## 6. Purchase Order Setup

This Chapter

**Getting There** 

Signing On

This Chapter looks at the setup of the Purchase Order Status, Types, Manufacturer, Buyers and Companies.

### 6.1 How To Work With The PO Setup Menu

The following shows you how to get to the PO Setup Menu.

Sign on, and you will see the User Application Menu, as shown in Figure 1.

	ZZMENUR DIS	SPLAY		1/02/98 08:00:00
$User \rightarrow$		User Applica	tion Menu	
	User Id YOU			
Application	Your Name			
Menu	Type options,	press Enter.		
	1=Select Menu	Option 2=Change Current Ap	plication Company	
			~	
	? Application	Description	Company.	
	AP	Accounts Payable	YOURCO	
	AR	Accounts Receivable	YOURCO	
	CM	Contact management	YOURCO	
	GL	General Ledger	YOURCO	
	IC	Inventory Control	YOURCO	
	IT	Incident (project) Tracking	J OTHERCO	
	OE	Order Entry	YOURCO	
	PO	Purchase Orders	YOURCO	
	UU	Union Information System	OTHERCO	
	ZZ	Run Time	YOURCO	
	F3=Exit			

The Applications

Here is a display of the applications you have been given to work with.

- In this display, YOURCO is short for Your Company, and OTHERCO is short for Other Company.
- The Other Company would be one that your company owns or is affiliated with.
- In Figure 1, option number 1 lets you select an application.

### Selecting An Application

We are going to work with the Purchase Order application. Tab across then down to PO, type in a 1, as shown in Figure 2, and press Enter.

• If you tab too far by mistake, use the  $\uparrow$  to take you back up.

ZZMENUR DISPLAY		
	: Run Application Menu	:
User Id YOU	: KOBELT TEST Manufacturing Co. Ltd.	:
Your Name	: PO Purchase Order	:
Type options, press Enter.	: Select Menu options using `1'	:
1=Select Menu Option 2=Chang	: ? Menu Description	:
	: Work with PO Vendor	:
? Application	: Work with Purchase Orders	:
1 PO Purchase Orders	: Work With PO Item Master	:
$1 \rightarrow  $	: PO Setup	:
1 /	: Common Menu Functions	:
	:	:
	:	:
	:	:
	:	:
	:	:
	:	:
	:	:
	:	:
	: F3=Exit F17=Change Current Company	:
	- * *	:
	:	:
F3=Exit		:
	Hous's the second second	

**Purchase Orders** 

A panel appears on the right, partially covering the previous display.

- Although you are now working with one of the applications, you can still see your user ID and your choice of options on the left.
- This information is useful for troubleshooting.

Tab down and type in a 1 beside PO Setup, as shown in Figure 3.

Selected

Figure 3

ZZMENOR DISPLAI		• :
	Run Apprication Menu	:
User Id YOU	: KOBELT TEST Manufacturing Co. Ltd.	:
Your Name	: PO Purchase Order	:
Type options, press Enter.	: Select Menu options using `1'	:
1=Select Menu Option 2=Chang	: ? Menu Description	:
	: Work with PO Vendor	:
? Application	: Work with Purchase Orders	:
1 PO Purchase Orders	: Work With PO Item Master	:
	: 1 PO Setup	:
	: Common Menu Functions	:
	:	:
	:	:
	:	:
	:	:
	:	:
	:	:
	:	:
	:	:
	: F3=Exit F17=Change Current Company	:
		:
	:	:
F3=Exit		. :

You're working with this panel

PO Setup	Press Enter, an	nd your display v	will look like Figure 4.
	11000 <b>Direct</b> , wi		

	Figure 4			
Purchase Order Setup Menu →	ZZMENUR DISPLAY ZZMENUR DISPLAY User Id YOU Your Name Run Application Sub Mer POSETUP PO Setup Menu Select Menu options using '1' ? Menu Description Work with PO Status Work with PO Type Work with PO Type Work With PO Type Work With PO Item Master Work With PO Item Master Work With PO Buyer Work with PO Company : : : : : : : : : : : : :	KOBELT PO	Run Application Menu : Test Manufacturing Co. Ltd. : Purchase Order . options using '1' : ription : PO Vendor : Purchase Orders : PO Item Master : : nu Functions : : : : : : : : : : : : :	
Cash Management	You're working with The Purchase Order Setup Menu This will be the Starting Point for	this panel display fills the next 5 s	<i>l</i> up half of your screen. ections.	
1 Option Already Covered	<ul> <li>Work With With PO Item Master</li> <li>This chapter will cover Work with Manufacture</li> </ul>	has already Work with r, Work w	been covered in Chapter 5. PO Status, Work with PO Type, ith Buyer and Work with PO	

Company.

## 6.2 How To Setup PO Status

**Start Here** 

Figure 1 shows the Purchase Order Setup Menu.

Purchase	User Id YOU Your Name	: : KOBELT : PO	Run Application Menu Test Manufacturing Co. Ltd. Purchase Order
rder Setup Menu → Work With → PO Status	Run Application Sub Me POSETUP PO Setup Menu Select Menu options using '1 Menu Description Work with PO Status Work With PO Type Work With Manufacturer Work With PO Item Master Work With PO Item Master Work with PO Buyer Work with PO Company	nu	<pre> options using '1' : ription : PO Vendor : Purchase Orders : PO Item Master : . nu Functions :</pre>
	: : : F3=Exit : :		: : 7=Change Current Company : :

The Task

1

• In Figure 1, option 1 lets you work with displays.

Selecting

Tab down to Work With PO Status, and type in a 1, as shown in Figure 2.

### Figure 2

ZZMENUR DISPLAY			•
	:	Run Application Menu	:
User Id YOU	: KOBELT	Test Manufacturing Co. Ltd.	:
Your Name	: PO	Purchase Order	
		options using '1'	
: Run Application Sul	o Menu	: ription	
: POSETUP PO Setup Menu		: PO Vendor	
: Select Menu options using	g `1′	: Purchase Orders	
: ? Menu Description		: PO Item Master	
: 1 Work with PO Status		:	
: Work With PO Type		: nu Functions	
: Work with Manufacture:	r	:	
: Work With PO Item Mas	ter	:	
: Work with PO Buyer		:	
: Work with PO Company		:	
:		:	
:		:	
:		:	
:		:	
: F3=Exit		: 7=Change Current Company	
:		:	
		:	

You're working with this panel

### Filled

Press Enter, and your display will look like Figure 3.

	Figure 3					
	POXXDFR	DISPLAY				1/02/98 08:00:00
Work With $ ightarrow$ PO Status	Order Status	Description	Work with PO	Status		
	Type optic	ns, press Enter.				
Ontions >	2=Change	4=Delete				
$Options \rightarrow$	? Order Status CLOSED OPEN QUOTE	Description Closed Open PO Out for Quotation		Allow Changes 0 1 1	PO Closed? 1 0	Items Ordered? N Y N
	F3=Exit	F6=Add F21=Print	List			
$\mathbf{F6} = Add \rightarrow$						

**Your Choices** 

Figure 3 shows the Work With PO Status display.

- First, we will use F6 to add a new Order Status Code. •
- Next, we will use Option 2 to change it. •
- Then we will use Option 4 to delete it. ٠

Adding

Press F6, and your display will look like Figure 4.

	Figure 4		
	POXXDFR DISPLAY Work wi Order Description	1/02/98 08:00:00 ith PO Status	
Add PO Status → Order → Status Code	Ty : Add PO Status 2= : : Order Status Code . ? : : F3=Exit	: : : : Allow PO Items : Changes Closed? Ordered? : 0 1 N : 1 0 Y : 1 0 N : 	
	F3=Exit F6=Add F21=Print List		

*You're working with this panel* Figure 4 shows the Add PO Status panel.

- You are creating a brand new Order Status Code, therefore the code will be whatever you want it to be.
- We will create a TEST code.

**New Code** Type in *TEST*, as shown in Figure 5.

Figure 5



You're working with this panel

Press Enter, and your display will look like Figure 6.



### Manual Field Fill in the Description, as shown in Figure 7.

	Figure 7	
	POXXDFR DISPLAY	1/02/98 08:00:00
	Order Description Status	Po Status
	Ty : A : Add P 2= : :	20 Status Details :
	: Order Sta : Order Status Code : ? : :	TEST :
<b>E</b> :11 1	: : Description	Test Status Detail :
$Filled \rightarrow$	: F3=Exit : Allow Changes	:
$\texttt{Allow} \rightarrow$	: : PO Closed?	:
Changes	::: : : Items Ordered?	т :
	: : F3=Exit F4=Prompt	: F12=Key screen :
	:	
	F3=Exit F6=Add F21=Print List	i
Prompting	<ul> <li>The Description field has been f</li> <li>Next, we will fill in the Allow C</li> <li>F4 lets us prompt.</li> <li>Tab down to Allow Changes, and press F4.</li> </ul>	illed. Changes field. . Your display will look like Figure 8.
	Figure 8	
Allow $\rightarrow$ Change List	: Allow Changes list : Position to : 1=Select : Opt Value Description	1/02/98 08:00:00 : Status : :
1 = Select	: 0 No : 1 Yes	:
		: : 
	: F3=Exit F5=Refresh F24=More keys	· Si · · · · ·
	:	: St Status Details :
	: :	.: :
	: : PO Closed?	:
	: Items Ordered?	
	: F3=Exit F4=Prompt : Value required. :	F12=Key screen : :
	F3=Exit F6=Add F21=Print List	······
	You're working with this panel	

Figure 8 shows the Allow Changes List panel.

- Option 1 lets you select value.
- We will select the Yes option.

**Selecting** Tab down to Yes, and type in a *1*, as shown in Figure 9.



You're working with this panel

Press Enter, and your display will look like Figure 10.





*You're working with this panel* Figure 10 shows the Add PO Status Details panel.

Your Choices

•

- The Allow Changes field is filled.
- Next, we will fill in the PO Closed field.
- F4 lets you prompt this field.

# **Prompting** Tab down to PO Closed, and press **F4**. Your display will look like Figure 11.

	Figure 11
	POXXDFR DISPLAY 1/02/98 08:00:00
	Order Description Status
$drop \ box \ \rightarrow$	Ty :       A :       Add PO Status Details       :         2= :       :       :       :         :       Order Status Code :       TEST       :         ?       :       Description Test Status Details       :         :       :       Description Test Status Details       :         :       :       :       PO Closed?
Your Choices	<ul> <li>You're working with this drop-box</li> <li>Figure 11 shows a drop box.</li> <li>You are given two options.</li> <li>We are going to choose option 1.</li> </ul>
Selecting	Type in a $I$ , and in a few seconds your display will look like Figure 12
	Figure 12
Add PO Status Details $\rightarrow$	POXXDFR       DISPLAY       1/02/98 08:00:00         Work with PO Status       Order       Description         Status
Add PO Status Details $\rightarrow$ filled $\rightarrow$ Items Ordered $\rightarrow$	POXXDFR       DISPLAY       1/02/98 08:00:00         Order       Description         Status       A:       Add PO Status Details         :       :          :       :          :       :          :       :          :       :          :       :          :       :       Description         :       :       :         :       :       :         :       :       :         :       :       :         :       :       :         :       :       :         :       :       :         :       :       :         :       :       :         :       :       :         :       :       :         :       :       :

KDI

# **Prompting** Tab down to Items Ordered and press **F4**, your display will look like Figure 13.

	POXXDFR DISPLAY	1/02/98 08:00:0
	Work with PO Statu Order Description Status	IS
	Ty : A : Add PO Status	Details
	2= : : : Order Sta : Order Status Code : TEST	
	? : : Description Test St	atus Details
	F3=Exit : Allow Changes 1	
	: PO Closed? 1	
	: Items Ordered? : . <b>1.</b>	 No :
dron bor	: F3=Exit F4=Prompt : <b>2.</b> :	Yes : n
$urop$ -box $\rightarrow$	:	
	: F3=Exit F6=Add F21=Print List	
L	Vou'r	e working with this dron-h

Figure 13 shows a drop-box.

