

VERSION 1.0
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Apps for Greentree

QUICK ENTRY OF BUY-IN STOCK

APP NUMBER: 010048

Powered by:

MYOB Greentree



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FEATURES

1. Functionality to support one-off type of order requirements.

If you regularly buy in products that are not part of your standard range, to satisfy a one-off client order, you'll be familiar with how time-consuming this process can be.

This App automates the creation of Stock Item records and Purchase Orders for what we call **Buy In Stock**, straight from the Sales Order screen or Quote screen, saving you valuable time.

Create Buy-In stock items may be done from:

- A Sales Order
- A CRM Quote

IMPORTANT NOTES

- We recommend that you test the configuration of the App thoroughly in a test system prior to deploying the App in your live Greentree system.

OTHER REQUIREMENTS

Greentree Modules: Inventory, Sales Orders, Purchase Orders, SO/PO Linking

Associated Apps: **10046 Merge Inventory Items** is an associated App which will help you manage Inventory Items to save your system becoming cluttered with records that were created to fulfil a one-off order and will never be used again.

USER INSTRUCTIONS

CREATE BUY-IN

ENTRY OF BUY-IN STOCK FROM A SALES ORDER

Use the following process to create a Sales Order, Stock Item and Purchase Order for a Buy In product needs to be purchased, click this button to open the Buy-In Code Maintenance window.

1. Select the menu item | **Data Entry** | **Sales Orders** | **Sales Order Entry** |
2. Click on the **Create Buy-In** button

The screenshot shows the 'SO Order Entry' application window. The 'Sales Order' tab is active, displaying fields for Order Detail Number (500063), Branch (03 Christchurch), Order Date (24/9/2012), Delivery Date (24/9/2012), and Location (01). The 'Line Item' tab is also visible, showing Customer Detail Code (TEST), Name (Test Customer), Currency (New Zealand Dollars), Rate (1.0000000), and Payment Terms (30 Days from Invoice Date). The 'Delivery Details' tab shows Alpha (TEST), Salesperson (Steve Sampson), and Freight Type. At the bottom right, the 'Create Buy-In' button is circled in red. Other buttons include 'Save Header', 'Print Options', 'Packing Slip', 'Order Status', 'Invoice', and 'On Hold'. The bottom status bar shows Discount (0.00), Surcharge (0.00), Net (0.00), Tax (0.00), and Total (0.00).

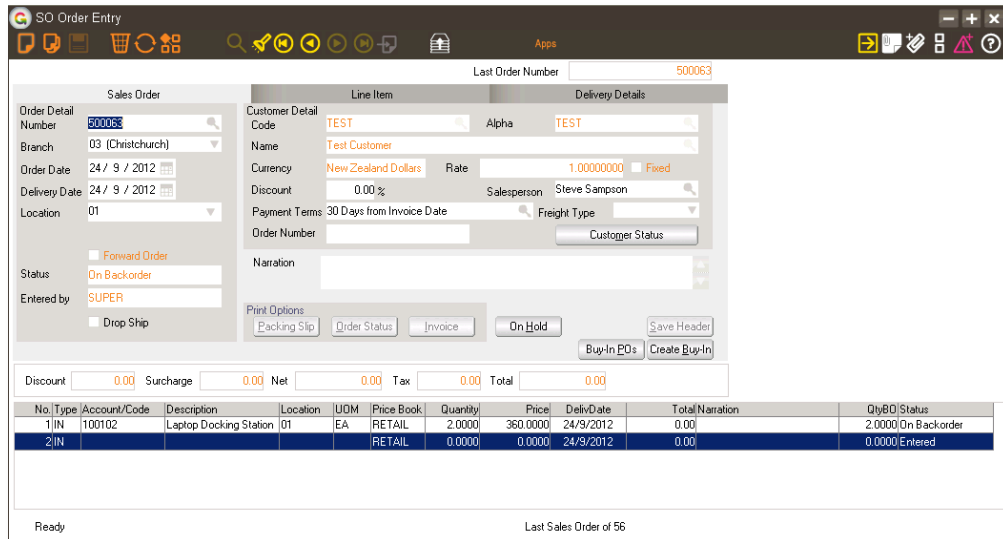
3. Complete the **Buy-In Code Maintenance** form, to set up the new Inventory Item

The screenshot shows the 'Buy-In Code Maintenance' application window. The form contains the following fields and values: Code (empty), Description (Laptop Docking Station), Sub-group (BuyIn Item()), Supplier Alpha (TEST), Name (Test Supplier abc), Code (TEST), Supplier's Part (BR4851), Unit Of Measure (EA), Cost (120.00), Selling Price (360.00), Customer Order Quantity (2), and Supplier Order Quantity (2).

