InventoryControl Purchase Orders/Receiving Overview

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Purchase Orders/Receiving Overview

This function applies to Pro and Enterprise Version users only.

Note: For information on the benefits of upgrading your version of InventoryControl or WaspNest Inventory, please select **Help > Benefits of Upgrading** on the Main window.

Purchase orders can be created in InventoryControl when you need to order additional inventory from suppliers. These orders can be emailed to the supplier and/or printed upon creation and can be easily referenced and searched in the system. When you receive shipment of the items on the purchase order, the items can be marked as received either on the PC's **Receive** screen or on the mobile devices. You can also create backorders from an existing purchase order for all or some of the items on the order.

InventoryControl allows you to create purchase orders for:

-Inventory Items - This item is already in your inventory database. Use this to re-order existing items.
-Assembly Items - Assembly items are created when you combine two or more existing items or multiple quantity of one item to create a new item.
-Non-Inventory Items - This item is not listed as inventory in your database. Use this to order items for which you do not want to track inventory, such as marketing fliers or business cards.
-Manually Entered Items - Use this option to add one-time items, such as shipping and handling, to an order. Be aware that manual items cannot be received on the mobile devices.

With a little advanced planning much of the purchase order creation process can be automated for you. Setting up these four pieces before you begin creating purchase orders will speed the process:

-Set up preferred suppliers for your items (Pro and Enterprise versions only), then you can simply enter the item number on the purchase order and the supplier information will automatically appear on the order.

-Enter a supplier or suppliers for an item and enter that supplier's shipping unit of measures, this information will also automatically appear. Preferred suppliers are entered on the **Create New or Edit Item screen, Manage Suppliers** tab. Supplier unit of measure information is entered on the **Create New or Edit Supplier** screen.

-Create a template for your purchase order numbers so that they will be automatically generated for each purchase order you create. These templates are set up on the **Formatting PO and Pick Order Numbers** screen.

-Make sure you enter a minimum stock level for your items and enable the **Automatic Notification** option. This enables InventoryControl to notify you of items that have reached their reorder point in a report broken down by location. Minimum stock levels are entered on the **Create New or Edit Item screen, General** tab. The **Automatic Notification** option is enabled on the **Options** screen.

-Enter email addresses for your suppliers. If email addresses are entered, you can select the **Email on Save** option at the bottom of the **Create New Purchase Order** screen to automatically send notification emails to the supplier attached the current PO. In addition, you can enable InventoryControl to send notification emails to PO managers, receiving, or anyone for whom you have entered an email address. You can enter email addresses for your suppliers on the **Create New or Edit Supplier** screen.

To further streamline the process, you can use a barcode scanner to add information to the scannable fields on the **Create New Purchase Order** screen, including **Supplier**, **Purchase Order Number** and **Item Number**.

The basic flow from purchase order creation to receiving the items is as follows:

1. When you need to replenish inventory for an item or items, create a purchase order on the **Create New Purchase Order** screen (accessed from **New > Purchase Order**). After you select a Supplier for this purchase order, you can click the Items at **Re-Order Point** button at the bottom of the screen. The system will then check for any items for this supplier that are at or below their reorder points and populate the purchase order with those items.

A newly created **Purchase Order** has a status of New. The status remains New until item quantities are entered on the **Receive** screen. If the order becomes overdue before you receive it, the status changes to **New - Overdue**.

For detailed information creating purchase orders, please see the article below.

The **Purchase Order** now appears on your **Purchase Order List** (**Lists > Purchase Orders**). From the **Purchase Order List** you can **Edit** or **Delete** (as long as the order has not been partially received) the order as needed.

2. When you begin to receive inventory for the purchase order, you will enter the quantity received for each item on the **Receive** screen (**Receive/Pick** menu **> Receive**). Inventory for an item can be marked as received on the PC's **Receive** screen or on the mobile devices. This screen allows you to enter quantities received by location, and can optionally show you costing information as well. Receiving inventory on the Receive screen adds inventory to that item.

Purchase orders that have some items received have a status of **In Process**. If the order becomes overdue, it will have a status of **In Process - Overdue**. You can choose to close the partially received purchase order and create a backorder for the remaining items.

3. After the order is fully picked it has a status of **Completed**.

Related Articles:

InventoryControl: How to create a Purchase Order
https://support.waspbarcode.com/kb/articles/797