

Standard Operating Procedures for:
PO Manager

Revisions:

Date	Author	Description
7/20/2012	Sara Toliver	Creation of document.

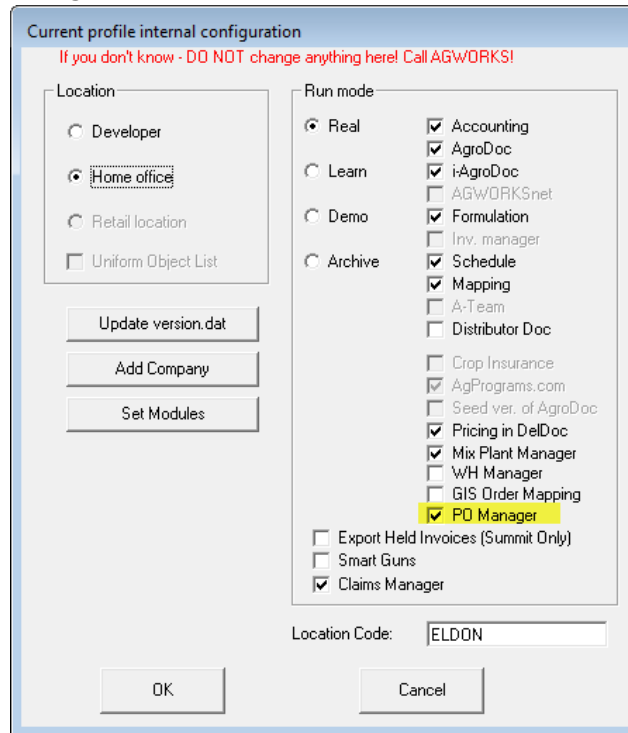
Summary/Overview:

The following guide is to assist the user through the PO Manager functionality.

This is new functionality and there are no recent modifications.

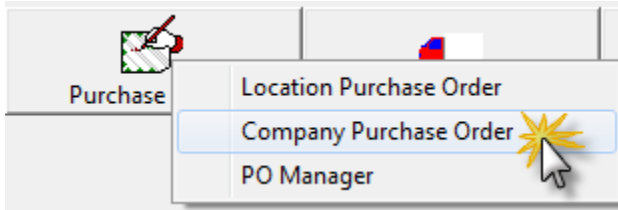
Warning/Notice:

- The following assumes that PO Manager has been enabled for all locations
 - This is to be completed by AgWorks trained personnel through the AgWorks System Configuration menu.

