CHAPTER 6

Order Processing

Having read the previous five chapters, you know how incredibly powerful COMPTRON® is in keeping a retail business up to date and well organized. There's more.

COMPTRON® also makes ordering and receiving parts easy. The system can identify what to order based on minimum stock quantities, and then print a list of suggested parts to order based on sales history. You can then edit the list based on the sales trends you foresee, and print final purchase orders. When the merchandise comes in, pull the purchase order and identify parts to enter as received or backordered. COMPTRON® also allows you to order and receive the parts your customers have requested for Special Orders.

COMPTRON® allows you to order based on **YOUR** inventory and sales history, not on the suggestions of vendors, employees, or others. The results are a reduction of dead inventory, fewer lost sales, higher profits, and greater efficiency.

Processing Orders 6

This chapter corresponds to **Option 6** of the **Parts Menu**: **Order Processing**.

When your on-hand quantity for a particular item reaches or falls below the reorder point, COMPTRON®suggests placing an order for that item. It subtracts the *on hand* quantity from the *stock level*. COMPTRON®creates a stock order list that contains the items suggested for ordering.

In creating an order, you could complete the following steps:

> 1. Create and print a suggested stock order list by:

> > Vendor

> > Part Status

> > Code

> > Spring Dating

> > Category

> 2. Edit the stock order list, print the purchase order, and send it to the vendor.

> 3. Print purchase orders for Special Orders.

When the order comes in, follow these steps to receive the items:

> 1. Retrieve purchase order and check items received.

> 2. Enter all items received, or enter the exceptions (if items did not arrive, or were backordered, etc.). COMPTRON®will automatically update your on-hand quantities.

> 3. Print labels for the items received.

Standard Orders Menu 6-1

From the **Parts Menu**, selection of **Option 6** will display the following **Order Processing** menu:

Order Processing Menu

```
Order Processing


                          Select

                            1.   Standard Orders

                            2.   Other Order Options

                            3.   Order Reports

                            4.   Order Receiving

                             '   Exit
```

For standard ordering, select **Option 1**, and the following submenu will appear, showing the different standard order options:

Standard Orders Menu

```
Standard Orders


                          Select

                            1.   Stock Order by Vendor

                            2.   Special Order by Vendor

                            3.   Edit Stock Order

                            4.   On-Line Ordering

                            5.   Forced Stock Order

                             '   Exit
```

Explanation of Submenu Options:

Stock Order by Vendor Option 6-1-1

When creating a stock order by vendor, COMPTRON® suggests quantities to order based on stocking levels and reorder points. It also considers a 30-, 60-, and 90-day sales history. Use **Option 1** to create a *suggested* stock order list by vendor before creating the final purchase order.

From the **Parts Menu**, select **6**, then **1**, then **1**. You will be prompted to choose whether you want to send the output to a printer (default) or display it on the screen.

After your output selection, COMPTRON® will ask you to enter the vendor for which you want to place the order. Type the vendor number and press *Enter*. You have the option at this time to **Continue** or **Exit**.

Press *Enter* again, and if any of your stock levels for this vendor have reached the reorder point, you will see a message showing that COMPTRON® is gathering information. Otherwise, the following message will display, and pressing *Enter* will return you to the **Standard Orders** menu.

```
   *** Nothing to Order for Vendor ___ ***
```

COMPTRON® reads through the Stock file and prints a list of the items it suggests ordering from the vendor. This order list will print at the designated purchase order printer (or the main printer—*see Chapter 11, Management*).

After printing the suggested stock order list, check to see if you agree or disagree with the quantities to order.

Example: Suggested Stock Order:

```
Suggested Stock Order List For Vendor 002           Purchase Order Number 7067                                    9/21/2004

                                            Qty   Order        Stk  Rord              Sold in Previous
Part Number      Code     Description     PS ML Tot Cost  O/H  Qty  Sug  Lvl   Pt   30+   60   90  1Yr+  2Yr  3Yr

08118-MN520               RR SPKR & FADER KIT    Z  1  $160.00   1    2    1    2    1    1    0    2    7   10    0
08C35-A251M01    20W50    GN4 OIL 20W50 QT       A 12   $60.12   5    3    9  120   60   84   77   80  568    0    0
12391-425-010    1049113  GASKET CYLNDR HD CVR   A  1    $9.28   0    1    1    0    0    1    0    0    1    1    0
154A1-413-005    149631   OIL FILTER             A  1   $14.28   4    6    1    2    1    2    0    2   14   24   16
17950-HC4-670    3225166  CABLE COMP., CHOKE     A  1    $5.32   0    1    1    0    0    1    0    0    1    0    0
22884-MB0-006    124572   ROD PUSH               C  1    $3.95   0    1    1    0    0    1    0    0    1    0    0
30202-107-154    0363184  BREAKER CONTACT        A  1    $3.46   0    1    1    0    0    1    0    0    1    1    0
44710-HB9-003    2325397  21X7.00-10 RT101 OHT   B  1   $61.40   0    2    2    2    1    1    2    0    6    0    0
51490-MB4-315    183370   SEAL SET FR FORK       A  1   $13.80   0    2    1    1    0    2    0    0    2    4    2
98056-57713      C7HSA    S/PLG C7HSA            A  1   $12.35   7   13    1    8    4    4    8    5   45    0    2
98069-38716      DR8ESL   S/PLG DR8ES-L          A  1   $23.80  10   20   11   21   10   17   17    9  125   19   29
98069-58717      D8EA     S/PLG D8EA             A  1   $14.25  15   15    1    7    3    8    5    1  120    0    0
98069-58916      DPR8EA9  S/PLG DPR8EA-9         A  1   $13.09  39   11    1   14    7    7    6   14   77   18   45

    13 Part Numbers                 Total Cost:    $395.10
```

Field Descriptions:

Part Number - The part number assigned by the vendor.

Code - The code assigned to this part number.

Description - Description of the item.

PS - The **P**art **S**tatus assigned to this part (whether fast or slow moving).

ML - **Multiples** of items required by the vendor.