- You are given two options.
- We are going to choose option 2.

### Selecting

**Your Choices** 

Using your arrow key, move your cursor down to Yes, and type in a *1*. In a few seconds your display will look like Figure 14.

### Figure 14

-		
	POXXDFR DISPLAY 1/02/98 08:00:00	
	Work with PO Status	
	Order Description	
	Status	
Add PO Status		
	Ty : A : Add PO Status Details :	
Details $\rightarrow$	2	
	· Order Sta · Order Status Code · TEST	
	· order stall order status code : TEST	
	: : Description Test Status Details :	
	: : :	
	: F3=Exit : Allow Changes 1 :	
	· · · · · · · · · · · · · · · · · · ·	
	: Items Ordered? Y :	
Filled 🛶	: F3=Exit F4=Prompt F12=Key screen :	
1 111000 9		
	::	
	F3=Exit F6=Add F21=Print List	

### You're working with this panel

### **Processing** Press **Enter** to bring up the CONFIRM: Y prompt as shown in Figure 15.

	Figure 15						
	POXXDFR DISPLAY 1/02/98 08:00:00						
	Order Description Status						
	Ty : A : Add PO Status Details :						
	: Order Sta : Order Status Code : TEST :						
	: : Description Test Status Details :						
	: : : : : : F3=Exit : Allow Changes 1 :						
	: : PO Closed? 1 :						
	::: : : : : : : : : : : : : : : : :						
	: : : F3=Exit F4=Prompt F12=Key screen :						
	::: : CONFIRM: Y (Y/N) : :						
CONFIRM: $Y \rightarrow$	:: : : : : : : : : : : : : : : : :						
Confirming	You will be asked to confirm your addition.						
Confirmation Tine	The Y for "yes" will be waiting for your response.						
commation rips	• If you want to make a correction, press N.						
	• If you want to escape without processing, press N then F3.						
Returning	Press Enter to return to Work with PO Status						
Roturning	These Enter to return to work with 10 Status.						
	Figure 16						
Work With →	POXXDFR         DISPLAY         1/02/98         08:00:00           Work with PO Status         PO Status         1/02/98         08:00:00						
PO Status	Order Description Status						
$2 = Change \rightarrow$	Type options, press Enter. <b>2=Change</b> 4=Delete						
	? Order Description Allow PO Items						
	CLOSED Closed 0 1 N						
The new	QUOTE Out for Quotation 1 0 N						
Order Status	TEST Test Status Details I I N						
	F3=Exit F6=Add F21=Print List						
	F3=Exit F6=Add F21=Print List						
Your Choices	F3=Exit F6=Add F21=Print List Figure 16 shows the Work with PO Status display.						

• Next, we will use option 2 to bring up the panel that lets you make changes to Order Status Codes.

### **Changing** Tab down to Test Status Details, and type in a 2, as shown in Figure 17.

POXXDFR	DISPLAY			1/02/98 08:00:00
	Work with PC	) Status		
Order	Description			
Status				
Type optic	ons, press Enter.			
2=Change	4=Delete			
? Order	Description	Allow	PO	Items
Status	-	Changes	Closed?	Ordered?
CLOSED	Closed	0	1	N
OPEN	Open PO	1	0	Y
QUOTE	Out for Quotation	1	0	N
2 TEST	Test Status Details	1	1	N
	PC Add PO1 Pulse Tist			

Filled

Press Enter, and your display will look like Figure 18.

### Figure 18

	POXXDFR DISPLAY	1/02/098 08:00:00
	Work with PO Status	
	Order Description	
Edit PO	Status	
Status		
	Ty : Edit PO Status Details	:
Details $\rightarrow$	2= :	:
	: Order Status Code : TEST	:
	· Description Test Status Details	: . ed?
Changeable fields	: Deberrycron	:
$\neg$	: Allow Changes 1	:
	:	:
	2 : <b>PO Closed</b> ? 1	:
	: There Ordered?	:
	· Items ordered? N	:
	: F3=Exit F4=Prompt	
	:	:
	:	:
	F3=EXIC F6=Add F2I=Print List	
	Vanles a varling a visle shing a real	
	tou re working with this panel	
	Figure 18 shows the Edit PO Status Details panel.	

- The Description, Allow Changes, PO Closed and Items Ordered fields can be changed.
- This process is similar to adding new Order Status Codes. **F4** lets you prompt every field except the Description field which is manually filled. Press **Enter** to process your changes, then you will be asked to confirm these changes.
- **F3** lets you exit without making changes.

Returning	Press F3, to return to Work with PO Status	
-----------	--	--

	Figure 19				
	POXXDFR	DISPLAY			1/02/98 08:00:00
Work with $\rightarrow$ PO Status	Order Status	Work with PO Description	Status		
A - Delete	Type optio 2=Change	ns, press Enter. <b>4=Delete</b>			
$4 = Delete \rightarrow$	? Order Status CLOSED OPEN QUOTE TEST	Description Closed Open PO Out for Quotation Test Status Details	Allow Changes 0 1 1	PO Closed? 1 0 1	Items Ordered? N Y N N
	F3=Exit	F6=Add F21=Print List			

**Your Choices** 

- Figure 19 shows the Work with PO Status display. • Now we are going to delete the Test Status we created.
- Option 4 lets you delete.

Tab down to Test, and type in a 4, as shown in Figure 20.

### Deleting

Figure 20

PO	XXDFR	DISPLAY					1/02/98 (	8:00:00
			Work	with 1	PO Status		, . ,	
	Order	Description						
	Status	I I I						
Ту	pe optio	ns, press Enter.						
2=	Change	4=Delete						
?	Order	Description			Allow	PO	Items	
	Status				Change	s Closed?	Ordered?	
	CLOSED	Closed			0	1	N	
	OPEN	Open PO			1	0	Y	
	QUOTE	Out for Quotation			1	0	N	
4	TEST	Test Status Detail	S		1	1	N	
F3	=Exit	F6=Add F21=Print	List					

your display will look like Figure 21.

	Figure 21					
	POXXDFR DISPLAY	1/02/98 08:00:00				
	Order Description Status					
Delete PO						
Status $\rightarrow$	Ty :   Delete PO Status     2= :	:				
	: Press Enter to confirm Deletion ? :	:				
	: Order Status Code : TEST : Description : Test Status Details	: ed? :				
	: Allow Changes : 1	:				
	4 :	:				
	: F3=Exit	:				
	:	:				
	:	:				
	F3=Exit F6=Add F21=Print List					
	You're working with this panel					
	Figure 21 shows the Delete PO Status panel.					
Your Choices	Press Enter to confirm deletion					
	• F3 lats you avit without delating					
	• <b>F5</b> lets you exit without deteting.					
Processing	Press Enter to confirm deletion.					
	Figure 22	1/02/08 08:00:00				
	Work with PO Status	1/02/98 08:00:00				
	Order Description Status					
	Ty : Delete PO Status	····· :				
	: Press Enter to confirm Deletion	:				
	: : Order Status Code : TEST : Description : Test Status Details	: : ed? :				
	: : Allow Changes : 1 4 :	:				
	: : F3=Exit	:				
	: 	:				
	: CONFIRM: I (I/N)	::				
CONFIRM: $Y \rightarrow$	:	.:				
Confirming	You will be asked to confirm you delete request.					
Somming	The V for "ves" will be waiting for your response					
Confirmation Tips	<ul> <li>If you want to make a correction press N</li> </ul>					
	<ul> <li>If you want to escape without processing, press N to</li> </ul>	then <b>F3</b> .				

### **Continuing** Press **Enter**, and your display will look like Figure 23.

	Figure 23					
	POXXDFR	DISPLAY				1/02/98 08:00:00
Work with $\rightarrow$ PO Status	Order Status	Description	Work with PC	Status		
	Type optio 2=Change	ns, press Enter. 4=Delete				
	? Order Status CLOSED OPEN	Description Closed Open PO		Allow Changes 0 1	PO Closed? 1 0	Items Ordered? N Y
New Order Status	QUOTE	Out for Quotation		1	0	Ν
$gone \rightarrow$						
	F3=Exit	F6=Add F21=Print	List			

Exiting

Press F3 to return to the PO Setup Menu.



## 6.3 How To Setup PO Type

Start Here

Figure 1 shows the Purchase Order Setup Menu.

	ZZMENUR DISPLAY	:	Run Application Menu	· · · :
_	Vour Name	· PO	TEST Manufacturing Co. Ltd. Purchase Order	:
Purchase			options using '1'	
Order Setup	: Run Application S	ub Menu	: ription	
Monu	: POSETUP PO Setup Men	u	: PO Vendor	
Mellu →	: Select Menu options usi	ng `l'	: Purchase Orders	
Work With	· Work with PO Status		· PO ILEM MASLEI	
WOLK WICH	: Work With PO Type		: nu Functions	
PO Type $\rightarrow$	: Work with Manufactur	er	:	
	: Work With PO Item Ma	ster	:	
	: Work with PO Buyer		:	
	: Work with PO Company		:	
			:	
	:		:	
	: F3=Exit		: 7=Change Current Company	
	:		:	
			:	
			• • • • • • • • • • • • • • • • • • • •	:

The Task

- We are going to bring up the Work With PO Type.
- In Figure 1, option 1 lets you work with displays.

Tab down to Work With PO Type, and type in a 1, as shown in Figure 2.

### Selecting

1 →	Figure 2 ZZMENUR DISPLAY User Id YOU Your Name : Run Application Sub Me : POSETUP PO Setup Menu : Select Menu options using '1 : ? Menu Description : Work with PO Status : 1 Work With PO Status : 1 Work With PO Type : Work With PO Type : Work With PO Item Master : Work With PO Item Master : Work with PO Company : : : : : : : : : : : : : :	: KOBELT : PO nu	Run Application Menu TEST Manufacturing Co. Ltd. Purchase Order . options using '1' : ription : PO Vendor : PUrchase Orders : PO Item Master : : nu Functions : : : : : : : : : : : : : : : : : : :	 : :
	:   :		: .:	:

### You're working with this panel

### **Filled** Press **Enter**, and your display will look like Figure 3.

	Figure 3	
	POYDDFR DISPLAY	1/02/98 08:00:00
Work With $\rightarrow$ PO Type	Work With PO Type Order Description Order Type Code Status Code	
Ontions $\rightarrow$	Type options, press Enter. 2=Change	
options 7	? Order     Description     Order       Type Code     Status Code       ORDER     PO     OPEN       OWDER     OPEN     OPEN	
	QUOIL request for guotación guois	
	F3=Exit F6=Add F21=Print List	
Functions $\rightarrow$		

Figure 3 shows the Work With PO Type display.

- First, we will use **F6** to add a new Order Type Code.
- Next, we will use Option 2 to change it.
- Then we will use Option 4 to delete it.

Adding

**Your Choices** 

Press **F6**, and your display will look like Figure 4.

Figure 4 DISPLAY POYDDFR 1/02/98 08:00:00 Work With PO Type Description Order Order Type Code Status Code . . . . . . . . . . . . . . . . ту : Add PO Type Add PO Type  $\rightarrow$ 2= : • : Purchase Order Type Code . : ?: Purchase  $\rightarrow$ : der : atus Code Order Type : EN : F3=Exit Code : OTE :... . . . . . . . . . . . . . . . . F3=Exit F6=Add F21=Print List

*You're working with this panel* Figure 4 shows the Add PO Type panel

- You are creating a brand new Purchase Order Type Code, therefore the code will be whatever you want it to be.
- We will create a TEST code.