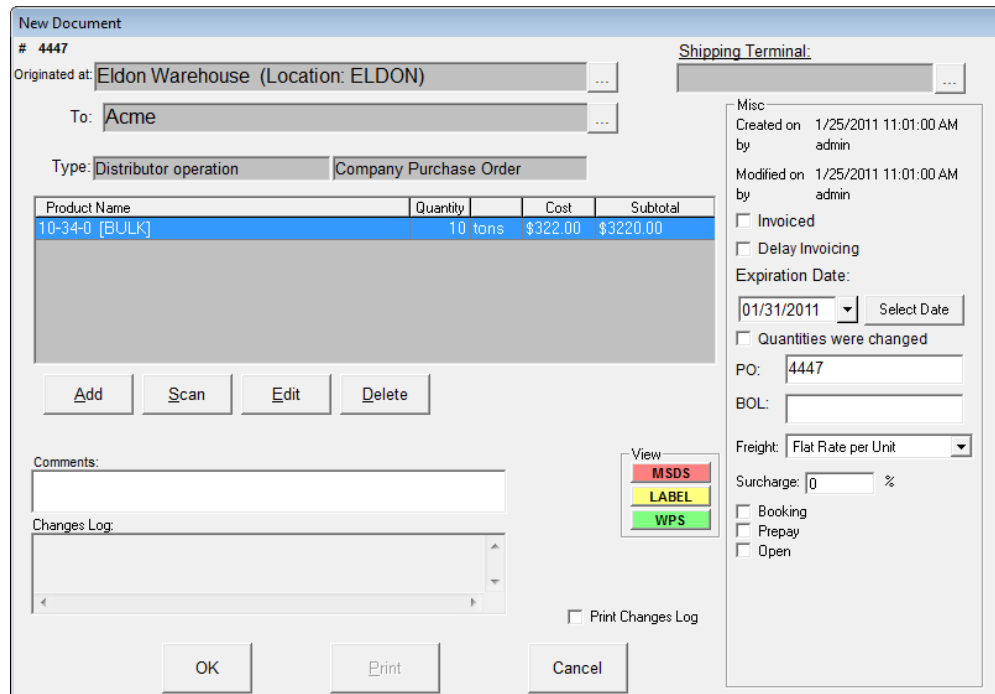


Procedures:

1. Create a Purchase Order



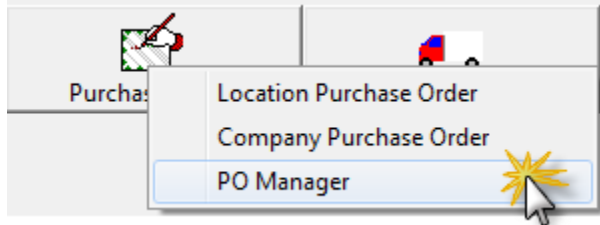
- a. A Company Purchase Order is a Purchase Order that can only be created by the HOME location, and will be available to all locations.



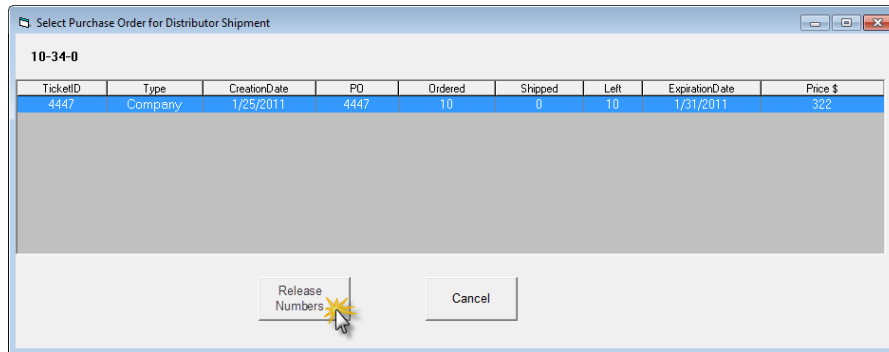
Product Name	Quantity	Cost	Subtotal
10-34-0 [BULK]	10 tons	\$322.00	\$3220.00

- i. Select a Distributor
 - ii. Select a Product
 - iii. Enter the Quantity, Base Cost, Freight, and other necessary details.
 - iv. Enter the Expiration Date
- b. A Location Purchase Order is a Purchase Order that can be created by any location, and will be available to that specific location only.
 - i. When Release Numbers are created for a Location Purchase Order, the Release Numbers will automatically be assigned to the Location that created the PO.

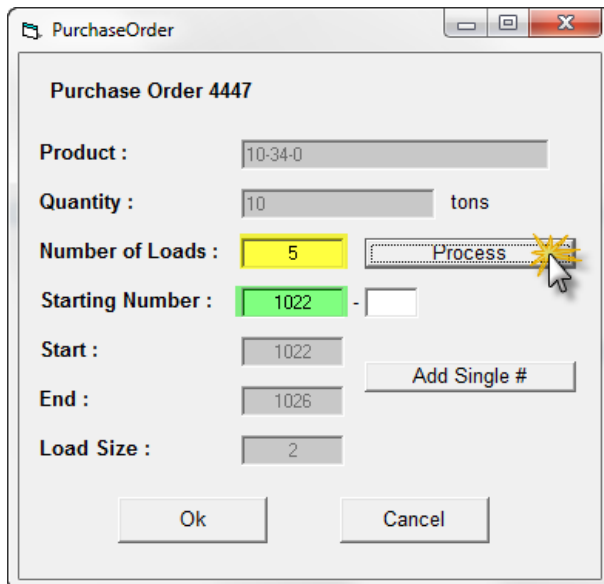
2. Once the Purchase Order is created, go to PO Manager



