



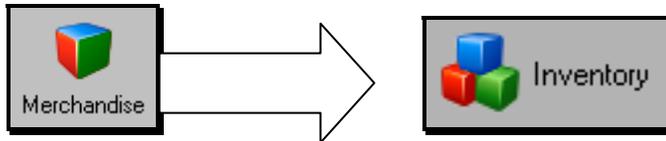
Auto Purchase Orders

February 2010 – Retail Pro v8

One of the most effective tools in Retail Pro is the Auto PO utility. This tool allows retailers to determine when the on-hand quantity of a specific item is below an assigned *minimum* level and needs to be reordered. The Auto PO tool can be used for all of a retailer’s inventory, or just a few select items, departments, or vendors. Note that the steps below separate the use of this tool into two steps: (1) assigning minimum and/or maximum values that serve as the “reorder” point to a group of items and (2) actually running the Auto PO utility to analyze what inventory has dipped below the min value.

STEP 1 – Assigning MIN/MAX values

1. From the main screen in Retail Pro select **MERCHANDISE** and then **INVENTORY**.



2. Navigate to a tab in inventory that shows the MIN and MAX fields (by default there is a tab labeled Quantities that should have these columns displayed), or use Page Manager to add those two fields into the list view.

Item #	DCS	Vend ...	Style #	Description	Attr	Size	Qty	Min	Max
103088	TOPWOV	FIBERS	1980RI	3/4 RUFFLE	AST	XL	0	0	0
103089	PA JE	LILLYP	73172	PALM BEACH	117	2	0	0	0
103090	SW	BARKHU	70542	SCROLL V	AST	S	0	0	0

3. Use Filtered View, or the Search Box, to locate the items that you want to start using the Auto PO tool for. *(NOTE: Many retailers start by assigning these values to all items in just a single vendor or department)*
4. Press **CTRL+F2** on the keyboard to enter into continuous edit mode.
5. Arrow down the list of items and type in the minimum or maximum value. Note the definitions below:

MIN: The “reorder” point. Once your on-hand quantity is below the minimum, the Auto PO tool will suggest that this item be reordered when the analysis is ran. Items that you do not care to reorder should have their minimum left at zero.

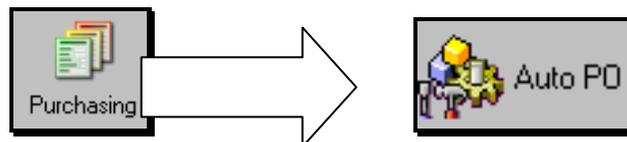
MAX: The quantity that you’d want to restock this item to during your peak season. This value is not a ‘maximum on-hand’ due to shelf space. It’s simply a way to telling Retail Pro exactly how many units you’d want to order if an item is below its minimum quantity. *(NOTE: Many retailers leave this field blank, indicating that they only want to reorder up to their minimum quantity.)*

6. Once you’ve taken a group of items, as shown below, and established a minimum and/or maximum value you’re ready for Step #2. *(NOTE: For multi-store clients, the min/max values are specific to each store. These steps have been used to establish min/max values for just one inventory. Click **SELECT LOCATION** from the sidetoolbar and repeat the process above to assign min/max values to other stores.)*

