Workshop: Purchase Order, Requisitions, Inventory Hands On

In this follow up session to the Operations Changes in Purchase Order, Requisition, and Inventory Theory course, this hands on session will look at some of the best practices and new features introduced over the past year.

Scenario 1:

As a user, you will be requesting to purchase a computer for your department as well your blue pen ran out of ink.

1. Logon to Multiview
   - Username: MANAGER
   - Password: MANAGER

2. From the Main Menu, click on the word **Multiview** at the bottom left hand side, the MV module menus will be displayed. Select **Purchase Order > Requisitions > Requisition Entry**

3. Click on the button **New Requisition**.
4. We will need to select the department we are requisitioning the items for, from the drop down list for the **Purchase Type Id**, select **601-REQ**. Once you have selected 601-REQ notice the field Req Group Id, automatically populated with REQ. Leave the Supplier Id blank as the Purchasing department will determine that.

5. Select the **Detail Grid Entry** tab.

6. Notice the new window for detail entry, but if you don’t want to use the grid view you can still revert back to using the Detail Entry screen to enter in the item you are requesting.

7. Select the **Add Detail** button.
8. Notice how it put the number 1 under the Seq No column and a drop down appeared for Item Class.
Select the drop down for the Item Class and select Open (Open is for a non-stock item) then tab to
the next field.

9. Select the drop down list for the Product Id and select Computers and we’ll leave the Supplier
Product Id blank.

10. For the Product Qty, we’ll leave the default of 1 quantity for the computer and we’ll leave the
Product Price blank since we don’t know how much a computer will cost.

11. Click on the GL Distribution button, notice how it automatically populated the Business Unit and
Account. The Business unit is being pulled from what was set in Purchase For Type and the Account
is coming from the product Computer which was set in Product Maintenance.
12. We’ll need add another detail line to this Requisition, select the Add Detail button. Notice it put a 2 under the Seq No.

13. On the Item Class, select STCK from the drop down and then tab.

14. From the Product Id drop down, select 1100016 (BANDAID REGULAR) and tab, notice the Supplier Product Id appears as there a supplier cross reference setup for this product.

15. Tab over to the Product QTY and enter in 10, the quantity you need.

16. Select the Add Detail button again and we’ll add another line item to the requisition.

17. Select STCK from the drop down list for Item Class and then tab.

18. Select Pen – Blue from the drop down list for Product Id and we’ll leave the Product Qty at 1.

19. At this point we are done entering our requisition, we’ll go ahead and click on the button Purchase/Fulfill. Leave the ADDITIONAL comments field blank, select OK and OK.
20. If you click back on **Header Data Entry** tab, you’ll notice the Status change to Ready To Be Purchased/Fulfilled. Please take note of your Order No.

Scenario 2:
You are now the analyst that works in Central Supply and will be purchasing the items your colleagues have requested and also fulfilling the orders they need from the stock room.

1. As we mentioned in our earlier session today, Multiview has created a **Requisition Management** form that will help us to manage and see what is going on, almost like a ‘Todo List’. Let’s open up the **Requisition Management** form which is located under **Purchase Order>Requisitions>Requisition Management**.
2. You will notice under the Saved Queries, we have created and saved a *Todo List* query. We are searching on Header Status being Open, Approval In Progress and Ready To Be Purchased/Fulfilled along with our Line Status of Open and Partial and order date of today. Select **Todo List** and then **Query**.

3. As you can see in the results returned, we can now see what we need to do.
4. Given that everyone logged in as a user Manager, we are going to group it by Order No. So you’ll drag the **Order No** column and drop it where it displays “**Drag a column header here to group by that column**”.

5. We’ll then take the **Inventory Product** column and drag it right beside the Order No.
6. Now that we have customized our screen, we can now either create Purchase Orders for the Computer we need to buy or fulfill some orders that department 601 needs.

7. We’ll purchase our computer first. You’ll put a check mark in the box for the computer based on your order no.

8. At the top of the tool bar, we’ll select the drop down for Process Selection and select Create PO.

9. A message will pop up indicating “Are you sure you want to create POs for the selected Requisition Lines” and you will select Yes.

10. A Purchase Order pop up will appear. Select the drop down list for Purchase Type id and select 601-PO. Tab over to the Buyer Group Id and select from the drop down list ALL. Since we know from our Requisition Management screen we didn’t enter a Supplier Id, we can select Dell from the drop down list. Once that has been done, select the Create PO button. A pop message appears “POs have been created”, select OK.