- a. Select Product
- b. Select PO to assign Release Numbers to
- c. Click on Release Numbers

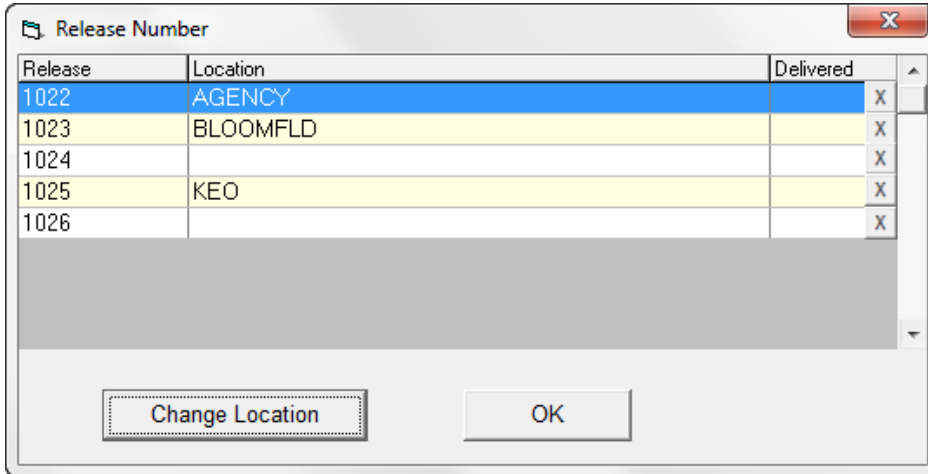


3. Fill out the Release Number Form

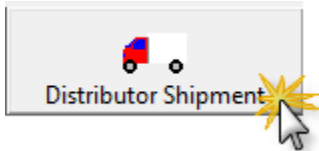


- a. Enter the **number of expected loads**
- b. Enter the **starting Release Number**
- c. Click Process
 - i. The system will automatically calculate the remaining Release Numbers and the expected quantity per load.
 - ii. You may add additional loads by clicking the Add Single # button
- d. Click OK to continue

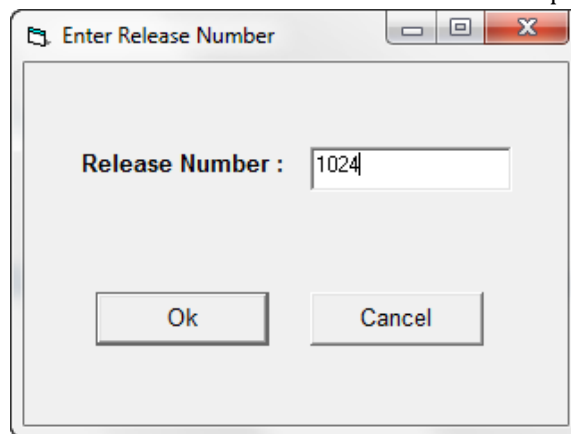
4. Next you will be able to assign the Release Numbers to specific or all locations



- a. By default, each Release Number will be blank; signifying that it is available for All Locations.
 - b. To Assign a Release Number to a specific location, click on the line-item associated to the desired Release Number and click Change Location.
 - c. If a Release Number has not been delivered, it can be reassigned to All Locations by clicking on the "x" associated to that line-item.
 - d. When finished, click OK to continue.
5. Create a Distributor Shipment

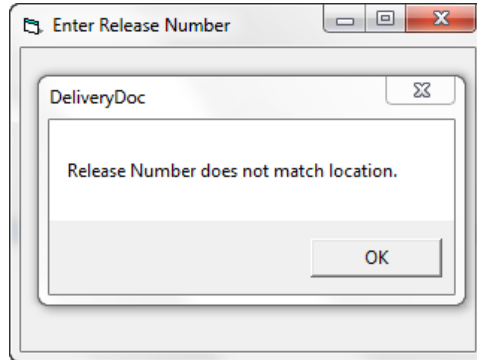


- a. Enter the Release Number associated to this shipment load, and then click OK

