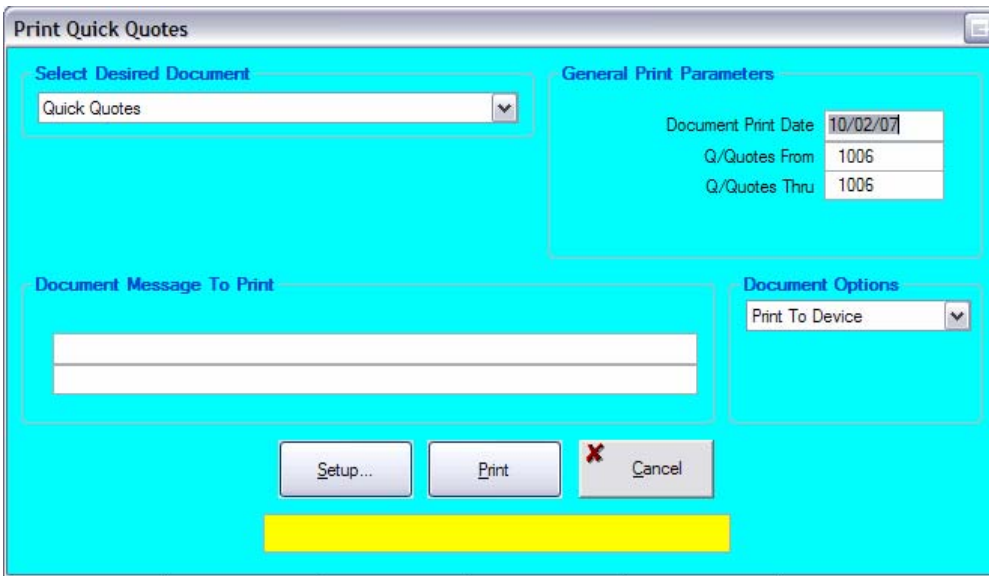
Once you have added line items, you can click the Summary tab. The 'Summary' window is displayed, providing a summary of all values associated with this Rental Contract.

**Quick Quote: 1006**

Header	Detail List	Summary
<b>Values</b>		
	130.00	Product
	0.00	Freight
	0.00	Delivery
	0.00	Layout/Design
	0.00	Other
	6.50	SalesTax - State
	1.37	Sales Tax - County
	1.38	Sales Tax - City
	1.39	Sales Tax - Misc 1
	1.41	Sales Tax - Misc 2
	1.42	Sales Tax - Misc 3
	143.47	Total Invoice

## Printing Quick Quotes

Once the Quick Quote is prepared it can be printed. To print the Quick Quote you must be in the Quick Quote maintenance screen ( Customers | Transactions Documents | Quick Quotes | File | Print Documents).



**Select Desired Document** – Select Quick Quotes.

**Document Print Date** – The date here will come from the profile of the Quick Quote. This will be the date printed on the Quick Quote. You may change it as needed.

**Q/Quotes From – Q/Quotes Thru** - You may select a range of Quick Quotes to print. If you wish to print only one Quick Quote specify the Quick Quote number in both fields. The fields should contain the number of the Quick Quote that was highlighted when Print Documents was selected from the menu.

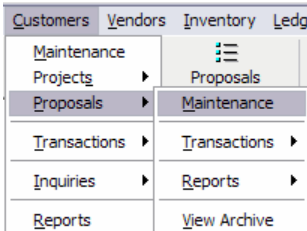
**Document Message To Print** - In these two fields you may specify additional text to print on the Quick Quote.

**Document Options** - Select either print to device (prints to the printer), print w/o graphics (prints to the printer with no graphics), or print to MS Word (prints to Microsoft Word).

