

6. Purchase Order Setup

This Chapter

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

Getting There Signing On

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.

Figure 1

User →
Application
Menu

ZZMENUR	DISPLAY	User Application Menu		1/02/98 08:00:00
User Id YOU				
Your Name				
Type options, press Enter.				
1=Select Menu Option 2=Change Current Application 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	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.

Purchase Orders

Selecting An Application

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

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

Figure 2

```
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 :
: PO Setup :
: Common Menu Functions :
: :
: :
: :
: :
: :
: F3=Exit F17=Change Current Company :
: :
F3=Exit :.....
```

Here's the new panel

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.

Selected

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

Figure 3

```
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 PO Setup :
: Common Menu Functions :
: :
: :
: :
: :
: :
: F3=Exit F17=Change Current Company :
: :
F3=Exit :.....
```

You're working with this panel



PO Setup

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

**Purchase
Order Setup
Menu** →

Figure 4

```
ZZMENUR   DISPLAY   .....
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 '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                    :
: Work with PO Company                  :
:                                       :
:                                       :
: F3=Exit                               : 7=Change Current Company
:                                       :
:                                       :
.....
```

You're working with this panel

The Purchase Order Setup Menu display fills up half of your screen.

**Cash
Management**

This will be the Starting Point for the next 5 sections.

Work With With PO Item Master has already been covered in Chapter 5.

**1 Option Already
Covered**

- This chapter will cover Work with PO Status, Work with PO Type, Work with Manufacturer, Work with Buyer and Work with PO Company.

6.2 How To Setup PO Status

Figure 1 shows the Purchase Order Setup Menu.

Start Here

Purchase
Order Setup
Menu →

Work With →
PO Status

Figure 1

```

ZZMENUR   DISPLAY .....
User Id YOU           :   KOBELT   Run Application Menu      :
Your Name            :   PO       Test  Manufacturing Co. Ltd. :
.....              :           Purchase Order      :
: Run Application Sub Menu : 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       :
: Work with PO Company     :
:
:
: F3=Exit                 : 7=Change Current Company
:
:
.....
    
```

You're working with this panel

The Task

We are going to use the Work With PO Type display.

- 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 .....
User Id YOU           :   KOBELT   Run Application Menu      :
Your Name            :   PO       Test  Manufacturing Co. Ltd. :
.....              :           Purchase Order      :
: Run Application Sub Menu : ription
: POSETUP   PO Setup Menu  : PO Vendor
: Select Menu options using '1' : Purchase Orders
: ? Menu Description         : PO Item Master
: 1 Work with PO Status      :
: Work With PO Type         : nu Functions
: Work with Manufacturer    :
: Work With PO Item Master  :
: 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

Work With PO Status →

Options →

F6 = Add →

```

POXXDFR      DISPLAY                               1/02/98 08:00:00
      Order  Description      Work with PO Status
      Status
Type options, 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

F3=Exit  F6=Add  F21=Print List
    
```

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.

Adding

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

Figure 4

Add PO Status →

Order Status Code →

```

POXXDFR      DISPLAY                               1/02/98 08:00:00
      Order  Description      Work with PO Status
      Status
.....
Ty :          Add PO Status          :
2= :          :                      :
? :          Order Status Code .    :
  :          :          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

Your Choices

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.



Purchase Orders

New Code

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

Figure 5

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

TEST →

You're working with this panel

Filled

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

Figure 6

POXXDFR	DISPLAY	Work with PO Status			1/02/98 08:00:00
Order Status	Description				
.....					
Ty :	A :	Add PO Status Details			:
2= :	:	:	:	:	:
:	Order Sta :	Order Status Code :	TEST	:	:
? :	:	:	:	:	:
:	:	Description	:	:	:
:	:	:	:	:	:
:	F3=Exit :	Allow Changes . . .	:	:	:
:	:	:	:	:	:
:	:	PO Closed?	:	:	:
:	:	:	:	:	:
:	:	Items Ordered? . .	:	:	:
:	:	:	:	:	:
:	:	F3=Exit F4=Prompt F12=Key screen	:	:	:
:	:	:	:	:	:
.....					
F3=Exit F6=Add F21=Print List					

Add PO Status Details →

Data Entry Fields →

Functions →

You're working with this panel

Your Choices

Figure 6 shows the Add PO Status Details panel.

- We need to fill in the fields that are highlighted.
- **F12** lets you change the Order Status Code.
- **F4** lets you prompt the fields.

Manual Field

Fill in the Description, as shown in Figure 7.

Figure 7

Filled →

Allow →

Changes →

```

POXXDFR      DISPLAY                      1/02/98 08:00:00
      Order  Description
      Status

.....
Ty :          A :                      Add PO Status Details          :
2= :          :                      :                               :
? : Order Sta : Order Status Code :   TEST                       :
:           : Description . . . .   Test Status Detail                   :
: F3=Exit   : Allow Changes . . . .                                     :
:           : PO Closed? . . . .                                           :
:           : Items Ordered? . .   T                                       :
:           : F3=Exit   F4=Prompt   F12=Key screen                       :
:           :                               :                               :
:           :                               :                               :
F3=Exit   F6=Add   F21=Print List
        
```

You're working with this panel

Your Choices

Figure 7 shows the Add PO Status Details panel.

- The Description field has been filled.
- Next, we will fill in the Allow Changes field.
- **F4** lets us prompt.

Prompting

Tab down to Allow Changes, and press **F4**. Your display will look like Figure 8.

Figure 8

Allow →

Change List →

1 = Select

```

.....
:          Allow Changes list          : Status                      1/02/98 08:00:00
: Position to                          :                               :
: 1=Select                              :                               :
: Opt Value          Description       :                               :
:   0                No               : .....
:   1                Yes              : tatus Details                :
:                               :                               :
: F3=Exit   F5=Refresh   F24=More keys : ST                            :
:                               :                               :
:                               : st Status Details            :
:                               :                               :
:                               :                               :
:           : PO Closed? . . . .   :                               :
:           : Items Ordered? . .   :                               :
:           : F3=Exit   F4=Prompt   F12=Key screen :                               :
:           : Value required.           :                               :
:           :                               :                               :
F3=Exit   F6=Add   F21=Print List
        
```

You're working with this panel

Your Choices

Figure 8 shows the Allow Changes List panel.

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



Purchase Orders

Selecting

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

Figure 9

