

Auto PO Classic

An enhancement for ACCPAC VisionPoint 10 Purchase Orders

"Turn shortages into purchase
orders...*automatically!*"

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I READ ME FIRST - HOW TO INSTALL

Auto PO Classic is a companion to ACCPAC's VisionPoint 10 Purchase Orders build 112 and later). Your computer system must meet all of ACCPAC's requirements for running VisionPoint to run Auto PO Classic.

You may install Auto PO Classic at any time.

L Special instructions for Auto PO Demo users:

Install Auto PO Demo exactly as you would Auto PO Classic. The Auto PO Classic Demo program can be loaded on your "real" ACCPAC VisionPoint 10 system. You may also install Auto PO Classic Demo onto a virgin copy of VisionPoint 2000. If you decide to do this and wish to test Auto PO Classic Demo on *Praxis Products*, ACCPAC's dummy company 99.

To install Auto PO Classic or Auto PO Classic Demo, install your ACCPAC VisionPoint 10 system, if it is not installed already.

- I. Make sure no one else is using your ACCPAC VisionPoint 10 system. Now make a backup of your system if you have not done so already.
- II. Copy all file from the Auto PO Classic installation diskette in the \PO directory to your ACCPAC VisionPoint 10 Purchase Orders program directory. In typical VisionPoint 10 installations, this is \ACCPAC\PO, but yours may be something else. It is always the directory which contains the file POPOST.FXP.
- III. Copy all of the files in the \ROOT directory on your Auto PO Classic diskette to the "root" directory of your VisionPoint 10 system. This directory always contains the file SYSDATA.DBF.

IV. Using Windows Explorer, double-click on the file LOAD_APO.EXE. This will start the Auto PO Classic installation program. Or you can run the installation through the Visual FoxPro 7.0 command line by typing "DO LOAD_APO." This will start the installation program.

V. The first time you run VisionPoint 10 Purchase Orders for each installed company, Auto PO Classic will try to add new data tables. For this program to run, you must be the only user in VisionPoint 10, so it is a good idea to enter each of your installed companies for Purchase Orders when no one else is on running ACCPAC.

VI. Auto PO Classic is now installed.

II WHAT Auto PO Classic DOES AND HOW IT DOES IT

Auto PO Classic is a utility for ACCPAC VisionPoint 10 Purchase Orders that automatically writes purchase orders for inventory items which are low or out of stock.

Auto PO Classic was designed to automate the often tedious process of reordering. Using the logic from the Recommended Reorder report in Inventory Control, Auto PO Classic creates a file of recommended reorders (RROs, from now on) which you can edit just as you edit real purchase orders. More importantly, you can convert these RROs into purchase orders either individually or as a batch.

Auto PO Classic works best for ACCPAC users who have long lists of inventory items. This includes manufacturers, wholesale/distributors and retailers. Users who do not have long inventory lists, but wish to minimize their stock on hand and reduce the likelihood of experiencing shortages will also benefit from using Auto PO Classic regularly.

Auto PO Classic relies on the On hand, On order, Allocated, Order point and Order quantity fields in the inventory table (ARINVTxx.DBF), particularly on Order point and Order quantity.

L The quality of Auto PO Classic generated purchase orders depends on the quality of the data in your accounting system's inventory!

ACCPAC VisionPoint 10 maintains On hand, On order and Allocated automatically. You control Order point and Order quantity. You are encouraged to review these two fields regularly for all of your inventory at all of your locations. If the levels are too low, you will find yourself running out of items too often. If they are too high, you will carry too much stock.

You can run Auto PO Classic as often as you wish. On the one hand, running it frequently can help you minimize your inventory cost with a "just-in-time" inventory regimen. On the other hand, waiting longer will increase the size of your purchase orders that may result in significant quantity discounts.

III WORKING WITH Auto PO Classic

Auto PO Classic adds a bar and a popup to the Purchase Orders *Transactions* pad called *Auto PO Classic*.

Attached to it is a popup menu which contains all of Auto PO Classic's functions. The new options are displayed in **Figure 1**.

The first option, *Create Recommended Reorder File*, scans the inventory file and generates RROs for inventory items which are in short; i.e.