### **New Code** Type in *TEST*, as shown in Figure 5.





You're working with this panel

Press Enter, and your display will look like Figure 6.

### Figure 6 POYDDFR DISPLAY 1/02/98 08:00:00 Work With PO Type Order Description Order Type Code Status Code . . . . . . . . . . . . . . . . ту : Add PO Type 2= : : Purchase Order Type Code . TEST : . Add PO Type Add PO Type Details Details $\rightarrow$ PO Type Code . . : TEST Description . . . . Data Dentry Fields $\rightarrow$ Default Order Status F3=Exit F4=Prompt Functions $\rightarrow$ You're working with this panel Figure 6 shows the Add PO Type Details panel. Your Choices We need to fill the Description and the Default Order Stattus fields. •

- F4 lets you prompt the Default Order Status field.
- **F3** lets you exit.

Filled

### Manual Field Fill in the Description, as shown in Figure 7.



You're working with this panel

**Your Choices** 

- Figure 7 shows the Description field has been filled.
- Next, we will fill in the Default Order Status field.
- **F4** lets us prompt this field.

Prompting

Tab down to Default Order Status, and press F4. Your display will look like Figure 8.

### Figure 8

	POYDDFR DISPLAY		
Select PO $\rightarrow$		: Select PO Status :	
	Order Descriptio	: Order Description :	
Status	Type Code	: Status :	
		: :	
		:	
$1 = Select \rightarrow$	Ty : Add PO	: 1=Select :	
I – Seleci /	2= :	: ? Status Description :	
	: Purchase Order Typ	: CLOSED Closed :	
		: OPEN Open PO :	
	: Add	: QUOTE Out for Quotation :	
	: DO Trimo Codo	: IESI TESI SLALUS DELATIS :	
	: PO Type Code :		
	: Description		
	· Description · · ·	· · · ·	
	. Default Order Status	· · ·	
	·	· F3=Exit	
	:	: : :	
	:		
	: F3=Exit F4=Prompt		
	:	:	
	:	:	
-		$\mathbf{V} = \mathbf{I} + \mathbf{I} + \mathbf{I} + \mathbf{I}$	

You're working with this panel

- Figure 8 shows the Select PO Status panel.Option 1 lets you select status.
- We will select the Open option.

### **Selecting** Tab down to Open, and type in a *1*, as shown in Figure 9.

POYDDFR DISPLAY		Sologt DO Statug	
Order Degariptie	Ordon	Deggrintion	•
The Cade	: Order	Description	-
туре соде	: Status		:
:	:		:
m	1 0-1		:
Ty: Add PO :	: I=Select	Description	:
2= : Englished a Condens Them	: ? Status	Glasse	:
: Purchase Order Typ	CLOSED		:
	: I OPEN	Open PO	:
: Add	QUOTE	Out for Quotation	:
: Do marco de la	TEST	Test Status Details	:
: PO Type Code :	:		:
			•
: Description	:		:
	:		:
: Default Order Status			:
:	F3=EXIC		•
:	:		:
:	:		:
: F3=Exit F4=Prompt			
:		:	
:		:	

You're working with this panel

Press Enter, and your display will look like Figure 10.

Filled



### **Processing** Press **Enter** to bring up the CONFIRM: Y prompt as shown in Figure 11

	Figure 11		
	POYDDFR DISPLAY		1/02/98 08:00:00
	W Description	ork With PO Type	
	Type Code	Status Code	
	Ty : Add PO Type		
	2= :	:	
	: Purchase Order Type Code .	TEST :	
	: Add PO Type	Details	:
	: : PO Type Code : TEST		:
	:		:
	: Description Test PO	Туре	:
	: Default Order Status OPEN		:
			:
	•	: CONFIRM: Y (Y/N)	: :
	: F3=Exit F4=Prompt	:	: :
CONFIRM: 1 -	:		:
	:		:
Confirming Confirmation Tips	<ul><li>The Y for "yes" will be waiting for</li><li>If you want to make a cor</li><li>If you want to escape wit</li></ul>	r your response. rrection, press N. hout processing, press N	then <b>F3</b> .
Returning	Press Enter to return to the A	Add PO Type panel.	
	Figure 12		
	POYDDFR DISPLAY	lark With DO Time	1/02/98 08:00:00
	Order Description	Order	
	Type Code	Status Code	
	Ty : Add PO Type	:	
Add PO Type $\rightarrow$	<pre>2= :</pre>	:	
	?:	: der	
	: • F3-Evit	: atus Code • EN	
	: Record added.	: OTE	
Record added $\rightarrow$	:	:	
	:		

Figure 12 shows that the record has been added.
F3 lets you exit.

F3=Exit F6=Add F21=Print List

You're working with this panel

KDI

### Exiting

Press F3 to return to the Work With PO Type display.

	Figure 13	
Work With <del>&gt;</del>	POYDDFR DISPLAY Work With PO Type	1/02/98 08:00:00
РО Туре	Type Code Order Status Code	
$2 = Change \rightarrow$	Type options, press Enter. <b>2=Change</b> 4=Delete	
The New Order Type Code →	? Order     Description     Order       Type Code     Status Code       ORDER     PO     OPEN       QUOTE     request for Quotation     QUOTE       TEST     Test PO Type     OPEN	
	F3=Exit F6=Add F21=Print List	

Your Choices

Figure 13 shows the Work With PO Type display.

- The new Order Type Code appears in the listing.
- Next, we will use option 2 to bring up the panel that lets you make changes to Order Type Codes.

Tab down to TEST, and type in a 2, as shown in Figure 14.

### Changing

Figure 14

	POYDDFR	DISPLAY		1/02/98 08:00:00
	Order Type Cod	Wor Description le	k With PO Type Order Status	Code
	Type option 2=Change	ns, press Enter. 4=Delete		
	<pre>? Order Type Cod ORDER QUOTE 2 TEST</pre>	Description le PO request for Quotatio Test PO Type	Order Status OPEN n QUOTE OPEN	Code
$2 \rightarrow$				
	F3=Exit F	°6=Add F21=Print List		

**Filled** Press **Enter**, and your display will look like Figure 15.

Figure 15 DISPLAY POYDDFR 1/02/98 08:00:00 Work With PO Type Order Description Order Type Code Status Code Edit PO Type . . . . ту : Edit PO Type Details Details  $\rightarrow$ 2= : : Order Type Code . : TEST ? : : Description . . . . Test PO Type : Order Status Code . OPEN 2 F3=Exit F4=Prompt F3=Exit F6=Add F21=Print List

> *You're working with this panel* Figure 15 shows the Edit PO Type Details panel.

Your Choices

- The Description and Order Status Code fields can be changed.
- This process is similar to adding new Order Type Codes. **F4** lets you prompt the Order Status Code field and if you press **Enter** to process your changes, you will be asked for confirmation.
- **F3** lets you exit without making changes.

Press F3 to return to the Work With PO Type display.

Returning

### Figure 16

	Figure 16			
	POYDDFR DI	ISPLAY		1/02/98 08:00:00
Work With $\rightarrow$		Work With	1 РО Туре	
	Order	Description	Order	
PO Type	Type Code		Status Code	
4 = Delete →	Type options, 2=Change 4= ? Order Type Code ORDER QUOTE	Press Enter. -Delete Description PO request for Quotation	Order Status Code OPEN QUOTE	
	TEST F3=Exit F6=	Test PO Type -Add F21=Print List	OPEN	
Your Choices	<ul><li>Figure 16 show</li><li>We are a</li></ul>	ws the Work With PO Type on now going to delete the	display. Test PO Type we	created.

• Option 4 lets us delete.

### Deleting

Tab down to TEST, and type in a 4, as shown in Figure 15.

Figure 15

4

	POYDDFR DI	ISPLAY						1/02/98	08:00:00	
	Order Type Code	Description	Work	With	PO T	ype Order Status	Code			
	Type options, 2=Change 4=	, press Enter. =Delete								
	? Order Type Code ORDER QUOTE	Description PO request for (	ouotation			Order Status OPEN QUOTE	Code			
$\rightarrow$	4 TEST	Test PO Type				OPEN				
	F3=Exit F6=	=Add F21=Prir	nt List							
			0							

Press Enter, and your display will look like Figure 16.

Filled



You're working with this panel

### Continuing Press Enter to confirm deletion.

Figure 17

-		
	POYDDFR DISPLAY	1/02/98 08:00:00
	Work With	PO Type
	Order Description	Örder
	Type Code	Status Code
	21	
	Ty : Delete PO Type	:
	2= :	:
	· Press Enter to confirm Deletion	
	? :	:
	· Order Type Code · TEST	
	. Description · Test DO Type	· ·
	. Description rest to type	
	4 : Orden Chabur Gada ODTN	:
	: Order Status Code : OPEN	:
	:	:
		:
	: F3=Exit	:
	:	
	:	: CONFIRM: Y $(Y/N)$ : :
	· · · · · · · · · · · · · · · · · · ·	: ::
CONFIRM: Y ->		*
	F3=Exit F6=Add F21=Print List	

Confirming

You will be asked to confirm your request.

**Confirmation Tips** 

The Y for "yes" will be waiting for your response.

- If you want to make a correction, press N. •
- If you want to escape without processing, press N then F3. •

Press Enter, to confirm delete request and to return to the Work With PO Type display.

### Returning

	Figure 18	
Work With → PO Type	POYDDFR DISPLAY Work With PO Type Order Description Orde Type Code Stat POYDD DISPLAY	1/02/98 08:00:00 r us Code
	Type options, press Enter. 2=Change 4=Delete	
	? Order Description Orde Type Code Stat ORDER PO OPEN QUOTE request for Quotation QUOT	rr us Code r E
$\mathbf{F3} = Exit \rightarrow$	F3=Exit F6=Add F21=Print List	

### The Result

You have successfully brought up the Work With PO Type display and worked with its function and options.

### **Returning** Press **F3** to return to the PO Setup Menu.

	Figure 19				
	ZZMENUR DISPLAY				
		:		Run Application Menu	:
	User Id YOU	:	KOBELT	TEST Manufacturing Co. Ltd.	:
Purchase	Your Name	:	PO	Purchase Order	
Order Setup	: Run Application Sub	 Menu	•••••	: ription	
-	: POSETUP PO Setup Menu			: PO Vendor	
Menu $\rightarrow$	: Select Menu options using	`1′		: Purchase Orders	
	: ? Menu Description			: PO Item Master	
	: Work with PO Status			:	
	: Work With PO Type			: nu Functions	
	: Work with Manufacturer			:	
	: Work With PO Item Maste	r		:	
	: Work with PO Buyer			:	
	: Work with PO Company			:	
	· F3-Exit			. 7-Change Current Company	
	:			: · · · · · · · · · · · · · · · · · · ·	
	:				
				.:	:

You're working with this panel

You Are Done

This completes Section 6.3, How To Setup PO Types.