```

..... 1/02/98 08:00:00
:      Allow Changes list      : Status
: Position to                  :
: 1=Select                     :
: Opt Value                    : Description
: 0                             : No
: 1 1                          : Yes
:                               : tatus Details
:                               :
:                               : ST
: F3=Exit F5=Refresh F24=More keys :
:                               : st Status Details
:                               :
:                               :
:                               :
:                               :
:                               : PO Closed? . . . .
:                               :
:                               : Items Ordered? . .
:                               :
:                               : F3=Exit F4=Prompt F12=Key screen
:                               : Value required.
:                               :
:                               :
:                               :
F3=Exit F6=Add F21=Print List
    
```

1 →

You're working with this panel

Filled

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

Figure 10

```

POXXDFR DISPLAY Work with PO Status 1/02/98 08:00:00
Order Description
Status
.....
Ty : A : Add PO Status Details
2= : :
? : Order Sta : Order Status Code : TEST
: : Description . . . . Test Status Details
: F3=Exit : Allow Changes . . . 1
: : PO Closed? . . . .
: : Items Ordered? . .
: F3=Exit F4=Prompt F12=Key screen
:
:
:
F3=Exit F6=Add F21=Print List
    
```

Filled →
PO Closed? →

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
                                Work with PO Status
  Order  Description
  Status

.....
Ty :          A :          Add PO Status Details          :
2= :          :          :                               :
  : Order Sta : Order Status Code : TEST              :
? :          :          :                               :
  :          : Description . . . . . Test Status Details      :
  :          :          :                               :
  : F3=Exit  : Allow Changes . . . 1                       :
  :          :          :                               :
  :          : PO Closed? . . . . .                          :
.....      :          :          :                               :
  :          : Items Ordered? . . : 1. Set PO to Closed :
  :          :          :          : 2. Leave PO Open   :
  :          :          :          :                               :
  :          : F3=Exit  F4=Prompt F12=Key screen          :
  :          :          :          :                               :
  :          :          :          :                               :
F3=Exit  F6=Add  F21=Print List
```

drop box →

You're working with this drop-box

Your Choices

Figure 11 shows a drop box.

- You are given two options.
- We are going to choose option 1.

Selecting

Type in a *I*, and in a few seconds your display will look like Figure 12

Figure 12

```
POXXDFR   DISPLAY                               1/02/98 08:00:00
                                Work with PO Status
  Order  Description
  Status

.....
Ty :          A :          Add PO Status Details          :
2= :          :          :                               :
  : Order Sta : Order Status Code : TEST              :
? :          :          :                               :
  :          : Description . . . . . Test Status Details      :
  :          :          :                               :
  : F3=Exit  : Allow Changes . . . 1                       :
  :          :          :                               :
  :          : PO Closed? . . . . . 1                       :
.....      :          :          :                               :
  :          : Items Ordered? . . :                               :
  :          :          :          :                               :
  :          : F3=Exit  F4=Prompt F12=Key screen          :
  :          :          :          :                               :
  :          :          :          :                               :
F3=Exit  F6=Add  F21=Print List
```

**Add PO Status
Details** →

filled →

Items Ordered →

You're working with this panel

Your Choices

Figure 12 shows the Add PO Status Details panel.

- PO Closed? field had been filled
- Next we will fill in the Item Ordered? field.
- **F4** prompts this field.



Prompting

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

Figure 13

```

POXXDFR      DISPLAY                               1/02/98 08:00:00
      Order  Description
      Status

.....
Ty :          A :          Add PO Status Details          :
2= :          :          :          :          :          :
? : Order Sta : Order Status Code : TEST          :
:          : Description . . . . Test Status Details          :
:          :          :          :          :          :
: F3=Exit   : Allow Changes . . . 1          :
:          : PO Closed? . . . . 1          :
:          :          :          :          :          :
:          : Items Ordered? . . .          :
:          :          :          :          :          :
:          : F3=Exit   F4=Prompt : 1. No : n          :
:          :          :          :          :          :
:          :          :          :          :          :
F3=Exit   F6=Add   F21=Print List
    
```

drop-box →

You're working with this drop-box

Your Choices

Figure 13 shows a drop-box.

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

Selecting

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

Figure 14

```

POXXDFR      DISPLAY                               1/02/98 08:00:00
      Order  Description
      Status

.....
Ty :          A :          Add PO Status Details          :
2= :          :          :          :          :          :
? : Order Sta : Order Status Code : TEST          :
:          : Description . . . . Test Status Details          :
:          :          :          :          :          :
: F3=Exit   : Allow Changes . . . 1          :
:          : PO Closed? . . . . 1          :
:          :          :          :          :          :
:          : Items Ordered? . . . Y          :
:          :          :          :          :          :
:          : F3=Exit   F4=Prompt   F12=Key screen          :
:          :          :          :          :          :
:          :          :          :          :          :
F3=Exit   F6=Add   F21=Print List
    
```

Add PO Status Details →

Filled →

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
                                Work with PO Status
Order  Description
Status
.....
Ty :          A :                      Add PO Status Details          :
2= :          :                      :                              :
? : Order Sta : Order Status Code :   TEST                      :
  :          : Description . . . . : Test Status Details       :
  :          :          :          :                              :
  : F3=Exit   : Allow Changes . . . : 1                          :
  :          :          :          :                              :
  :          : PO Closed? . . . . .      : 1                          :
  :          :          :          :                              :
  :          : Items Ordered? . . . . .    : N                          :
  :          :          :          :                              :
  :          : F3=Exit   F4=Prompt   F12=Key screen :                              :
  :          :          :          :                              :
  :          :          :          : CONFIRM: Y (Y/N)         :
  :          :          :          :                              :
F3=Exit  F6=Add  F21=Print List          :
    
```

CONFIRM: Y →

Confirming

You will be asked to confirm your addition.

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**.

Returning

Press **Enter** to return to Work with PO Status.

Figure 16

```

POXXDFR      DISPLAY                      1/02/98 08:00:00
                                Work with PO Status
Order  Description
Status
.....
Type options, 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
  TEST   Test Status Details 1      1      N

F3=Exit  F6=Add  F21=Print List
    
```

Work With →
PO Status

2 = Change →

The new
Order Status
Code →

Your Choices

Figure 16 shows the Work with PO Status display.

- The new Order Status Code appears in the listing.
- 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.

Figure 17

POXXDFR	DISPLAY	Work with PO Status			1/02/98 08:00:00
Order Status	Description				
Type options, press Enter.					
2=Change 4=Delete					
? Order Status	Description	Allow Changes	PO Closed?	Items 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	
F3=Exit F6=Add F21=Print List					

2 →

Filled

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

Figure 18

POXXDFR	DISPLAY	Work with PO Status			1/02/98 08:00:00
Order Status	Description				
.....					
Ty :	Edit PO Status Details				:
2= :					:
? :	Order Status Code :	TEST			:
:	Description	Test Status Details			ed?
:	Allow Changes	1			:
2 :	PO Closed?	1			:
:	Items Ordered? . . .	N			:
:	F3=Exit F4=Prompt				:
.....					
F3=Exit F6=Add F21=Print List					

Edit PO Status Details →

Changeable fields →

You're working with this panel

Your Choices

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.

Purchase Orders

Returning Press **F3**, to return to Work with PO Status.

Figure 19

Work with PO Status →

4 = Delete →

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

Deleting

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

Figure 20

4 →

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

F3=Exit F6=Add F21=Print List

Filled

Press **Enter**, and your display will look like Figure 21.

Figure 21

Delete PO
Status →