- Code** Enter a Code for the item or leave blank for the system to allocate the next available Code
- Description** Enter a Description for the item
- Sub-group** Choose the Inventory Tree branch applicable for the item from the drop-down. This is a sub-branch of the Group Tree specified in the Buy In Code Module Control (see the Implementation Guide below)
- Supplier** Select the Supplier for the item
- Supplier's Part** Enter a Supplier's Part Number (optional)
- Unit of Measure** The Unit of Measure will default from the IN Module Control settings, but may be changed if required
- Cost** Enter the actual cost the supplier will invoice you for this item. This field is mandatory and must not be zero
- Selling Price** Set the Price the customer will be invoiced. The Selling Price defaults to 3 X Cost but may be altered manually
- Customer Order Quantity** Enter the quantity the customer has ordered
- Supplier Order Quantity** Enter the quantity to be ordered from the Supplier. The value will default to match the Customer Order Quantity, but can be increased if you wish to order extra items for Stock. The Supplier Qty cannot be less than the Customer Qty

4. Click the **Save** button.

The Buy-In Code screen will close and a new Inventory line will be added to the Sales Order, using the data entered in the Buy In Code Maintenance screen



Note: The App has automatically created the Inventory Item and the associated Purchase Order, (which has not been sent to the supplier at this stage).

The screenshot shows the 'PO Purchase Order Entry' window. The 'Purchase Order' tab is active, displaying details for a purchase order with number 500063, dated 24/9/2012, from supplier 'TEST'. The net amount is 240.00, tax is 36.00, and the total is 276.00. A table below shows two line items: one for 'Laptop Docking Station' with a quantity of 2.0000 and price of 120.0000, and another with a quantity of 0.0000 and price of 0.0000.

No.	Type	Tax T	Account/Code	Description	SubCode/Loc	UOM/Av	Expected Date	Qty Ordered	Price	Total	Narration	Allocated Job	Activity Code
1	IN	E	100102	Laptop Docking Station	01	EA	24/9/2012	2.0000	120.0000	240.00			
2	IN	E			01		24/9/2012	0.0000	0.0000	0.00			

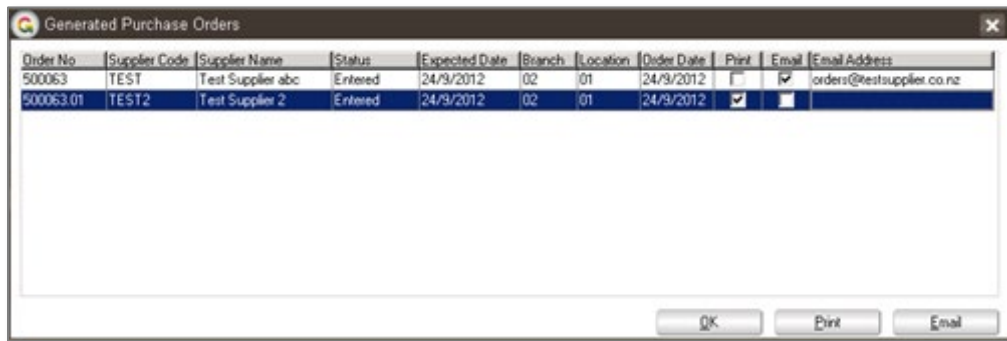
The screenshot shows the 'IN Inventory Item Maintenance' window for item 100102, 'Laptop Docking Station'. The 'Main' tab is selected, showing configuration options such as 'Analysis code' (BUYIN), 'Unit weight' (0.0000), and 'Stocking unit' (EA). A table on the right shows 'Available' quantities for various order types, with 'On-order' at 2. A 'Save details' button is visible at the top right.

