Purchase Order Wizard

One of the biggest differences in the industry compared to others is the way we procure goods.

Every day you get in new orders from customers of which some of the garments are required at the same.

Previously printing shops would spend hours paging through work orders and building lists of which garments they need to purchase. This took hours of their time not to mention the probability of making errors.

Some shops simply took the work orders and submitted them as purchase orders to the distributors. The problem with that was that not all the goods on the same work order would neccessary come from the same distributor. Also the distributor handled each order as a separate order which means every order had a new shipping charge.



The PO Wizard is **not** your purchase order. It is only a list of goods that still *need to be* ordered

You can use the PO wizard in 2 ways:

- To consolidate all your work order items into a single PO, or
- To create a PO for a single work order.

You can switch between each method at any time. No matter which method you prefer, by using FastManager's PO wizard you can create accurate purchase orders in minutes. This feature alone will save you thousands of dollars a year.

	A quick note on how FastManager builds the list of required items:
	First it gets a list of all orders which has a status of WIP.
	This is very important to understand. If you go straight to invoice or convert to an
	invoice too early then FastManager will think that those items are already done and
	will not add it to the procurement list. Only WIP orders are included.
	Next, FastManager will scan each line item and check if it was flagged in the sales
	screen to be purchased. Only flagged items will be in the procurement list.
	Next FastManager will scan all existing purchase orders to see how many of that line
1018	item you've already purchased and deduct it from the quantity required.
	If the quantity required minus the items already on PO is greater than zero then it will remain in the procurement list.
	If not it will be removed. FastManager will then consolidate and total all the items for you.
	If you have the stock module enabled, then FastManager will also look at all items that
	has a min stock level required and add any shortages to the PO Wizard.
	- This feature is only available if you use the consolidated method.

Even if you use FastManager just to create work orders and subsequently create purchase orders, then you have made a valuable investment. The money you save by using the PO wizard is far in excess of the money you paid to purchase FastManager.

Open The PO Wizard

To open the PO wizard, click on PO Wizard under the Purchases group from the main explorer bar on your left.

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FastManager may take a few seconds to scan all your orders and consolidate your items.

• then it will show you an entire list of items grouped by vendor and style number and the total quantity you need to buy.

Now decide how you want to order:

- If most of your orders are typically smaller quantities and you want to group all you items into one PO in order to save on shipping, you will most likely prefer to create consolidated orders.
- If you do fewer but larger work orders you may prefer to create one PO for every job you have. This will save you from having to split the items again as they come in.
- If you drop-ship many of your orders directly to your customer you would also prefer to create a single PO for the WO that you are drop-shipping.
- If you subcontract embellishment to other printers or embroidery companies then you will also create a single PO's for those orders.

• So depending on your company operations, you will most likely choose one of these options. You may even do a little of both.

Consolidated Purchase Orders

To have FastManager gang up all the items you need to order from all your current WIP, you would create consolidated orders.

- When creating consolidated PO's FastManager will also add items that had reached the min quantity in stock required.
- This way if you have the stock module activated and keep a min quantity of certain T's in stock, those items will automatically be added to the wizard.
- To create consolidated PO's ensure that the Consolidate tab is selected.

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Filtering

• From the Consolidated tab, you are able to filter out certain WIP that you do not want to purchase for at this point in time by changing any of the filter settings and then clicking on the Refresh button.

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For example:

You may not want to order items that you are only going to print in 6 weeks time. By ordering items that will keep you busy for the next 2-3 weeks you could have more cash in the bank.

In this case you would change the ship date up to 3 weeks from today and click on the Refresh button. FastManager will then only select WO's due in 3 weeks or less and add those items to the wizard.

The items you need to order are grouped by Vendor.

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The PO Wizard will show you how many vendors you need to order from as well as the current vendor selected with all of the items that you want to order from that vendor in the grid below.

You can easily navigate between vendors by clicking on the Next and Previous links to see which items you need to order from a specified vendor.

• You can also jump directly to specific vendor by clicking on the Select link.

Change Supplier

If there are items that you would rather order from another supplier, you can right click on the item and select switch supplier.

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For example you can select to order the 5000B from Alpha instead of Bodek or the other way around.

• This will add the item to the rest of the Alpha items. Then navigate to Alpha and create a large order from there.

Exclude Items

By default all items are selected to be ordered, but you can exclude items from this order (they will remain on the PO Wizard, ready to be included in a future PO)

• If you don't want to order a specific item you can uncheck the line item and it will not be added to the purchase order when you create it

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Partial Order

What happens if I only want to order some of the total quantity required for a line item?

This is very typical if you are unable to find a vendor who has the total number of items in stock and you may want to split the PO between multiple vendors.

- FastManager will show you the number of items required under the Req column.
 - You can change the number you want to ultimately order by changing the quantity in under the Order column. FastManager will update the new quantity required once you have placed the order. You can then order the remaining quantity from another supplier.