```

POXXDFR   DISPLAY                               1/02/98 08:00:00
          Order  Description                    Work with PO Status
          Status
.....
Ty :                               Delete PO Status                               :
2= :                               :                                           :
   :   Press Enter to confirm Deletion                                         :
?  :                               :                                           :
   :   Order Status Code :   TEST                                           : ed?
   :   Description . . . :   Test Status Details                               :
   :   Allow Changes . . :   1                                               :
4  :                               :                                           :
   :   F3=Exit                                                         :
   :                               :                                           :
   :                               :                                           :
   :                               :                                           :
.....
F3=Exit   F6=Add   F21=Print List
    
```

You're working with this panel

Your Choices

Figure 21 shows the Delete PO Status panel.

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

Processing

Press **Enter** to confirm deletion.

Figure 22

CONFIRM: Y →

```

POXXDFR   DISPLAY                               1/02/98 08:00:00
          Order  Description                    Work with PO Status
          Status
.....
Ty :                               Delete PO Status                               :
2= :                               :                                           :
   :   Press Enter to confirm Deletion                                         :
?  :                               :                                           :
   :   Order Status Code :   TEST                                           : ed?
   :   Description . . . :   Test Status Details                               :
   :   Allow Changes . . :   1                                               :
4  :                               :                                           :
   :   F3=Exit                                                         :
   :                               :                                           :
   :                               : CONFIRM: Y (Y/N) : :
   :                               :                                           :
   :                               :                                           :
.....
F3=Exit   F6=Add   F21=Print List
    
```

You will be asked to confirm you delete request.

Confirming

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**.

Continuing

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

Figure 23

Work with →
PO Status

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

New Order Status
gone →

Exiting

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

Figure 24

Purchase
Order Setup
Menu →

ZZMENUMR	DISPLAY	Run Application Menu	
User Id YOU	: KOBELT	Kobelt 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 '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			:
: Work with PO Company			:
: F3=Exit		7=Change Current Company	:

You're working with this panel

The Result

You have successfully brought up the Work with PO Status display and worked with its options and functions.

You Are Done

This completes Section 6.2, How To Setup PO Status.



6.3 How To Setup PO Type

Figure 1 shows the Purchase Order Setup Menu.

Start Here

Purchase
Order Setup
Menu →
Work With
PO Type →

Figure 1

```

ZZMENUR   DISPLAY
.....
User Id YOU           :   KOBELT   Run Application Menu      :
Your Name           :   PO       TEST Manufacturing Co. Ltd. :
.....
? Menu Description   :   PO Item Master
: Run Application Sub Menu : 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 :
: Work with PO Company :
:
:
: F3=Exit : 7=Change Current Company
:
:
.....
    
```

You're working with this panel

The Task

We are going to bring up the Work With PO Type.

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

Selecting

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

Figure 2

```

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

Work With PO Type →

Options →

Functions →

```

POYDDFR    DISPLAY                                1/02/98 08:00:00
      Order      Description      Work With PO Type      Order
      Type Code                                     Status Code

Type options, press Enter.
2=Change  4=Delete

? Order      Description      Order
  Type Code                                     Status Code
ORDER      PO                OPEN
QUOTE     request for Quotation  QUOTE

F3=Exit  F6=Add  F21=Print List
    
```

Your Choices

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

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

Figure 4

Add PO Type →

Purchase Order Type Code →

```

POYDDFR    DISPLAY                                1/02/98 08:00:00
      Order      Description      Work With PO Type      Order
      Type Code                                     Status Code

.....
Ty :                Add PO Type                :
2= :                Purchase Order Type Code .  :
?  :                :                          : der
   :                :                          : atus Code
   : F3=Exit        :                          : EN
   :                :                          : OTE
   :                :                          :
   :                :                          :
.....

F3=Exit  F6=Add  F21=Print List
    
```

You're working with this panel

Your Choices

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.

Figure 5

```

POYDDFR      DISPLAY                               1/02/98 08:00:00
  Order      Description      Work With PO Type      Order
  Type Code                                     Status Code

.....
Ty :          Add PO Type                               :
2= :          Purchase Order Type Code .   TEST       :
?  :          :                                         : der
   :          F3=Exit                               : atus Code
   :          :                                         : EN
   :          :                                         : OTE
   :          :                                         :
   :          :                                         :
.....

F3=Exit  F6=Add  F21=Print List
    
```

TEST →

You're working with this panel

Filled

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

Figure 6

```

POYDDFR      DISPLAY                               1/02/98 08:00:00
  Order      Description      Work With PO Type      Order
  Type Code                                     Status Code

.....
Ty :          Add PO Type                               :
2= :          Purchase Order Type Code .   TEST       :
   :          :                                         :
   :          Add PO Type Details                   :
   :          :                                         :
   :          PO Type Code . . . :   TEST               :
   :          :                                         :
   :          Description . . . .                   :
   :          :                                         :
   :          Default Order Status                   :
   :          :                                         :
   :          :                                         :
   :          F3=Exit  F4=Prompt                       :
   :          :                                         :
   :          :                                         :
.....
    
```

Add PO Type Details →

Data Entry Fields →

Functions →

You're working with this panel

Your Choices

Figure 6 shows the Add PO Type Details panel.

- We need to fill the Description and the Default Order Status fields.
- **F4** lets you prompt the Default Order Status field.
- **F3** lets you exit.

Manual Field

Fill in the Description, as shown in Figure 7.

Figure 7

```

POYDDFR      DISPLAY                               1/02/98 08:00:00
      Order      Description      Work With PO Type      Order
      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 Type          :
:          Default Order Status          :
:          F3=Exit   F4=Prompt          :
.....
    
```

Filled →
 Default Order Status →

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                               .....
      Order      Descriptio :      Order      Description          :
      Type Code                                     Status          :
.....
Ty :          Add PO :      1=Select          :
2= :          Purchase Order Typ :      ? Status Description          :
:          Add :      CLOSED Closed          :
:          Add :      OPEN Open PO          :
:          PO Type Code . . . :      QUOTE Out for Quotation          :
:          Description . . . . :      TEST Test Status Details          :
:          Default Order Status :      :
:          F3=Exit          :      :
:          F3=Exit   F4=Prompt :      :
.....
    