Category	Item	Quantity
On-hand quantities	On-hand	0
	Committed to sales orders	0
	Picked Qty	0
	Un-picked Qty	0
Committed to factory orders	Committed to factory orders	0
	Protected	0
Available	On-order	2
	On-requisition	0
	On-shipment	0
	In-production	0
	Backorders	2
	POs Allocated to Jobs	0
	Forward orders	0
	Balance	0
	Period balances	
	Date history	

5. Continue adding Buy-In Codes or standard Inventory Items to the order as required.

Note: If you select the same supplier for subsequent Buy-In products, these items will be added to the same Purchase Order. The first Purchase Order created will be assigned the same number as the Sales Order e.g. 500063. Subsequent Purchase Orders to other suppliers have a two digit suffix added e.g. 500063.01, 500063.02 etc.

- Once you have finished adding products to the Sales Order, click the **Save** button at the top of the screen. A new window will pop up listing the Purchase Orders that have been generated for Buy In Stock



- Click the tick box in the **Print** or **Email** column to specify the out-put method for each Purchase order

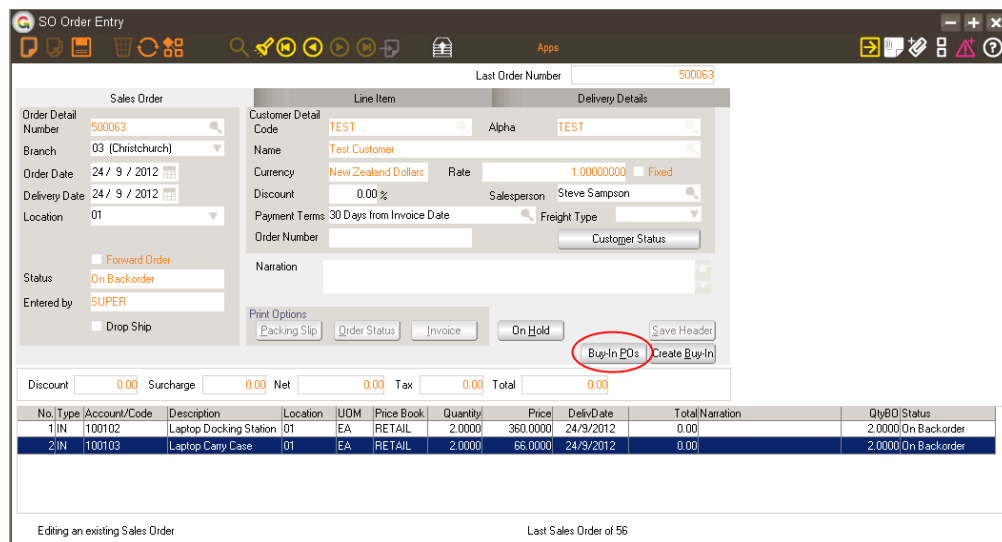
Print

Click the Print button to print Purchase Orders for those with a tick in the Print column

Email

Click the Email button to email Purchase Orders for those with a tick in the Email column

Note: The Generated Purchase Orders window can also be accessed via the **Buy-In POs** button on the Sales Order screen



Note: Standard SO/PO linking applies if in use, meaning that the Sales Order will be updated when the Purchase Order is received

ENTRY OF BUY-IN STOCK FROM A CRM QUOTE

Use the following process to use a Buy In product when creating a CRM Quote and converting it to a Sales Order.

Note: Please refer to the Configuration section of this User Guide for steps required to set the App up for use in the CRM Quote.

QUOTE CREATION

1. Select the menu item | CRM | Sales & Marketing | Quotes |
2. Complete the Quote header.
3. Add an IN line item, for a default **Buy-In Stock Item** created as part of the App Configuration. Complete the usual details including quantity, price, cost and supplier.
4. Save the Quote.

BUY-IN CODE CREATION

Note: Unless you need the correct code and description to appear on the Quote itself, we recommend you perform this step once the Quote has been accepted, to avoid creating a stock item that may never be used.

