

## Fuse5 Training Materials

### Product Management

#### *Purchase Orders*

You order parts from your vendors via Purchase Orders (we often refer to them simply as PO's). If you do not already do so, as a best business practice, you should ensure that every purchase that you make is based off of a Purchase Order. Even if you order something over the phone directly, and pay with a credit card at the time, you should back-fill the system with a PO for record keeping purposes. Fuse5 makes this very easy by giving you the ability to automate PO creation in many instances, such as when performing a buyout from a sales order (See the Point of Sale Module), or when receiving products (See the Receiving Module).

Every Purchase Order has a unique number that is automatically generated for it in Fuse5. In Personal & Admin > Settings > Company Details >...you can choose to edit these numbers (listed as Purchase Order Initials). You can assign specific prefixes to your PO numbers based on location so that if you have a multiple location set up, you can tell at a glance which location generated a PO. For example, one location may generate PO numbers with a prefix of "P1", and another location may be assigned "P2", etc.

There are several Purchase Orders generation options available in Fuse5, from the very traditional "Special Buy" type where you manually order products from a specific vendor to advanced "Forecasting" Purchase Orders, which automatically generate PO's from complex algorithms to set your inventory levels properly. These advanced Purchase Order generation options can combine returns along with purchases, create multiple vendor PO's simultaneously, and give you unprecedented embedded information to help you make good decisions without even having to leave the page. The various Purchase Order types will be covered in detail later in this module.

If you go to Product Management > Purchase Orders you will arrive at the Purchase Order listing page. Using the filters and searches you can see a variety of information about your company's purchase orders including the status.

Purchase Orders									
Search <input type="text"/> In <input type="text"/> <input checked="" type="radio"/> Exact match <input type="radio"/> Begins With <input type="button" value="Search Now"/> <input type="button" value="Show All"/>									
Go to Advanced Search									
A B C D E F G H I J K L M N O P Q R S T U V W X Y									
Showing 1 - 100 of 4501 <input type="button" value="1"/> <input type="button" value="2"/> <input type="button" value="3"/> <input type="button" value="4"/> <input type="button" value="5"/> Show per page: <input type="text" value="100"/> Filters: <input type="text" value="All"/>									
Calculated PPD%	Total	PO Number	Status	Created Time	Vendor Name	PO Type	For Customer #	Location	
<input type="checkbox"/>	0	\$15.00	P1-28730	Finalized	02-27-2013 06:56:05	THE VANGARD GROUP	SPECIAL BUY	zzz Jeff's Garage	Bora Bora
<input type="checkbox"/>	0	\$37.04	P1-28751	Finalized	02-26-2013 14:30:45	THE VANGARD GROUP	SPECIAL BUY	ZEAGLER AUTO SERVICE, INC.	Bora Bora
<input type="checkbox"/>	0	\$47.97	P1-28759	Finalized	02-25-2013 16:38:27	Dayco Products,LLC	SPECIAL BUY		Bora Bora
<input type="checkbox"/>	0	\$185.20	P1-28755	Finalized	02-25-2013 14:39:05	Dayco Products,LLC	SPECIAL BUY		Bora Bora
<input type="checkbox"/>	0	\$0.00	P1-28746	Order Received in Full	02-25-2013 10:35:55	Exide Technologies	SPECIAL BUY		Bora Bora
<input type="checkbox"/>	0	\$50.94	P1-28745	Order Received in Full	02-25-2013 10:31:03	Exide Technologies	SPECIAL BUY		Bora Bora
<input type="checkbox"/>	0	\$0.00	P1-28744	Order Received in Full	02-25-2013 10:24:08	Exide Technologies	SPECIAL BUY		Bora Bora
<input type="checkbox"/>	0	\$50.94	P1-28741	Order Received in Full	02-25-2013 10:20:31	Exide Technologies	SPECIAL BUY		Bora Bora
<input type="checkbox"/>	0	\$50.94	P1-28740	Order Received in Full	02-25-2013 10:17:29	Exide Technologies	SPECIAL BUY	robert Iglehart	Bora Bora