```

Select PO Status →
 1 = Select →

You're working with this panel

Your Choices

Figure 8 shows the Select PO Status panel.

- Option 1 lets you select status.
- We will select the Open option.



Purchase Orders

Selecting

Tab down to Open, and type in a **I**, as shown in Figure 9.

Figure 9

```

POYDDFR  DISPLAY
.....
Order      Descriptio :      Order      Description      :
Type Code  :      Status      :
.....
Ty :          Add PO : 1=Select      :
2= :          : ? Status   Description      :
   : Purchase Order Typ : CLOSED   Closed      :
.....
:          Add : 1 OPEN   Open PO      :
:          : QUOTE   Out for Quotation :
:          : TEST    Test Status Details :
: PO Type Code . . . :      :
:          :      :
: Description . . . . :      :
:          :      :
: Default Order Status :      :
:          : F3=Exit      :
:          :      :
:          :      :
: F3=Exit  F4=Prompt :.....
:          :      :
:          :      :

```

1 →

You're working with this panel

Filled

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

Figure 10

```

POYDDFR  DISPLAY                                     1/02/98 08:00:00
.....
Order      Description      Work With PO Type      Order
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 Type :
:          :                :
: Default Order Status : OPEN      :
:          :                :
:          :                :
:          :                :
: F3=Exit  F4=Prompt :
:          :                :
:          :                :
:          :                :
.....

```

Add PO Type
Details →

You're working with this panel

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
      Order      Description      Work With PO Type      Order
      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 Type                   :
   :          :                                         :
   : Default Order Status OPEN                         :
   :          :                                         :
   :          :                                         :
   :          : CONFIRM: Y (Y/N) :
   : F3=Exit   F4=Prompt                               :
   :          :                                         :
.....
CONFIRM: Y →
    
```

Confirming

You will be asked to confirm your addition.

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**.

Returning

Press **Enter** to return to the Add PO Type panel.

Figure 12

```

POYDDFR      DISPLAY                               1/02/98 08:00:00
      Order      Description      Work With PO Type      Order
      Type Code                                     Status Code
.....
Ty :          Add PO Type                               :
2= :          :                                         :
   : Purchase Order Type Code .   :
?  :          :                                         : der
   :          :                                         : atus Code
   : F3=Exit   :                                         : EN
   : Record added. :                                         : OTE
   :          :                                         :
.....
Add PO Type →
Record added →
.....
F3=Exit   F6=Add   F21=Print List
    
```

You're working with this panel

Your Choices

Figure 12 shows that the record has been added.

- **F3** lets you exit.



Exiting

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

Figure 13

Work With PO Type →

2 = Change →

The New Order Type Code →

```

POYDDFR      DISPLAY                               1/02/98 08:00:00
      Order      Description      Work With PO Type      Order
      Type Code                                     Status Code

Type options, press Enter.
2=Change    4=Delete

? 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.

Changing

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

Figure 14

2 →

```

POYDDFR      DISPLAY                               1/02/98 08:00:00
      Order      Description      Work With PO Type      Order
      Type Code                                     Status Code

Type options, press Enter.
2=Change    4=Delete

? Order      Description      Order
  Type Code                                     Status Code
ORDER       PO                OPEN
QUOTE       request for Quotation  QUOTE
2 TEST     Test PO Type         OPEN

F3=Exit    F6=Add    F21=Print List
    
```

Filled

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

Figure 15

Edit PO Type
Details →

```

POYDDFR      DISPLAY                               1/02/98 08:00:00
      Order      Description      Work With PO Type      Order
      Type Code                                     Status Code
.....
Ty :                               Edit PO Type Details                               :
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

Your Choices

Figure 15 shows the Edit PO Type Details panel.

- 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.

Returning

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

Figure 16

Work With →
PO Type

4 = Delete →

```

POYDDFR      DISPLAY                               1/02/98 08:00:00
      Order      Description      Work With PO Type      Order
      Type Code                                     Status Code
Type options, press Enter.
2=Change   4=Delete
?  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 16 shows the Work With PO Type display.

- We are now going to delete the Test PO Type we created.
- Option 4 lets us delete.



Purchase Orders

Deleting

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

Figure 15

```

POYDDFR    DISPLAY                                1/02/98 08:00:00
      Order      Description          Work With PO Type      Order
      Type Code                                     Status Code

Type options, press Enter.
2=Change  4=Delete

? Order      Description          Order
  Type Code                                     Status Code
  ORDER      PO                      OPEN
  QUOTE      request for Quotation    QUOTE
4 TEST      Test PO Type             OPEN

F3=Exit   F6=Add   F21=Print List
    
```

4 →

Filled

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

Figure 16

```

POYDDFR    DISPLAY                                1/02/98 08:00:00
      Order      Description          Work With PO Type      Order
      Type Code                                     Status Code

.....
Ty :                               Delete PO Type                :
2= :                               :                             :
   :   Press Enter to confirm Deletion                          :
?  :                               :                             :
   :   Order Type Code . . :   TEST                               :
   :                               :                             :
   :   Description . . . :   Test PO Type                         :
4 :                               :                             :
   :   Order Status Code :   OPEN                                :
   :                               :                             :
   :   F3=Exit                                                    :
   :                               :                             :
   :   .....
F3=Exit   F6=Add   F21=Print List
    
```

Delete PO Type →

You're working with this panel

Continuing

Press **Enter** to confirm deletion.

Figure 17

```

POYDDFR      DISPLAY                               1/02/98 08:00:00
  Order      Description      Work With PO Type      Order
  Type Code                                     Status Code
.....
Ty :                               Delete PO Type      :
2= :                               Press Enter to confirm Deletion :
?  :                               Order Type Code . . : TEST      :
   :                               Description . . . . : Test PO Type :
4  :                               Order Status Code : OPEN      :
   :                               F3=Exit              :
   :                               CONFIRM: Y (Y/N)      :
.....
F3=Exit  F6=Add  F21=Print List
    
```

CONFIRM: Y →

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**.

Returning

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

Figure 18

```

POYDDFR      DISPLAY                               1/02/98 08:00:00
  Order      Description      Work With PO Type      Order
  Type Code                                     Status Code
  POYDD      DISPLAY
Type options, press Enter.
2=Change   4=Delete
?  Order      Description      Order
   Type Code                                     Status Code
   ORDER      PO                OPEN
   QUOTE      request for Quotation QUOTE
.....
F3=Exit  F6=Add  F21=Print List
    
```

Work With →
PO Type

F3 = Exit →

The Result

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



Purchase Orders

Returning

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

Figure 19

**Purchase
Order Setup
Menu →**

```
ZZMENUR   DISPLAY .....
:
User Id YOU      :   KOBELT   TEST Manufacturing Co. Ltd.  :
Your Name       :   PO       Purchase Order          :
:
: Run Application Sub Menu          : 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             :
: 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.