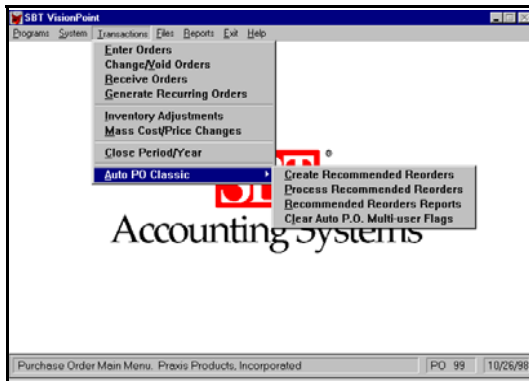


Figure 1

the quantity on hand plus the quantity on order less the quantity allocated (to sales orders *and* work orders, if Manufacturing is installed) is less than or equal to the order point. If this condition exists, an RRO for the amount needed to reach the order point plus the reorder quantity is created for the default supplier.

When you select *Create...*, Auto PO Classic checks for existing RROs. If they exist, Auto PO Classic lets you either delete the existing RROs, overwrite only the existing RROs affected by new RROs, add new RROs to the existing list or to cancel the process completely. Overwriting or deleting existing RROs may be desirable, especially if your inventory has changed significantly since *Create...* was last run.

When the option grid has been properly set, select Proceed. Auto PO Classic will scan your inventory to determine what needs to be ordered.

If inventory is needed, Auto PO Classic will show you how many items, how many vendors and how much the recommended reorder will cost. You will be asked a final time if you want to proceed or cancel. See **Figure 2**.

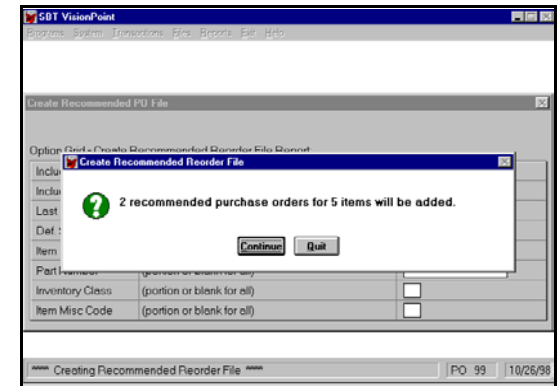


Figure 2

Processing Recommended Reorders

New RROs now exist. To examine them, select *Recommended Reorders Reports*, which is the last option on the Auto PO Classic submenu. You can also view the RROs by choosing *Process Recommended Reorder File*, the second option on the Auto PO popup menu. *Process...* resembles ACCPAC's Change or Void Orders option and it works in much the same way. In *Process...*, however, you select RROs by either Vendor ID or Item number rather than purchase order number. To select an RRO, enter a vendor number, hit the F2 key to trigger a look-up.

You may also look for an RRO by using the Item field or, again in Windows, click on the look-up icon next to the Item field. Once you have selected an RRO, you can manipulate it just as you would an existing purchase order. The “header” screen for maintaining RROs is displayed in **Figure 3**.

The default values for Tax %, Buyer, Ship Via, Confirm To, Payment Disc and Net Due are taken from the current vendor’s entry in the vendor file, while Req Date default is the date which you entered on the *Create...* option grid.

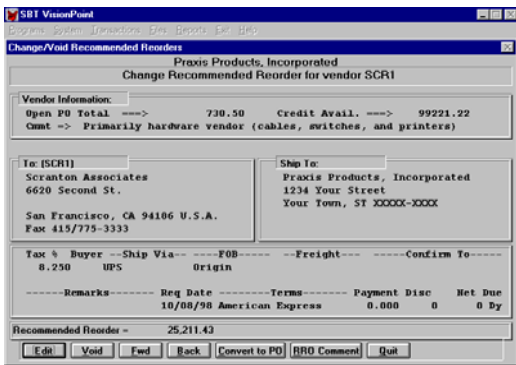


Figure 3

Editing Recommended Reorders

To edit the RRO, type E for Edit, C for Comments or L for Line items or click on the buttons for these options.