***STATUS DEFINITIONS***

<b>PO Listing Page Status</b>	<b>Definition</b>
Approved – Save As Is	PO that has been saved, but not sent. No impact to QoH
Finalized	PO is ready to be sent to vendor, QoH not affected, Quantity on Order will increase in product record
Order Received in Full	Have received by PO number or by Product and received ALL product on the PO
Order Partially Received	Have received products on the PO, but not all of them
Order Completely Canceled	PO was finalized, but all parts were canceled off the PO without receiving ANY of them
Partially Reconciled	PO has been partially received and VIR has been done on some of the parts received but not all.
Completed Reconciled	Have received the PO and used the vendor invoice reconciliation (if used)

***CAUTION: Do NOT use the F5 button to refresh your screen when doing a PO. The PO will be lost.***

**Create Purchase Order**

To create a purchase order go to Product Management > Purchase Orders > Create Purchase Orders or go to the Purchase Order listing page and hit the orange + button.

The first thing you will have to do is select the vendor you are ordering from by typing in their name in the Vendor Name field. You can partially type the name and Fuse5 will present you with a list of potential matches to choose from. Additionally, you can use the orange magnifying glass button next to the line to select from you list of vendors in Fuse5.

The next thing you will do is chose the PO Type. Depending on what you choose at this step will dictate how Fuse5 continues. Below is a description of some of the fields you see and what they do when creating a Purchsae Order.

Saved Templates:    

Purchase Order Information	
* Vendor Name	<input type="text"/> 
* PO Type	Select PO Type <input type="text"/>
By Barcode	<input type="checkbox"/>
Default Transaction Code	Normal Purchase <input type="text"/>
Order From Location	Fiji <input type="text"/>
Created By	admin <input type="text"/>

**By Barcode** – check this box in order to make the barcode column available on the PO for adding parts using a barcode scanner.

**Default Transaction Code** – defines which type of transaction you are intending for the purchase order. When acquiring products from a vendor users will not have an option to change the Transaction code as all products are considered a Normal Purchase. When using any of Return Purchase Order PO Types Users are able to choose between a Normal Return, Defect Return, Warranty Return, or Core Return.

**Default Delivery Preference** – Is the method in which it is believed that your organization will receive the products from the vendor. This can be defined in the Vendor Record so that when using that vendor to Order products the same delivery method is always defaulted. Users also have the option to change the delivery method by selecting another option from the drop down.

**Ship To Location** – Defaults to the location you are logged in to. If you are set as a distribution center in location settings you will be able to do Purchase Orders for any location.

**Created By** – Allows users to select themselves as a record that they created the purchase order. Selecting a User is required before continuing.

**Barcode** – The barcode field next to the Created by Field allows users to scan or enter in the barcode that is in the User record in the 'User Barcode' field that will identify them instead of choosing their name from the dropdown.

**The other options available in the Purchase Order Information section are as follows, but not all are used for all types of Purchase Orders.**

<b>Primary Supplier or Equivalent Parts Only</b>	<input type="checkbox"/>
<b>Order Lowest Cost Items Only</b>	<input type="checkbox"/>
<b>Ignore Overstock Locations</b>	<input type="checkbox"/>
<b>Factor Order Delay</b>	<input type="checkbox"/>
<b>Include Consignments</b>	<input type="checkbox"/>

**Primary Supplier or Equivalent Parts Only** – Check box. Checking this box will direct Fuse5 to only order parts where the vendor selected is listed as the Primary Supplier in the Product Record, or if there is an Equivalent Part entry pointing to the vendor. (see notes about Equivalent Parts and Ordering Lowest Costs at end of this document)

**Order Lowest Cost Items Only** – Check box. This works in conjunction with the “Primary Supplier or Equivalent Parts Only” check box and is only selectable if that is also checked. This will further inspect the potential products to see that not only is the selected vendor the Primary Supplier or has an Equivalent Part entry in the product file, but also that the applicable price is the lowest option available between the current cost or equivalent price entries. (see notes about Equivalent Parts and Ordering Lowest Costs at end of this document)