# **6.4 How To Setup PO Manufacturers** Figure 1 shows the Purchase Order Setup Menu.

**C**+ ....t L1.

Start Here	-	-
	Figure 1	
	ZZMENUR DISPLAY .	Run Application Menu :
Purchase	User Id YOU : Your Name :	KOBELT TEST Manufacturing Co. Ltd. : PO Purchase Order
Order Setup	: Run Application Sub Men	u : ription
Menu →	: POSETUP PO Setup Menu : Select Menu options using '1' : ? Menu Description : Work with PO Status : Work With PO Type Work With PO Type	: PO Vendor : Purchase Orders : PO Item Master : : nu Functions
Work with $\rightarrow$ Manufacturer	: Work With PO Item Master : Work With PO Buyer : Work with PO Company :	
	: F3=EXIC :	: /=Change Current Company :
Selecting	Tab down to Work with Manufac Figure 2.	turer, and type in a <i>I</i> , as shown in
	Figure 2	
1 →	ZZMENUR DISPLAY : User Id YOU Your Name : Run Application Sub Men : POSETUP PO Setup Menu : Select Menu options using 'l' ? Menu Description : Work with PO Status : Work With PO Type : Work With PO Type : Work With PO Item Master : Work With PO Buyer : Work with PO Company : : : :	Run Application Menu : KOBELT TEST Manufacturing Co. Ltd. : PO Purchase Order options using '1' u : ription : PO Vendor : Purchase Orders : PO Item Master : nu Functions : : : : :
	: F3=Exit	: 7=Change Current Company

You're working with this panel

:

:.

: : :

. . . . . . . . . . . . .

### **Filled** Press **Enter**, and your display will look like Figure 3.

### Figure 3 POX4DFR DISPLAY 1/02/98 08:00:00 Work with Manufacturer Work with $\rightarrow$ Address Name Manufacturer Number Type options, press Enter. 4=Delete 5=Display 8=Details (Manufacturer's Vendors) 9=Notes Options $\rightarrow$ F3=Exit F6=Add F21=Print List No data to display. Functions $\rightarrow$

### **Your Choices**

Figure 3 shows the Work with Manufacturer display.

- First, we will add a Manufacturer by using the **F6** function key.
- Next, we will work with details using option 8.
- Last we will use option to 4 to delete.

Press **F6**, and your display will look like Figure 4.

### Adding

	Figure 4				
	POX4DF .				0:00
Select → Address	: Addr : Numb :	Address Number	Select Address Name	Phone Number	::
Search Field →	: Type o : 4=Dele : : : : : : : : : : : : : : : : : : :	Type option 1=Select ? Number 0000411 0000412 0000413 0000414 0000415 0000419 0000420 F3=Exit F	As, press Enter. 5=Display 9=Notes Name "A" MISCELLANEOUS "C" MISCELLANEOUS "D" MISCELLANEOUS "E" MISCELLANEOUS "G" MISCELLANEOUS "I" MISCELLANEOUS "J" MISCELLANEOUS "J" MISCELLANEOUS "J" MISCELLANEOUS "26=Add 21=Print List	Phone Number	: : : : : : : : : : : : : : : : : : :
	NO GALA I	to ursplay.			

You're working with this panel

- Figure 4 shows the Select Address panel.This is a link to the Contact Management module.
- **F6** lets you add new Addresses.
- We will use the search field to find an existing Address.

### Searching Type *AB* in to the

Type *AB* in to the Name search field, as shown in Figure 5.

:		Select Address		:
Addr :	Address	Name	Phone Number	:
Numb :	Number			:
:		AB		:
:				:
Type o :	Type option	s, press Enter.		:
4=Dele :	1=Select	5=Display 9=Notes		:
:	? Number	Name	Phone Number	:
:	0000411	"A" MISCELLANEOUS		:
:	0000412	"B" MISCELLANEOUS		:
:	0000413	"C" MISCELLANEOUS		:
:	0000414	"D" MISCELLANEOUS		:
:	0000415	"E" MISCELLANEOUS		:
:	0000417	"G" MISCELLANEOUS		:
:	0000419	"I" MISCELLANEOUS		:
:	0000420	"J" MISCELLANEOUS		+ :
:				:
:	F3=Exit F	'6=Add		:
:				:
:				:
:				:

You're working with this panel

Press Enter, and your display will look like Figure 6.

### Found

Figure 6



You're working with this panel

Figure 6 shows the Select Address panel displaying the search item.

Your Choices

• We will now turn this Address into a PO Manufacturer.

### **Selecting** Tab down to ABM Co., and type in a *1*, as shown in Figure 7.

:		Select Address			:
Addr :	Address	Name	Phone Number		:
Numb :	Number				:
:		ABC			:
:					:
Туре о :	Type option	us, press Enter.			:
4=Dele :	1=Select	5=Display 9=Notes			:
:	? Number	Name	Phone Number		:
:	0000457	ABERDEEN DYNAMICS SUPPLY INC.	412-555-5551		:
:	<b>1</b> 0002500	ABM Co.	412-555-5552		:
:	0000023	ABS AMERICAS	412-555-5553		:
:	000004	ACCURATE RUBBER PRODUCTS LTD.	412-555-5554		:
:	0000458	ACF GREW INC.	412-555-5555		:
:	0000005	ACKLANDS-GRAINGER INC	412-555-5556		:
:	0002074	ACTIVATION	412-555-5557		:
:	0002432	ACTIVATION	412-555-5558	+	:
:					:
:	F3=Exit F	'6=Add			:
:					:
:					:

You're working with this panel

Press Enter, and your display will look like Figure 6.

### Selected

1

	Figure 8		
]	POYOPVR ENTER		1/02/98 08:00:00
$Add \rightarrow$		Add Manufacturer	
Manufacturer	Address Number	2500	
<b>⊿</b> Address Number	Manufacturer Name :		
	Address Line 1 :		
	Address Line 2 :		
	City		
	Country Code :	Region code :	
	Postal Code :		
	Phone Number :		
	Fax number :		
	Address Source Code . :		
	Address Status Code . :		
	F3=Exit F4=Prompt		

**Your Choices** 

Figure 8 shows the Add Manufacturer display.

- Address Number is already filled in.
- Press Enter, and the Data Entry fields will be filled in automatically.

### Continuing

Press Enter, and your display will look like Figure 9.

	Figure 9		
	POYOPVR ENTER	Add Manufacturer	1/02/98 08:00:00
	Address Number	2500	
	Manufacturer Name :	ABM Co.	
	Address Line 1 : Address Line 2 : Address Line 3 :	1212 Front Street	
	City : Country Code : Postal Code :	Washington USA Region code : 98765	
	Phone Number : Fax number :	412-555-5552	
	Address Source Code . : Address Status Code . :		
	F3=Exit F4=Prompt		CONFIRM: Y (Y/N)
CONFIRM: Y $\rightarrow$			
Confirming	You will be asked to confin	rm the converted address.	
Confirmation Tips	The Y for "yes" will be wa	iting for your response.	
•	• If you want to mak	te a correction, press N.	
	<b>T</b> C		50
	• If you want to esca	ppe without processing, press N th	nen <b>F3</b> .
Returning	• If you want to esca Press Enter to return to the	ape without processing, press N the Work with Manufacturer display.	nen F3.
Returning	• If you want to esca Press Enter to return to the	ape without processing, press N the Work with Manufacturer display.	nen F3.
Returning	If you want to esca Press Enter to return to the Figure 10 POX4DFR DISPLAY	ape without processing, press N the Work with Manufacturer display.	nen F3.
Returning Work with $\rightarrow$ Manufacturer	If you want to esca Press Enter to return to the  Figure 10  POX4DFR DISPLAY  Address Name Number	ppe without processing, press N the Work with Manufacturer display.	nen F3.
Returning Work with $\rightarrow$ Manufacturer $8 = Details \rightarrow$	• If you want to esca Press Enter to return to the Figure 10 POX4DFR DISPLAY Address Name Number Type options, press Enter 4=Delete 5=Display 8:	work with Manufacturer Work with Manufacturer *. -Details (Manufacturer's Vendors) 9=1	nen F3. 1/02/98 08:00:00 Notes
Returning Work with $\rightarrow$ Manufacturer $8 = Details \rightarrow$	<ul> <li>If you want to esca Press Enter to return to the</li> <li>Figure 10</li> <li>POX4DFR DISPLAY</li> <li>Address Name</li> <li>Number</li> <li>Type options, press Enter 4=Delete 5=Display 8:</li> <li>Address Name</li> <li>Number</li> </ul>	work with Manufacturer display. Work with Manufacturer Work with Manufacturer Phone Number Fax number	nen F3. 1/02/98 08:00:00 Notes Address Status
Returning Work with $\rightarrow$ Manufacturer $8 = Details \rightarrow$ New Manufacturer Address $\rightarrow$	<ul> <li>If you want to esca Press Enter to return to the Figure 10 POX4DFR DISPLAY Address Name Number</li> <li>Type options, press Enter 4=Delete 5=Display 8: ? Address Name Number 2500 ABM Co.</li> </ul>	work with Manufacturer display. Work with Manufacturer "	nen F3. 1/02/98 08:00:00 Notes Address Status ACTIVE
Returning Work with $\rightarrow$ Manufacturer $8 = Details \rightarrow$ New Manufacturer Address $\rightarrow$	<ul> <li>If you want to esca Press Enter to return to the</li> <li>Figure 10</li> <li>POX4DFR DISPLAY</li> <li>Address Name</li> <li>Number</li> <li>Type options, press Enter</li> <li>4=Delete 5=Display 8:</li> <li>? Address Name</li> <li>Number</li> <li>2500 ABM Co.</li> </ul>	work with Manufacturer display. Work with Manufacturer ". "Details (Manufacturer's Vendors) 9=1 Phone Number Fax number 412-555-5552	nen F3. 1/02/98 08:00:00 Notes Address Status ACTIVE
Returning Work with $\rightarrow$ Manufacturer $8 = Details \rightarrow$ New Manufacturer Address $\rightarrow$	<ul> <li>If you want to esca Press Enter to return to the</li> <li>Figure 10</li> <li>POX4DFR DISPLAY</li> <li>Address Name</li> <li>Number</li> <li>Type options, press Enter 4=Delete 5=Display 8:</li> <li>? Address Name</li> <li>Number</li> <li>2500 ABM Co.</li> </ul>	work with Manufacturer display. Work with Manufacturer ". -Details (Manufacturer's Vendors) 9=1 Phone Number Fax number 412-555-5552	nen F3. 1/02/98 08:00:00 Notes Address Status ACTIVE
Returning Work with $\rightarrow$ Manufacturer $8 = Details \rightarrow$ New Manufacturer Address $\rightarrow$	• If you want to esca Press Enter to return to the Figure 10 POX4DFR DISPLAY Address Name Number Type options, press Enter 4=Delete 5=Display 8= ? Address Name Number 2500 ABM Co.	work with Manufacturer display. Work with Manufacturer ". =Details (Manufacturer's Vendors) 9=1 Phone Number Fax number 412-555-5552	nen F3. 1/02/98 08:00:00 Notes Address Status ACTIVE
Returning Work with $\rightarrow$ Manufacturer $8 = Details \rightarrow$ New Manufacturer Address $\rightarrow$	<ul> <li>If you want to esca Press Enter to return to the</li> <li>Figure 10</li> <li>POX4DFR DISPLAY</li> <li>Address Name</li> <li>Number</li> <li>Type options, press Enter</li> <li>4-Delete 5-Display 8:</li> <li>? Address Name</li> <li>Number</li> <li>2500 ABM Co.</li> </ul>	The without processing, press N the work with Manufacturer display. Work with Manufacturer ". =Details (Manufacturer's Vendors) 9=1 Phone Number Fax number 412-555-5552	nen F3. 1/02/98 08:00:00 Notes Address Status ACTIVE
Returning Work with $\rightarrow$ Manufacturer $8 = Details \rightarrow$ New Manufacturer Address $\rightarrow$	<ul> <li>If you want to esca Press Enter to return to the</li> <li>Figure 10</li> <li>POX4DFR DISPLAY</li> <li>Address Name</li> <li>Number</li> <li>Type options, press Enter 4=Delete 5=Display 8:</li> <li>? Address Name</li> <li>Number</li> <li>2500 ABM Co.</li> </ul>	The without processing, press N the work with Manufacturer display. Work with Manufacturer ". "Details (Manufacturer's Vendors) 9=1 Phone Number Fax number 412-555-5552	nen F3. 1/02/98 08:00:00 Notes Address Status ACTIVE
Returning Work with $\rightarrow$ Manufacturer $8 = Details \rightarrow$ New Manufacturer Address $\rightarrow$	<ul> <li>If you want to esca Press Enter to return to the Figure 10 POX4DFR DISPLAY Address Name Number Type options, press Enter 4-Delete 5-Display 8: ? Address Name Number 2500 ABM Co.</li> </ul>	<pre>mape without processing, press N the e Work with Manufacturer display. Work with Manufacturer ". =Details (Manufacturer's Vendors) 9=1 Phone Number Fax number 412-555-5552</pre>	nen F3. 1/02/98 08:00:00 Notes Address Status ACTIVE
Returning Work with $\rightarrow$ Manufacturer $8 = Details \rightarrow$ New Manufacturer Address $\rightarrow$	<ul> <li>If you want to esca Press Enter to return to the</li> <li>Figure 10</li> <li>POX4DFR DISPLAY</li> <li>Address Name</li> <li>Number</li> <li>Type options, press Enter</li> <li>4-Delete 5-Display 8:</li> <li>? Address Name</li> <li>Number</li> <li>2500 ABM Co.</li> </ul> F3=Exit F6=Add F21=Press Figure 10 shows the Work	work with Manufacturer display. Work with Manufacturer ". -Details (Manufacturer's Vendors) 9-1 Phone Number Fax number 412-555-5552	nen F3. 1/02/98 08:00:00 Notes Address Status ACTIVE

• We will now use option 8 to add a vendor to the new Manufacturer.