Start Here

Purchase
Order Setup
Menu →

Work with
Manufacturer →

Figure 1

```

ZZMENUR   DISPLAY .....
:
User Id YOU           :   KOBELT   TEST   Manufacturing Co. Ltd.   :
Your Name            :   PO       Purchase Order
:
: Run Application Sub Menu           : 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                 :
: Work with PO Company               :
:
:
: F3=Exit                          : 7=Change Current Company
:
:
:.....
    
```

You're working with this panel

The Task

We are going to bring up the Work with Manufacturer display.

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

Selecting

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

Figure 2

```

ZZMENUR   DISPLAY .....
:
User Id YOU           :   KOBELT   TEST   Manufacturing Co. Ltd.   :
Your Name            :   PO       Purchase Order
:
: Run Application Sub Menu           : 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
: 1 Work with Manufacturer          :
: Work With PO Item Master           :
: 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

Work with Manufacturer →

Options →

Functions →

```

POX4DFR      DISPLAY                               1/02/98 08:00:00
                                     Work with Manufacturer
Address Name
Number

Type options, press Enter.
4=Delete  5=Display  8=Details (Manufacturer's Vendors)  9=Notes

F3=Exit  F6=Add  F21=Print List
No data to display.
    
```

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 4 to delete.

Adding

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

Figure 4

Select Address →

Search Field →

```

POX4DF ..... 0:00
:                                     Select Address
Addr :   Address Name   Phone Number
Numb :   Number
:
:
Type o : Type options, 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  F6=Add
:
:
:
F3=Exit  F6=Add  F21=Print List
No data to display.
    
```

You're working with this panel

Your Choices

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.



Purchase Orders

Searching

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

Figure 5

AB →

```
POX4DF ..... 0:00
:
:           Select Address
:
Addr :      Address Name           Phone Number
Numb :      Number
:           _____
:           AB
:
Type o : Type options, 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 F6=Add
:
:
:
:
: F3=Exit F6=Add F21=Print List
: No data to display.
```

You're working with this panel

Found

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

Figure 6

Found →

```
POX4DF ..... 0:00
:
:           Select Address
:
Addr :      Address Name           Phone Number
Numb :      Number
:           _____
:           AB
:
Type o : Type options, press Enter.
4=Dele : 1=Select 5=Display 9=Notes
: ? Number Name           Phone Number
: 0000457 ABERDEEN DYNAMICS SUPPLY INC. 412-555-5551
: 0002500 ABM Co. 412-555-5552
: 0000023 ABS AMERICAS 412-555-5553
: 0000004 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 F6=Add
:
:
:
:
: F3=Exit F6=Add F21=Print List
: No data to display.
```

You're working with this panel

Your Choices

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

- 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.

Figure 7

```

POX4DF ..... 2:51
:
:           Select Address
:
Addr :      Address Name           Phone Number
Numb :      Number
:
:           ABC
:
Type o : Type options, press Enter.
4=Dele : 1=Select  5=Display  9=Notes
:
: ? Number Name           Phone Number
:
: 0000457 ABERDEEN DYNAMICS SUPPLY INC. 412-555-5551
: 1 0002500 ABM Co.                    412-555-5552
: 0000023 ABS AMERICAS                 412-555-5553
: 0000004 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  F6=Add
:
:
:
:
F3=Exit  F6=Add  F21=Print List
No data to display.
    
```

You're working with this panel

Selected

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

Figure 8

```

POYOPVR  ENTER                               1/02/98 08:00:00
:
:           Add Manufacturer
:
Address Number . . . . . 2500
Manufacturer Name . . . :
Address Line 1 . . . . :
Address Line 2 . . . . :
Address Line 3 . . . . :
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                               1/02/98 08:00:00
                                     Add Manufacturer
Address Number . . . . .      2500
Manufacturer Name . . . :    ABM Co.
Address Line 1 . . . . .    1212 Front Street
Address Line 2 . . . . .
Address Line 3 . . . . .
City . . . . .              Washington
Country Code . . . . .    USA Region code :
Postal Code . . . . .      98765

Phone Number . . . . .    412-555-5552
Fax number . . . . .

Address Source Code . .
Address Status Code . .

F3=Exit  F4=Prompt

CONFIRM: Y (Y/N)
    
```

CONFIRM: Y →

Confirming

You will be asked to confirm the converted address.

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**.

Returning

Press **Enter** to return to the Work with Manufacturer display.

Figure 10

Work with →
Manufacturer

8 = Details →

New Manufacturer
Address →

```

POX4DFR      DISPLAY                               1/02/98 08:00:00
                                     Work with Manufacturer
Address Name
Number

Type options, press Enter.
4=Delete  5=Display  8=Details (Manufacturer's Vendors)  9=Notes

? Address Name                Phone Number Fax      Address
  Number                      number      Status
    2500 ABM Co.                412-555-5552      ACTIVE