**Ignore Overstock Locations** – Check box. When doing an “Order to X” or “Forecast” type of purchase order, you can use Fuse5 to balance your inventory across multiple locations by shifting overstock to locations that are under stocked before ordering new products. Understocked is defined as having a Quantity On Hand less than the order point the order or suggested quantity (this is used with Forecast-Simple PO types) is being created to. Overstocked is defined as having a Quantity On Hand that is greater than the order point or suggested qty the purchase order is being created to. Checking this box will cause Fuse5 to ignore any overstock at other locations and order products for selected locations according to the purchase order method selected. Ex. If you do NOT choose this option and you are doing an order to max for three locations where the order to max number is 5 in each location. If one location has 2, the second has 4, and the third has 20....the TA (Total Available) will be 26. If you were to CHOOSE this feature then the TA would be only 11. Fuse5 would NOT count anything above the order point as available as you have chosen to ignore overstock. This feature would most likely be used if you do not transfer product among locations regularly, rather you want them to keep their overstock and order enough at the warehouse to bring your other locations back up to the ordering point. This has no functionality for single location set ups.

**Factor Order Delay** – Include order delay's from Order Delay in product records. These are typically used for slow moving product that you don't necessarily want to order automatically based on preset forecasting or order to X information. Ex. You may have sold a product recently that has a part min of 1, but have only sold one in last year. You may put a order delay of 60 days so that you don't automatically re-order because you expect possibility of either a return or a long time before you sell it again. (Order Delay's can be created by going to PRODUCT MANAGEMENT > ORDER DELAY LIST > CREATE ORDER DELAY)

**Include Consignments** - Check this box if you want to include consignment quantities as part of your QoH when creating a Purchase Order.

**Delayed Quantity On Order** - This setting allows users to delay the Quantity on Order from being used in calculating order quantities for Purchase Orders and Store Transfers until the specified date. Once the date has passed, the products on the Purchase Order will show up as normal Quantity on Order.

If you need to change the date when you want the Delayed Quantity on Order to expire, click the associated value in any product record. If you need to update all of the products in the Purchase Order, click on the Purchase Order link in the Delayed Quantity on Order pop-up. From this new Purchase Order detail page users may modify the dates on individual PO line items or modify all of the products on the Purchase Order under the Purchase Order Information header.

Notes:

1. This option will only be available if the Custom Setting called 'Delayed Quantity on Order' is turned On.
2. It is likely advisable to expire the Delayed Quantity on Order some time in advance of the expected receipt date of the Purchase Order depending on how sure you are of the date of receipt and how you want the Quantity on Order to affect Store Transfers and other Purchase Orders when that date gets closer.

**Leave Cores On Hand** - This option is only available on Defect or Warranty RGN's. Selecting this option will result in the retention of all cores associated with the products included in the PO. The Core Qty On Hand for products with cores will increase when the RGN is finalized and there will be no Core Price Total on the RGN.

**Ignore Vendor Core Qty** - Fuse5 will normally restrict your ability to return more cores to a Vendor than have been purchased from that Vendor. When you select this option, 'Get Products' will ignore the Vendor Core Qty and return all Cores available in the current Location in the associated Lines Purchased for that Vendor.

When this option is checked, the described check against purchases from that Vendor will be ignored and all Core Qty On Hand for all lines selected will load into the Purchase Order.

Note: The internal Vendor Core Log will be based on Purchase Orders that are newly received. You may find that some of your existing Core Quantity On Hand is not currently associated with any specific Vendor. In this case, simply use the 'Ignore Vendor Core Qty' option and all Cores will be added.