Tot Cost - If you order the amount COMPTRON® is suggesting, this will be your total cost, including the order quantity and the multiples of that item.

Qty O/H - The **Quantity On Hand** at the time of creating this order.

Order Qty - The order quantity or amount COMPTRON® will order from your vendor, unless changed when you edit the order.

Order Sug - This is the suggested amount that should be ordered, based on your sales history. *(If there is an asterisk (*) after the suggested amount, COMPTRON® does not have enough history to suggest an accurate amount.)*

Stk Lvl - The suggested stock level. *(If there is an asterisk (*) beside the suggested stock level, COMPTRON® does not have enough history to suggest an accurate value.)*

Rord Pt - The suggested reorder point. *(If there is an asterisk (*) beside the suggested reorder point, COMPTRON® does not have enough history to suggest an accurate value.)*

Sold In Previous - This section displays your sales history:

> **30+** - The amount of sales you had last month, plus the amount sold so far this month.

> **60** - The amount of sales two months ago, not including the 30+ amount.

> **90** - The amount of sales three months ago, not including the last 60 days.

> **1YR** - The amount of sales in the last 12 months, not including the current month.

> **2YR** - The amount of sales in the previous 12-month period, not including the last 12 months.

> **3YR** - The amount of sales in the previous 12-month period, not including the last 24 months.

Total Cost - (Found at the bottom of the list) This is the total cost of items, including the **Multiples** field and the **Quantity** fields.

☞ *NOTE: If you have an item that shows a multiple of 2 and you order 3, most vendors will send you 4 items. Therefore, your quantity to order should always be a multiple of the entry in the* **Multiples** *column.*

Now you are ready to edit the suggested stock order list to create the final purchase order. *(Refer to the Edit Stock Order section later in this chapter.)*

Special Order by Vendor Option   6-1-2

After special ordering parts for your customers in **Counter Operations**, the Special Orders are stored in COMPTRON's memory, waiting for you to create a purchase order to the vendor. If you forget to create the Special Order the same day the customer ordered the part(s), COMPTRON® will remind you on the End of Day reports. This will help you keep your customers happy.

From the **Parts Menu**, select **6**, then **1**, then **2**, and you will be prompted to enter the vendor number for this Special Order. After you do so, the following screen will appear, allowing you to choose which shipping priorities to place on the purchase order. Once you have pressed *Enter* to **Accept** the Special Order priority selections, a purchase order will be printed.

```
                            < > Accept   <C> Change  <'> Exit   < >
          Select Priorities to be Ordered




                             Priority  Description

                                0        NORMAL - NO PRIORITY  <N>
                                1        NEXT DAY AIR          <Y>
                                2        UPS 2-DAY SELECT      <Y>
                                3        UPS 3-DAY SELECT      <Y>
                                4        UPS GROUND DELIVERY   <Y>
```

Select Priorities to Be Ordered Screen

NOTE: *You cannot edit a Special Order, since your customers have ordered these items.*

For Special Orders, lines will be printed in ticket number order. COMPTRON® will ask if you want to include a remark on the purchase order. If you answer yes, COMPTRON® allows you to type any message that you want printed at the top of your purchase order, such as "Please ship UPS red!" COMPTRON® keeps this purchase order in memory until after the order is received.

Example: Special Order printout

```
                           Special Order For:
                          SMITH ACTION SPORTS
                             22 BROADWAY
                          RIVERSIDE, CA 92500
             (607)723-1564   (607)724-1411   FAX (607)724-1430

Date: 12/10/2004     PO No: 4855            Vendor No:  1         Page:   1

To: AMERICAN HONDA                            Dealer No:  103992
    P.O. BOX 50                               Phone No:   213-327-8280
    GARDENA            CA 90247               Fax No:
---------------------------------------------------------------------------
Part Number        Qty  Code     *--------Description---------*     Cost
         Name                    Home Phone   Work Phone   Ext  Ticket Typ Pri

06110-393-S00        1   23195    GASKET KIT A (AS)                $24.95
         SMITH, JOE              607-722-4687                            HLD   4

97284-52148-1        4   23199    SPOKE A FRONT                     $.64
         TULIPPE, RANDY          607-722-9328 607-723-3547               CTR   3

23481-427-000        1   23200    GEAR MAINSHFT 4TH 25             $16.91
         DAVIDSON, MARTIN        607-721-2753 607-724-4892  3            CTR   2

    Lines Ordered:   3             Total Cost:     $42.50
```

If for some reason the paper jams in the printer, or you do not get a good printout of the purchase order, you have the capability to reprint the order. *(Refer to Chapter 10, System Maintenance, and read the Reprints section.)*

The next process in ordering is to receive the order from the vendor, and update your inventory with the new quantities. *(See the Order Receiving section later in this chapter.)*

Edit Stock Order Option   6-1-3

From the **Parts Menu**, select **6**, then **1**, then **3**, and you will be prompted first to select either printer output (default) or screen display, and then to enter a vendor number.

If there is an unedited order pending, the following **Edit Stock Order** screen appears. The upper portion of the screen displays information on the first item from the suggested stock order list for this vendor, including its cost, recommended order quantity, part status, unit quantity, stock level, reorder point, and the quantities on hand and on order. The bottom half of the screen displays the same types of information for a substitute part, if one is available and COMPTRON®has a record for it in the Stock file.

Edit Stock Order Screen (Subst. Part)

```
                    < > History  <'> Exit  <C> Change

  Vendor: 006                      Description:  SUZ OE 45040 OIL FILTER

  Part Number        Code      Last Cost     Repl Cost      Total Cost  Order Qty
  16510-45040         SOF        $2.90         $2.90          $78.30          27

            PS    UQ    M T D     O/H Qty   O/O Qty  B/O Qty  Stk Lvl      ROP
            5     1               23                                 50       30
  ============================= S u b s t i t u t e ===============================

  Part Number        Code      Last Cost     Repl Cost     Vendor
  140021              SOF        $2.24         $2.24         009

  Location  PS    UQ    M T D     O/H Qty   O/O Qty  B/O Qty  Stk Lvl      ROP
                  1               6                                 15       10
```

Explanation of Screen Command Options:

< >   **History** - If you press *Enter*, the bottom section of the screen will change to display your sales history on this part for the last three years *(see the example on the next page)*, so you can decide whether the quantity suggested should be adjusted up or down.

