
Multi-Store Purchasing

Multi-Store Purchasing Overview

Tag-N-Trak Purchasing provides multi-store purchasing capability. Purchase orders for multiple stores may be combined on ONE purchase order for a vendor.

The “primary store” is the store that actually does the ordering from a vendor. All other stores are considered “secondary stores” for that vendor.

Secondary stores create purchase orders in the normal manner. During the “POST AND PRINT PO” process, the operator indicates that the purchase order should be “ORDERED BY OTHER STORE.” This places the PO in a PENDING status. It is “waiting” to be picked up by the primary store.

To create a combined purchase order for a vendor, the primary store runs the batch “PURCHASE ORDER CREATE” program and responds YES to “INCLUDE OTHER STORES.” Automatically, items on “pending” purchase orders from the secondary stores will be included on the combined PO. When combining purchase orders for multiple stores, the item numbers are grouped together so that the quantity to order for each item can be accumulated and print as one amount on the combined PO for the vendor.

The primary store receives the “combined” purchase order. This generates “Store Purchase Order Transfer” documents so that items ordered by the “secondary” stores can be delivered.

Secondary stores receive these items in the normal manner. The receiving process is no different than if the items had been ordered directly from the vendor.

Getting Started

Determine the primary and secondary stores for each purchasing vendor.

Remember, the primary store is the one that actually does the ordering. The secondary stores are those that create purchase orders to be “picked up” by the primary store when creating a combined PO.

The “store numbers” of secondary stores are entered in the vendor master of the primary store (see next page).

No entry is made to the vendor master of secondary stores.

Determining primary and secondary stores should be done on a vendor by vendor basis. For example, assume a company has three stores. Store 1 may be the primary store for the majority of vendors, with stores 2 and 3 secondary. For the remaining vendors, store 2 may be the primary vendor with stores 1 and 3 considered secondary.

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Enter "Other Strs" in Purchasing Vendor Master of Primary Store

1. Login to a Tag-N-Trak store that will be considered a Primary Store for a vendor.
2. From the MAIN MENU, select Inventory Purchasing.
3. From the INVENTORY PURCHASING MENU, select Vendor Master.
4. Enter the ID of a purchasing vendor.
5. Cursor down to the field labeled "Other Strs." **Enter the secondary store numbers in this field separating them with a comma.** These are stores that will create "pending" purchase orders to be included on a combined PO.

MM/DD/YYYY	INVENTORY PURCHASING	VENDOR MASTER	VEND ID
ID: _____	Name: _____	Supplier ID: _____	
Address: _____		Contact: _____	
		Terms: _____	
City/ST: _____	Zipcode: _____	Phone: (____) _____	
Code: _____	Ship Instructions: _____		
Notes: _____			
Start: _____	Stop: _____		
Prod: __ Pop: _ CORE: _ Sub Group: _ Free: __ Serial#: _ Kit: _ Supp: _____			
QTY Calculation: QOO: _ QBO: _ QRV: _ Proc CBO: _ CBO Note: _ Prt Multi: _			
Add to QOO: _ Maintain QBO: _ Round to Package: _ Print in Package: _			
Sales Fields: STY: _ SLY: _ SPY: _ STP: _ SLP: _ SPP: _ LS-YR: _ LS-DLY: _ BUY: _			
4th: _ 5th: _ 6th: _ 7th: _ 8th: _ 9th: _ 10th: _ 11th: _ 12th: _ 13th: _ 14th: _ 15th: _			
Order Days Minimum: _____	Vendor Code Conversion: _		
Alternate Pricing: _____	Which field: _		
Price Select: _	Other Strs: _____		
	This Period	Last Period	This Year
Purchases -	_____	_____	_____
Units -	_____	_____	_____
Free -	_____	_____	_____
			Last Year

			Last Purchase

F7=NEXT ITEM BY			

See the example below. Store 1 is considered the primary store for Vendor AAA. Stores 2 and 3 are considered secondary stores for Vendor AAA.

<p>STORE 1</p> <p>INVENTORY PURCHASING VENDOR MASTER</p> <p>ID: AAA</p> <p>Other Strs: 2,3</p> <p>-----</p>

When a combined purchase order is created by Store 1, the program looks at the "Other Strs" field to see which other stores may have purchase orders to be included on the combined PO.

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**** IMPORTANT ****

NO ENTRY is made to the purchasing vendor master of “secondary stores.” The “Other Strs” field should be left BLANK in the purchasing Vendor Master of “Secondary Stores.”

Though “primary” and “secondary” stores are established for each purchasing vendor, creating combined purchase orders is always an OPTION when “Post and Print” a purchase order is done. Primary and secondary stores will continue to have the option to create their own purchase orders.

Also, a store can be designated as both a primary and secondary store for the SAME vendor. This allows the primary store to create manual purchase orders (as a “secondary” store) to be included in a combined automatic purchase order. Contact Mylee Customer Support for more information on setting up a store as both a primary and secondary store for the same vendor.