**Reorder To** - When using the PO Type of Order To Min, Order To Max, or Order to Order Point users can select another Order Point in this setting to affect the Ordering behavior and to use two order points in conjunction with each other. The default setting for the Reorder To is to be the same as the PO Type. For example if a Order to Order Point is selected as the PO Type then the Reorder To will also be Order To Order Point. In this situation if the QOH is 5 and the Part Order Point In the product record is 10 then Fuse5 will suggest to order 5 of the product to achieve a QOH of 10 when the PO is received. If a

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User selects PO Type of Order To Order Point and a Reorder To of Part Max and the product has a Part order point of 10, Part Max of 0 and a QOH of 5 Fuse5 will not order the part. In this situation the Reorder To is the Part Max of 0 and acts as the trigger for when Fuse5 will suggest to order more of this product. When the product gets to a QOH of 0 then Fuse5 will Reorder up to the PO Type selected which in this case is the Part Order Point.

**Order Point Option** - This setting allows you to restrict the Purchase Order to Products with the current Vendor used as the 'Primary Supplier', restrict the Product from ordering Products from specified 'Primary Suppliers' or the default, which is to consider all Products in the selected Linecodes. Vendors that have the Vendor setting Manufacturer/Supplier set to Supplier or Both will display as an option to exclude.

### Related Setting

Product field - 'Primary Supplier'

Vendor field- 'Manufacturer/Supplier'

### *Order Delay List*

Order Delay List – Found under the Product Management tab. Used to set up Line Code, sales rank code, and number of days to delay ordering an item on a PO even if through forecast or order point logic the PO would normally order it. When creating a PO you have an option to push a button to follow these rules if set up. Essentially, if you have a slow mover that you don't want to order for example for 30 days after it becomes eligible for re-order, this is the tool you would use to set that up.

Create Order Delay					
Order Delay					
Line Code			Rank Group		
Subline	NONE		Sales Rank Code		
Product Division			Delay Days		

## Purchase Order Types

### Special Buy

A Special Buy Purchase Order is the most basic and traditional type of PO generation and it is the default selection when you create a new PO. With “Special Buy” selected, you simply start manually entering products to be included on the PO once a Vendor is selected. Reorder Status, Quantity on hand, Order Points and Sales history are all not considered when doing this type of Purchase Order. Buy Outs from the Point of sales are considered to be Special Buy Purchase Orders.

### **Forecast – Simple**

A Forecast - Simple PO will automatically suggest to order products from a vendor based on the lines that they carry. This process is based on a complex forecasting logic built into Fuse5 that suggests an Order Quantity based on the Sales History in a specified Time Period and the Amount of Days that the Users is wanting to Stock Inventory for. In suggesting an Order Qty in this method of ordering, Fuse5 Calculates the Average Daily Demand by summing the amount of sales occurred in the selected timeframe and dividing by the number of days in the period. For example if the number of sales in a 30 day period was 15 then the Average Daily Demand would be  $15 \text{ Sales} / 30 \text{ Number of days} = 0.50$  or every day there is half a sale of the product. (essentially the location is averaging 1 sale every other day). Fuse5 will then look at the Days Inventory that was suggested and multiple it by the Average Daily Demand. For example if the Average Daily Demand is 0.50 and the user wants to stock this line for 30 Days Fuse5 would suggest to order Days Inventory of  $30 \text{ Days} \times 0.50$  the Average daily demand and suggest to order a qty of 15 on the purchase order. (This is given that the Quantity on Hand is 0 and there are not other factors used to manipulate the Order Qty, Backorder Qty and Round up Options can change what the Suggested Order Qty is).

When Creating a Forecast Simple Purchase Order users will Specify the Days Inventory and Period Used to Calculate Average Daily Demand in the 'Forecasting Variables' section.

Forecasting Variables	
<b>Days Inventory</b> ?	Manual Entry: <input type="text" value="30"/> <input type="checkbox"/> Make Entry Default Across Line <b>by Sales Rank</b> ?
<b>Period Used to Calculate Average Daily Demand</b> ?	<input checked="" type="radio"/> Use Default: 26 Weeks Prior <input type="radio"/> Manual Entry: <input type="text"/> Weeks Prior <input type="checkbox"/> Make Entry Default Across Line <input type="radio"/> Period Selected: <input type="text" value="Start Week"/> - <input type="text" value="End Week"/> <input type="button" value="X"/>

**Days Inventory** – This is the number of days that Fuse5 will forecast required inventory for. For example, if you wish to stock enough of a certain product to last for two weeks, you would enter a value of fourteen days here. Typically 15, 30, 60 or 90 day periods are entered manually here but Fuse5 will suggest a Order Qty for any entered period.