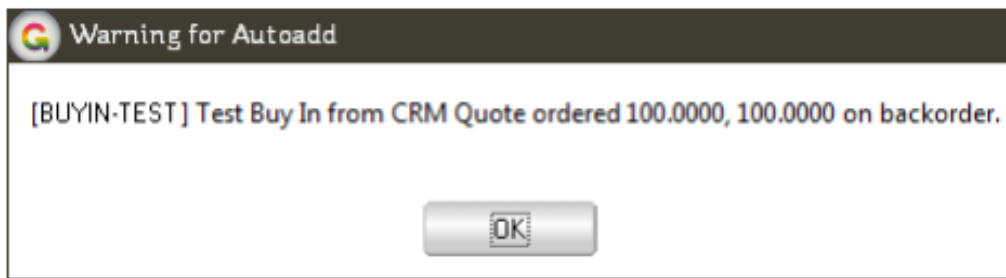
1. Click to select the line containing the default **Buy-In Stock Item** entered above.
2. Click on the **Create Buy-In** button
3. Complete the **Buy-In Code Maintenance** form, to set up the new **Inventory Item**

Code	BUYIN-TEST				
Description	Test creation of Buy-In item from a CRM Quote				
Sub-group	Acer()				
Supplier Alpha	TOYOTA	Name	Freehills Toyota	Code	2003
Supplier's Part					
Unit Of Measure	EA				
Cost	2.00				
Selling Price	6.00				
Customer Order Quantity	100.0000				

- | | |
|--------------------|--|
| Code | Enter a Code for the item or leave blank for the system to allocate the next available Code |
| Description | Enter a Description for the item |
| Sub-group | Choose the Inventory Tree branch applicable for the item from the drop-down. This is a sub-branch of the Group Tree specified in the Buy In Code Module Control (see the Implementation Guide below) |

Supplier	Select the Supplier for the item
Supplier's Part	Enter a Supplier's Part Number (optional)
Unit of Measure	The Unit of Measure will default from the IN Module Control settings, but may be changed if required
Cost	Enter the actual cost the supplier will invoice you for this item. This field is mandatory and must not be zero
Selling Price	Set the Price the customer will be invoiced. The Selling Price defaults to 3 X Cost but may be altered manually
Customer Order Quantity	Enter the quantity the customer has ordered
Supplier Order Quantity	Enter the quantity to be ordered from the Supplier. The value will default to match the Customer Order Quantity, but can be increased if you wish to order extra items for Stock. The Supplier Qty cannot be less than the Customer Qty

- The new Item will be created and will replace the default item on the **Quote**.
- Click on the **Create Sales Order** button to create a **Sales Order**.
- You'll receive the following message informing you that the new Item is on back-order.
Note: the App does not automatically create a PO when the item originates from a **Quote**.



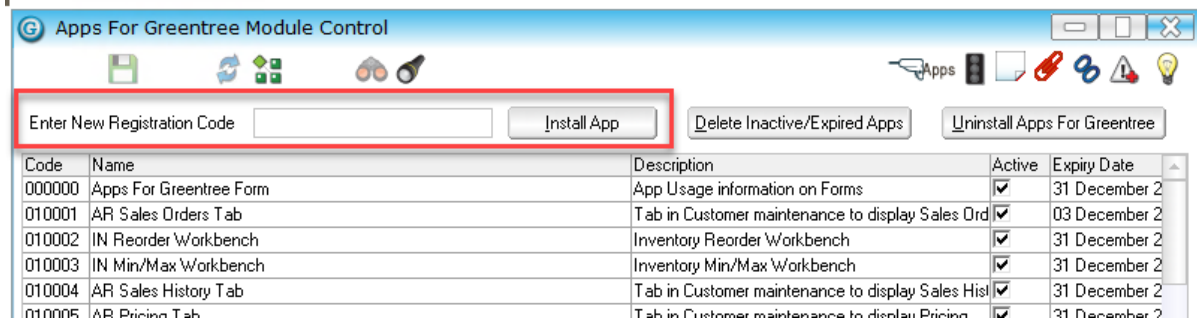
- If the system has the Greentree **SO/PO Linking** Module enabled, click on the Item in the **Sales Order** and then click on the **PO Link** button to raise an order for the item. Otherwise raise a manual **Purchase Order** to satisfy the back-order.