< '>   **Exit** - If for some reason you need to leave the edit screen, type ' and you will exit this screen. When you are ready to continue, return to this section, and the system will pick up where you stopped.

< C>   **Change** - If you want to change the **Cost**, **Stk Lvl**, or **ROP** entries, type C and COMPTRON®will allow you to change these fields. This changes your Stock file to the new cost, stock level, or reorder point.

```
                  < > Accept  <'> Exit  <C> Change  <A> Substitute

    Vendor: 006                       Description:  SUZ OE 45040 OIL FILTER

    Part Number        Code      Last Cost     Repl Cost      Total Cost   Order Qty
    16510-45040         SOF         $2.90         $2.90         $78.30           27


              PS    UQ    M T D      O/H Qty   O/O Qty  B/O Qty  Stk Lvl        ROP
              5     1                  23                           50          30

    ============================ H I S T O R Y ====================================

     Mar   Feb   Jan   Dec   Nov   Oct   Sep   Aug   Jul   Jun   May   Apr    Total
      04    04    04    03    03    03    03    03    03    03    03    03
      24    42    33    27    23    29    26    27    29    37    41    48      386

      03    03    03    02    02    02    02    02    02    02    02    02
      55    35    29    28    21    22    20    21    30    35    40    35      371

      02    02    02    01    01    01    01    01    01    01    01    01
      46    30    21    20    19    22    17    18    13    27    31    34      298
```

Edit Stock Order (History) Screen

Explanation of Edit Stock Order History Screen Command Options:

< > Accept - After you scan the information about the part and decide on the quantity to order (27 in the example), just press *Enter* to accept it. COMPTRON®will go to the next item on your purchase order list.

<**'**> **Exit** - Type ' to exit this screen. When you return to this section, COMPTRON®will resume where you left off editing.

< C> Change - If you want to change the **Cost**, **Stk Lvl**, or **ROP** entries, type C and COMPTRON®will allow you to change these fields. This changes your Stock file to the new cost, stock level, or reorder point.

< A> Substitute - If you need to see the substitute part information again, type A, and the bottom section of the screen will revert to the first display that appeared when you invoked the **Edit Stock Order** screen.

If you want to see how much 35 of these parts would cost, type 35 in the **Order** field and press *Enter* to get the total cost. You may want to try several quantities before selecting the number to order. When the amount under **Order** is the number you want to select, press *Enter*. The next item on the list will then be displayed.

After you have edited all the parts entries on your purchase order, the following prompt appears on the screen:

```
   Additions to Purchase Order? <Y> or <N> <N>
```

Pressing *Enter* accepts the default answer ''No.'' Typing Y allows you to add part numbers to your order for this vendor.   After you have made any necessary additions to your purchase order, the following message will be displayed: Include Special Orders? <Y> or <N> <Y>

If you decide to include Special Orders pending for this vendor, but not yet ordered, press *Enter* for the default answer "Yes", and the screen will display this message:

```
Include Remark on Purchase Order? <Y> or <N> <N>
```

Pressing *Enter* accepts the default answer "No," while typing Y lets you add clarifying comments or other remarks to the order, and then **< > Accept** or **< '> Correct** them before leaving the **Remark** screen.

Next, the **Select Priorities to Be Ordered** screen is displayed, allowing you to select which Special Order shipping priorities to include on the purchase order:

Select Priorities to Be Ordered Screen

```
Select Priorities to be Ordered




                        Priority   Description

                           0        NORMAL - NO PRIORITY   <Y>
                           1        NEXT DAY AIR           <Y>
                           2        UPS 2-DAY SELECT       <Y>
                           3        UPS 3-DAY SELECT       <Y>
                           4        UPS GROUND DELIVERY    <Y>




               < > Accept  <'> Correct   <U> Undo    <  >
```

After you indicate which priorities to place on the purchase order, you will see this **Print Special Orders** screen for choosing whether to print the Special Orders in ticket number or part number sequence (part number order matches the way most vendors list parts on their packing slips/invoices):

Print Special Orders Screen

```
Print Special Orders by




                        Select

                           1.   Ticket Number

                           2.   Part Number

                           '  Exit




1 = Special Orders will be printed in Ticket Number sequence.
2 = Special Orders will be printed in Part Number sequence.
```

An example of a purchase order printout follows. Note that only the Special Order item includes the ticket number and type, and the shipping priority code. Standard stock orders are just identified as "STOCK."

```
                          Purchase Order For:
                          SMITH ACTION SPORTS
                             22 BROADWAY
                          RIVERSIDE, CA 92500
            {607}-723-1564  {607}-724-1411  FAX {607}-724-1430

Date: 03/18/04      PO No: 4860            Vendor No:  1        Page:    1

To: AMERICAN HONDA                              Dealer No: 103992
    P.O. BOX 50                                 Phone No:  213-327-8280
    GARDENA          CA 90247                   Fax No:
-----------------------------------------------------------------------
Part Number        Qty Code    Description              Cost Pr Ticket Typ
                       Name               Home Phone   Work Phone    Ext.

1540-426-010         2 1113737  OIL FILTER               $1.50       STOCK
17510-GB4-720ZE      5 1504895  TANK COMP FUEL          $25.21       STOCK
18240-110-671        3 0213546  PROTECTOR PIPE           $3.65       STOCK

140-2345-2123        1 MTLH     HELMET, MED TO LARGE    $21.95 0      948 CTR
                       MACDOUGAL, GERALD A    607-589-5890 607-679-7789

23 Lines Ordered:   4                      Total Cost:   $161.95
```

On-Line Ordering Option   6-1-4

COMPTRON®can automatically dial some of your major vendors and send
orders over the telephone lines by modem.