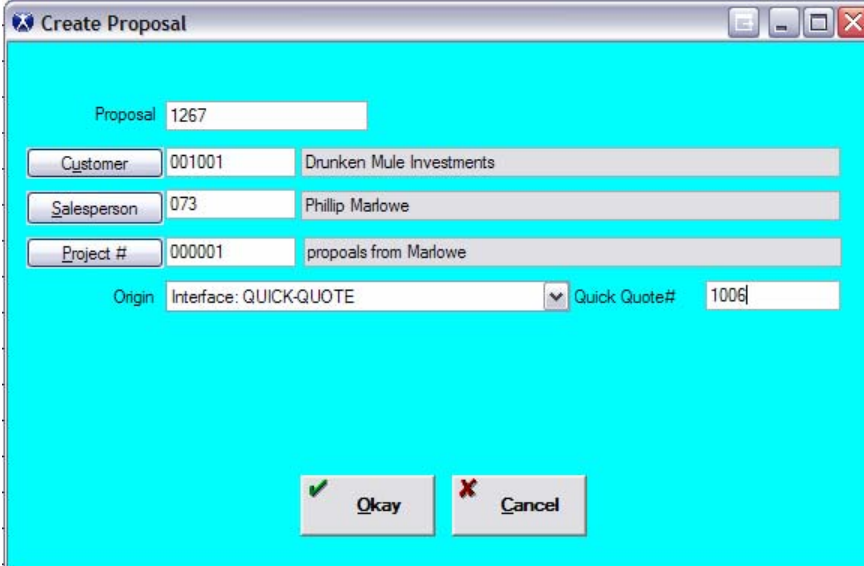
When you have completed the fields, click the Print button. This will print the Quick Quote and return you to the list of Quick Quotes.

## Creating a Proposal from a Quick Quote

From the main screen in **TEAM-DESIGN!™** go to Customers | Proposals | Maintenance.



To create a new proposal from a Quick Quote click the the add icon  or click on Edit/Add. This will bring up the Create Proposal screen.



**Proposal** – You can either use the Proposal number *TEAM-DESIGN!*<sup>TM</sup> generates for you or specify your own proposal number.

**Customer** – By choosing a customer number when you click on the Project # button the Projects will be sorted the customer number. If you do not know the customer number you can search for the customer by clicking the Customer button.

**Salesperson** – By choosing a salesperson number when you click on the Project # button the Projects will be sorted the salesperson number. If you do not know the salesperson number you can search for the salesperson by clicking the Salesperson button. If you know the project number type the first three digit portion of it in this field, you may leave out any leading zeros.

**Project #** - If you know the project number type the second six digit portion of it in this field, you may leave out any leading zeros. Otherwise click the Project # button and choose the project number from the list of Projects.

**Origin** – Click on the pull down arrow for this field and scroll down and select “Interface: QUICK-QUOTE. In the adjacent field that will open up type in the Quick Quote number you wish to use to create the proposal.

Now click on the Okay button. *TEAM-DESIGN!*<sup>TM</sup> will create the proposal using the information in the Quick Quotes to generate the line items. You will still need to fill in the Proposal Profile.

# Inventory Catalog Updates

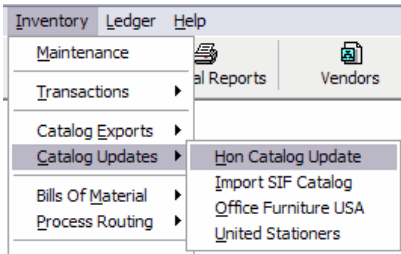
## What is Inventory Catalog Update?

This module gives you the ability to import various third-party catalogs into the Inventory system of **TEAM-DESIGN!**™ such as Hon, Office Furniture USA and standard SIF files. You can use the same process to update the inventory in your database. These items may then be used on proposals, debit credit memos, rental contracts, quick quotes, service work orders, and stock purchase orders. Also, once these items have been imported into inventory they can be exported to **TEAM-SCOREBOARD!**™ our online shopping cart software.

## Getting Started

You will need to obtain the catalog files from Hon, Office Furniture USA, or United Stationers. You can also use a SIF formatted file to import or update the **TEAM-DESIGN!**™ inventory.

Then follow the path to Inventory | Catalog Updates and then choose the type of import you wish to perform.



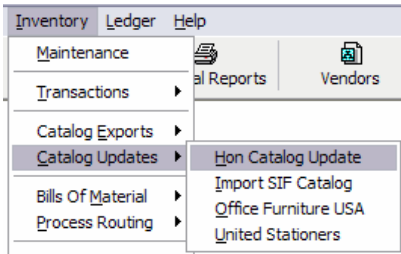
## Hon Catalog Update

The system allows you to update, and optionally add, the HON catalog to your **TEAM-DESIGN!**™ inventory master files. You can receive the catalog price update by contacting HON and requesting the DOWNLOAD.EXE file for dealerships. This file contains the base part number, option, description, and retail price.