### Tab down to ABM Co., and type in an 8, as shown in Figure 11. Details

POX4DFR	DISPLAY	Work	with Manufacturer	1/02/	98 08:00:00
Address Number	Name	WOLK			
Type optic 4=Delete	ons, press E 5=Display	nter. 8=Details	(Manufacturer's Vendo	ors) 9=Notes	
? Address	Name		Phone Number	Fax	Address
Number 8 2500	ABM Co.		412-555-5552	number	Status ACTIVE
F3=Exit	F6=Add F2	1=Print List	-		

Filed

Press Enter, and your display will look like Figure 12.

	Figure 12			
	POYPDFR	DISPLAY	1/02/98 0	08:00:00
Work with → Manufacturers Vendor	Seq. Number	Vendor Number	Work with Manufacturer's Vendor	
	Type optic	ns, press E	nter.	
	4=Delete	5=Display	7=Diary History 8=Details 9=Notes	
	F3=Exit No data to	<b>F6=Add</b> F2 display.	1=Print List	
$\mathbf{F6}=Add \rightarrow$				

Figure 12 shows the Work with Manufacturer's Vendor display. **Your Choices** We are working with the New Manufacturer. There are not yet any • Vendors assigned to it.

F6 lets you assign new Vendors. ٠

Adding Press F6, and your display will look like Figure 13.

	Figure13	
Add $\rightarrow$	POYQPVR ENTER Add Manufacturer Vendor	1/02/98 08:00:00
Manufacturer	Enter Sequence and Address Number, press Enter.	
vendor	Manufacturer Address Number 2500	
	sequence number	
	Vendor Address Number	
	F3=Exit F4=Prompt	
$\mathbf{F4} = Prompt \rightarrow$		

**Your Choices** 

Figure 13 shows the Add Manufacturer Vendor display.

- We will need to add a Sequence and Address Number. •
- F4 prompts both fields. ٠

Prompting

Tab down to sequence number and press F4, your display will look like Figure 14.

	Figure14	
Select PO $\rightarrow$	POXFSRR SELECT Select PO Manufacturer Ve	1/02/98 08:00:00
Manufacturer Vendor	Company Code Company Code Number Number 21 21 2500	
$1=Select \rightarrow$	Type options, press Enter. 1=Select	
1 20000 /	? Internal Internal Address Seq. Address Company Code Company Code Number Number 21 21 2500 1 23	
	F3=Exit F4=Prompt	

### **Your Choices**

Figure 14 shows the Select PO Manufacturer Vendor display.

• Option 1 lets you select.

### **Selecting** Tab down to 21, type in a *1*, as shown in Figure 15.

[	POXFSRR SELECT	1/02/98 08:00:00
	Select PO Manufacturer Ve Internal Internal Address Seq. Company Code Company Code Number Number 21 21 2500	
	Type options, press Enter. 1=Select	
	? InternalInternalAddressSeq.AddressCompany CodeCompany CodeNumberNumberNumber121212500123	
$1 \rightarrow$		
	F3=Exit F4=Prompt	

Filled

Press Enter, and your display will look like Figure 16.

### Figure 16

	POYQPVR ENTER	1/02/98 08:00:00
$\texttt{Add} \rightarrow$	Add Manufacturer Vendor	
Manufacturer	Enter Sequence and Address Number, press Enter.	
Vendor	Manufacturer Address Number 2500	
Filled $\rightarrow$	sequence number 1	
	Vendor Address Number	
Vendor $\rightarrow$		
Address		
Number		
	F3=Exit F4=Prompt	

**Your Choices** 

Figure 16 shows the Add Manufacturer Vendor display.

- Sequence Number has been filled.
- Next, we will fill in the Vendor Address Number field.
- **F4** prompts this field.

**Prompting** Tab down to Vendor Address Number, and press **F4**, your display will look like Figure 16.

			-
- Ei.	~	~1	C
- E 19	uur	eг	D
	_		_

$e_{\text{Lect PO}} \rightarrow$	:		:	Select PO Ven	dor				:
Vondon	:	Vendor	Name		Phone Number				:
vendor	:								:
	:								:
	:	Type optic	ons, press Enter.						:
	:	1=Select							:
	:	? Vendor#	Name		Phone Number	Terms	Preference		:
	:	5	ACKLANDS-GRAINGER	INC	596-6121	N30	A		:
	:	8	A.C.T. EQUIPMENT	SALES LTD.	294-6271	N30	A		:
	:	21	A & M NON-FERROUS	METALS LTD.	272-2422	N30	A		:
	:	23	ABS AMERICAS		713-873-0700	N30	A		:
	:	25	ANALYTIC SYSTEMS N	WARE LTD.	604-543-7378	N30	A		:
	:	28	ARPEL SECURITY SYS	STEMS LTD.	437-3317	N30	A		:
	:	29	ATOM DELIVERY		255-3131	N30	A		:
	:	31	ATLAS ALLOYS		534-8999	N30	A		:
	:	32	ATN VISUALS INC.		253-5569	N30	A	+	:
	:								:
	:	F3=Exit	F6=Add						:
	:								:
	:								:
	• • •								•

*You're working with this panel* Figure 16 shows the Select PO Vendor panel.

**Your Choices** 

- Option 1 lets you select a vendor number.
- We are going to select ABS Americas.

Selecting Tab down

Tab down to ABS Americas, type in a 1, as shown in Figure 17.

Figure 17

	Vondo	Namo	Dhono Numbor	
:	venuo.	I Maille	Phone Number	
:				
:				
:	Type opt	tions, press Enter.		
:	1=Select	t		
:	? Vendo:	r# Name	Phone Number Terms Pre	eference
:		5 ACKLANDS-GRAINGER INC	596-6121 N30 A	
:		8 A.C.T. EQUIPMENT SALES I	TD. 294-6271 N30 A	
:	:	21 A & M NON-FERROUS METALS	LTD. 272-2422 N30 A	
:	1 :	23 ABS AMERICAS	713-873-0700 N30 A	
:	:	25 ANALYTIC SYSTEMS WARE LI	D. 604-543-7378 N30 A	
:	:	28 ARPEL SECURITY SYSTEMS I	TD. 437-3317 N30 A	
:	:	29 ATOM DELIVERY	255-3131 N30 A	
:		31 ATLAS ALLOYS	534-8999 N30 A	
:		32 ATN VISUALS INC.	253-5569 N30 A	+
:				
	F3=Exit	F6=Add		
•				

You're working with this panel

### Filled Press Enter, and your display will look like Figure 18.

	Figure18	
	POYQPVR ENTER 1/02/98 08:0	0:00
$Add \rightarrow$	Add Manufacturer Vendor	
Manufacturer	Enter Sequence and Address Number, press Enter.	
Vendor	Manufacturer Address Number 2500	
	sequence number 1	
$Filled \rightarrow$	Vendor Address Number 23	
	F3=Exit F4=Prompt	

Press Enter to bring up the CONFIRM: Y prompt as shown in Figure 19.

### Continuing

Fiaure	19	

POYQPVR ENTER Add Manufacturer Vendor	1/02/98 08:00:00
Enter Sequence and Address Number, press Enter.	
Manufacturer Address Number 2500	
sequence number 1	
Vendor Address Number 23	
F3-Frit F4-Promot	
	CONFIRM: Y (Y/N)

**Returning** Press **Enter** to return to the Work with Manufacturer's Vendor display.

	Figure 20		
	POYPDFR	DISPLAY	1/02/98 08:00:00
Work with → Manufacturer's Vendor	Seq. Number	Work with Manufacturer's Vendor Vendor Number	
	Type optic 4=Delete	ns, press Enter. 5=Display 7=Diary History 8=Details 9=Notes	
Vendor has been added $\rightarrow$	? Seq. Number 1	Vendor Vendor Name Number 23 ABS AMERICAS	
	F3=Exit	F6=Add F21=Print List	

**Your Choices** 

Figure 20 shows the Work with Manufacturer's Vendor display.

- The Vendor has been added.
- F3 lets you exit.

Figure 21

Press F3 to return to the Work with Manufactuer display.

Returning

033	1.2	ω	return	ω	unc	W OIK	vv I tIII	Wianulactuci	•

	POX4DFR DISPLAY 1/02/98 08:00:00	
Work With → Manufacturer	Work with Manufacturer Address Name Number	
4 Delete→	Type options, press Enter. <b>4=Delete</b> 5=Display 8=Details (Manufacturer's Vendors) 9=Notes	
	? Address Name Phone Number Fax Address	
	Number number Status	
	2500 ADM CO. 412-555-5552 ACTIVE	
	F3=Exit F6=Add F21=Print List	

- Figure 21 shows the Work with Manufacturer display.
- Option 4 lets you delete the Manufacturer that we created.

### Deleting Tab down to ABM Co., and type in a 4, as shown in Figure 22.

POX4DFR	DISPLAY			1,	/02/98 08:00:00
		Work	with Manufacturer		
Address Number	Name				
Type optio 4=Delete	ons, press 5=Displa	s Enter. ay 8=Details	(Manufacturer's Ven	dors) 9=No	otes
? Address	Name		Phone Numbe	r Fax	Address
Number				number	Status
<b>4</b> 2500	ABM Co.		412-555-555	2	ACTIVE
F3=Exit	F6=Add	F21=Print Lis	t		

Press Enter and your display will look like Figure 23.

### Filled

|--|

	POX4DFR .		00:00
Delete →	:	Delete Manufacturer :	
Derece	Addre :		
Manufacturer	Numbe :	Press Enter to confirm Deletion :	
	:		
	:	Address Number .: 2500 :	
	Type op :		
	4=Delet :	Name : ABM Co. :	
	:	Address Line 1 . : C/O CNC TRUCKING :	
	? Addre :	Address Line 2 . : 10055 MARCONI DRIVE :	S
	Numbe :	Address Line 3 . :	
	4 25 :	City : SAN DIEGO :	
	:	Country Code :	
	:	Postal Code : 92173 :	
	:	Phone Number : *	
	:	Fax number :	
	:	Address Source Code :	
	:	Address Status Code :	
	:		
	:	F3=Exit :	
	:		
	:		
	F3=Exit :		
	: : F3=Exit :	: : 	

*You're working with this panel* Figure 23 shows the Delete Manufacturer panel.