Recap of Setup Procedures

To recap, the primary store is the one that will actually order the merchandise from the vendor. Login to the store that will be the primary store for a vendor, go to the Purchasing Vendor Master screen and specify the “secondary” store numbers in the “Other Strs” field.

How Secondary Stores Create Purchase Orders

Secondary stores create purchase orders in NEW status as usual. Purchase orders may be entered manually or created automatically. They may contain items for stock, miscellaneous non-stock items, and items to fill customer backorders.

After reviewing a new purchase order, a “Post and Print” is done. During the “Post and Print,” the secondary store indicates whether or not this purchase order should be **“ORDERED BY OTHER STORE.”**

ORDERED BY OTHER STORE - Y (Yes)

The purchase order is placed in a PENDING (PND) status, waiting to be picked up by the primary store. When the primary store creates a combined purchase order for this vendor, the items on this PO will be included.

ORDERED BY OTHER STORE - N (No)

The purchase order is placed in the normal ORDERED (ORD) status. When the primary store creates a combined purchase order for this vendor, the items on this PO will **NOT** be included.

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SAMPLE POST AND PRINT SCREEN FOR PO CREATED BY SECONDARY STORE

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                POST AND PRINT P.O. REPORT FOR MM/DD/YYYY

SPECIFY OUTPUT DEVICE 1 (PRINTER OR $ = FILE)
SPECIFY OUTPUT ORDER 3 (1 = VENDOR ID, 2 = VENDOR NAME, 3 = ORDER NUMBER)

ENTER THE START NUMBER <PO Number Displays Here>
ENTER THE STOP NUMBER <PO Number Displays Here>

ENTER CODE ****

BLANK LINE BETWEEN LINES      N (Y OR N)
PRINT 80 COLUMN FORMAT        Y (Y OR N)
PRINT PACKAGE,COST OR NONE    C (P, C OR N)
PRINT PRICES                   Y (Y OR N)
POST AND PRINT                 Y (Y, N = RE-PRINT PO ONLY, OR P = POST ONLY)
PRINT BACKORDERS              N (Y OR N)

PRINT A RECEIVING REPORT      N (Y OR N)
    PRINT ORDER QUANTITY      N (Y OR N)
    PRINT SCAN CODES         N (Y OR N)

ORDERED BY OTHER STORE        Y (Y OR N)
    
```

There is no default response to the ORDERED BY OTHER STORE prompt. The operator is required to type “Y” for YES or “N” for NO. Type this response carefully! The program does NOT allow a regular purchase order to be converted to a “pending” PO to be ordered by the primary store.

The “On Order” quantity IS UPDATED in the inventory record of items on pending purchase orders.

**** PENDING **** prints on the PURCHASE ORDER (below the PO Number). This distinguishes it from a regular purchase order. The Inventory Purchase Order Status Screen displays the status of the PO as PND. The status changes from NEW to PND during the “Post and Print” routine.

A purchase order remains in “PND” (pending) status while waiting for the primary store to pick up the items and add them to the primary store’s own purchase order. The program allows the pending order to be edited either before the primary store has added the items to its PO or after the items have already been added to the primary PO, but prior to the primary PO being put in “ORD” (ordered) mode.

If editing a pending purchase order is necessary, change to the secondary store and select to edit the pending purchase order. On the Create/Edit screen of the pending purchase order, the following types of changes are allowed: (1) cost of existing items, (2) quantity of existing items, (3) adding items to PO or (4) deleting items from PO.

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Once the changes are done, press [F12] for the action menu and select 'T' for "updaTe pnd". If the pending purchase order had already been picked up on a combined PO that is still in a NEW status, the program will automatically update the primary purchase order to reflect the changes.

How the Primary Store Creates a Combined Purchase Order

In order to create a "combined" purchase order, the primary store MUST use the batch "Purchase Order Create" program. Additional items the primary store wants to order can be added to the PO after it has been automatically created.

During the "Purchase Order Create" routine, the primary store indicates whether or not this purchase order should **"INCLUDE OTHER STORES."**

SAMPLE PURCHASE ORDER CREATE SCREEN FOR COMBINED PURCHASE ORDER

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                PURCHASE ORDER CREATE FOR MM/DD/YYYY

SPECIFY OUTPUT DEVICE  1  (PRINTER OR $ = FILE OR  N = NO REPORT)

RUN TRIAL CALCULATION  N  (Y,N,Totals only or Vendor totals only)
ENTER ORDER MODE:  _  ( 1=ROL, 2=FORMULA, 3=ROL/FORMULA, 4=FORMULA/ROL,
                    5=DAILY REPLENISH, 6=FORMULA/ROL/REPLENISH
                    7=SPECIAL/CBO ONLY )

ENTER PURCHASE ORDER      _____
ENTER VENDOR MASTER       WAC
PROCESS BACKORDERS        _          (Y, N, Delivery, Order)
DELIVERY DATE             _____
POS ORDER NUMBER          _____

ENTER TOTAL DAYS          _____

INCLUDE OTHER STORES      Y  (Y OR N)
PRINT SUGGESTED ORDER     Y  (Y OR N)
LINE FEED BETWEEN ITEMS  N  (Y OR N)
PRINT VENDOR CODE TOTALS  N  (Y OR N)

RETURN POINT WHEN COMPLETE (O=inv/pO C=Create/edit)
    
```

INCLUDE OTHER STORES - Y (Yes)

If a "Yes" response is given, the program checks the store numbers in the "Other Strs" field of the vendor master, searches all PENDING PO's for the vendor in those stores and includes these items on a new "combined" purchase order.