When you choose Line items, Auto PO Classic clears the header screen and replaces it with the Recommended Reorder Line Item screen which is displayed in **Figure 4**. From this screen, you can add to, edit and delete items from an RRO just as you would an ordinary purchase order. Use this screen to change quantities, prices, discounts or anything else pertaining to line items.

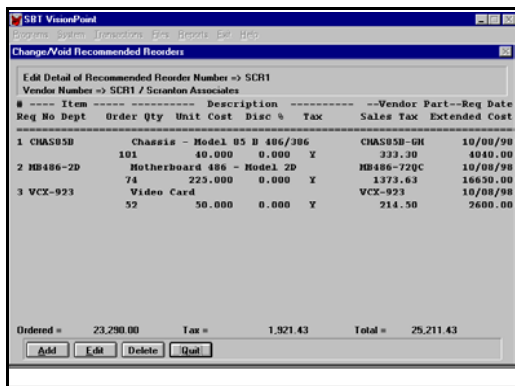


Figure 4

When you are satisfied with the current RRO and want to convert it to a purchase order, move back to the Edit Recommended Purchase Orders “header” screen and select C for Convert to PO. Auto PO Classic asks if you want to convert the current RRO or All RROs (**Figure 5**).

The first option lets you convert your RROs to either purchase orders or purchase order bids. The second option lets you decide whether you or Auto PO Classic will assign numbers to the new purchase orders.

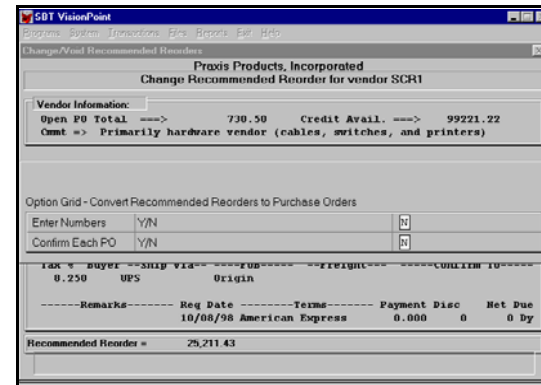


Figure 5

You may choose to assign purchase order number to the new purchase orders or to let Auto PO Classic do it. If you do not choose to enter PO numbers, Auto PO will assign the next available PO number to each new purchase order.

During the conversion process, a window which shows the status of the conversion process is displayed (**Figure 6**). If you chose to enter purchase order numbers or to confirm each new purchase order, the procedure will pause before each RRO is processed.

That's it! A new batch of purchase orders now exist. You can print them

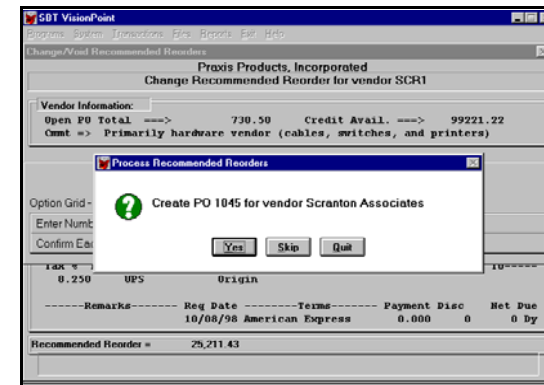


Figure 6

all as a batch by moving to the *Print* menu pad and selecting *Purchase Orders*. Select "Batch" and "Print New and Changed" on the option grid. All of your new purchase order which were generated by Auto PO Classic plus any other new or changed, non-Auto PO Classic purchase orders will print. In every respect, these purchase orders are indistinguishable from purchase orders entered manually.

IV Auto PO Classic TECHNIQUES AND TIPS.

Auto PO Classic is very simple to use. You should not have any problems generating RROs and converting them into purchase orders. The difficult part is setting your inventory switches (order point and reorder quantity) in the item at location screen properly and maintaining an accurate inventory. These switches should be adjusted as conditions change. For some organizations, this means making seasonal adjustments. For others, adjustments should be made to reflect changes in demand for various products which are unique to you. These decisions are the key to effective use of Auto PO Classic.

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