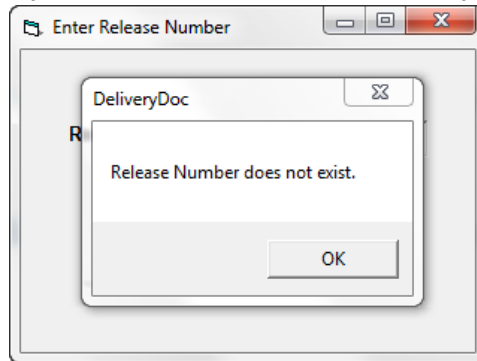


- i. If there is no Release Number associated to this load, click Cancel.
 1. When the Distributor Shipment is created, it will not be associated to any PO since there is no Release Number.

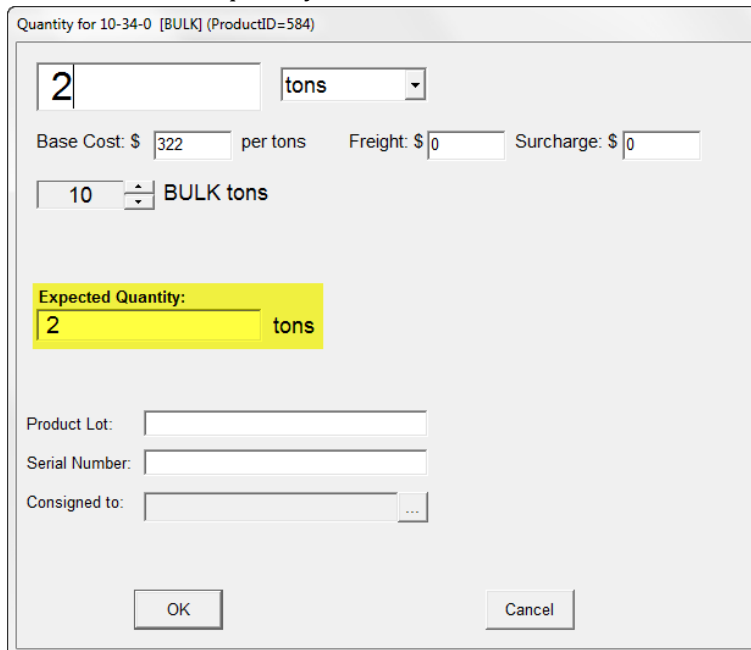
- ii. If you enter a Release Number that is not allocated to this location, you will receive the following prompt.



- iii. If you enter an invalid Release Number, you will receive the following prompt.



6. Enter the received quantity

A screenshot of a software dialog box titled "Quantity for 10-34-0 [BULK] (ProductID=584)". The dialog contains several input fields: a quantity field with the value "2" and a unit dropdown menu set to "tons"; a "Base Cost" field with "\$ 322 per tons"; a "Freight" field with "\$ 0"; and a "Surcharge" field with "\$ 0". Below these is a "10 BULK tons" field. A section titled "Expected Quantity:" is highlighted in yellow, containing a field with the value "2" and the unit "tons". At the bottom, there are fields for "Product Lot:", "Serial Number:", and "Consigned to:" with an ellipsis button. "OK" and "Cancel" buttons are at the bottom.

- a. **Expected Quantity** will automatically be pulled from the load size associated to the Release Number.
7. Enter the Bill of Lading (BOL)
- a. The BOL must be unique for this Distributor

8. The Distributor Shipment will be displayed and the **PO** will automatically be populated from the PO associated to the Release Number

New Document
4448
Originated at: Eldon Warehouse (Location: ELDON) ...
From: Acme ...
Type: Distributor operation | Distributor Shipment

Product Name	Quantity	Cost	Subtotal
10-34-0 [BULK] (From ID: 4447, Price: 322.00)	2 tons	\$322.00	\$644.00

Total: \$644.00

Shipping Terminal: ...
Misc:
Created on: 1/25/2011 12:22:00 PM by admin
Modified on: 1/25/2011 12:22:00 PM by admin
 Invoiced
 Quantities were changed
PO: 4447
BOL: 11254
Freight: Flat Rate per Unit
Surcharge: 0 %

View:
MSDS
LABEL
WPS

Comments:
Changes Log:
 Print Changes Log

OK | Print | Cancel

- a. Click OK to close and complete this task.
i. The printed Distributor Shipment will display the associated Release Number.