- Press Enter to confirm deletion. •
- **F3** lets you exit without deleting. ٠

### Continuing

Press Enter to bring up the CONFIRM: Y prompt, as shown in Figure 24.

Delete Manufacturer :	00:00
to confirm Deletion :	
er.: 2500 :	
ABIMAR       :         ABIMAR       :	5
: 	
: CONFIRM: I (I/N) : : 	
firm the deletion. waiting for your response. ake a correction, press N. cape without processing, press N then F3.	
the Work with Manufacturer display.	
1/02/98 08 Work with Manufacturer	:00:00
er. 8=Details (Manufacturer's Vendors) 9=Notes	
8=	Details (Manufacturer's Vendors) - Motes

Your Choices

Figure 25 shows Work with Manufacturer display.

- The New Address has been deleted.
- F3 lets you exit.

### Exiting

Press F3, to return to the PO Setup Menu.

	Figure 26				
	ZZMENUR DISPLAY				
		:		Run Application Menu	:
	User Id YOU	:	KOBELT	TEST Manufacturing Co. Ltd.	:
Purchase	Your Name	:	PO	Purchase Order	
Order Setur	Dun Denlisstien Ouk	 Mamu		options using 'l'	
order secup	· Run Application Sub	Menu		: ription	
Menu $\rightarrow$	· Select Menu options using	111		· Purchase Orders	
	: ? Menu Description	-		: PO Item Master	
	: Work with PO Status			:	
	: Work With PO Type			: nu Functions	
	: Work with Manufacturer			:	
	: Work With PO Item Maste	r		:	
	: Work with PO Buyer			:	
	: Work with PO Company			:	
	: F3=Exit			: 7=Change Current Company	
	:			:	
	:			:	
	:			.:	:

You're working with this panel

The ResultYou have successfully brought up the Work with Manufacturer display and worked with<br/>its options and functions.<br/>This completes Section 6.4, How To Setup PO Manufacturers.You Are Done

KDI

## 6.5 How To Setup PO Buyer

Start Here

Figure 1 shows the Purchase Order Menu.

Purchase Order Setup Menu → Work with PO Buyer →	ZZMENUR DISPLAY User Id YOU Your Name : Run Application St : POSETUP PO Setup Menu : Select Menu options usir : ? Menu Description : Work with PO Status : Work With PO Type : Work With PO Type : Work With PO Item Mas : Work With PO Item Mas : Work with PO Buyer : Work with PO Company :	: : KOBELT : PO ub Menu ng '1'	Run Application Menu TEST Manufacturing Co. Ltd. Purchase Order options using 'l' : ription : PO Vendor : Purchase Orders : PO Item Master : : nu Functions :	
	: : : F3=Exit : :		: : : 7=Change Current Company : :	:
he Task	You're working with a We are going to bring up the In Figure 1, option	<i>this panel</i> e Work with PO 1 lets you brin	Buyer display. 1g up displays.	

Selecting

Tab down to Work with PO Buyer, and type in a 1, as shown in Figure 2.

Figure 2

	ZZMENUR DISPLAY		
		:	Run Application Menu :
	User Id YOU	: KOBELT	TEST Manufacturing Co. Ltd. :
	Your Name	: PO	Purchase Order
			options using `1'
	: Run Application Sub	Menu	: ription
	: POSETUP PO Setup Menu		: PO Vendor
	: Select Menu options using	11'	: Purchase Orders
	: ? Menu Description		: PO Item Master
	: Work with PO Status		:
	: Work With PO Type		: nu Functions
	: Work with Manufacturer		:
	: Work With PO Item Maste	r	:
	: 1 Work with PO Buyer		:
	: Work with PO Company		:
$1 \rightarrow$	:		:
	:		:
	:		:
	:		:
	: F3=Exit		: 7=Change Current Company
	:		:
	:		:
	:		:

You're working with this panel

### Filled

Press Enter, and your display will look like Figure 3.

	Figure 3			
	POB5DFR	DISPLAY		1/02/98 08:00:00
Work with $\rightarrow$		Work with	PO Buyer	
	Account	Description	-	
PO Buyer	Manager	-		
	Type optic	ons, press Enter.		
	2=Change	5=Display		
Options $\rightarrow$	-			
1	? Account	Description	Setup	
	Manager	-	-	
	* -	In House Account Canadian		
	DC	Distributor Commission		
	DM	Dan McKeena		
	DT	Dennis Turnbull	*	
	KD	Kurt Dreger	*	
	KK	Kathleen Kirk		
	KL	Kevin Lee		
	TK	Tom Kobelt	*	
	USA	US Accounts		
	XPRT	Export (International) Account	.t	
		-		
	F3=Exit	F6=Add F21=Print List		
Functions $\rightarrow$				

### **Your Choices**

Figure 3 shows the Work with PO Buyer display.

- First we will add a new buyer using **F6**.
- Next, we will display the new buyer using option 5.
- Last, we will make changes using option 2.

Press F6, and your display will look like Figure 4.

### Adding

Figure 4 POB5DFR DISPLAY 1/02/98 08:00:00 Work with PO Buyer Account Description Manager Add Account . . . . . . . . . . . . т: Add Account Rep Code **Rep.Code**  $\rightarrow$  2: Account Rep. Code . Account Rep.  $\rightarrow$ ?: : F3=Exit Code : : DT Dennis Turnbull KD Kurt Dreger KK Kathleen Kirk KL Kevin Lee TK Tom Kobelt USA US Accounts XPRT Export (International) Account · · · · · · · : \* F3=Exit F6=Add F21=Print List *You're working with this panel* 

*You're working with this panel* Figure 4 shows the Add Account Rep. Code panel.

Your Choices

• We will fill in a test code.



### A New Code Type in **JS**, as shown in Figure 5.

Figure 5

	POB5DFR	DISPLAY		1/02/98 08:00:00
		Wor	k with PO Buver	, . ,
	Accourt	t Description		
	Manago	r		
	Mallage	1		
	т:	Add Account Rep Code	:	
	2 :		:	
	: Acc	ount Rep. Code . JS	:	
$\rightarrow$	?:	_	:	
1	: F3=	Exit	:	
	:		:	
	:		:	
	DT	Dennis Turnbull	*	
	КD	Kurt Dreger	*	
	KK	Kathleen Kirk		
	KI.	Kevin Lee		
	TK	Tom Kobelt	*	
	TICA	IS Accounts		
	VDDT	Export (International)	Account	
	APRI	Export (International)	ACCOUNT	
		DC add DO1 Duint Lint		
	F3=EXIL	F6=Add F21=Print List		

You're working with this panel

Press Enter, and your display will look like Figure 6.

### Details

	Figure 6
	POB5DFR DISPLAY 1/02/98 08:00:00 Work with PO Buyer Account Description Manager
	T : Add Account Rep Code : 2 : : : Account Rep. Code . JS :
Add Account	: F3=Exit : Add Account Rep Detail :
Rep. Detail $ ightarrow$	: : Account Manager Code : JS :
Description $\rightarrow$	DT Dennis Turnb : <b>Description</b> : KD Kurt Dreger : : KK Kathleen Kir : F3=Exit <b>F12=Key screen</b> :
<b>F12</b> = Key screen $\rightarrow$	KL       Kevin Lee       :         TK       Tom Kobelt       :         USA       US Accounts       :         XPPT       Export (International) Account
	F3=Exit F6=Add F21=Print List
	Vou'vo wowling with this new of

You're working with this panel

- Figure 6 shows the Add Account Rep. Detail panel. F12 lets you change the Account Manager Code if desired. •
- We will fill in the Description field. ٠

### Manual Field Fill in the Description, as shown in Figure 7.

	Figure 7	
	POB5DFR DISPLAY 1/02/98 08:00:00	
	Work with PO Buyer	
	Account Description Manager	
	T : Add Account Rep Code : 2 : : : Account Rep. Code . JS :	
	?:	
	: : Account Manager Code : JS :	
	DT Dennis Turnb : Description <b>John Smith</b> : KD Kurt Dreger : :	
Filled $\rightarrow$	KK Kathleen Kir : F3=Exit F12=Key screen : KL Kevin Lee : :	
	TK Tom Kobelt : : : USA US Accounts ::	
	XPRT Export (International) Account	
	F3=Exit F6=Add F21=Print List	

You're working with this panel

Press Enter, and your display will look like Figure 8.

### Continuing

### Figure 8

Work with PO Buyer         Account Description         Manager         T:       Add Account Rep Code         2:       :         2:       :         :       Account Rep. Code         :       Account Rep. Code         :       Add Account Rep Detail         :       :         :       Add Account Rep Detail         :       :         :       :         DT       Dennis Turnb : Description         DT       Dennis Turnb : Description         KK       Kathleen Kir : F3=Exit         KK       Kathleen Kir : F3=Exit         :       :         :       :         :       :         :       :         :       :         :       :         :       :         :       :         :       :         :       :         :       :         :       :         :       :         :       :         :       :         :       :         :       :         :       : <th>POB5DFR DISPLAY</th> <th>1/02/98 08:00:0</th>	POB5DFR DISPLAY	1/02/98 08:00:0
Account Description Manager T : Add Account Rep Code : 2 : Account Rep. Code . JS : : Account Rep. Code . JS : : F3=Exit : Add Account Rep Detail : DT Dennis Turnb : Description John Smith KD Kurt Dreger : KK Kathleen Kir : F3=Exit F12=Key screen KL Kevin Lee : TK Tom Kobelt : : CONFIRM: Y (Y/N) : USA US Accounts : :		Work with PO Buyer
Manager         T :       Add Account Rep Code         2 :       :         :       Account Rep. Code . JS         :       F3=Exit         :       F3=Exit         :       Add Account Rep Detail         :       :         :       Account Manager Code : JS         :       :         DT Dennis Turnb : Description John Smith         KD Kurt Dreger :         KK Kathleen Kir : F3=Exit F12=Key screen         KL Kevin Lee :         TK Tom Kobelt :         USA US Accounts :         XPRT Export (International) Account	Account Descript:	ion
T : Add Account Rep Code : 2 :	Manager	
<pre>T : Add Account Rep Code : : 2 : 2 : 2 : 3 Add Account Rep. Code . JS 7 : 5 F3=Exit : Add Account Rep Detail 7 : 6 DT Dennis Turnb : Description John Smith 7 KD Kurt Dreger : 7 KK Kathleen Kir : F3=Exit F12=Key screen 7 KK Kathleen Kir : F3=Exit F12=Key screen 7 KK Tom Kobelt : 7 KT Tom Kobelt :</pre>		
<pre>2 : : : Account Rep. Code . JS : ? : : F3=Exit : Add Account Rep Detail : : : DT Dennis Turnb : Description John Smith KD Kurt Dreger : KK Kathleen Kir : F3=Exit F12=Key screen KL Kevin Lee : TK Tom Kobelt : : CONFIRM: Y (Y/N) : USA US Accounts : : : XPRT Export (International) Account :</pre>	T : Add Aco	count Rep Code :
: Account Rep. Code . JS : ? : . F3=Exit : Add Account Rep Detail :	2 :	:
<pre>? :     F3=Exit : Add Account Rep Detail     E : Account Manager Code : JS     DT Dennis Turnb : Description John Smith     KD Kurt Dreger :     KK Kathleen Kir : F3=Exit F12=Key screen     KL Kevin Lee :     TK Tom Kobelt : CONFIRM: Y (Y/N) :     USA US Accounts :</pre>	: Account Rep. Co	ode.JS:
: F3=Exit : Add Account Rep Detail : : : DT Dennis Turnb : Description John Smith KD Kurt Dreger : KK Kathleen Kir : F3=Exit F12=Key screen KL Kevin Lee : TK Tom Kobelt : : CONFIRM: Y (Y/N) : USA US Accounts : : :	? :	
: : Account Manager Code : JS : DT Dennis Turnb : Description John Smith KD Kurt Dreger : KK Kathleen Kir : F3=Exit F12=Key screen KL Kevin Lee : TK Tom Kobelt : <b>: CONFIRM: Y (Y/N)</b> : USA US Accounts : : : :	: F3=Exit	: Add Account Rep Detail
: : Account Manager Code : JS :: DT Dennis Turnb : Description John Smith KD Kurt Dreger : KK Kathleen Kir : F3=Exit F12=Key screen KL Kevin Lee : TK Tom Kobelt : : CONFIRM: Y (Y/N) : USA US Accounts : : : :	:	-
:: DT Dennis Turnb : Description John Smith KD Kurt Dreger : KK Kathleen Kir : F3=Exit F12=Key screen KL Kevin Lee : TK Tom Kobelt : : CONFIRM: Y (Y/N) : USA US Accounts : : : XPRT Export (International) Account :	:	: Account Manager Code : JS
DT Dennis Turnb : Description John Smith KD Kurt Dreger : KK Kathleen Kir : F3=Exit F12=Key screen KL Kevin Lee : TK Tom Kobelt : : CONFIRM: Y (Y/N) : USA US Accounts : : : XPRT Export (International) Account :		
KD       Kurt Dreger :         KK       Kathleen Kir :       F3=Exit F12=Key screen         KL       Kevin Lee :          TK       Tom Kobelt :       :       CONFIRM: Y (Y/N) :         USA       US Accounts :       :       :         XPRT       Export (International) Account       :       :	DT Dennis Ti	urnb : Description John Smith
KK       Kathleen Kir : F3=Exit       F12=Key screen         KL       Kevin Lee :          TK       Tom Kobelt :          USA       US Accounts :	KD Kurt Dree	der :
KL       Kevin Lee       :	KK Kathleen	Kir: F3=Exit F12=Key screen
TK       Tom Kobelt :       : CONFIRM: Y (Y/N) :         USA       US Accounts :       : :         XPRT       Export (International) Account :       :	KI. Kevin Lee	······································
USA US Accounts : : : : : : : : : : : : : : : : :	TK Tom Kobe	· CONFIRM• V (V/N) ·
XPRT Export (International) Account :		
APRI EXPORT (International) Account :	VDD Emport (	International) Account
	APRI EXPORT (	