INCLUDE OTHER STORES - N (No)

If a "No" response is given, a purchase order is created for the primary store only.

The "INCLUDE OTHER STORES" field defaults to "N," so the operator must override it with "Y" to create the combined purchase order.

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The PRINT SUGGESTED ORDER field also defaults to “N.” Override it to “Y” if a “SUGGESTED ORDER REPORT” is desired. When combining purchase orders for multiple stores, the item numbers are grouped together. On the Suggested PO report, the STORE number prints to the right of the CBO quantity if that line was ordered by a secondary store.

The purchasing agent at the primary store may view items on the new combined PO by using the “CREATE / EDIT LINE ITEMS” screen. The STORE number displays to the right of the backorder flag for all line items ordered on secondary store purchase orders.

On the combined purchase order, the program does not allow adding or deleting line items for secondary stores. Also, the program currently does not allow any changes to line items from secondary store PO’s with one exception—the COST of line items may be changed. (NOTE: This changes the COST of the line item on the combined purchase order only. It does NOT affect the COST of that same item on the secondary store’s purchase order. The user must edit the secondary store’s purchase order and change the cost of the item prior to doing a Post & Print for the primary PO.)

The operator is allowed to add, change and delete line items for the primary store. Also, the operator is allowed to DELETE the entire combined purchase order. If the combined PO in a NEW status is deleted, the line items from secondary store PO’s are “released” and will be picked up the next time a combined PO is generated by the primary store.

If there were changes to a pending PO in a secondary store without updating the primary PO, the user can press F12 and ‘T’ for “update pnd.” The program will then automatically update the primary purchase order to reflect the changes that were made on the pending PO.

When the primary PO is ready to be posted and printed, the program will check one last time to see if there are any changes to the pending purchase order. If there are changes, the program will update the primary PO. This update occurs before the program checks for the optional free freight, so the correct PO cost is used to determine if this order meets the requirements for free freight.

Important Note: The program will not automatically update cost changes made on the primary PO to items that were brought over from the "PND" PO. If changes are made to those line items on the primary PO, the user must manually return to the "PND" PO to maintain that PO prior to doing the Post & Print for the primary store.

When the “Post & Print” is run for the combined purchase order, the status of the combined PO changes to ORD (ordered). At the same time, the status changes from PND to ORD (ordered) for pending secondary store purchase orders included on this combined PO.

A combined PO in an ORD (ordered) status may be deleted. If deleted, the status of the secondary store purchase orders included on the PO revert back to “PND” (pending) so that they may be picked up on a future PO.

The multi-store PURCHASE ORDER prints each item once with the combined quantity to order.

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Primary Store Receives Combined Purchase Order

The primary store receives the purchase order in the normal manner. The "RECEIVE LINE ITEMS" screen displays the store number to the right of the backorder flag. The primary store receives all line items, including those from secondary stores. Items may be backordered, just as they are with a regular purchase order.

When the primary store runs the "POST RECEIVED ORDER" program for the combined purchase order, the quantity-on-order is reduced and the quantity-on-hand is increased for primary store items. (At this point, the quantity-on-order and quantity-on-hand of items at secondary stores are not affected.)

The "Post Received Order" program automatically generates "STORE PURCHASE ORDER TRANSFER" reports. A "STORE PURCHASE ORDER TRANSFER" is printed for each secondary store that had items received on the combined PO. This document is intended to serve as the delivery ticket/packing slip for items transferred to the secondary stores.

The STORE PURCHASE ORDER TRANSFER prints the quantity of each item received, the PO# it was ordered on (this is the secondary store's PO#), along with the vendor code, item number and description. The secondary store uses this document to receive the merchandise.

Following the STORE PURCHASE ORDER TRANSFER reports, a POST RECEIVED ORDER REPORT is printed. The POST RECEIVED ORDER REPORT is for merchandise ordered and received for the PRIMARY store. (This report also includes a recap of the "Shipment Total Ordered, Received and Backordered" which includes secondary stores.)

Secondary Store Receives PO's Using "Store Purchase Order Transfer"

When secondary stores receive their inventory from the primary store, they receive their PO's in the normal fashion. The receiving process is just as though they had ordered from the vendor directly. The "Store Purchase Order Transfer" document described above serves as the packing slip.

As usual, the secondary stores run the "Post Received Order" program when receiving items has been completed. It is at this time that the quantity-on-order of items at secondary stores is reduced and the quantity-on-hand is increased. A "POST RECEIVED ORDER REPORT" prints for each PO received.