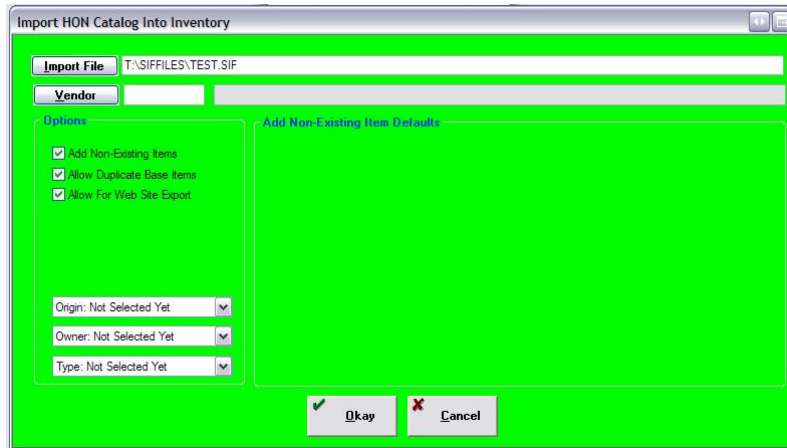
Since the HON catalog contains a number of duplicate "base" part numbers which are different only by their option, the system allows you to only update or add the base part, of which there are approximately 8000, to your inventory. This is the recommended method.

If you choose to allow duplicate base part numbers, then all catalog numbers and options, of which there are approximately 58,000, will be added to your inventory file. Selecting this option can dramatically increase the size of your inventory file. The larger number of records will affect processing speed for things such as report printing, file searches, etc.

Once you have received the catalog file from Hon to import or update the Hon catalog in your **TEAM-DESIGN!**™ inventory go to Inventory | Catalog Updates | Hon Catalog Update.



This will open the **Import Hon Catalog Into Inventory** window.



**Import File** - Enter the drive, path and file name for the system to perform the catalog import. Or you may click on the Import File command button to search your system.

**Vendor** - Enter the Accounts Payable Vendor number for HON. You may also click on the *Vendor* button to search for HON.

**Options/Add Non-Existing Items** – If checked items not currently in the inventory will be added. If you only wish to update existing items uncheck this box.

**Options/Allow Duplicate Base Items** – As long as this box is left unchecked only the base part numbers will be updated or added to your inventory master file. (Approximately 8,000 records.) If you want the entire catalog, including all item options, to be imported (approximately 58,000 records) make sure this box is checked.

**Options/Allow For Web Site Export** – Select this option if you have plans to export this item to **TEAM-SCOREBOARD!™** our online shopping cart software.

**Options/Origin <N>ew <U>sed <B>uy** – Classify the items you are importing as New, Used or Buy. New and used are for new items or used items. Buy is for items that you try to maintain a certain level of in inventory.

**Options/Owner <S>tocked <O>wned or <C>ustomer Inventory** – Further classify these items as Stocked items, as an item to track and reorder when stock is low, or Customer Inventory, an item owned by your Customer or Owned, items the dealership owns.

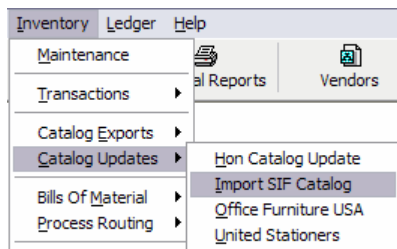
**Options/Type** <F>inished Product, <R>aw Material or <S>ubAssembly – Classify the items as Finished Product, Raw Material or Sub Assemblies.

The fields **Options/Origin, Options/Owner, Options/Type** must be answered before the catalog can be updated or imported. Click the Okay button to begin the update or import.

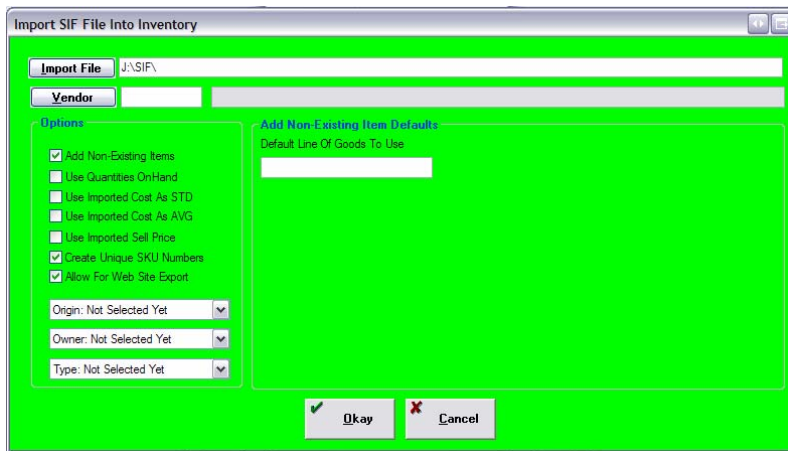
## Import SIF Catalog Update

You can also update or import items in your **TEAM-DESIGN!**™ inventory with a SIF formatted file.