You will be asked to confirm your new Account Rep. Code.

### Confirmation Tips

Confirming

CONFIRM:

The Y for "yes" will be waiting for your response.

- If you want to make a correction, press N.
- If you want to escape without processing your new Account Rep. Code, press N then F3.

### **Returning** Press **Enter**, and your display will look like Figure 9.

Work with →       POB5DFR DISPLAY       1/02/98 08:00:00         Account Description       Manager       POB       DISPLAY         5=Display →       Type options, press Enter.       2=Change 5=Display         ? Account Description       Setup         Manager       *       In House Account Canadian         DC       Distributor Commission         DM       Dan McKeena         DT       Dennis Turnbull         XD       Kurt Dreger         KK       Kathleen Kirk         KL       Kevin Lee         TK       Tom Kobelt         YSA       US Accounts         +       F3=Exit F6=Add F21=Print List		Figure 9			
Work with → PO Buyer       New Account Description         S=Display →       Type options, press Enter. 2=Change S=Display         ? Account Description       Setup Manager *         *       In House Account Canadian DC         DC       Distributor Commission DM         DM       Dan McKeena DT         DT       Dennis Turnbull         *       John Smith KD         KL       Kevin Lee TK TK USA       *         F3=Exit       F6=Add       F21=Print List		POB5DFR	DISPLAY		1/02/98 08:00:00
Normalized of the second bescription         POB       DISPLAY         S=Display →       Type options, press Enter.         2=Change       S=Display         ? Account Description       Setup         Manager       *         POB       DISPLAY         ? Account Description       Setup         Manager       *         *       In House Account Canadian         DC       Distributor Commission         DM       Dan McKeena         DT       Dennis Turnbull         *       JS         John Smith       *         KL       Kevin Lee         TK       Tom Kobelt       *         F3=Exit       F6=Add       F21=Print List	Work with $\rightarrow$		Work wit	th PO Buyer	
PO Buyer       Manager POB DISPLAY         S=Display →       Type options, press Enter. 2=Change 5=Display         ? Account Description       Setup Manager * In House Account Canadian DC Distributor Commission DM Dan McKeena DT Dennis Turnbull * JS John Smith KD Kurt Dreger KK Kathleen Kirk KL Kevin Lee TK Tom Kobelt SA USA Counts         New Account Rep. →       F3=Exit F6=Add F21=Print List		Account	Description		
FOB       DISPLAY         Type options, press Enter.       2=Change 5=Display         ? Account Description       Setup         Manager       *         *       In House Account Canadian         DC       Distributor Commission         DM       Dan McKeena         DT       Dennis Turnbull         *       JS         John Smith       *         KK       Kathleen Kirk         KL       Kevin Lee         TK       Tom Kobelt       *         F3=Exit       F6=Add       F21=Print List	PO Buyer	Manager			
<pre>5=Display → Type options, press Enter. 2=Change 5=Display ? Account Description Setup Manager * In House Account Canadian DC Distributor Commission DM Dan McKeena DT Dennis Turnbull * JS John Smith KD Kurt Dreger * KK Kathleen Kirk KL Kevin Lee TK Tom Kobelt * USA US Accounts + F3=Exit F6=Add F21=Print List</pre>		POB	DISPLAY		
$5 = Display \rightarrow$ $P = Display = 5 = Display$ $P = Account Description Setup$ $P = Account Description Setup$ $P = Account Canadian$ $P = Distributor Commission$ $P = Distributor Commission$ $P = Distributor Commission$ $P = Display = Account Canadian$ $P = Account C$		Time ontio	ng progg Entor		
$5 = Display \rightarrow$ ? Account Description Setup Manager * In House Account Canadian DC Distributor Commission DM Dan McKeena DT Dennis Turnbull * JS John Smith KD Kurt Dreger * KK Kathleen Kirk KL Kevin Lee TK Tom Kobelt * USA US Accounts + F3=Exit F6=Add F21=Print List		2-Change	5-Dignlay		
<pre>? Account Description Setup Manager * In House Account Canadian DC Distributor Commission DM Dan McKeena DT Dennis Turnbull * JS John Smith KD Kurt Dreger * KK Kathleen Kirk KL Kevin Lee TK Tom Kobelt * USA US Accounts + F3=Exit F6=Add F21=Print List</pre>	$5 = Display \rightarrow$	z=change	J-DISPINY		
Manager       *       In House Account Canadian         DC       Distributor Commission         DM       Dan McKeena         DT       Dennis Turnbull <b>JS</b> John Smith         KD       Kurt Dreger         KK       Kathleen Kirk         KL       Kevin Lee         TK       Tom Kobelt         F3=Exit       F6=Add         F21=Print List	e Dispidy ,	? Account	Description	Setup	
<pre>* In House Account Canadian DC Distributor Commission DM Dan McKeena DT Dennis Turnbull * JS John Smith KD Kurt Dreger * KK Kathleen Kirk KL Kevin Lee TK Tom Kobelt * USA US Accounts + F3=Exit F6=Add F21=Print List</pre>		Manager			
DC       Distributor Commission         DM       Dan McKeena         DT       Dennis Turbull         JS       John Smith         KD       Kurt Dreger         KK       Kathleen Kirk         KL       Kevin Lee         TK       Tom Kobelt         F3=Exit       F6=Add         F21=Print List		*	In House Account Canadian		
DM       Dan McKeena         DT       Dennis Turnbull       *         JS       John Smith       *         KD       Kurt Dreger       *         KK       Kathleen Kirk       *         KL       Kevin Lee       *         TK       Tom Kobelt       *         USA       US Accounts       +         F3=Exit       F6=Add       F21=Print List		DC	Distributor Commission		
DT       Dennis Turnbull       *         JS       John Smith       *         KD       Kurt Dreger       *         KK       Kathleen Kirk       *         KL       Kevin Lee       *         TK       Tom Kobelt       *         USA       US Accounts       +         F3=Exit       F6=Add       F21=Print List		DM	Dan McKeena		
New Account Rep. → KC Kathleen Kirk KL Kevin Lee TK Tom Kobelt * USA US Accounts + F3=Exit F6=Add F21=Print List		DT	Dennis Turnbull	*	
New Account Rep. → KD Kurt Dreger * KK Kathleen Kirk KL Kevin Lee TK Tom Kobelt * USA US Accounts + F3=Exit F6=Add F21=Print List		JS	John Smith		
New Account Rep. →       KK       Kathleen Kirk         KL       Kevin Lee       K         TK       Tom Kobelt       *         USA       US Accounts       +         F3=Exit       F6=Add       F21=Print List	Now Account Day	KD	Kurt Dreger	*	
TK Tom Kobelt * USA US Accounts + F3=Exit F6=Add F21=Print List	New Account Kep. $\rightarrow$	KK	Kauineen Kirk		
USA US Accounts + F3=Exit F6=Add F21=Print List		TK	Tom Kobelt	*	
F3=Exit F6=Add F21=Print List		IISA	US Accounts		+
F3=Exit F6=Add F21=Print List		0011			
		F3=Exit	F6=Add F21=Print List		

Your Choices

Figure 9 shows the Work with PO Buyer display.

- The new Account Rep. appears in the listing.
- Option 5 lets you display.

Tab down to the JS, and type in a 5, as shown in Figure 10.

### Displaying

POB5DFR	DISPLAY		1/02/98 08:00:00
	Wo	rk with PO Buyer	
Account	Description	-	
Manager	-		
POB	DISPLAY		
Type optio	ons, press Enter.		
2=Change	5=Display		
? Account	Description	Setup	
Manager		<u>F</u>	
*	In House Account Cana	dian	
DC	Distributor Commissio	n	
DM	Dan McKeena		
DT	Dennis Turnbull	*	
5 JS	John Smith		
KD	Kurt Dreger	*	
KK	Kathleen Kirk		
KT.	Kevin Lee		
TK	Tom Kobelt	*	
TIGA	IIS Accounts		
USA	US ACCOUNTS		
F3-Evit	F6-Add F21-Print Lis	t	

### **Filled** Press **Enter**, and your display will look like Figure 11.

Figure 11 POB5DFR DISPLAY 1/02/98 08:00:00 . Display PO Buyer KEY SCRE Display PO  $\rightarrow$ : Buyer KEY Account Manager Code . JS : Description : John Smith SCRE F3=Exit F4=Prompt F9=Change  $F3 = Exit \rightarrow$ *You're working with this panel* Figure 11 shows the Display PO Buyer KEY SCREEN panel. **Your Choices** • You have successfully displayed a PO Buyer. F3 lets you exit this display. •

Press F3 to return to Work with PO Buyer.

### Returning

	Figure 12			
	POB5DFR	DISPLAY		1/02/98 08:00:00
Work with $\rightarrow$			Work with PO Buyer	
	Account	Description		
PO Buyer	Manager			
	m			
	Type optic	ns, press Enter.		
2-Change	2=change	5=Display		
<b>z</b> −Chunge <b>→</b>	2 Account	Degaription	Sotup	
	Manager	Description	Secup	
	*	In House Account (	Tanadian	
	DC	Distributor Commis	rion	
	DM	Dan McKeena	551011	
	חיום	Dennig Turnbull	*	
	JIS	John Smith		
	KD C D	Kurt Dreger	*	
	KK	Kathleen Kirk		
	KT.	Kevin Lee		
	TK	Tom Kobelt	*	
	USA	US Accounts		+
	0011			
	F3=Exit	F6=Add F21=Print	List	
	•			

*You're working with this panel* Figure 12 shows the Work with PO Buyer display.