From the **Parts Menu**, select **6**, then **1**, then **4**. You will see a menu listing
on-line ordering options, similar to the example below. Only the options for
which you have subscribed will appear. Contact Comptron Data for a
complete list of the vendors for which the on-line ordering option is available.

**On-Line Ordering
Services Menu**

```
On-Line Ordering Services




                   Select ▯

                    1.  MIDAS     (Mercury)
                    2.  SCAT      (Suzuki)
                    3.  DOES      (Yamaha)
                    4.  EASY LINK (Harley Davidson)
                    5.  K-SHARE   (Kawasaki)
                    6.  DCS       (Honda)
                    7.  TRDOS     (Tucker/Rocky)
                    8.  BMW       (B.M.W.)
                    9.  POLARIS   (Polaris)
                    0.  YCS       (Yamaha-Disk)
                    A.  ACCESS    (OMC)

                    '   Exit
```

☞ *NOTE: These menu items are options installed by COMPTRON®as needed.
As Comptron Data grows, we will provide you with more dial-up services.*

More Automation in the Near Future . . . That s COMPTRON®!

Forced Stock Order Option   6-1-5

As noted above in the section on standard orders, COMPTRON® will not prepare a suggested stock order if your stock levels have not reached the reorder point. There may be times, however, when you anticipate a greater need than usual for certain parts, and do not want to delay ordering. Then you can choose to prepare a *forced* stock order. This option can also be used to order things that you have not stocked before; any such items that are not already in your Stock file will be added to it from here by COMPTRON®.

From the **Parts Menu**, select **6**, then **1**, then **5**. You will be prompted to enter a vendor number. After you do so and press *Enter*, a **Creating Stock Order** screen like this appears:

Creating Stock Order Screen

```
                              <'> Exit  </> Search
Creating Stock Order 0016
                                        Quantity on Hand
Vendor #    000                         Stock Level
Code                                    Reorder Point
Part #          [            ]
Sub Ven                                 Multiples
Sub Part #                              Unit Pack
                                        Minimum Order Quantity
Category      00
Description                             Quantity on Order
Part Status                             Quantity on Backorder
SRA                                     Date Last Order

Last Cost           $.00
Average Cost        $.00
Replace Cost
Matrix <Y or N>                         Quantity to Order
Sugg List           $.00
Percent Profit                          Cost
Percent Markup
```

Note that the fields on the **Creating Stock Order** screen are very similar to those on the **Stock File** screen, except for the absence of fields regarding sales history.

Type in the part number for the first item to order, using the slash (/) if you want to search the Stock file for it. If the part number is in the Stock file, COMPTRON® will instantly fill in the rest of the information for you, and take you to the **Quantity to Order** field, now in a box with the **Cost** field. If there is no record for the part number, however, the following **Stock Options** screen will appear, allowing you to indicate whether you want COMPTRON® to enter the quantity on hand or skip that field, and whether you want to set the stock level to the quantity ordered and the reorder point to half that amount, or manually enter both numbers.

```
                              < > Accept  <C> Change  <'> Exit  < >
Stock Options




                                 Enter Stock Level/ROP     <Y>

                                 Default Stock Level/ROP  <N>




```

Stock Options Screen

The **Creating Stock Order** screen will then reappear, showing the part number as you entered it, but just "ADDED TO PO (#) BY (Opr #)" in the **Description** field. The **Stock Level**, **Multiples**, and **Minimum Order Quantity** fields will all show "1," the **Date Last Order** will be the current date, and all other fields will be left blank or at zeros.

After you enter an order quantity, the cursor will return to the **Code** field and then step down through the other fields for you to complete or correct them. COMPTRON® will use the same cost in the **Last Cost** and **Average Cost** fields as you enter for the **Replace Cost** field. When you type in a list price, COMPTRON® will compute the profit and markup percentages. Once you complete the fields on the upper right part of the screen, the cursor will return to the box and wait on the **Order Cost** field, which shows the per item cost, allowing you to accept the information or go back to the previous field. When you accept it, the command line at the top of that box will vanish, and this command line will be displayed across the bottom of the screen:

```
   < > Accept  <'> Correct  <U> Undo  <C> Change  < >
```

As soon as you accept the entries for the first item, the blank **Creating Stock Order** screen will reappear so that you can enter the next item. When you have entered all the regular stock items for this forced order, type an apostrophe (') to **Exit** the screen, and you will see the same Special Orders and Remarks messages as at the end of the **Edit Stock Order** process.

Other Order Options Menu   6-2

The **Other Order Options** menu offers different types of ordering processes that you may choose for various situations. To view these choices, select **6**, then **2**, from the **Parts Menu**.

You will see the following **Other Order Options** menu:

Other Order Options Menu

```
Other Order Options



                        Select

                          1.  Fast Moving Order by Vendor
                          2.  Order by Part Status
                          3.  Order by Code
                          4.  Order for Spring Dating
                          5.  Order for Future Sales
                          6.  Suggested Order by Category
                          7.  Edit Stock Order
                          8.  Change Stock Level & Reorder Point
                          9.  Delete Suggested Stock Order
                          0.  Cancel Purchase Order
                          A.  Cancel Outdated Backorders

                           '  Exit
```

Explanation of Menu Options:

Fast Moving Order by Vendor Option   6-2-1

The **Fast Moving Order** option allows you to print a suggested stock order for a vendor based on sales history. As with all suggested stock orders, COMPTRON® will first offer you the option of sending the output to a printer (default) or displaying it on the screen.

Type in how far back you want your sales history searched. For example, if you create an order for vendor 11, and want to include only items that reached their reorder point in the last 60 days, type 60 in the **No. of Days Back** field.

The option to < > **Continu**e or < > **Exit** appears. If everything is correct, press *Enter*. COMPTRON® will display the message W O R K I N G, and your suggested stock order will be printed and ready to edit. The printout will look the same as on page 6-4.