F3=Exit  F6=Add  F21=Print List
    
```

Your Choices

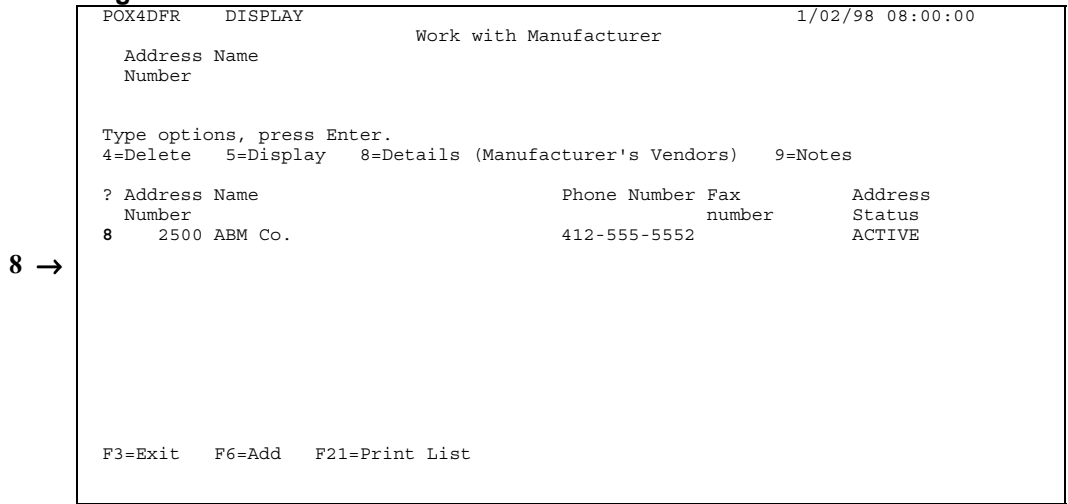
Figure 10 shows the Work with Manufacturer display.

- The new Manufacturer Address appears in the listing.
- We will now use option 8 to add a vendor to the new Manufacturer.

Details

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

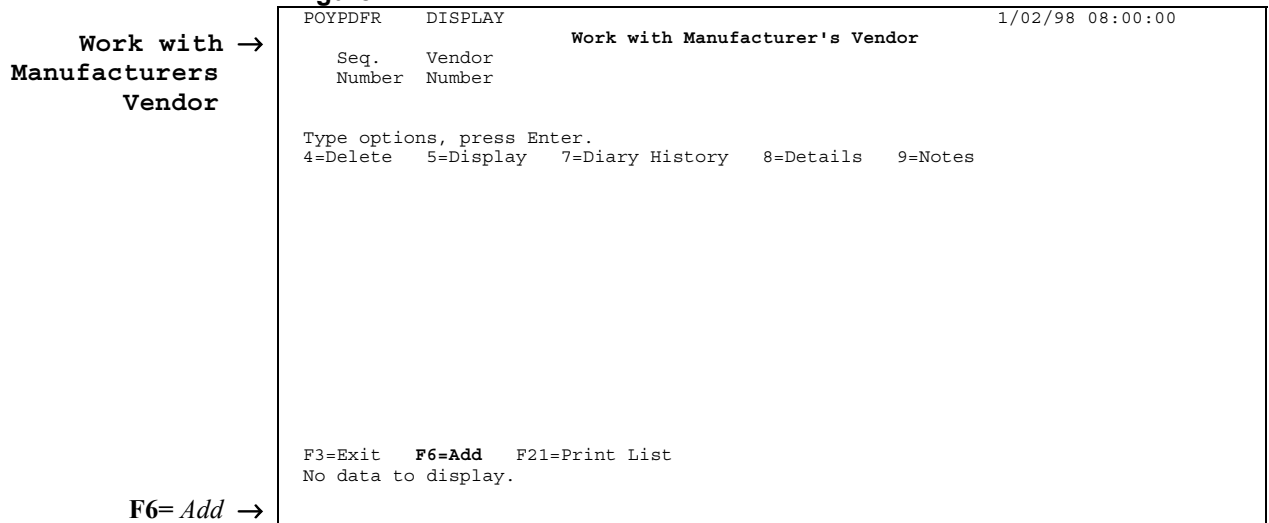
Figure 11



Filed

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

Figure 12



Your Choices

Figure 12 shows the Work with Manufacturer's Vendor display.

- We are working with the New Manufacturer. There are not yet any Vendors assigned to it.
- **F6** lets you assign new Vendors.



Adding

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

**Add →
Manufacturer
Vendor**

Figure13

```

POYQPVR  ENTER 1/02/98 08:00:00
                Add Manufacturer Vendor
Enter Sequence and Address Number, press Enter.
Manufacturer Address Number      2500
sequence number . . . . .
Vendor Address Number . . .
F3=Exit  F4=Prompt
    
```

F4 = Prompt →

Your Choices

Figure 13 shows the Add Manufacturer Vendor display.

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

Prompting

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

**Select PO →
Manufacturer
Vendor**

Figure14

```

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
? Internal      Internal      Address  Seq.  Address
  Company Code  Company Code  Number  Number Number
    21          21          2500    1    23
F3=Exit  F4=Prompt
    
```

1 = Select →

Your Choices

Figure 14 shows the Select PO Manufacturer Vendor display.

- Option 1 lets you select.

Selecting

Tab down to 21, type in a *I*, as shown in Figure 15.

Figure 15

```

POXFSRR      SELECT                                     1/02/98 08:00:00
Internal      Internal      Select PO Manufacturer Ve
Company Code  Company Code  Address Seq.
      21          21          Number  Number
Type options, press Enter.
1=Select
? Internal      Internal      Address  Seq.  Address
  Company Code  Company Code  Number  Number Number
1          21          21          2500  1    23

F3=Exit  F4=Prompt
    
```

1 →

Filled

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

Figure 16

```

POYQPVR      ENTER                                     1/02/98 08:00:00
Add Manufacturer Vendor
Enter Sequence and Address Number, press Enter.
Manufacturer Address Number      2500
sequence number . . . . . 1
Vendor Address Number . . .

F3=Exit  F4=Prompt
    
```

Add →
 Manufacturer
 Vendor
 Filled →
 Vendor →
 Address
 Number

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.



Purchase Orders

Prompting

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

Figure 16

Select PO →
Vendor

```

.....:
:                               Select PO Vendor                               :
:   Vendor  Name                Phone Number                                :
:   :       :                   :                                             :
:   :       :                   :                                             :
:   :       :                   :                                             :
:   :       :                   :                                             :
:   Type options, press Enter.                                             :
:   l=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 WARE LTD.  604-543-7378 N30  A                       :
:      28 ARPEL SECURITY SYSTEMS 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                                                         :
:   :       :                   :                                             :
:   :       :                   :                                             :
:   :       :                   :                                             :
:   :       :                   :                                             :
:   F3=Exit  F4=Prompt
.....:
  
```

You're working with this panel

Your Choices

Figure 16 shows the Select PO Vendor panel.

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

Selecting

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

Figure 17

1 →

```

.....:
:                               Select PO Vendor                               :
:   Vendor  Name                Phone Number                                :
:   :       :                   :                                             :
:   :       :                   :                                             :
:   :       :                   :                                             :
:   :       :                   :                                             :
:   Type options, press Enter.                                             :
:   l=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                       :
:      1  23 ABS AMERICAS                713-873-0700 N30  A                       :
:      25 ANALYTIC SYSTEMS WARE LTD.  604-543-7378 N30  A                       :
:      28 ARPEL SECURITY SYSTEMS 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                                                         :
:   :       :                   :                                             :
:   :       :                   :                                             :
:   :       :                   :                                             :
:   :       :                   :                                             :
:   F3=Exit  F4=Prompt
.....:
  
```

You're working with this panel

Filled

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

Figure 18

**Add →
Manufacturer
Vendor**

Filled →