Your Choices

• We will now use option 2 to bring up the panel that lets you make changes to PO Buyer.

### Selecting

Tab down to the JS, and type in a 2, as shown in Figure 13.

### Figure 13

	POB5DFR	DISPLAY		1/02/98 08:00:00
		Woi	rk with PO Buyer	
	Account	Description		
	Manager			
	Type optic	ons, press Enter.		
	2=Change	5=Display		
	? Account	Description	Setup	
	Manager			
	*	In House Account Canad	lian	
	DC	Distributor Commission	1	
	DM	Dan McKeena		
	DT	Dennis Turnbull	*	
	2 JS	John Smith		
	KD	Kurt Dreger	*	
$2 \rightarrow$	KK	Kathleen Kirk		
	KL	Kevin Lee		
	TK	Tom Kobelt	*	
	USA	US Accounts		+
	F3=Exit	F6=Add F21=Print List	5	

Filled

Press Enter, and your display will look like Figure 14.

### Figure 14 POB :00 Edit PO Buyer Details Edit PO $\rightarrow$ A : Buyer M : Account Manager Code : JS John Smith Details User Id . . . . . . тур : Purchasing Level . . . 2=C : ? A : Approval Level . . . м: D : D : F3=Exit D : 2 J : к :.... KK Kathleen Kirk Kevin Lee KL ΤK Tom Kobelt USA US Accounts F3=Exit F6=Add F21=Print List

You're working with this panel

Figure 14 shows the Edit PO Buyer Details display.

- The User ID, Purchasing Level and Approval Level fields can all be changed.
- This process is similar to adding. **F4** lets you prompt each field and if you press **Enter** to process your changes, you will be asked for confrmation.
- **F3** lets you exit without making changes.

### Returning

### Press F3, to return to Work with PO Buyer.

	Figure 15				
	POB5DFR	DISPLAY		1/02/98	08:00:00
Work with $\rightarrow$			Work with PO Buyer		
	Account	Description			
PO Buyer	Manager				
	Type optic	ns, press Enter.			
	2=Change	5=Display			
	? Account	Description	Setup		
	Manager				
	*	In House Account C	Canadian		
	DC	Distributor Commis	sion		
	DM	Dan McKeena			
	DT	Dennis Turnbull	*		
	JS	John Smith			
	KD	Kurt Dreger	*		
	KK	Kathleen Kirk			
	KL	Kevin Lee			
	TK	Tom Kobelt	*		
	USA	US Accounts			+
	F3=Exit	F6=Add F21=Print	List		

The ResultYou have successfully brought up the Work with PO Buyer display and worked with the<br/>Add function and the Display and Change options

Exiting

Press F3, to return to the PO Setup Menu.

	Figure 16			
	ZZMENUR DISPLAY			
		:	Run Application Menu :	
	User Id YOU	: KOBELT	TEST Manufacturing Co. Ltd. :	
Dumahaga	Your Name	: PO	Purchase Order	
Purchase			options using '1'	
Order Setup	: Run Application Sub	Menu	: ription	
	: POSETUP PO Setup Menu	: PO Vendor		
Menu →	: Select Menu options using	`1'	: Purchase Orders	
	: ? Menu Description		: PO Item Master	
	: Work with PO Status		:	
	: Work With PO Type		: nu Functions	
	: Work with Manufacturer		:	
	: Work With PO Item Maste	er	:	
	: Work with PO Buyer		:	
	: Work with PO Company		:	
	:		:	
	:		:	
	:		:	
	:		:	
	: F3=Exit		: 7=Change Current Company	
	:		:	
	:		:	
	:		:	

*You're working with this panel* This completes Section 6.5, How to Setup PO Buyer.

You Are Done

# **6.6 How To Setup PO Companies** Figure 1 shows the Purchase Order Setup Menu.

Start Horo

Purchase	User Id YOU : KOBELT Your Name : PO	Run Application Menu : TEST Manufacturing Co. Ltd. : Purchase Order options using '1'
Order Setup Menu →	: Run Application Sub Menu : POSETUP PO Setup Menu : Select Menu options using '1' : ? Menu Description : Work with PO Status : Work With PO Type : Work with Manufacturer : Work With PO Item Master : Work with PO Buyer	: ription : PO Vendor : Purchase Orders : PO Item Master : : nu Functions : :
Work with PO Company $\rightarrow$	Work with PO Company	
	: F3=EXIL	: /=Change Current Company
	You're working with this panel	:
he Task	<ul> <li>You're working with this panel</li> <li>We are going to bring up the Work with PC</li> <li>In Figure 1, option 1 lets you bring</li> </ul>	Company Display.

		:	Run Application Menu	:
	User Id YOU	: KOBELT	TEST Manufacturing Co. Ltd.	:
	Your Name	: PO	Purchase Order	
			options using '1'	
	: Run Application Sub M	lenu	: ription	
	: POSETUP PO Setup Menu		: PO Vendor	
	: Select Menu options using '	1′	: Purchase Orders	
	: ? Menu Description		: PO Item Master	
	: Work with PO Status		:	
	: Work With PO Type		: nu Functions	
	: Work with Manufacturer		:	
	: Work With PO Item Master		:	
	: Work with PO Buyer		:	
	: 1 Work with PO Company		:	
4	:		:	
$1 \rightarrow$	:		:	
	:		:	
	:		:	
	: F3=Exit		: 7=Change Current Company	
	:		:	
	:		:	
			•••• •••••••••••••••••••••••••••••	

*You're working with this panel* 

### Filled

Press Enter, and your display will look like Figure 3.

	Figure 3			
	POMTDFR	DISPLAY		1/02/98 08:00:00
Work with $\rightarrow$ PO Company	Company Code ZZMEN	Work with Description DISPLAY	PO Company	
$Options \rightarrow$	Type option <b>2=Change</b>	s, press Enter.		
1	? Company Code ALPINE DEMO	Description Alpine Holdings Ltd. Your Demo Company	Setup	
	KDI KOBELT MMI NTRKOB	TEST Kobelt Development I TEST Manufacturing Co. L Mainland Metal Impregnatio Interkob Holdings Ltd.	nc. * td. * n	
	F3=Exit F	21=Print List		
Functions $\rightarrow$				

Figure 5 shows the Work with PO Company display.

Press F21 and your display will look like Figure 4.

- **F21** lets you print a list of the companies.
- We will bring up the display that lets you make changes to each company.
- Option 2 lets you make changes.

Print List

**Your Choices** 

Figure 4

	Figure 4.			
	POMTDFR Company Code	DISPLAY Work with PO C Description	Company	1/02/98 08:00:00
	Type option 2=Change	s, press Enter.		
	? Company Code ALPINE DEMO KDI KOBELT MMI NTRKOB	Description Alpine Holdings Ltd. Your Demo Company Kobelt Development Inc. Kobelt Manufacturing Co. Ltd. Mainland Metal Impregnation Interkob Holdings Ltd.	Setup * *	
	F3=Exit F Processing	21=Print List <b>Print List</b>		
Processing Print list $\rightarrow$				

**Processing** In a few seconds the Processing Print List message appears.

**Completed** After a few more seconds the Completed Printing List message appears.

### Figure 5

Г	DOMTDED	DICDIAV		1/02/00 00.00.00
Marsh saith	POHIDIK	Work with PO (	Company	1/02/98 08:00:00
work with $\rightarrow$	Company	Description	company	
PO Company	Code	<u>I</u>		
	Type option	s, press Enter.		
$2 = Change \rightarrow$	z=change			
	? Company	Description	Setup	
	Code	-	-	
	ALPINE	Alpine Holdings Ltd.		
	DEMO	Your Demo Company	ц.	
	KOBELT	Kobelt Manufacturing Co. Ltd	*	
	MMI	Mainland Metal Impregnation		
	NTRKOB	Interkob Holdings Ltd.		
	F3=Exit F	21=Print List		
	Completed P	rinting List		
Completed Printing				
$I$ ist $\rightarrow$				
$Lisi \rightarrow$				

Your Choices	<ul> <li>Figure 5 shows the Work with PO Company display.</li> <li>You have used function key F21 to print the Company list.</li> <li>Next, we will use option 2 to bring up The Edit Company Details display.</li> </ul>
	uispiay.

Changing

Tab down to KOBELT, and type in a 2, as shown in Figure 4.

2

PO	MTDFR	DISPLAY		1/02/98 08:00:00
	Company Code	Work with PC Description	Company	
Ту 2=	pe option Change	s, press Enter.		
?	Company Code	Description	Setup	
	ALPINE DEMO	Alpine Holdings Ltd. Your Demo Company		
_	KDI	TEST Kobelt Development Inc.	*	
2	MMI NTRROP	TEST Manufacturing Co. Ltd. Mainland Metal Impregnation	*	
	MIRROD	incerkob notarings nea.		
<b>F</b> 3	-Evit B	21-Print List		

Purchase Orders

Г

### Filled

Press Enter, and your display will look like Figure 7.

	Figure 7		
	POXSE1R ADD		1/02/98 08:00:00
Edit PO $\rightarrow$	I	Edit PO Company Details	
Company	Company Code :	KOBELT TEST Manufacturing Co.	Ltd.
Details	GL Company	21	
	Cooda Bog/d Lipbility Agt	E 0120	
Changeable Fields $\rightarrow$	Goods Rec a mability Act .	5 0120	
	Inventory Company	21	
	Default Warehouse Code	F Finished Goods Warehouse	
	Default Shipping Method	AIR-P Air freight Prepaid	
	Goods Rec'd Code	REC	
	AP Vendor Company	21	
	Default Currency Code	CAN Canadian Dollar	
	Default Buyer	JS John Smith	
	Default Terms Code	CASH C.O.D.	
	Closed Order Status Code .	OPEN Open PO	
	Note Type Code	<ul> <li>General Note</li> </ul>	
	F3=Exit F4=Prompt		

Your Choices

Figure 7 shows the Edit PO Company Details display.

- All changeable fields are in bold type.
- **F4** lets you prompt the Code fields.
- **F3** lets you exit without making changes.

Press **F3** to return to the Work With PO Company display.

### Returning

	Figure 8	
	POMTDFR DISPLAY	1/02/98 08:00:00
Work with $\rightarrow$ PO Company	Work with PO Company Description Code	Company
	Type options, press Enter. 2=Change	
	? Company Description Code ALPINE Alpine Holdings Ltd	Setup
	DEMO Your Demo Company KDI TEST Kobelt Development Inc.	*
	KOBELT TEST Manufacturing Co. Ltd. MMI Mainland Metal Impregnation NTRKOB Interkob Holdings Ltd.	*
F3=Exit F21=Print List		
$\mathbf{F3} = Exit \rightarrow$		

Exiting	Press F3 to return to the PO Setup Menu display.
---------	--

	Figure 9 ZZMENUR DISPLAY			
Purchase Order Setup Menu →	User Id YOU Your Name	: KOBELT : PO Menu g `l'	Run Application Menu TEST Manufacturing Co. Ltd. Purchase Order options using '1' : ription : PO Vendor : Purchase Orders : PO Item Master : : nu Functions : : : : : : : : : : : : : : : : : : :	

You're working with this panel

The ResultYou have successfully brought up the Work with PO Company display and worked with<br/>its options and functions.You Are DoneThis completes Section 6.6, How To Setup PO Companies and Chapter 6, PO Setup.