Note that you can edit your purchase order from the **Other Order Options** menu by selecting **Option 7**, which brings up the same screen described earlier, under the **Edit Stock Order** option of the **Standard Orders** menu

Order by Part Status Option 6-2-2

Another feature of COMPTRON®is the ability to create a purchase order **by Part Status**. This option allows you to print a purchase order to a vendor using the part status as a reference. You can create a purchase order of just the *fast moving* parts, thus enabling you to stock only the faster selling inventory.

From the **Parts Menu**, select **6**, then **2**, then **2**.

Complete the **Vendor**, **Starting Status**, and **Ending Status** fields — 0-9 or A-Z. (Some vendors use a part status of numbers and some letters.)

The option **< > Continue** or **< '> Exit** appears. (If you made a mistake, type **'** , and a message will be displayed showing that COMPTRON®is gathering information; then the suggested order is printed.

You must edit the stock order before sending it to the vendor. *(Refer to the Edit and Print Stock Order section earlier in this chapter.)*

NOTE: Only those items needing to be ordered, and within the status range selected, are printed. The printout is in the same format as the basic Stock Order printout.

Order by Code Option 6-2-3

COMPTRON®also allows creating a purchase order by Code. For example, if you use a code for all T-shirts and you notice that this inventory is low, just print a purchase order using the T-shirts code.

From the **Parts Menu**, select **6**, then **2**, then **3**.

Complete the **Vendor**, **Starting Code**, and **Ending Code** fields.

The option to **< > Continue** or **< '> Exit** appears. If everything is correct, press *Enter* and your suggested order list by code is printed.

You must edit the list before sending it to the vendor. *(Refer to the Edit and Print Stock Order section earlier in this chapter.)*

NOTE: Only those items needing to be ordered and within the code range selected will print. The printout is in the same format as the basic Stock Order printout.

Order for Spring Dating Option   6-2-4

Sometimes vendors accept placement of spring orders in the wintertime, and allow certain price breaks on large-quantity orders. If you have this opportunity, COMPTRON® will allow you to **TEMPORARILY** increase or decrease your stocking levels based on a certain percentage.

From the **Parts Menu**, select **6**, then **2**, then **4**.

COMPTRON® asks for the vendor and for the "Stock level increased by ____%" or "Stock level decreased by ____%."

Type in the vendor for this order and press *Enter*. Then type the *percentage* by which you want your stock levels **INCREASED** (do not type the decimal point), and press *Enter* again.

If you want to decrease your stock levels, skip this line by pressing *Enter* and type the percentage by which to **DECREASE** your stock levels, then press *Enter* again. The option to < > **Continue** or < ' > **Exit** appears. Press *Enter*, and your stock order list is printed. The printout is in the same format as the stock order printout.

NOTE: This will not change your Stock file. It will increase or decrease your suggested stock levels for this order only.

Order for Future Sales Option   6-2-5

Use this option to help give you an idea of how many items to stock for the next three months, based on your sales for this same time period last year.

From the **Parts Menu**, select **6**, then **2**, then **5**.

Suggested Order by Category Option   6-2-6

As the accessory purchaser for your store, you may have an opportunity to purchase a large quantity of inventory on sale from a vendor at a greatly reduced price. If you want to see if a particular category needs to be ordered, (tires, for example) you may print a suggested order of that particular category. COMPTRON® suggests items needing to be ordered based on your sales history.

From the **Parts Menu**, select **6**, then **2**, then **6**.

COMPTRON® will ask for the category, then print a suggested order.

NOTE: This section only suggests an amount to order based on your sales history. It does not give you an actual purchase order, or keep this list in memory. This list is for information on this category only.

Edit Stock Order Option   6-2-7

If you have created several orders in a row from the **Other Order Options** menu and then decide you want to edit them now, you don't have to exit back to the main **Order Processing** menu and the **Standard Orders** menu to access the **Edit Stock Order** option. The same feature is available as **Option 7** on the **Other Order Options** menu.

Change Stock Level & Reorder Point Option   **6-2-8**

This option is available for those interested in making seasonal changes to their stock levels and reorder points. It is similar to Spring Dating, except that it allows you to **PERMANENTLY** increase or decrease your stocking levels by a certain percentage. Instead of using a percentage, however, you may want to change your stock levels and reorder points to COMPTRON's suggested amounts.

From the **Parts Menu**, select **6**, then **2**, then **8**. You will see a menu of three options allowing you to **Increase by Percentage** or **Decrease by Percentage** the stock level and reorder points, or **Change to Suggested** amounts.

COMPTRON® asks for the **Starting** and **Ending Vendor**s and then allows you to enter the percentage of increase or decrease, depending on your selection. Do not type the decimal point to indicate percentage.

NOTE: Remember to change the stock levels and reorder points back to the old values at the end of the season, if needed.

The **Change to Suggested** option changes your stock levels to an amount based on the past three months' sales history. The reorder point changes to half of the stock level amount. If you want to see these amounts before running this program, print a suggested stock order for the vendor. The printout shows the suggested stock order amounts.

Delete Suggested Stock Order Option   **6-2-9**

This option enables you to delete a suggested order that was created but not edited.

NOTE: If you create a suggested order for a vendor and one is already pending for the same vendor, the first one will be deleted automatically if it was not completely edited.

Cancel Purchase Order Option   **6-2-0**

If you have created a purchase order, but not yet received it, you may cancel it using this option. Canceling a *stock order* leaves the same results as if you had received the order and answered ''Cancel'' for each line item. Canceling a *Special Order* places all the ordered items on reorder status; they will be reordered when the next purchase order is created for that vendor.

Cancel Outdated Backorders Option   **6-2-A**

Use this option to cancel backorders that are one, two, or three months old (and older) for any range of vendors.

