

Fulfillment manager Purchase Order to sales order soft linkage enhancement: This document outlines how the custom works

### Sales orders

Sales orders are placed via the sales order manager in the normal way.

117 Green Street Richmond VIC 3121  
www.simms.com.au

Transaction Date: 02/04/2013  
Document Number: 149  
Sales Agent: Lisa Bell

**Customer: A SHOP CALLED MILK**

**Bill To:**  
A SHOP CALLED MILK  
383 HAMPTON ST  
HAMPTON VIC 3188

**Ship To:**  
A SHOP CALLED MILK  
383 HAMPTON ST  
HAMPTON VIC 3188

Tel: 03 9521 6391  
Fax:  
Contact:  
CARDID: MILK

117 Green Street Richmond VIC 3121  
www.simms.com.au

Transaction Date: 02/04/2013  
Document Number: 150  
Sales Agent: Joseph Borcham

**Customer: AMYST**

**Bill To:**  
AMYST  
SHOP # 418 FERGUSON ST  
WILLIAMSTOWN VIC 2016 AUSTRALIA

**Ship To:**  
AMYST  
SHOP # 418 FERGUSON ST  
WILLIAMSTOWN VIC 2016 AUSTRALIA

Tel: 03 9397 7132  
Fax:  
Contact:  
CARDID: AMYST

Item Code	Location	Qty	BO	UM	Price	Extended Price
ITEM1	RIC-001	0	10	Each	20.00	200.00
ITEM2	RIC-001	0	10	Each	20.00	200.00

Item Code	Location	Qty	BO	UM	Price	Extended Price
ITEM1	RIC-001	0	20	Each	20.00	400.00
ITEM2	RIC-001	0	20	Each	20.00	400.00

### Creation of purchase orders

Purchase orders are created from the fulfilment manager.

The screenshot shows the 'Fulfillment Manager 2013 v01.11' interface. It features several filter sections: '1. Filter Options' with checkboxes for 'Select All Customers', 'Select All Categories', 'Select All Items', 'Select All Locations', 'Select All Outlets', and 'Select All PO's'; '2. Selection Options' with checkboxes for 'Set All To Zero', 'Select All For PO', 'Select All For Picking', 'Select All For Invoice', and 'Select All For Stock'; and '3. Recalculation' with a 'Recalculate All Qty' button. A table below shows a list of items with columns for Date, Item Code, Vendor, Location, and various quantity and price fields.

You filter to the category that you want to order for then select all for PO.

The screenshot shows the 'Reordering Purchase Order' window. It includes a 'Reorder List' table with columns for Item Description, Item Code, Vendor, Location, Qty, and Price. Below the table, there are fields for 'Net Order' (600.00), 'Purchase Order Information' (Order No., Order Date, Vendor, Ship Via), and 'Purchase Order Information' (Order No., Order Date, Vendor, Ship Via). A 'Print' button is visible at the bottom.

The qty's required will be bought into the Reordering Purchase Order window.

Adjustments to quantities can be made if required. When the user is happy with the quantities they would select **Create PO's to Default Vendors**

Merchandise Marketing Management Company Pty.  
117 Green Street Richmond VIC 3121  
www.simms.com.au

**Purchase Order**  
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Ship To:  
117 Green Street  
Richmond VIC 3121 AUSTRALIA

PO Date: 04-Feb-2013  
Doc Number:  
User Defined: 1:

Vendor: Invoice  
Ship Via:  
Tel:  
Fax:  
Purchase Terms:  
Date Required: 06-Mar-2013  
Currency: AUD  
User Defined: 2:

Item Code	Qty on Order	Qty on Hand	UM	Unit Cost	Extended Cost
ITEM1	30	0	Each	10.00	300.00
ITEM2	0	0	Each	10.00	0.00

The PO is created and the fulfilment manager is updated with the PO no.

Drag a column header here to group by that column

Due Date	Or...	Item Code	Mfr. Lot	Location	Fill Qty	Set to Zero	PO	Inv...	Picking	On BO	On PO	On Order	On-Hand	Total SO	PO No.
5/02/2013	149	ITEM1		RIC-001	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	10	30	10	0	440.00	43
5/02/2013	149	ITEM2		RIC-001	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	10	30	10	0	440.00	43
5/02/2013	150	ITEM1		RIC-001	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	20	30	20	0	880.00	43
5/02/2013	150	ITEM2		RIC-001	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	20	30	20	0	880.00	43

You would receive the PO in the normal way via the Receipt Manager.

### Fulfilling the Sales Orders

In the Fulfillment Manager you can now select a PO and all SO's related to that PO will be displayed

You can select multiple PO's if required and a broader range of SO's will be displayed

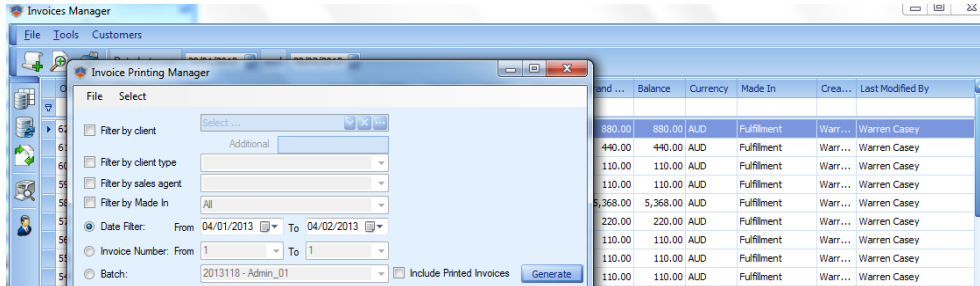
You can allocate the stock manually if required or you can click on the Recalculate Fill Qty button and it will allocate the stock across the lines. You can make manual adjustments after an automatic adjustment has been made.

You would then click on the  Select Filled Qty For Picking and all lines that have stock allocated against them will be selected. When you select the  option picking lists will be produced for each sales order.

You then click in the  Select Filled Qty For Invoice

When you click on the  button and all relevant invoices will be produced.

You can print off the invoices using the Invoice Printing Manager from within the Invoice Manager.



### **Allocation of Stock to Different Orders**

The fulfilment manager provides you with a means of automatically allocating stock to orders, though you can choose to allocate the stock manually.

#### **IMPORTANT**

You can allocate stock from one PO to a sales order that is not associated to that sales order but you should ensure that the sales order you are allocating stock to has a purchase order associated with it that will bring in the stock to fulfil the sales order that you have taken stock from. If you do not do this then you will have to manually order the stock to fulfil the original purchase order.