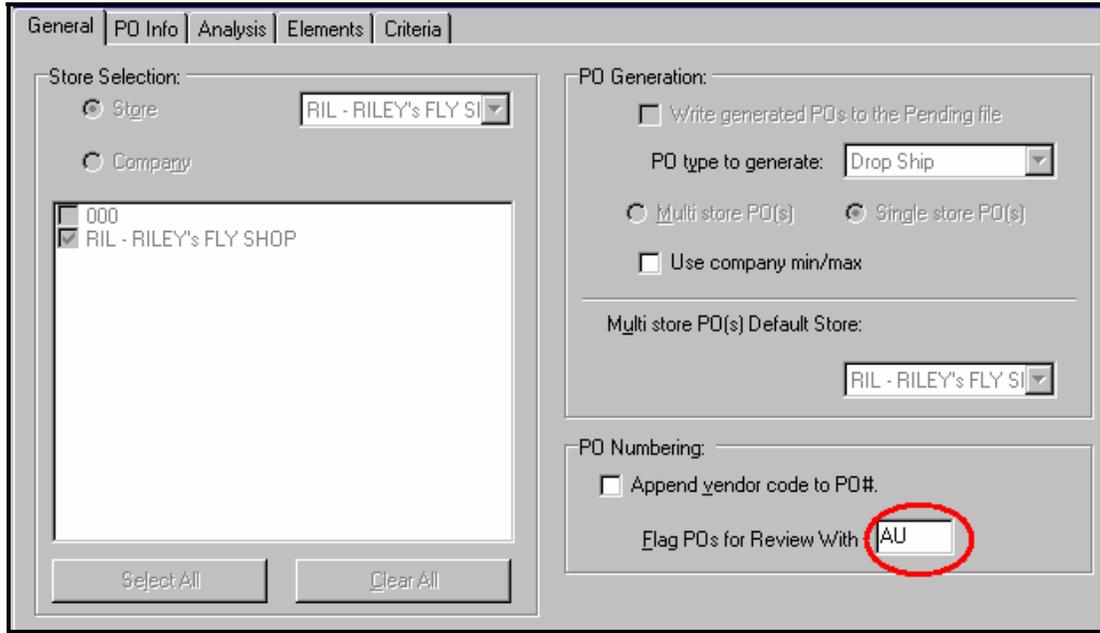
Item #	DCS	Vend ...	Style #	Description	Attr	Size	Qty	Min	Max
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103089	PA JE	LILLYP	73172	PALM BEACH	117	2	0	2	0
103090	SW	PARKHU	70542	SCROLL V	AST	S	0	1	0
103091	SW	PARKHU	70542	SCROLL V	AST	M	0	1	0
103092	SW	PARKHU	70542	SCROLL V	AST	L	0	2	0
103093	SW	PARKHU	70542	SCROLL V	AST	XL	0	1	2
103094	SW	PARKHU	77871	RIB SIDE SWTR	AST	S	0	0	0
103095	SW	PARKHU	77871	RIB SIDE SWTR	AST	M	0	1	2
103096	SW	PARKHU	77871	RIB SIDE SWTR	AST	L	0	1	2
103097	SW	PARKHU	16297	CROCHET CARDY	AST	S	0	3	5
103098	SW	PARKHU	16297	CROCHET CARDY	AST	M	0	3	5
103099	SW	PARKHU	16297	CROCHET CARDY	AST	L	0	4	6

STEP 2 – Running the Auto PO Utility

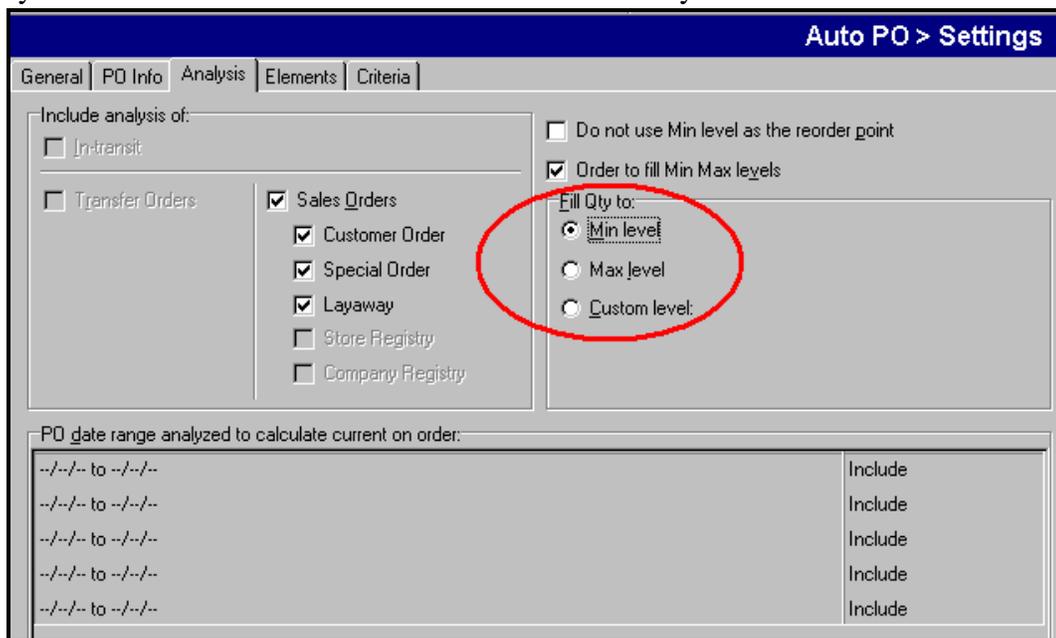
1. From the main screen in Retail Pro select **PURCHASING** and then **AUTO PO**.