Once you have the SIF formatted file. Go to *Inventory | Catalog Updates | Import SIF Catalog* this will bring up the Import SIF File Into Inventory screen.



That will bring you to the *Import SIF File Into Inventory* screen.



**Import File** - Enter the drive, path and file name for the system to perform the SIF File import. Alternatively you may click on the Import File button to search your system.

**Vendor** - Enter the Accounts Payable Vendor number for the Vendor you are importing. If you are using these items as database items, use the Vendor from which you will normally purchase the items. If you are importing these items as stock inventory, use your internal Vendor number.

**Options/Add Non-Existing Items** – If checked, items not currently in the inventory master file will be added upon import. If you only wish to update existing inventory items click the box to remove the checkmark.

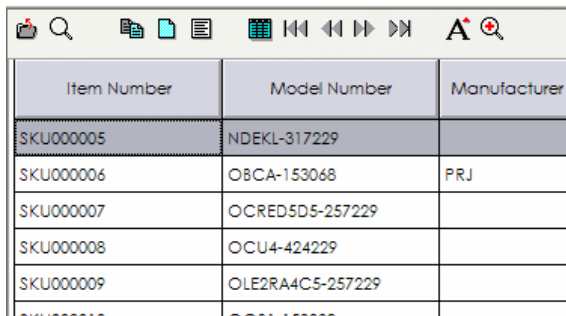
**Options/Use Quantities on Hand** – If left unchecked the quantity for each item in the SIF file will not be imported as the quantity on hand for your inventory items. If you do want the quantity for each item to be imported as the quantity on hand check this box.

**Options/Use Imported Cost as STD** - The system default is to not use imported cost as standard cost, meaning that the cost of each item in the SIF file will not be imported as the standard cost for your inventory items. If you do want the cost of each item to be imported as the standard cost check this.

**Options/Use Imported Cost as AVG** - The system default is to not use imported cost as average cost, meaning that the cost of each item in the SIF file will not be imported as the average cost for your inventory items. If you do want the cost of each item to be imported as the average cost check this box.

**Options/Use Imported Sell Price** - The system default is to not use imported sell price, meaning that the sell price of each item in the SIF file will not be imported as the sell price for your inventory items. If you do want the sell price of each item to be imported as the sell price for your inventory items check this box.

**Options/Create Unique SKU Numbers** – If a model number in the SIF file matches the item number of an item in inventory the item will be updated. If there is not an item in inventory that matches the model number of the item in the SIF file a new inventory item will be created. Alternatively if you check this box instead of checking the model numbers of existing inventory items each item in the SIF file will be imported with a sequential Item number as illustrated below.



Item Number	Model Number	Manufacturer
SKU000005	NDEKL-317229	
SKU000006	OBCA-153068	PRJ
SKU000007	OCRED5D5-257229	
SKU000008	OCU4-424229	
SKU000009	OLE2RA4C5-257229	

**Options/ Options/Allow For Web Site Export** – Select this option if you have plans to export this item to **TEAM-SCOREBOARD!**™ our online shopping cart software.

**Options/Origin <N>ew <U>sed <B>uy** – Classify the items you are importing as New, Used or Buy. New and used are for new items or used items. Buy is for items that you try to maintain a certain level of in inventory.

**Options/Owner <S>tocked <O>wned or <C>ustomer Inventory** – Further classify these items as Stocked items, as an item to track and reorder when stock is low, or Customer Inventory, an item owned by your Customer or Owned, items the dealership owns.

**Options/Type <F>inished Product, <R>aw Material or <S>ubAssembly** – Classify the items as Finished Product, Raw Material or Sub Assemblies.

The fields **Options/Origin, Options/Owner, Options/Type** must be answered before the catalog can be updated or imported. Click the Okay button to begin the update or import.