**By Sales Rank** – allows users to use a different days inventory for products that have been calculated to be specific Sales ranks. You can enter a sales rank in a product record either manually by product, through an import, or by using the Product Re-Rank Report (found under DATA TOOLS > REPORTS) to rank your products based on sales history. If you use sales ranks and want to consider sales rank when doing forecast purchase orders you have the ability to do so. If you want to order a different number of days inventory for each sales rank simply click the “by Sales Rank” button and you will get a pop up that allows you to enter the number of days for each of the seven sales ranks available.

**Period Used to Calculate Average Daily Demand** – This is used to designate the sales history time period you want Fuse5 to sum up the number of sales in that period when doing the forecast. You can choose the default, 26 weeks, or can do a manual entry for any number of weeks you want. 26

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Weeks represents the 6 months prior to the current day. Other common manual entries are 52 to sum up the sales in the previous years time. Additionally, you can use PERIOD SELECT to establish a specific period of time you want evaluated (useful for evaluating seasonal demand).

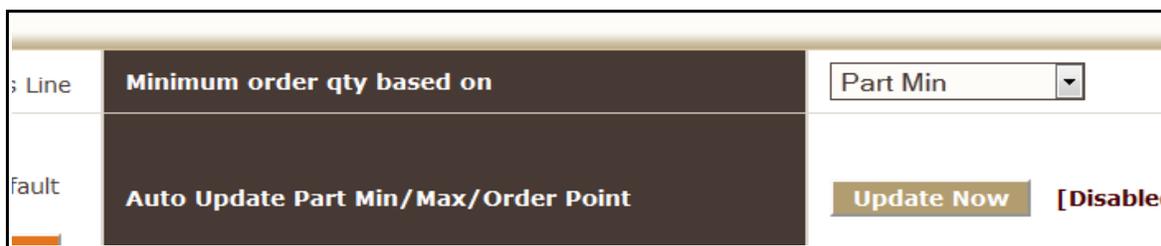
**Auto Update Part Min/Max/Order Point** – This allows you to update selected fields in the Product record(s) with new values that have been calculated by the Fuse5 forecasting logic. After you have hit the “Get Product” button, the “Update Now” button will become selectable. Clicking on it will cause a pop-up window to load. Here you will be able to select which field in the product record(s) you wish to update (Part Min, Part Max, or Order Point), which parts or lines you want to auto-update, and which locations you wish to include in the process (if you have multiple locations).

NOTE: THIS IS THE OLD FUNCTIONALTIY FOR UPDATING PRODUCTS ORDER POINTS BASED ON SALES HISTORY. It is the recommended to use the 'Order Point Calculations' report or the 'Warehouse Order Point Calculations' report to update the Order points in your system. These reports are located in the Data tools > Reports section and provide greater functionality for updating order points and ease of use.

### Forecast – Simple W/Order Points

The process is the same as a forecast PO with a few exceptions. Forecast Simple w/Order Points PO Type considers both the Order Point of the product and the Sales History of the product in determining which quantity of products to order.

**Minumum order Qty Based On** – In addition to picking the forecasting variables(see above for further detial), Users must choose the Minimum order qty based on (Part Min, Part Max, Part Order Point). This is the Order Point that will be considered along with the Forecasting Variables when determing the Suggested Order Quantity of the product on this type of PO.



The screenshot shows a software interface with two rows of settings. The first row is labeled 'Line' and has a dark background with the text 'Minimum order qty based on' and a dropdown menu set to 'Part Min'. The second row is labeled 'fault' and has a dark background with the text 'Auto Update Part Min/Max/Order Point', a yellow 'Update Now' button, and a red '[Disable]' button.