Order Reports Menu   6-3

Four types of reports are available for checking the status of your orders.
From the **Parts Menu**, select **Option 6**, then **3**, and the **Order Reports** menu
will display as follows:

```
Order Reports


                              Select ▊

                                1.   Backorders by Vendor

                                2.   Outstanding Stock Orders

                                3.   Stock Order Reminder

                                4.   Special Order Reminder

                                '   Exit

```

Order Reports Menu

Explanation of Menu Options:

Backorders by Vendor Option   6-3-1

This report shows the items on backorder from any range of vendors you
select. These are the items that were marked as backordered on invoices for
orders you received. An example of the Backorder Report follows, with
descriptions of the fields that may be unfamiliar to you.

```
Backorder Report Starting With Vendor   0 Ending With Vendor 999

12/11/2004                                                                              Page   1

Ven Cat   PO  Part Number     Code    Description            PS O/H Qty      Cost      Retail Stk Lvl RP UP UQ  B/O Qty

  0  00 7595  08118-MN510              PASS. AUDIO CONTROL      Z     1     $65.00     $124.58      3  2 EA  1        2
  0  00 7476  89301-918-672   025039  TIRE GAUGE 0-4PSI        B     4      $4.00       $8.07      4  2 EA  1        2

  2  00 7960  32421-85A                IGNITION MODULE(8000 RPM) A    0     $59.97     $114.94      1  0 EA  1        2
  2  00 7318  56063-82A                CHROME STRAIGHT RISER KIT      1     $48.00      $85.04      1  0 EA  1        1
  2  00 7960  68011-91T                COVER T/LGHT G/LOGO            0     $10.48      $24.09      1  0 EA  1        1
  2  00 7318  71469-65B                SWITCH, SOLENOID STARTER       0     $29.97      $68.94      1  0 EA  1        1

 14  00 7778  040041                   GL 150 BACKREST ASSY     A     1    $122.50     $175.00      1  0 EA  1        1
 14  00 7778  040051                   GL1500 DRIVER B/R'90 BLUE      1    $126.00     $195.00      1  0     1        1

 26  12 7945  MI1550                   INTERCOM WITH MUSIC      A     1    $150.00     $299.95      1  0 EA  1        1
```

Field Descriptions:

RP - Reorder point

UP - Unit Pack

UQ - Unit Quantity (multiples)

Outstanding Stock Orders Option   6-3-2

This report shows all items on order, but not received, for all vendors.

```
Outstanding Stock Orders

12/14/2004                                                                                    Page  1

  PO  Ven  Part Number      Code      Ord/Changed    On Hand   Multiples   Unit Pack  On Order   Backordered  Cross Shipped

7318  002  56063-82A                  02/22/2004         1          1      EA                          1
7318  002  71469-65B                  02/22/2004                    1      EA                          1
7318  002  98159-81V S                02/22/2004                    1      EA                                         2

7319  000  08732-0002       2874444   02/22/2004         7         12                                                 2

7394  026  HS134BJHSFF                03/10/2004                    1                     4

7461  026  HS134BJHS                  03/27/2004         5          1                    12

7476  000  89301-918-672    025039    04/03/2004         4          1      EA                          2

7595  000  08118-MN510                04/28/2004         1          1      EA                          2
```

The **Ord/Changed** column indicates the date of the order, or the date when a change was made to the order record.

Stock Order Reminder Option   6-3-3

In the past, you may have run out of parts at times by forgetting to run a purchase order for a vendor. With COMPTRON®this is easy to avoid.

From the **Parts Menu**, select **Option 6**, then **3**, then **3**. COMPTRON®will display the word   W O R K I N G while it searches your **ENTIRE STOCK FILE** for parts that need to be ordered, based on your stock level and specified reorder points.

Example: Stock Order Reminder report:

```
Stock Order Reminder

09/15/2003                                                                                    Page   1

Vendor    Vendor Name                  Items to Order   Order Quantity   Mtd Sales   Total Cost   Last Sale   Last Order

 000      AMERICAN HONDA MOTOR CO., INC.        2              6             5        $129.54     8/08/2003    8/01/2003
 009      TUCKER/ROCKY                         52            274             6      $8,033.39     8/08/2003    7/15/2003
 011      MALCOLM SMITH                        21             43             2        $557.80     6/11/2003   11/10/2002
 013      USA SPORT                            16             29             3        $715.69     6/16/2003   11/09/2002
 014      UNITED MOTOR SPORTS                   5              8             1        $298.48     8/14/2003    6/05/2003
 015      MARKLAND INDUSTRIES                  14             41                      $186.42     6/10/2003   10/27/2002
 016      BIG BIKE PARTS                       10             26                      $215.48     6/11/2003   10/28/2002
 017      HELMET HOUSE                          6              8             1        $130.03     6/25/2003   10/16/2002
 018      LOCKHART                             19             23                      $696.02     6/10/2003   10/28/2002
 019      BOMBARDIER                           34             49             4      $1,759.03     8/04/2003    4/10/2003
 020      PJ CYCLE PRODUCTS                     6            122                      $399.46     6/09/2003    7/25/2003
```

Field Descriptions:

Items to Order - Total quantity of different part numbers that need ordering.

Order Quantity - Total quantity, including multiples that need to be ordered.

Mtd Sales - Total sales, this month, of parts to be ordered.

Total Cost - Total cost of parts to be ordered.

Last Sale - The most recent date sold of parts to be ordered.

Last Order - The most recent previous order date of parts to be ordered.

In the example, let's look at Tucker/Rocky (Vendor 9). The Stock Order Reminder Report tells us that we last ordered from Tucker/Rocky on July 15, 1997. However, the last time we sold a part was more recent (August 8, 1997), so we want to print a purchase order for this vendor.

Special Order Reminder Option   6-3-4

The Special Order Reminder Report is a valuable tool. After you create a Special Order, it can easily be forgotten, resulting in an unhappy customer. COMPTRON® always remembers your customers. After running the **End of Day** processing, COMPTRON® prints a Special Order Reminder report, reminding you of any Special Orders that are pending.

You don't have to wait until the end of the day, however. You can print this report at any time. Beginning at the **Parts Menu**, select **6**, then **3**, then **4**.

