Solution-IV[®] Accounting Create Purchase Order from Order using menu option



46 Vreeland Drive, Suite 1 • Skillman, NJ 08558-2638 Telephone: 732-560-1377 • Outside NJ 800-524-0430 • Fax: 732-560-1594

Internet address: http://www.tbred.com

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Create Purchase Order from Order using menu option

For help with any option or field please refer to the Order Process Manual or press **F6** on your keyboard.

Cross Reference Selection

Cross Reference Selection is used to select orders that will be processed to create Purchase Orders.



Select Orders for P	O Cross Ref			• 🔀
	Lightspeed Reprographics, Inc. (DEM)	05/19/16	Wł
Starting Date Ending Date	010115 12/31/16	Selected Orders		
Print Selected C From Order To Order	Inders Only? N 0000000001 0000000389			

Starting Date

If you are printing this report for a range of dates, enter the starting date.

Ending Date

If you are printing this report for a range of dates, enter the ending date.

Print Selected Orders Only?

If you have chosen to print the report sorted in its primary sort order, you have the option of entering specific codes or a range of codes to include on the report as follows:

- **Y** Displays a view and allows you to select individual records to print on the report.
- **N** Allows you to enter a range of records to print.

From Order

If you are printing this report for a range of order numbers, enter the starting order number.

To Order

If you are printing this report for a range of order numbers, enter the ending order number.

The system displays:

🥭 Solution-IV Accounting	
System Options Help	
Are the report selection options correct? Yes No Save	

Select Yes, press Enter.

🤔 Solution-IV Accounting		
System Options Help		
Do you want a printed copy (Y/N)?	Yes No Help Cancel	

Select Yes, press Enter.

Select Printer.

Selected Orde	ers for PO Cross Ref						
05/19/16 03	:37 PM Selected (Lightspeed F	Orders for PO Cross Ref Reprographics, Inc. (DEM)	Term: Page:	Wh 6			<u> </u>
Order Number	Line Item Code	Description	Order Quantity	Order UOM Date P	Potential urchase Order	L	
000000386	1 50-110	Bond	8.0000	SQFT 05/06/16 Customer: 00000	09000 Helmetta	0 сору	
000000386	2 50-199	Minimum	1.0000	EA 05/06/16 Customer: 00000	09000 Helmetta	0 copy	
000000387	1 50-199	Minimum	1.0000	EA 05/06/16 Customer: 00000	09000 Helmetta	0 copy	
000000389	1 50-110	Bond	204.0000	SQFT 05/06/16 Customer: 33-10	0 CUST 33	0	
000000389	2 50-199	Minimum	3.0000	EA 05/06/16	о сист оо	0	- - -

Cross Reference Maintenance

Cross Reference Maintenance is used to remove selected orders from the Cross Reference Selection file so that those orders will not be included when the Cross Reference are processed for Purchase Orders creation.

E > Selected Orders for PO <						
Order Number 	Order Line M	ITEM-CODE	Order Quantity 	UOM 	Order Date 	Potential Purchase Order
0000000001	1	10-110	16.0000	SQFT	04/11/16	0056
0000000325	1	10-120	110.0000	SQFT	01/13/15	
0000000325	2	10-110	1100.0000	SQFT	01/13/15	0056
0000000327	1	60-110	250.0000	EA	02/05/15	
0000000327	2	60-310	10.0000	EA	02/05/15	
0000000327	3	60-410	10.0000	EA	02/05/15	
0000000327	4	90-200	10.0000	EA	02/05/15	
0000000328	1	10-120	455.5000	SQFT	02/05/15	
0000000328	2	10-202	20.0000	EA	02/05/15	
0000000328	3	40-110	100.0000	EA	02/05/15	
KKAN	K X X					Þ

Select the record you want to remove either by double clicking or using the arrow keys to navigate to the record and then press **Enter**.

The system displays:

System Options Help			
Remove order 00000000	1 1 from cross ref build?	Yes No All	

Select Yes, press Enter.

Press **F4** to exit the maintenance view.

Cross Reference Update

Cross Reference Update will do the actual creation of the cross reference records required for the creation of Purchase Orders for Order Processing orders.

System Options H	elp	
Do you want to o	continue with the update? Yes No	
📃 Update Status Scre	en	
Folution	Lightspeed Reprographics, Inc. (DEM)	05/25/16 Wt
	Cross Reference Creation	
ſ		

Select Yes, press Enter.

Select the Automatic Purchase Ordering option off the Special	🔄 Special Processing Menu 🗖 🗉 🔜		
Processing Menu.	Summary Invoicing Summary Invoice Selection Summary Invoice Maintenance Summary Invoice Creation Summary Invoice Report		
	Recurring Orders Recurring Order Selection Recurring Order Maintenance Recurring Order Creation Recurring Order Report		
	Cross Reference - PO Cross Reference Selection Cross Reference Maintenance Cross Reference Status Report Automatic Purchase Ordering		
	Gift Card Information		

Purchase Order Creation

This option creates purchase orders from the reorder selection file. A separate purchase order is created for each vendor/warehouse combination.

This purchase orders can then be edited in Purchase Order Entry.

System Options Help	
Do you want to create Purchase Orders? Yes No	
Update Status Screen	
Lightspeed Reprographics, Inc. (DEM)	05/25/16 Wt
Automatic Inventory Reorder - Create PDs	

Select Yes, press Enter.

📃 > Automatic	Re	order Selection	File <			
Vendor Code 	Р Х -	Purchase Number	Purchase Order Qty	Whse Code 	Item Code	Unit Cost
	Y		4.0000	000001	00-00-000	10.00
EAS001	Y		3.0000	000001	10-01-001	306.82
MI2001	Y		1.0000	000001	10-01-002	41.50
MIZ001	Y		13.0000	000001	10-01-002	41.50
MIZ001	Y		1.0000	000001	10-01-002	41.50
MIZ001	Y		11.0000	000001	10-01-002	41.50
K (T V) / (

Vendor Code

Enter the 10 character Accounts Payable vendor code for this purchase order. If the item has a primary vendor code, it will prefill it.

PX

This field is used to indicate if a purchase order will be created for this record.

Purchase Order

This is the purchase order number that will be used when creating this record. If this field is left blank it will use the next purchase order number. If a number is entered it will either add to the existing purchase order or create a new one using that number. Press **F4** to exit the view.

System Options Help	
Print Purchase Order? Yes No	
Update Status Screen	
Miami Valley Data (MVS)	05/25/16 Wt
Automatic Inventory Reorder - Create POs	

Select **Yes**, press **Enter** to print purchase orders.