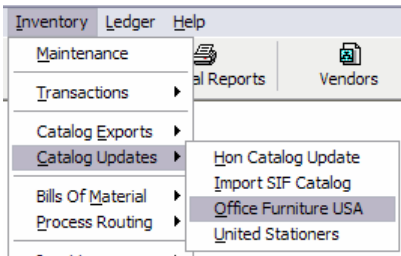
## Office Furniture USA Update

Office Furniture U.S.A. Franchisees may now import the catalog supplied by Office Furniture U.S.A. directly into **TEAM-DESIGN!™** inventory. Before performing the import, you must create a vendor profile for Office Furniture U.S.A. and assign it a default Revenue Posting Code in the Vendors, Maintenance menu options. Optionally, you may create vendor profiles for the individual manufacturer acronyms contained within the catalog(s) and using the acronym as the "CAD/SIF Interface ID" within the vendor name/address screen. When importing, **TEAM-DESIGN!™** will use the Revenue Posting Codes from the individual manufacturer profiles (if found) rather than the default Revenue Posting Code associated with the main Office Furniture U.S.A. vendor.

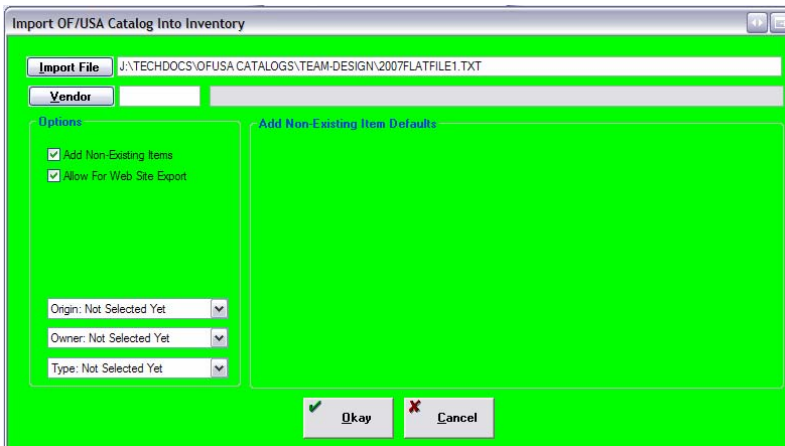
By creating individual vendor profiles (highly recommended) for each manufacturer within the catalogs with their own Revenue Posting Codes, you will be able to identify and analyze sales of each manufacturer represented by OFUSA. You may obtain a list of the manufacturer acronyms contained within the catalogs by contacting OFUSA directly.

After the import is complete, the inventory items will contain the part numbers, descriptions, list prices and purchase prices which may then be used in Proposals, Rentals, etc.

From the **TEAM-DESIGN!™** main menu, select the Inventory, Catalog Updates, Office Furniture USA menu options as illustrated below.



This opens the 'Import OF/USA Catalog Into Inventory ' window as illustrated below.



**Import File** - Enter the drive, path and file name for the system to perform the SIF File import. If you do not know the drive, path and file name, click on the Import File command button to search your system.

**Vendor** - Enter the Accounts Payable Vendor number for the Vendor you are importing. If you are using these items as database items, use the Vendor from which you will normally purchase the items. If you are importing these items as stock inventory, use your internal Vendor number.

**Options/Add Non-Existing Items** - The system defaults to a checkmark in this box, meaning that items not currently in the inventory master file will be added upon import. If you do not want non-existing items to be added upon import, click in the box to the left of the Add Non-Existing Items field to remove the checkmark.

**Options/ Options/Allow For Web Site Export** – Select this option if you have plans to export this item to **TEAM-SCOREBOARD!**<sup>™</sup> our online shopping cart software.

**Options/Origin <N>ew <U>sed <B>uy** – Classify the items you are importing as New, Used or Buy. New and used are for new items or used items. Buy is for items that you try to maintain a certain level of in inventory.

**Options/Owner <S>tocked <O>wned or <C>ustomer Inventory** – Further classify these items as Stocked items, as an item to track and reorder when stock is low, or Customer Inventory, an item owned by your Customer or Owned, items the dealership owns.

**Options/Type <F>inished Product, <R>aw Material or <S>ubAssembly** – Classify the items as Finished Product, Raw Material or Sub Assemblies.

The fields **Options/Origin, Options/Owner, Options/Type** must be answered before the catalog can be updated or imported. Click the Okay button to begin the update or import.