The following is an example of a Special Order Reminder printout. Notice that it includes a subtotal by vendor, and a grand total at the end.

```
Special Order Reminder

 1/28/2004                                                                          Page   1

Ven  Part Number        Code      Qty Ext. Cost Description              Typ Pri Name                  Phone Number  Date

001  18240-110-671      1534020     1     $2.43 PROTECTOR PIPE           CTR  3  ARTHUR, JACK T         877-2937      1/28/2004
001  18353-110-670B     1524236     1     $3.56 BRACKET MUFFLER          CTR  3  ARTHUR, JACK T         877-2937      1/28/2004
001  33450-MC7-612      2087094     1    $11.22 WINKER ASSY L FR         CTR  3  ARTHUR, JACK T         877-2937      1/28/2004
001  M107X-006-LLG1K    3711713     1     $4.50 HR MX MAROON LR          CTR  3  ARTHUR, JACK T         877-2937      1/28/2004

              Vendor 001 Total Cost     $21.71

                       Total Cost     $21.71
```

There may be more items to order, so you can wait to print the purchase order later if you wish. But until you create a purchase order for each of these vendors, this reminder will not go away.

Order Receiving Menu 6-4

COMPTRON's **Order Receiving** function makes it quick and easy to update your inventory records as you receive orders. In addition, the system can print labels for the new stock (with or without prices) as you receive your inventory. Just stick on the labels, place the items on the shelves, and you're done!

When a shipment comes in, first check the vendor's packing slip against the items in the boxes, to be sure everything listed is there. Then go to the **Parts Menu** and type **6**, then **4**, to see the following **Order Receiving** menu:

Order Receiving Menu

```
Order Receiving




                        Select

                        1.   Accept Purchase Order in Entirety

                        2.   Enter Quantities for Each Item

                        3.   Enter Exceptions to Purchase Order

                        4.   Receive from Invoice - No Purchase Order

                        5.   Enter Single Items

                         '   Exit

```

Explanation of Menu Options:

Accept Purchase Order in Entirety Option 6-4-1

Selecting **Option 1** from the **Order Receiving** menu brings up the following submenu to enter instructions for printing parts labels:

Order Receiving (Print Labels)

```
Order Receiving




                        Select

                         1.   No Labels at All

                         2.   Parts Labels Only

                         3.   Address Labels Only

                         4.   Parts and Address Labels

                          '   Exit

```

Explanation of Print Labels Submenu Options for Order Receiving:

< 1> **No Labels at All** - Choose this option when receiving items that already have labels, such as bin boxes, and you don't want to print labels. After asking for a PO (purchase order) number, COMPTRON® will accept the quantities just as they appear on the purchase order, and update the file accordingly.

< 2> **Parts Labels Only** - Use this option when receiving either a standard stock or Special Order, and you wish to print labels. These will show the vendor and part numbers, date, and description, plus the customer name if for a Special Order. COMPTRON® will ask if you want the price on the labels.

< 3> **Address Labels Only** - Many businesses send a notice (preprinted post card) to tell their customers when Special Orders arrive. COMPTRON® includes this capability as part of **Order Receiving**. When you select this option, the system will ask for a PO number; then it will accept the quantities as shown on the purchase order, update the file accordingly, and print address labels for your customer notices.

< 4> **Parts and Address Labels** - This option prints two types of labels, one for the part and one for mailing a notice to the customer. Stick one on the part and one on the preprinted post card.

If you choose **Option 2** or **4**, this submenu displays, offering three process options for parts label quantities to print:

Order Receiving
(Parts/Address Labels)

```
Order Receiving




                        Select  ▮

                           1.   Ask for Label Quantity

                           2.   Use Received Qty for Labels

                           3.   One Label Per Item

                           '   Exit

```

Explanation of Parts/Address Labels Submenu Options:

< 1> **Ask for Label Quantity** - With this option, after displaying each part number received, COMPTRON® will ask how many labels you need. For example, your incoming order might include a case containing 12 bottles of oil, and you want a label on each bottle; but there could also be six boxes of spark plugs, but you just want to label each box.

< 2> **Use Received Qty for Labels** - This option asks if you want prices on the labels, and tells COMPTRON® to print as many labels as the quantity of items received.

< 3> **One Label Per Item** - This option prints one label for each part number on the purchase order, regardless of the quantity ordered.

Enter Quantities for Each Item Option   6-4-2

Selecting **Option 2** from the **Order Receiving** menu brings up the same **Order Receiving Print Labels** submenus explained above for **Option 1**. Type the PO number when prompted. COMPTRON® will display a **Receiving Stock Order** screen similar to the following example, showing the first part number on the purchase order:

Receiving Stock Order (Item by Item) Screen

```
Receiving Stock Order 0010 (Item by Item)
                                          Quantity on Hand          19
Vendor #   004                            Stock Level               40
Code       KOF                            Reorder Point             20
Part #     16099-003
Sub Ven #  009                            Multiples                  1
Sub Part # 140032                         Origin
                                          Minimum Order Quantity     1
Category     12
Description  KAW OE 003 OIL FILTER        Quantity on Order
Part Status                               Quantity on Backorder
SRA                                       Date Last Order      6/29/2001


Last Cost           $4.92
Average Cost        $4.92      ┌────────────────────────────────────────┐
Replace Cost        $4.92      │ <A> Add  <K> Skip Part  <M> Memo  <'> Exit│
Matrix               <N>       │                                        │
Sugg List           $9.84      │      Quantity Ordered          2       │
Percent Profit     50.0000     │      Quantity Received         2       │
Percent Markup    100.0000     │      Order Cost            $4.92       │
Update from Book     <Y>       └────────────────────────────────────────┘
```

A window on the lower right side of the screen shows the quantity ordered and received, and the cost. The cursor waits at the **Quantity Received** field, so that you can change the quantity for this item if the shipment you've received contains more or fewer than actually ordered. When you press *Enter*, the cursor moves down to the **Order Cost** field, and a new line is highlighted at the bottom of the screen, showing this item's cost as of when you ordered it. You can change the cost in the window, as in the case of a specially ordered part, if the invoice shows a different cost than was used on your PO. Selecting < > **Exit** at any point after entering a PO number will return you to the **PO Number** prompt, so you can receive items for a different PO number.