**Forecast w/ Order Points Options** – Three options can be selected that will change the suggested Order Quantity of the product and how the two types of ordering work together. This option is only available with Purchase Order type Forecast SIMPLE w/ ORDER POINTS. The three options in this setting are: **Forecast then O2X**, **Greater of Forecast vs O2X**, and **Forecast + Order Points**.

**Forecast then O2X** - Fuse5 will calculate the forecast value for each location then, if the calculated order quantity from forecast is zero, Fuse5 will add the selected Order Point order quantity

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to the Purchase Order. (It is possible to have both a PO line item for the same Product for Forecast & O2X when some selected locations have sales history but others do not.)

**Greater of Forecast vs O2X** - Fuse5 calculates the forecast order quantity then if that value is less than the selected Order Point, Fuse5 will add a 2nd Purchase Order line item for the difference between the forecast order quantity and the selected Order Point.

**Forecast + Order Points** - Fuse5 will calculate the Forecast order for each location then, in addition to that, Fuse5 will calculate the Order Point order for each location

When ready to populate the Purchase Order with Suggested products click the GET PRODUCTS button. You will get a few pop ups asking you to confirm that this is the action you want to take and that the process may take some time to execute. You will then get the Forecast with Order Points pop up.

Forecast with Order POints

Do you want us to run a forecast w/ order points PO and list the rest of the parts in Yellow, or just get list every product in the line based on the filter below?

Forecast & Order Points & all the rest

OK Cancel

You have a drop down with the following options:

1. **Forecast & Order Points & all the rest** – This will populate all products that Fuse5 is suggesting you order based off the forecasting logic you entered (FORECAST), then it will populate all products NOT in the forecast at the appropriate ordering point (ORDER POINT), and finally it will populate ALL other products in the selected line, whether set to reorder or not, with an order quantity of one (REST).
2. **Forecast & Order Points** – same as previous, but will leave off the rest.
3. **Just the rest** – will leave off products based on forecast and order point.

Do you want us to run a forecast w/ order points PO and list the rest of the parts in Yellow, or just get list every product in the line below?

Just the Rest

There are 3 total Rest products for the selected line codes. Would you like us to add ALL of these to this PO?

Yes

OK Cancel

If the user chooses Just the Rest, you will get a line that shows you the number of products that qualify as the REST, and the ability to choose to use a filter to narrow down your search even more.

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Use Filter ▾

Min Ord Qty ▾ is ▾

More Fewer

OK Cancel

If the User chooses 'Forecast & Order Points & all the Rest', or 'Forecast & Order Points' Fuse5 will Display in the Transaction column where the suggested Order Qty is derived from. Forecast, Order Points, Or The Rest will be displayed.

<input type="checkbox"/>	35	Normal Purchase ▾ <b>Forecast</b>
<input type="checkbox"/>	47	Normal Purchase ▾ <b>Order Points</b>
<input type="checkbox"/>	48	Normal Purchase ▾ <b>The Rest</b>

### Order to Min

The overall process is similar to the Forecast PO described above, just without the extra forecasting options. With an Order to Min, Users have already told Fuse5 how many to Order by setting the Part Min in the Product Record. The Process consists of selecting your vendor, set the PO type to “Order to Min”, and then selecting which vendor lines in the Lines Purchased section that the user intends to be included on the PO. When the user clicks “Get Products”, Fuse5 will populate a Purchase Order that will suggest products in the selected lines to get the “Quantity on Hand” equal to the “Part Min” set in the product record. For example: If a Part Min is 5 and the QOH is 0 for a product that is on the Selected Line, Fuse5 will suggest to Order 5 of the Selected product if the Reorder Status is Yes in the location the Purchase Order is being created for.

### Order to Max

This is just like the “Order to Min” operation, except that instead of setting inventory levels based on Part Min set in the product record Fuse5 will look at the Part Max and to suggest products of the selected Linecodes of the “Quantity On Hand” equal to the Part Max.