First expand the item row, then adjust the qty/ies on the WO row

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Items Grouping

Why do I need to order so many items?

All items are listed in a "parent - child" relationship. The parent will give you the total number of items you need to order.

If you click on the plus icon then the tree will expand and you can see for which order the items are for.

• Parent rows are colored in black, and child rows are colored in blue.

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You can expand or collapse the all line items by clicking on the Expand or Collapse buttons respectively.

You cannot edit the Comment column.



- FastManager will display important information, such as the number of orders and possible late orders in the comment column.
- This is for information purposes only and you cannot edit the comment column.

You can add comments in the form of a remark line in the purchase screen.

Print the PO Wizard

I want to print out the required purchase order list for review.

• You can print the current list by clicking on any of the print buttons.

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Editing the PO

What if I make a mistake?

Don't worry about getting everything perfect. You can adjust the Purchase Order at any time once it is created.

• This will update the number of items required and therefore also your purchase order wizard.

Create the PO

So can we create the PO already?

To create a Purchase order, click on the Create Order button.

po-wiz_create-po.mp4

From the Purchase Order screen you can add or remove items and much more. For more information on this screen, see Editing Purchase Orders

You now send the purchase order to your vendor by clicking on the Print button. You can choose to fax the order, call it in, use your vendor's web site or in the case of some vendors, send the order in

real time.

Order Date Expected Confirmation	Date: 06/19/2019 -		nip Method: nip To:	Enter or Sele	ect		~	Phon Fax	ne:	
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Refresh the PO Wizard

Back to the Purchase Order Wizard

The PO Wizard will now adjust to reflect the items you now require.

• To get an updated list of required items you can click on the Refresh button.

Working with Inventory

If I have the stock module activated, how does it effect this screen?

The stock module will effect 2 areas of the PO Wizard:

- FastManager will automatically add items that you need to order if you are running low on stock.
 - This only applies to items where the minimum quantity required is greater than zero.
 This feature is only available in consolidated mode.
- The PO Wizard will display an icon next to the quantity required if you have items in stock. You

can double click on the icon to use the items in stock. The PO Wizard will then update and only require you to order the remaining items.

• For more information please read our topic on Stock Control

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Order by WO Number

This option is very similar to ordering consolidated accept that you will only be ordering goods for a single work order.



If you have not read the topic on creating consolidated purchase orders (above) please do so first.

To create purchase orders by WO, please ensure that the Order by WO# tab is selected

• In stead of the normal filter options you saw when order consolidated, you will see the current WO information.

13/17

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WO Info

As when consolidating your Purchase Order, you will also see a list of the items that you need to order grouped by vendor.

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If you need to order from multiple vendors then you will also see how many vendors you can order from and you can navigate between these vendors in the same way when ordering consolidated.

Protect yourself!

FastManager will show you the current deposit status of an order which may prevent you from laying out money to order their goods if you have not yet received a deposit from a customer.

FastManager will also show you the ship date in order to make an informed decision on how long you can wait to order these items.

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	Kertervious NextD> Select. View All Vendors Select Collaps Print Image: Collaps Print Style Description Color Size Req. Ord. Onto Cost L Comment 298 Youth 5.6 oz. DRI-POWER ACTIVE T-Shirt AQUATIC BLUE XS 1 1 0.00 1 order(z). WARNINGI At least 1 order was scheduled to ship 193 days								

You can view a list of all the Work Orders for which goods need to be ordered if you Click on the Edit WO List button,

• OR you can navigate between orders with the *Next* » and *Previous* « buttons.

1	3. PO Wizard									-		×
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po-wiz_order-by-wo.mp4

You can change the sort order of the work orders: Simply click on any of the column headers FastManager will display the work orders in the order you specified when using the next and previous navigation buttons

To view the items required for a specific work order, double-click on it

WO number as PO number

Make PO's fool proof?

When ordering by WO you can also select to use the Work Order Number as the PO Number number when creating the order.

• Click on the Preferences button.

• Select: Use WO# as PO# number when ordering by group.

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FastManager will use the WO & "hash" as the vendor Ref where the # will be a sequential number.
So if you have mutiple PO's for a WO the PO numbers will be 1234-1 and 1234-2, and so on.
The Vendor reference is ultimately the number that your vendor will see as the PO Number.
FastManager will always maintain a sequential PO number internally but your vendor will only see the vendor reference.
This is very convenient as most vendors will print your PO number on the box labels and boxes are then easily identified if the WO number is displayed on it.
When ordering consolidated the PO number will simply become the vendor reference number.

You can make all the same changes to the supplier, quantities and cost as you can on the Consolidate tab

← Purchasing: Overview

The Purchase Order List ⇒

From: https://docs.fastmanager.com/ - FastManager Help Manual

Permanent link: https://docs.fastmanager.com/purchasing/po_wizard



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