```
POYQPVR  ENTER 1/02/98 08:00:00
                                Add Manufacturer Vendor
Enter Sequence and Address Number, press Enter.
Manufacturer Address Number      2500
sequence number . . . . .       1
Vendor Address Number . . .     23

F3=Exit  F4=Prompt
```

Continuing

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

Figure 19

CONFIRM: Y →

```
POYQPVR  ENTER 1/02/98 08:00:00
                                Add Manufacturer Vendor
Enter Sequence and Address Number, press Enter.
Manufacturer Address Number      2500
sequence number . . . . .       1
Vendor Address Number . . .     23

F3=Exit  F4=Prompt
CONFIRM: Y (Y/N)
```

Confirming

Confirmation Tips

You will be asked to confirm your addition.

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**.



Returning

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

Figure 20

**Work with
Manufacturer's
Vendor** →

*Vendor has been
added* →

```

POYPDFR  DISPLAY 1/02/98 08:00:00
Work with Manufacturer's Vendor

  Seq.  Vendor
  Number Number

Type options, press Enter.
4=Delete 5=Display 7=Diary History 8=Details 9=Notes

? Seq.  Vendor  Vendor Name
  Number Number
    1      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.

Returning

Press **F3** to return to the Work with Manufacturer display.

Figure 21

**Work With
Manufacturer** →

4 Delete→

```

POX4DFR  DISPLAY 1/02/98 08:00:00
Work with Manufacturer

  Address Name
  Number

Type options, press Enter.
4=Delete 5=Display 8=Details (Manufacturer's Vendors) 9=Notes

? Address Name                Phone Number Fax      Address
  Number                        number          Status
    2500 ABM Co.                412-555-5552    ACTIVE

F3=Exit  F6=Add  F21=Print List
    
```

Your Choices

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.

Figure 22

```

POX4DFR      DISPLAY                               1/02/98 08:00:00
                                     Work with Manufacturer
Address Name
Number

Type options, press Enter.
4=Delete  5=Display  8=Details (Manufacturer's Vendors)  9=Notes

? Address Name      Phone Number Fax      Address
  Number           number      Status
4   2500 ABM Co.   412-555-5552    ACTIVE

F3=Exit  F6=Add  F21=Print List
    
```

4 →

Filled

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

Figure 23

```

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

You're working with this panel

Figure 23 shows the Delete Manufacturer panel.

Your Choices

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



Continuing

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

Figure 24

```

POX4DFR ..... 00:00
: Delete Manufacturer
:
  Adre :
  Numbe : Press Enter to confirm Deletion
:
: Address Number . : 2500
:
Type op :
4=Delet : Name . . . . . : ABIMAR
: Address Line 1 . : C/O CNC TRUCKING
? Adre : 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
:
: CONFIRM: Y (Y/N) :
F3=Exit ..... :
CONFIRM: Y →
    
```

Confirming

You will be asked to confirm the deletion.

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**.

Returning

Press **Enter**, to return to the Work with Manufacturer display.

Figure 25

```

POX4DFR DISPLAY 1/02/98 08:00:00
Work with Manufacturer
Address Name
Number

Type options, press Enter.
4=Delete 5=Display 8=Details (Manufacturer's Vendors) 9=Notes

F3=Exit F6=Add F21=Print List
No data to display.

Work with Manufacturer →
New Address is gone →
    
```

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

**Purchase
Order Setup
Menu →**

```

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

You're working with this panel

The Result

You have successfully brought up the Work with Manufacturer display and worked with its options and functions.

You Are Done

This completes Section 6.4, How To Setup PO Manufacturers.

6.5 How To Setup PO Buyer

Figure 1 shows the Purchase Order Menu.

Start Here

Purchase
Order Setup
Menu →

Work with
PO Buyer →

Figure 1

```

ZZMENUR   DISPLAY .....
User Id YOU           :   KOBELT   Run Application Menu      :
Your Name            :   PO       TEST Manufacturing Co. Ltd.  :
.....              :   PO       Purchase Order              :
:                   :   options using '1' :
: Run Application Sub Menu : 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      :              :
: Work with PO Company      :              :
:                             :              :
:                             :              :
:                             :              :
: F3=Exit                   : 7=Change Current Company :
:                             :              :
:                             :              :
:                             :              :
.....
    
```

You're working with this panel

The Task

We are going to bring up the Work with PO Buyer display.

- In Figure 1, option 1 lets you bring up displays.

Selecting

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

Figure 2

```

ZZMENUR   DISPLAY .....
User Id YOU           :   KOBELT   Run Application Menu      :
Your Name            :   PO       TEST Manufacturing Co. Ltd.  :
.....              :   PO       Purchase Order              :
:                   :   options using '1' :
: Run Application Sub Menu : 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  :              :
: 1 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

Work with PO Buyer →

Options →

Functions →

```

POB5DFR      DISPLAY                               1/02/98 08:00:00
                Work with PO Buyer
Account      Description
Manager

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                          *
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
    
```

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.

Adding

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

Figure 4

Add Account Rep. Code →

Account Rep. Code →

```

POB5DFR      DISPLAY                               1/02/98 08:00:00
                Work with PO Buyer
Account      Description
Manager

.....
T :          Add Account Rep Code                :
2 :          :                                  :
? : Account Rep. Code .                          :
: F3=Exit                                       :
:                                              :
:                                              :
.....
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

Your Choices

Figure 4 shows the Add Account Rep. Code panel.

- We will fill in a test code.



Purchase Orders

A New Code

Type in **JS**, as shown in Figure 5.

Figure 5

```
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                  :
? :                                          :
: F3=Exit                                  :
:                                          :
:                                          :
.....
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
```

JS →

You're working with this panel

Details

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

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                  :
? :                                          :
: F3=Exit                                  :
:                                          :
:                                          :
.....
DT      Dennis Turnb : Description          :
KD      Kurt Dreger  :                      :
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
```

Add Account
Rep. Detail →

Description →

F12 = Key screen →

You're working with this panel

Your Choices

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.

Purchase Orders

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                   :
? :          :                               :
: 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 :
F3=Exit  F6=Add  F21=Print List
```

Filled →

You're working with this panel

Continuing

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

Figure 8

```
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                   :
? :          :                               :
: 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 :
F3=Exit  F6=Add  F21=Print List
```

CONFIRM: Y →

Confirming

Confirmation Tips

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

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**.

Purchase Orders

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

Figure 9

POB5DFR	DISPLAY	Work with PO Buyer	1/02/98 08:00:00
Account Manager	Description		
POB	DISPLAY		
Type options, press Enter.			
2=Change	5=Display		
? Account Manager	Description	Setup	
*	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	

Work with PO Buyer →
5 = Display →
New Account Rep. →

Your Choices

Figure 9 shows the Work with PO Buyer display.

