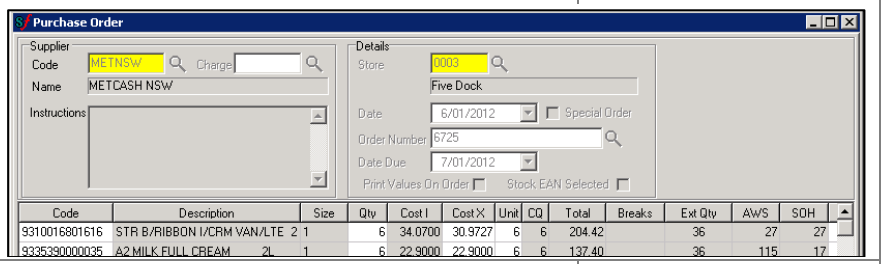
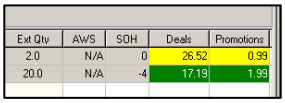
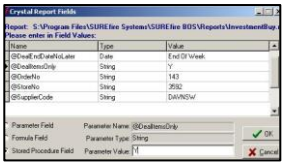
INV-2f *Page| 1 of 2*

Category	Inventory
Course	Ordering
Version	1.0
Client	Generic
Software	2.15.10

Review and Send a Supplier Order

You fax or electronically export an order to the Supplier.

Procedure to Review and Print/Export an Order

1.	From the **Payables** menu, select **Purchase Order.**	
2.	In the **Supplier Code** field, type or search for the supplier's code.	
3.	Press **Enter** or **Tab** if you typed the **Supplier Code**.	
4.	In the **Order Number** field, type or search for the order number to retrieve.	 
5.	**To:** / **then:** add to the order → refer to the INV-2c BOS Manual Orders Fact Sheet. change a quantity → overtype the quantity. delete a product → change the value to [**0**], or click in the row & press **Ctrl** & **Delete**; the row is highlighted red. check if products are on a deal or promotion (to decide if you buy more stock) → hover the curser over the Deal/Promotions fields. **Green means it's active this week or this week and next week. Yellow means it's active next week.** **Alternatively, click* Invest. Buy *to check for deals; see Hints & Tips.** delete the order → click Delete. A warning message is displayed. Click **Yes** to continue. End of Procedure. export the order to Metcash/ALM → go to step 6. export the order via Rymac (for a direct suppliers) → go to step 7. fax the order → go to step 8.	 
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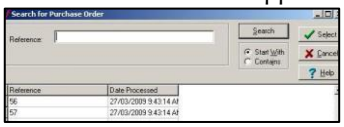
Hints and Tips

- ✓ Don't know the **order number**? Click 🔍, then **Search,** to retrieve every outstanding order for the selected supplier.



- ✓ Always review EVERY order:
  - Pay attention to multiple cases & seasonal products.
  - Use the **AWS** column (unit Average Weekly Sales) to validate order quantities. [N/A] is displayed if the AWS calculation isn't turned on.
  - Check for deals, and order more stock if it's worthwhile.
- ✓ You can also run the **Investment Buy** report from the BOS **Reports->Stock** menu.
  - Select the report parameters
  - Click **OK.** The Investment Buy report is displayed; it lists all products ordered which have a deal ending on the selected date.

- ✓ Click a column header to re-order the products on the order by this column.
- ✓ If you want to **delete an order that you've exported** but not 'sent', it'll still be transmitted when the next order is 'sent' for this supplier (at step 6).
  - Contact SUREfire Support to delete the file.

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Hints and Tips

- ✓ Your business may have several customer numbers with a supplier; the orders for each account are picked & delivered separately. This is useful to keep promotional stock separate.
- ✓ You can save additional customer numbers in the BOS **Tools -> Codes and Descriptions -> Supplier Accounts** tab.
- ✓ **If the Results screen is blank** (an error), call the supplier to check that the order was received.
- ✓ Contact SURE*fire* Retail Support if there's any error's when you export an order.
- ✓ You receive an email/fax from Rymac once they've received the order.
- ✓ Once an order has been exported, it isn't listed on the WebRF device order screen; you can only retrieve the order via this Purchase Order function on the BOS.

6.	Complete the follow steps to export the order (i.e to Spar, Metcash or ALM): a. Click Export. **The gateway defaults to Grocery (if Metcash) or Liquor (if ALM), and the customer number set in the suppliers AP record.** b. If required, type or select a different **Customer Number** if available. c. Click **OK**. An export confirmation is displayed. d. Click **OK**. A sent now? prompt is displayed. e. Click **Yes** to continue. f. Click Send. *A dialling window is displayed; all exported orders for this supplier are transmitted, and the results displayed.* g. Click Print to keep the results for reference; it prints from the default printer configured. h. Click **Close**. A confirmation is displayed. i. Click **Yes** to continue. j. Click Close o exit the Purchase Order screen. End of procedure	
7.	Complete the follow steps to export the order via Rymac (for selected direct suppliers): a. Click Export. **The gateway defaults to Rymac, and the customer ABN set in the suppliers AP record.** b. Click **OK**. A confirmation message is displayed. c. Click **OK**. d. Click Close to exit the Purchase Order screen. End of procedure	
8.	Complete the following steps to fax the order: a. Click Print. A preview is displayed. b. Click the **Print Setup** icon to select a printer, then the **Print** icon to print the order. c. Click the [**X**] icon to close the report. d. Follow store process to fax the order. e. Click Close to exit the Purchase Order screen. End of procedure	
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