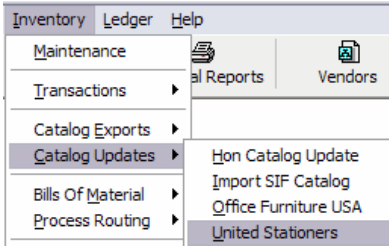
Once completed, click the Okay command button. The system performs the import and returns you to the **TEAM-DESIGN!**<sup>™</sup> main window.

## United Stationers Update

United Stationers dealerships may now import the catalog supplied by United Stationers directly into **TEAM-DESIGN!**<sup>™</sup> inventory. Before performing the import, you must create a vendor profile for United Stationers and assign it a default Revenue Posting Code in the Vendors, Maintenance menu options.

After the import is complete, the inventory items will contain the part numbers, descriptions, list prices and purchase prices which may then be used in Proposals, Rentals, etc.

From the **TEAM-DESIGN!**<sup>™</sup> main menu, select the Inventory | Catalog Updates | United Stationers menu options as illustrated below.



This opens the 'Import United Stationers Catalog' window as illustrated below.



**Import File** - Enter the drive, path and file name for the system to perform the SIF File import. If you do not know the drive, path and file name, click on the Import File command button to search your system.

**Vendor** - Enter the Accounts Payable Vendor number for the Vendor you are importing. If you are using these items as database items, use the Vendor from which you will normally purchase the items. If you are importing these items as stock inventory, use your internal Vendor number.

**Options/Add Non-Existing Items** - The system defaults to a checkmark in this box, meaning that items not currently in the inventory master file will be added upon import. If you do not want non-existing items to be added upon import, click in the box to the left of the Add Non-Existing Items field to remove the checkmark.

**Options/ Options/Allow For Web Site Export** – Select this option if you have plans to export this item to **TEAM-SCOREBOARD!™** our online shopping cart software.

**Options/Origin <N>ew <U>sed <B>uy** – Classify the items you are importing as New, Used or Buy. New and used are for new items or used items. Buy is for items that you try to maintain a certain level of in inventory.

**Options/Owner <S>tocked <O>wned or <C>ustomer Inventory** – Further classify these items as Stocked items, as an item to track and reorder when stock is low, or Customer Inventory, an item owned by your Customer or Owned, items the dealership owns.

**Options/Type <F>inished Product, <R>aw Material or <S>ubAssembly** – Classify the items as Finished Product, Raw Material or Sub Assemblies.

## Quick Quotes – Inventory Imports – Stock Purchase

The fields **Options/Origin, Options/Owner, Options/Type** must be answered before the catalog can be updated or imported. Click the Okay button to begin the update or import.

Once completed, click the Okay command button. The system performs the import and returns you to the **TEAM-DESIGN!<sup>TM</sup>** main window.

# Stock Purchase Orders

## What is a Stock Purchase Order?

Stock Purchase Orders provides the ability to create a non job related Purchase Order. These Purchase Orders may be for stocking inventory, showroom inventory, office supplies or anything else you may need a Purchase Order for but do not need or wish to prepare a Proposal. Vendor's invoices can not be attached to a Stock Purchase Order the way they can be a Purchase Order generated from a Proposal. If you wish for any reason to attach a specific vendor's invoice to a specific purchase order you will need to use a Purchase Order generated from a Proposal.

## Getting Started

Nothing special needs to be done before creating a Stock Purchase Order beyond Before using Stock Purchase Orders a few

## Creating a Stock Purchase Order

### *Stock Purchase Orders - Inventory | Transactions | Stock Purchase Orders*

From the Stock Purchase Order listing, click the Add icon located on the toolbar or click the Edit | Add menu options. The 'Create Stock Purchase Order' screen opens. Enter or select the Vendor number. After clicking "Okay", the 'Stock Purchase Order' window opens defaulted to the Header Tab window, as illustrated.