11. As you can see, this has opened up the Purchase Order Entry tab.
12. Let’s look at our Purchase Order to make sure we aren’t missing any information. Select either the **Edit Purchase Order** button or you can select the **Header Data Entry** tab.

13. You can see in the Header Data Entry all the fields that have been populated either from the requisition or from the PO pop up window that appeared earlier. You can still make changes to the header fields as the status of the purchase order is in an Open state.

14. One of the new enhancements we discussed earlier is MV now allows up to 1000 characters in a User Defined Field. On the field marked “PO Header UDF1” input “Please call me when the product has arrived”.

15. Select the **Details** button or select the **Detail Entry** tab to view the detail of the purchase order.
16. As we look at the details of the purchase order, you’ll notice there is no Purchase Price. You’ll recall when you were requisitioning to purchase a computer, we didn’t know the cost. Now that you are the purchaser, you’ll input the price of the computer **$2100.00**, in the Purchase Price field.
17. Let’s select **GL Dist** button or **GL Distribution** tab to view the distribution.

18. You’ll notice the GL distribution assigned to the purchase order as well as 2100.00 under the amount.

19. Now that we are done with our Purchase Order we’ll select the button **Send PO**.

20. A pop up window will appear, select **OK**. If we setup workflow you could off input some comments into the field but for today we are bypassing workflow.
21. A message will pop up indicating “The PO is ready to be sent to the Supplier”, select OK.

22. If you click on the Header Data Entry tab, you’ll notice the status changed from Open to Ready to Send. At this point you can print your purchase order, but since we don’t have a printer setup, we’ll assume we have printed it and we’ll select Send PO again so that the status of our purchase order will display Sent.

23. Go back to the tab Requisition Management and select Refresh, and you’ll notice the row that you selected has disappeared from the list. Now we’ll deal with fulfilling the inventory items department 601 has requested.

24. Put a check mark beside the product BANDAID REGULAR and PEN – BLUE based on your order number. One of the enhancements added is the column Qty Available. This will indicate if you have enough product in the bin to fulfill this line item. If not, you would not select it and wait till you have received stock to fulfill at a later date.

25. At the top of the tool bar, select the drop down for Process Selection and select Create Fulfillment.
26. A pop up message will appear “Are you sure you want to create Inventory Fulfilments for the selected Requisition Lines” select Yes.

27. An Inventory Fulfillment screen will pop for us to input and Accounting Date. Put your cursor into the Accounting Date field and press the space bar, this will input today’s date, and then select the button Create Fulfillment.

28. A pop up message will appear “Fulfillment have been created” select OK.

29. The Inventory Requisition Fulfillment Entry screen has opened up and you’ll notice you are on the listing tab.

30. You can either double click the row that is highlighted or select the Data Entry tab to view the form.
31. Now you are ready to pick the items from inventory, so let’s select **Print Pick List**.

32. The Fulfillment Pick list is customizable like any other screen in MV. We can remove or add columns tailored to you. Once done, remember to select the drop down by the Options button and select “**Replace as My Default**”. Close the tab.

33. Now that you have picked the items you can select **Post Fulfillment**.

34. A pop up message will appear “This Requisition Fulfillment Entry has been Posted” and select **OK**.

**Scenario 3:**
We are working in the OR warehouse and we are requesting a transfer of inventory items from warehouse 601 to the OR.

1. Select Multiview>Inventory>Transfers>Inventory One-Step Transfer Requisition Entry.
2. A Search Criteria will appear, select **New One-Step Transfer**.

3. Select the drop down list for – From Warehouse Id and select 601 and tab. From the To Warehouse Id, select the drop down and select **OR**. You can tab over to the comments section and input a comment if you like but for this exercise we will leave it blank. Notice the Accounting Date default to Today’s date, you can keep it today or change it to another date, but for today we will accept the default.
4. Select **Add Transfer Line** and notice it has placed your cursor in the Product Id field.

5. From the drop down list for Product Id, locate BANDAID by typing in the “Enter text to search....” And select the **Select** button and tab.
6. From the From Location Id, select the drop down list and select **W-4** and select the **Select** button and then tab.

7. For the Qty Requested field, we'll type in **10** and tab.

8. From the To Location Id, select the drop down list and select **W-4** and select the **Select** button and then tab. Notice the Qty Available column, this tells us how much we have in our Warehouse so we know if we have enough to transfer before we go and pick the item off the shelf.

9. Now that we have picked up our items to transfer from Warehouse 601 to Warehouse OR, we can go ahead and select **Post Transfer** button.