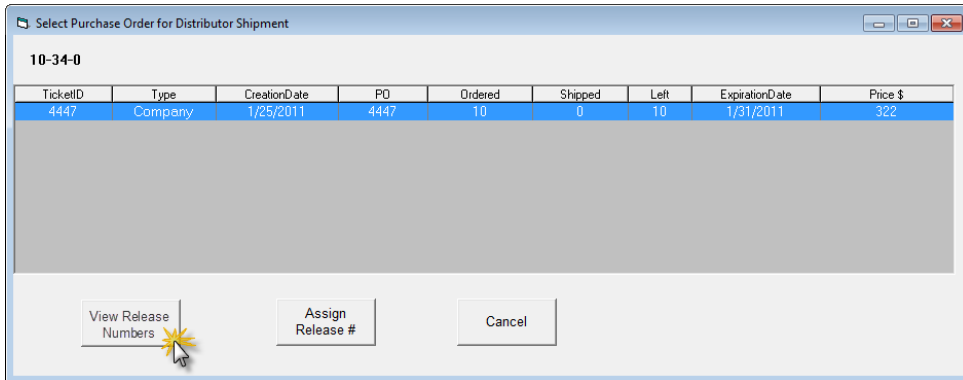
Distributor Shipment # 4,448

Acme
PO: 4447 BOL: 11254 Release Number: 1024

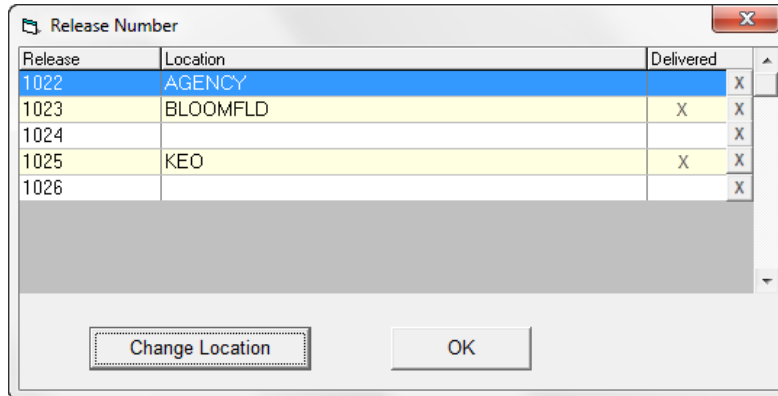
#	Product ID	Product Name	EPA Reg No., RU	Quantity
1	584 [33020400]	10-34-0 [BULK]		4,000 lbs Expected: 2,000 tons

View Release Numbers:

1. To view Release Numbers assignments, go to PO Manager > select Product > select PO > click on View Release Numbers.



- a. You will be brought to the following form where you can view the Release Numbers assigned to their locations and whether or not the load has been delivered.



- i. Users are restricted from modifying a Release load that has already been delivered.
2. Release Numbers assignments can also be found on the Purchase Order Product Remaining Report.
 - a. Navigate to: Reports > Across Company > PO Product Remaining Report

Golden Furrow Fertilizer					
<u>Purchase Order Product Remaining Report</u>					
(Location: Eldon)					
Show Expired Purchase Orders = No					
ACME					
(ObjectID=10,021\AcctID: ACME)					
Purchase Order: 5555		Terminal: Burlington		Expiration Date: 04/01/2011	
Release Numbers: 2290(x), 2291, 2292, 2293, 2294(x), 2295, 2296, 2297				Expires in 100 days	
Prod ID	Product Name	Ordered	Cost	Received	Remaining
10148	11-52-0 [BULK]	30.00 tons	\$540.0000	23.89	6.11
10018	0-0-62 Granular [BULK]	30.00 tons	\$478.0000	29.45	0.55
10151	32-0-0 [BULK]	40.00 tons	\$253.0000	0.00	40.00
584	12-34-0 [BULK]	15.00 tons	\$415.0000	0.00	15.00
		115.00		53.34	61.66