The screenshot shows a software interface for creating a Stock Purchase Order. At the top, a red header bar displays "Stock Purchase Order#: 1800". Below this, there are four main sections:

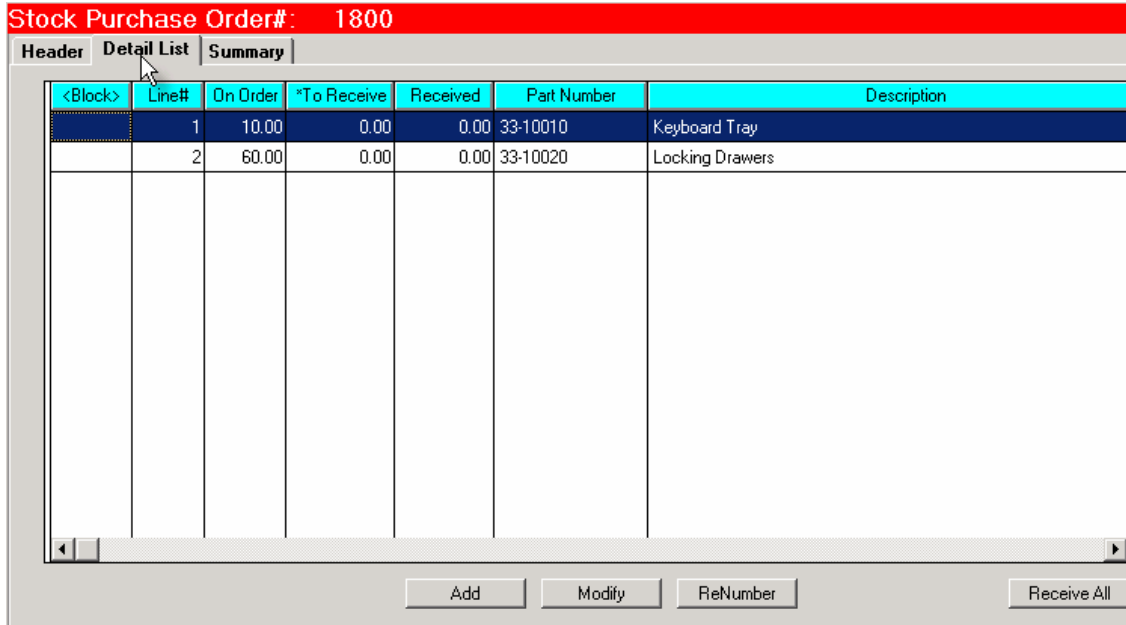
- Vendor Address:** Includes fields for "HAWTHORNE", "ONE HAWTHORNE CENTER", "AMSTERDAM MI, 12345", and "ATTN:".
- Ship To / Install At Address:** Includes a "ShipTo Addresses" dropdown menu and fields for "INSTALLATIONS BY GEORGE", "# 99 INDUSTRIAL PARK SO.", "WHSE # 46", and "SAWDUST TN 37045".
- Order Information:** Includes fields for "Payment Terms", "Buyer Name", and "Order Date" (pre-filled with "09/05/02").
- Shipment Information:** Includes fields for "Acknowledgement#", "Expected Delivery" (pre-filled with "/ /"), "Ship Via", and "Shipping Note".

The system automatically pulls in the vendor address from the Vendor Master file. You may alter the "Attention" line at this time.

The system automatically pulls in the Ship To address from the System, Setup, System Configuration, Company Profile Tab, Standard Ship To Address field. You may overwrite any portion of this address as required.

For the Order Information/Payment Terms, enter the payment terms applicable to this Stock Purchase Order. Complete the other fields as needed, including any notes that you wish to add.

Once the Header Tab fields are completed, click on the Detail List Tab. The 'Detail List' window opens as illustrated.



## Adding Line Items to a Stock Purchase Order

You can manually add line items to a stock purchase order just as you would a proposal, Debit/Credit Memo, etc. You can also import items from a purchase order that used a parent item from Bill of Materials. A stock purchase order would then be created for all of the sub-components for the parent item. Blocked line items from other documents, as well as sif files, can also be imported into a stock purchase order.

If you want to pull the item from your inventory, click on the Item Number command button to access the 'Inventory Search' window.

**NOTE:**

You MUST select the item number from inventory in order for the Stock Purchase Order to update quantities when received. You also must enter the correct vendor number in order to affect the inventory quantities.

Once completed, click the Save button. The system returns to the 'Detail Line Item' list window. You can continue to add items, change items or click on the Summary Tab to view totals for the Stock Purchase Order.

Once you click on the Summary Tab, the 'Summary' window opens as illustrated.

**Stock Purchase Order#:** 1800

Header | Detail List | Summary

**Values**

1,800.00	Product
0.00	Freight
0.00	Delivery
0.00	Design/Other
1,800.00	Total Order

Exit the Stock Purchase Order by clicking on the List icon.

## Updating Inventory Quantities

If the Stock Purchase Order was created