☞ *NOTE: If this is a Special Order for vendor 0 or 1, the code will display instead of the part number. When receiving a standard stock order, the message* Stock Ordered Item *will appear instead of* Special Ordered Item.

If you type a quantity less than the purchase order amount, COMPTRON® will notify you of the quantity remaining and allow you to **Backorder**, **Cancel**, **Cross-ship**, or **Reorder** the part(s). If you type a quantity greater than on the purchase order, COMPTRON® will ask if you want to add the excess to stock; this will update the Stock file by adding the surplus to the on-hand quantity.

If you accidentally receive a specially ordered part which was cross-shipped or backordered, and fail to use the **Enter Single Items** option described later in this chapter, you can correct the Special Order file using **Option 6** from the **Maintenance** menu. *(Refer to Chapter 10, System Maintenance, and read the Special Order File section.)*

Enter Exceptions to Purchase Order Option   6-4-3

Selecting **Option 3** from the **Order Receiving** menu brings up the same **Order Receiving (Print Labels) submenus** covered under **Option 1**. COMPTRON®will prompt you for the PO number and part number of the item for which you **DID NOT** receive the quantity you ordered, and then you will see a **Receiving Stock Order** screen nearly identical to that displayed for **Option 2**. As with that option, type the quantity received and press *Enter*. If you ordered two items and only received one, the remaining item may be **Backorder**ed, **Cancel**ed, or **Cross-ship**ped, or you may **Reorder** the remaining part(s). COMPTRON®will update the Stock file accordingly. As with **Option 2**, you can also use this window to change the cost of a part if the invoice indicates that it has risen.

Receive from Invoice - No Purchase Order Option   6-4-4

Occasionally when you receive a stock order or Special Order, you may also get some items that were not listed on your purchase order (you might have added them orally by phone). With this option, you can still process in the extra items from the invoice without a PO for them, but you will have to type in every part number. However, it is better to have a PO for everything on order; that way everyone can tell if a customer's part has been ordered, and avoid duplicating orders.

When you select **Option 4** from the **Order Receiving** menu, you will see the same **Order Receiving (Print Labels)** submenu that was described under **Option 1**. If you choose to print parts labels only (submenu **Option 2**) or both parts and address labels (submenu **Option 4**), you will first go through the second submenu process for labels.

After that, or if you have chosen to print no labels (submenu **Option 1**) or address labels only (submenu **Option 3**), you will be prompted to enter a vendor number. You can type the number if you know it, or just use a slash (/) character to search a full or partial list of vendors organized in vendor number order or alphabetically by name. (You can also use the (/) in the **Sub Ven #**, **Sub Part #**, and **Category** fields.)

When you have chosen a vendor, COMPTRON®will ask if you want to generate and print a purchase order to account for the received items that were not previously included on your purchase order. Regardless of your answer to this question, COMPTRON®will next display the following **Receiving Stock Order from Invoice** screen, with only the **Vendor** field completed and the cursor waiting at the **Part #** field:

```
                                   <'> Exit   </> Search
Receiving Stock Order 0010 from Invoice

                                           Quantity on Hand
Vendor #    004                            Stock Level
Code                                       Reorder Point
Part #
Sub Ven #                                  Multiples
Sub Part #                                 Origin
                                           Minimum Order Quantity
Category
Description                                Quantity on Order
Part Status                                Quantity on Backorder
SRA                                        Date Last Order


Last Cost
Average Cost
Replace Cost
Matrix              < >                     Quantity Ordered
Sugg List                                   Quantity Received
Percent Profit                              Order Cost
Percent Markup
Update from Book      < >
```

Receiving Stock Order from Invoice Screen

Type in the part number for the first item received, using the slash (/) to search the Stock file for it if necessary, and COMPTRON® will instantly fill in the rest of the information for you, displaying a window in the lower right corner (like the window for options **2** and **3**), for you to fill in the quantity ordered. After you enter a quantity, the program will put the same number in the **Quantity Received** field and display the per item cost of this "order," waiting for you to accept the information or go back to the previous field. When you accept it, the command line at the top of that box will vanish, and this command line will be displayed across the bottom of the screen:

```
   < > Accept  <'> Correct  <U> Undo  <C> Change  < >
```

As soon as you accept the entries for the first item, the blank **Receiving Stock Order from Invoice** screen will reappear, for you to enter the next item. When you have entered data on all the extra parts received that were not included on your previous purchase order, use the apostrophe (') command to **Exit** from this screen. COMPTRON® will update the on-hand quantities and last cost in your Stock file, even building a new stock record if these parts were not already on file, as though you had sent a purchase order for the items. It will also create and print out an "after the fact" purchase order, and labels, if you asked for them.

Enter Single Items Option   6-4-5

Use this option when receiving single, backordered, or cross-shipped items. COMPTRON® does not recognize a purchase order after it is received. It does, however, recognize **ITEMS** not received, in this section only.

When you select **Option 5** from the **Order Receiving** menu, the same **Order** Receiving (Print Labels) submenus appear that were covered under Option 1. You will see the same prompt screens as for **Option 3**, **Enter Exceptions to Purchase Order**. As with options 2 and 3, you can also change a part's cost, using the **< C> Change** command.

Summary

This chapter explained the various aspects of processing orders. Specifically, it covered how to handle:

Standard Orders

> Creating stock orders by vendor

> Creating stock orders by part status

> Creating stock orders by code

> Creating a fast-moving order

> Creating stock orders for spring dating

> Creating orders for future sales

> Creating suggested orders by category

> Creating a combined stock order and Special Order

> Editing and printing purchase orders

> Creating Special Orders

> Ordering on line

Order Status Reports

> Generating a list of backorders by vendor

> Generating a list of outstanding stock orders

> Producing stock order reminders

> Producing Special Order reminders

Order Receiving

> Accepting orders in entirety

> Creating labels automatically when receiving orders

> Entering quantities received for each item ordered

> Entering exceptions to purchase orders

> Receiving items from an invoice without a purchase order

> Entering single items

Chapter 6   Quick Reference