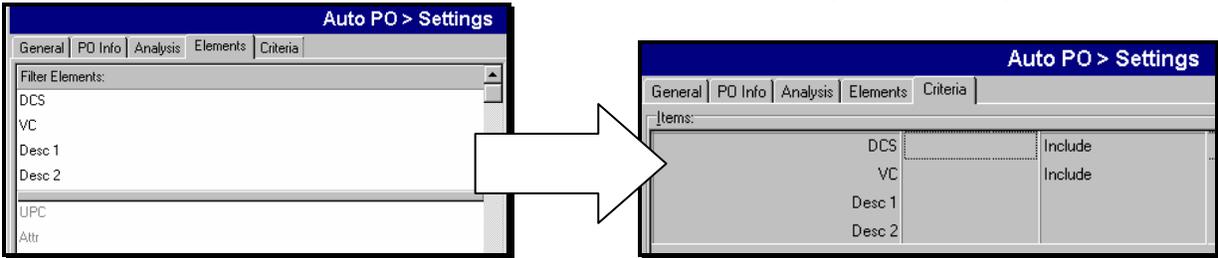
- Notice a separate window appears. On the **GENERAL** tab, make sure the correct store is checked in the upper left corner. In the bottom right type the letters 'AU' next to "Flag POs for Review With" so that all purchase orders created from this tool can be easily sorted together. All other settings should be defaulted correctly, and appear as below.



- Select the **ANALYSIS** tab at the top. On the left, under "Include analysis of", check the options for Sales Orders if you use those documents in Retail Pro and want the Auto PO tool to consider items on those documents as already being sold. On the right, change the "Fill Qty to:" to reflect your wishes. If you are in a peak season, and want to order up to the maximum level you established choose that. In this scenario we only want to order to the minimum level.



4. Select the **ELEMENTS** and **CRITERIA** tabs to add fields that you want to filter this Auto PO for. If you leave those fields blank the tool will run for all of your inventory.



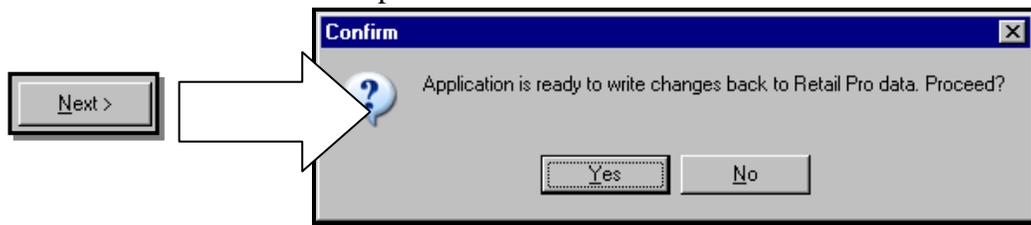
5. Select **RUN** in the upper right corner of the screen.



6. Select **YES** to save changes.



7. The final window shows a preview of all the items that need to be replenished to meet their min/max value. You may review this window to make sure your filter in step 4, but *cannot* edit any quantities in this window. Select **NEXT** in the bottom right corner to continue, and then **YES** to have Retail Pro create the purchase order.



8. Optionally select **YES** to print the Purchase Orders created at the end.
9. Close the Auto PO utility by clicking the X in the upper right corner of the screen.
10. If desired, go back into **PURCHASING** and **PURCHASE ORDERS** and locate the newly created Auto POs (they'll start with an AU as per step 2). On that screen you may edit quantities or the PO Cost or Price if desired.