IMPLEMENTATION GUIDE

Please refer to the Important Notes section above before installing and configuring this App

APP INSTALLATION

1. Log into Greentree as the Super user
2. Select the menu item | System | Apps For Greentree | Apps Module Control |
3. Enter the New Registration Codes supplied and click Install App



4. Select/Highlight the Buy-in Stock App.
5. Click on the Edit Users button and select the users who will be configured to use Quick Entry of Buy-in Stock, for which companies.

APP CONFIGURATION

1. Select/Highlight the Quick Entry of Buy-in Stock App.
2. Click on the Change button

Buy-In Module Control

Stock Group Tree

Sub-group

Analysis Code

Status

Indent Item

CRM Item Status

Allow Foreign Currency Suppliers

Tree	Default Value
Items by Manufactur	
Product Catalogue	
StockItemNZ	
StockItemTree	
Webstore Catalogue	

Editing an existing IN Buy In Control

3. These settings determine:
 - a. The Group Tree & Subgroup, Analysis Code, Status and CRM Status, which will be assigned to all Buy-In Stock Items created.
 - b. Whether Buy-In items may be indented.
 - c. Whether Foreign Currency Suppliers are permitted
 - d. The Default values for any Inventory Trees assigned to new Items.

All other required fields will be populated based on your IN Module Control settings

4. **Save** and **Close** the Buy-In Module Control form.
5. **Save** and **Close** the Apps Module Control form

OTHER GREENTREE CONFIGURATION

NB: This configuration is only required if Buy-In codes are to be used when creating CRM Quotes.

1. Log in to Greentree as the *Super* user
2. Select the menu item | **System** | **Inventory** | **Module Control** |
3. Click on the **Defaults** tab
4. Ensure the option **Allow negative available** is NOT checked.

This means that new inventory items created by the App, will be forced onto backorder when a

Sales Order is raised. This is necessary to allow a Purchase Order to be raised and linked to the Sales Order.

5. Click on the **Options** tab
6. Ensure the option **Validate Locations** is NOT checked.
If this setting is required to be checked, it will require the user to specify a suitable location for each Buy-In code prior to saving the Order or Quote record on which it is included.
7. Save and close the **Inventory Module Control** screen.
8. Select the menu item | **Data Entry | Inventory | Inventory Item Maintenance |**
9. Set up one or more default **Buy-In Stock Items**, for use as a placeholder on the CRM Quote. E.g.

The screenshot shows the 'IN Inventory Item Maintenance' form. The 'Code' field is 'BUYIN' and the 'Description' is 'Default Buy-In product'. The 'Analysis code' is 'SOUND' and the 'Description' for the analysis code is 'SOUND CARDS'. The 'Decimal item unit' is '0 Decimal Places'. The 'Job activity code' is empty. The 'Type' is 'Not Serial/Lot Item'. The 'Track dimensions' checkbox is unchecked. The 'Kitsets exist' checkbox is unchecked. The 'Unit weight' is '0.0000'. The 'Unit volume' is '0.0000'. The 'Stocking unit' is 'EA'. The 'Stocktake details' section shows 'Cycle' as 'Monthly' and 'Stock ranking' as 'None'. The 'Location' field is empty. The 'Next Stocktake Date' is empty. The 'Stocktake in Progress' is empty. The 'Last' checkbox is unchecked. The 'Non diminishing' checkbox is checked. The 'Indent Item' checkbox is unchecked. The 'Keep warranty details' checkbox is unchecked. The 'Allow negative available' checkbox is unchecked. The 'Allow negative on-hand' checkbox is unchecked. The 'On-hand quantities' section shows 'On-hand' as '999999999', 'Committed to sales orders' as '0', 'Picked Qty' as '0', and 'Un-picked Qty' as '0'. The 'Committed to factory orders' is '0', 'Committed to requisitions' is '0', and 'Protected' is '0'. The 'Available' quantity is '999999999'. The 'On-order' quantity is '0', 'On-requisition' is '0', 'On-shipment' is '0', 'In-production' is '0', 'Backorders' is '0', 'POs Allocated to Jobs' is '0', and 'Forward orders' is '0'. The 'Balance' is '999999999'.

Note: the product is set up as **Non diminishing** and the setting **Allow negative available** is unchecked.

10. Save and close the **Inventory Item Maintenance** form.