

INV-2f Page | 1 of 2


Category	Inventory
Course	Ordering
Version	1.1
Client	Generic
Software	2.18.4.64

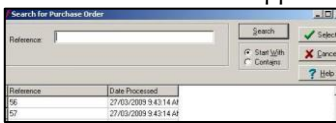
Review and Send a Supplier Order

You email or electronically export an order to the Supplier.

Procedure to Review and Print/Export/Email an Order

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:

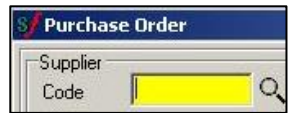

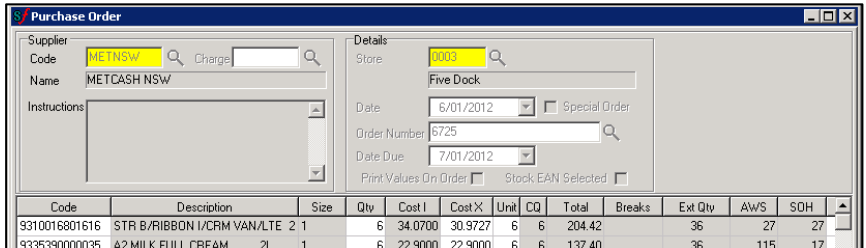




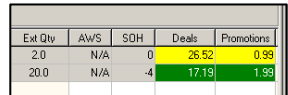
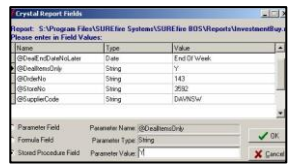


- Pay attention to multiple cases & seasonal products.
- Use the **AWS** column (unit Average Weekly Sales) to validate order quantities. [N/A] is displayed if the AWS calculation isn't turned on.
- Check for deals, and order more stock if it's worthwhile.

✓ 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.


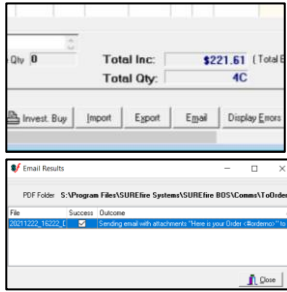



✓ Click a column header to re-order the products on the order by this column.

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.	<table border="1"> <tr> <td>To:</td> <td>then:</td> </tr> <tr> <td>add to the order</td> <td>refer to the INV-2c BOS Manual Orders Fact Sheet.</td> </tr> <tr> <td>change a quantity</td> <td>overtyping the quantity.</td> </tr> <tr> <td>delete a product</td> <td>change the value to [0], or click in the row & press Ctrl & Delete; the row is highlighted red.</td> </tr> <tr> <td>check if products are on a deal or promotion (to decide if you buy more stock)</td> <td>hover the cursor over the Deal/Promotions fields. <i>*Green means it's active this week or this week and next week. Yellow means it's active next week.*</i> <i>*Alternatively, click  to check for deals; see Hints & Tips.*</i></td> </tr> <tr> <td>delete the order</td> <td>click . A warning message is displayed. Click Yes to continue. End of Procedure.</td> </tr> <tr> <td>export the order to Metcash/ALM</td> <td>go to step 6.</td> </tr> <tr> <td>Email the order (for directs)</td> <td>go to step 7.</td> </tr> <tr> <td>print the order</td> <td>go to step 8.</td> </tr> </table>	To:	then:	add to the order	refer to the INV-2c BOS Manual Orders Fact Sheet .	change a quantity	overtyping 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 cursor over the Deal/Promotions fields. <i>*Green means it's active this week or this week and next week. Yellow means it's active next week.*</i> <i>*Alternatively, click  to check for deals; see Hints & Tips.*</i>	delete the order	click  . A warning message is displayed. Click Yes to continue. End of Procedure.	export the order to Metcash/ALM	go to step 6.	Email the order (for directs)	go to step 7.	print the order	go to step 8.	 
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Hints and Tips

- ✓ Your business may have several customer numbers with a supplier. This is mainly so that regular and promo stock is picked & delivered separately.
- ✓ You can save additional customer numbers in the BOS **Tools -> Codes and Descriptions -> Supplier Accounts** tab.
 - Click **New**.
 - In the **Code** field, type the customer number.
 - In the **Description** field, type the name of the account.
 - In the **Supplier** field, type the supplier code for the supplier.
 - Click **Save**.
- ✓ **If the Results screen is blank** (an error), call the supplier to check the order was received.
- ✓ Contact SUREfire Retail Support if there are any error's when you export an order.
- ✓ Contact SUREfire Support if you want to **delete an order that you've exported** but not 'sent', or it'll still be transmitted when the next order is 'sent' for this supplier (at step 6).
- ✓ An exported order isn't listed on the WebRF; you can only retrieve the order via this BOS Purchase Order function.
- ✓ Email is only available if:
 - Email set up is complete [TECH-3i-G-Configure-Emailing-of-Direct-Orders-and-EOP-Statements-Fact-Sheet.pdf](#)
 - An **Order Email** is saved in the Supplier Account.
- ✓ Once you've emailed the order, the Surefire system:
 - Creates a pdf file (YYYYMMDD-supplier code-order no.) in the Surefire Systems/Surefire BOS/comms/ToOrders directory
 - Records the task to the PurchaseOrders.log in Program Files/Surefire Systems/Surefire BOS/Logs.

<p>6. Complete the follow steps to export the order (i.e to Spar, Metcash or ALM):</p> <ol style="list-style-type: none"> a. Click Export. <i>*The gateway defaults to Grocery (if Metcash) or Liquor (if ALM), and the customer number set in the suppliers AP record.*</i> 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. <i>A dialling window is displayed; all exported orders for this supplier are transmitted, and the results displayed.</i> 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 to exit the Purchase Order screen. <p>End of procedure</p>	 <p>The screenshots show the 'Purchase Order Export Type' dialog with 'Grocery' selected and customer number '495580'. The 'Information' window shows 'Export completed successfully. 5 record(s) exported'. The 'Send Purchase Order' dialog shows 'Metcash NSW' selected. The 'Send Purchase Order Results' window displays order details like 'Order Received', 'Batch No.', 'Trans. Date & Time', 'Order Date', 'Application Type', 'Customer No.', 'Cust. Order No.', 'Business Division', 'State of Origin', 'Total Cases Ordered', 'Total Units Ordered', and 'Total Domestic Cases'.</p>
<p>7. Complete the follow steps to Email the order (for email-ready direct suppliers):</p> <ol style="list-style-type: none"> a. Click Email. <i>*Email is greyed out if there isn't an email saved against this supplier.*</i> b. The system generates the emails and displays a confirmation message once complete. You can sort by any column. c. Click Close. d. Click Close to exit the Purchase Order screen. <p>End of procedure</p> <p><i>*Note: if you need a copy of the Email Results, use the Windows Snipping app to save a copy. An action for this may be available in a future release.*</i></p> <p><i>*A copy of the PDF and logs is saved; see Hints & Tips.*</i></p>	 <p>The screenshots show the 'Email Results' window with a table of results including 'Qty', 'Total Inc.', and 'Total Qty'. Below it is a screenshot of the PDF file 'ORDRSUMM_20100617_1040.LOG' in the Windows Explorer.</p>
<p>8. Complete the following steps to print the order:</p> <ol style="list-style-type: none"> 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. Click Close to exit the Purchase Order screen. <p>End of procedure</p>	 <p>The screenshots show the 'Print' icon, the 'Print Setup' icon, and the 'Close' icon (represented by an 'X' in a box).</p>