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

Displaying

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

Figure 10

POB5DFR	DISPLAY	Work with PO Buyer	1/02/98 08:00:00
Account Manager	Description		
POB	DISPLAY		
Type options, press Enter.			
2=Change	5=Display		
? Account Manager	Description	Setup	
*	In House Account Canadian		
DC	Distributor Commission		
DM	Dan McKeena		
DT	Dennis Turnbull	*	
5 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	

5 →

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
Work with PO Buyer

Account Description
Manager

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 *
2 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 →

Filled

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

Figure 14

```

Edit PO →
Buyer
Details

POB ..... :00
: Edit PO Buyer Details :
A : :
M : Account Manager Code : JS John Smith :
: :
: User Id . . . . . :
Typ : :
2=C : Purchasing Level . . . :
: :
? A : Approval Level . . . . :
M : :
* : :
D : :
D : F3=Exit :
D : :
2 J : :
K : ..... :
KK Kathleen Kirk :
KL Kevin Lee :
TK Tom Kobelt * :
USA US Accounts + :

F3=Exit F6=Add F21=Print List
    
```

You're working with this panel

Your Choices

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 confirmation.
- **F3** lets you exit without making changes.

Purchase Orders

Returning Press **F3**, to return to Work with PO Buyer.

Work with PO Buyer →

Figure 15

```
POB5DFR   DISPLAY                               1/02/98 08:00:00
                                         Work with PO Buyer

Account   Description
Manager

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
```

The Result You have successfully brought up the Work with PO Buyer display and worked with the Add function and the Display and Change options

Exiting Press **F3**, to return to the PO Setup Menu.

Purchase Order Setup Menu →

Figure 16

```
ZZMENUR   DISPLAY
User Id YOU              : KOBELT          Run Application Menu
Your Name                : PO            TEST Manufacturing Co. Ltd.
:                        : options using '1'
: Run Application Sub Menu : 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         :
: 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 Here

Purchase
Order Setup
Menu →

Work with
PO Company →

Figure 1

```

ZZMENUR   DISPLAY
.....
User Id YOU           :   KOBELT   Run Application Menu           :
Your Name            :   PO       TEST Manufacturing Co. Ltd. :
.....
: Run Application Sub Menu : 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     :
: Work with PO Company   :
:
:
: F3=Exit                : 7=Change Current Company
:
:
.....
    
```

You're working with this panel

The Task

We are going to bring up the Work with PO Company Display.

- In Figure 1, option 1 lets you bring up displays.

Selecting

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

Figure 2

```

ZZMENUR   DISPLAY
.....
User Id YOU           :   KOBELT   Run Application Menu           :
Your Name            :   PO       TEST Manufacturing Co. Ltd. :
.....
: Run Application Sub Menu : 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  :
:
:
: F3=Exit                : 7=Change Current Company
:
:
.....
    
```

You're working with this panel

Purchase Orders

Filled

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

Figure 3

Work with PO Company →

Options →

Functions →

```
POMTDFR  DISPLAY 1/02/98 08:00:00
Work with PO Company
Company  Description
Code
ZZMEN   DISPLAY  . . . . .

Type options, press Enter.
2=Change

? Company  Description          Setup
Code
ALPINE   Alpine Holdings Ltd.
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
```

Your Choices

Figure 5 shows the Work with PO Company display.

- **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

Press **F21** and your display will look like Figure 4.

Figure 4.

Processing Print list →

```
POMTDFR  DISPLAY 1/02/98 08:00:00
Work with PO Company
Company  Description
Code

Type options, press Enter.
2=Change

? Company  Description          Setup
Code
ALPINE   Alpine Holdings Ltd.
DEMO    Your Demo Company
KDI     Kobelt Development Inc. *
KOBELT  Kobelt Manufacturing Co. Ltd. *
MMI     Mainland Metal Impregnation
NTRKOB  Interkob Holdings Ltd.

F3=Exit  F21=Print List
Processing Print List
```

Purchase Orders

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

Work with PO Company →

2 =Change →

Completed Printing List →

```
POMTDFR    DISPLAY                                1/02/98 08:00:00
                                     Work with PO Company
Company  Description
Code

Type options, press Enter.
2=Change

? Company  Description                                Setup
Code
ALPINE    Alpine Holdings Ltd.
DEMO      Your Demo Company
KDI       Kobelt Development Inc.      *
KOBELT    Kobelt Manufacturing Co. Ltd. *
MMI       Mainland Metal Impregnation
NTRKOB    Interkob Holdings Ltd.

F3=Exit   F21=Print List
Completed Printing List
```

Your Choices

Figure 5 shows the Work with PO Company display.

- You have used function key **F21** to print the Company list.
- Next, we will use option 2 to bring up The Edit Company Details display.

Changing

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

Figure 6

2 →

```
POMTDFR    DISPLAY                                1/02/98 08:00:00
                                     Work with PO Company
Company  Description
Code

Type options, press Enter.
2=Change

? Company  Description                                Setup
Code
ALPINE    Alpine Holdings Ltd.
DEMO      Your Demo Company
KDI       TEST Kobelt Development Inc.  *
2 KOBELT   TEST Manufacturing Co. Ltd.     *
MMI       Mainland Metal Impregnation
NTRKOB    Interkob Holdings Ltd.

F3=Exit   F21=Print List
```

Purchase Orders

--

Purchase Orders

Filled

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

Figure 7

Edit PO →
Company
Details

Changeable Fields →

POXSE1R	ADD	1/02/98 08:00:00	
Edit PO Company Details			
Company Code	KOBELT TEST	Manufacturing Co. Ltd.	
GL Company	21		
Default Purchase Account	1	0000	
Goods Rec'd Liability 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	*	General Note	
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.

Returning

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

Figure 8

Work with →
PO Company

POMTDFR	DISPLAY	1/02/98 08:00:00	
Work with PO Company			
Company Code	Description		
Type options, press Enter.			
2=Change			
? Company Code	Description	Setup	
ALPINE	Alpine Holdings Ltd.		
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			

F3 = Exit →

Exiting

Press **F3** to return to the PO Setup Menu display.

Figure 9

**Purchase
Order Setup
Menu →**

```

ZZMENUR   DISPLAY
.....
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 '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                 :
: Work with PO Company               :
:                                     :
:                                     :
:                                     :
: F3=Exit                            : 7=Change Current Company
:                                     :
:                                     :
.....
    
```

You're working with this panel

The Result

You have successfully brought up the Work with PO Company display and worked with its options and functions.

You Are Done

This completes Section 6.6, How To Setup PO Companies and Chapter 6, PO Setup.