### **Order to Order Point**

This is just like the “Order to Min” and “Order to Max” operations, except that instead of setting inventory levels based on Part Min or Part Max products to stock, Fuse5 will look at the Part Order Point.

### **Special Return**

Similar to a Special Buy purchase order, a Special Return purchase order allows users to manually add products to a Purchase order. Users will select their Vendor and PO Type Special Return and then type the product # that they intend to return to their vendor.

### **Return Order to Min**

This will automatically create a Return Purchase Order or an RGN that has “Normal Return” to reduce the Quantity on Hand of the Selected Linecode products to the Part Min setting in the product record. For example if the Quantity on Hand is 15 and the Part Min is 10, Fuse5 will suggest to return a Quantity of 5 to the Selected vendor.

*Note: On product returns, if you have multiple suppliers for a product, Fuse5 does not currently distinguish where a part came from when returning it to a vendor on a PO.*

*Note: When Return Purchase Orders are finalized Fuse5 will reduce the Quantity On Hand in the part record by the 'Order Quantity' on the Purchase. Canceling products on a Return Purchase Order will return the Quantity On Hand to the part record.*

### **Return Order to Max**

Return Order to Max is Similar to Return Order to Min, only using Part Max number in the product record to determine what quantity to return to the vendor.

### **Return Order to Order Point**

Return Order to Order Point is Similar to Return Order to Min/Max, only using Part Order Point number in the product record to determine what quantity to return to the vendor.

### **Return Cores**

Return Cores PO Type Allows for Users to Return the Cores that Accounts have returned to them from the Point of Sales by creating this type of Purchase Order. After selecting “Return Cores” PO Type and the vendor then select which lines in the Lines Purchased that you would like to consider on the Purchase order. Fuse5 will query the products in the selected lines to see if there is a Core Quantity on Hand in product record of those parts. This occurs when the user selects the “Get Products” button.

### **Return Warranty**

Return Warranty PO Type allows for Users to products that have been returned at the Point of Sales as a Warranty Return. If you have products that have been returned to you by your Accounts that you want to ship back to the vendor for refund/credit/etc., you create a “Return Warranty” PO to that vendor and select which lines you wish to include. When you click the “Get Products” button, Fuse5 will create a PO for the selected lines based on the “Warranty Qty on Hand” value in the product records.

### **Return Defect**

Return Defect PO Type will allow Users to have products that have been returned at the Point Of Sales to you by your Accounts that you want to receive a refund/credit/etc. for from a vendor, but are not required to ship the items back (they are broken and the vendor has told you to simply throw them away), you create a “Return Defect” PO to that vendor and select which lines you wish to include. When you click the “Get Products” button, Fuse5 will create a PO for the selected lines based on the “Defect Qty on Hand” value in the product records. Even though no products are being shipped, this is a way to clear your defect quantities and establish a paper trail for record keeping purposes.

*Return Defect and Return Warranty can be used interchangeably depending on your internal policies. The definition of what is considered a Defect or a Warranty is completely dependent on your organization. The Process of returning a Product at the Point of Sales and in Purchase Orders is reliant on the Users selecting the correct Transaction Codes when Processing the Sales.*

### **Return Forecast**

This function is the same as Forecast purchase order, except that instead of increasing existing inventory to achieve the number dictated by the forecasting logic, it reduces existing inventory to achieve that number for products that are stocked beyond it. Also similar to a Return to Min, Max or Order Point except for the Forecasting Parameters

### **Return Reorder No**

Return all products in the selected line(s) that have the “Reorder” field in their product record set to “No” to your selected Vendor. This would be best used when returning products that are not regularly stocked in the location to your Vendor.

### **Return to Zero**

Return all products in the selected line(s) regardless of reorder status to your vendor. This is best when products are being discontinued or the product lines are no longer being stocked.

### Highest Order Points

Users can select multiple order points with the PO Type 'Highest Order Point' and the highest of the selected order points will be used to determine the Order Qty that is needed for the Purchase order. Select a Vendor and the PO Type "Highest Order Point" and notice a Order Points Selection section is not available. Users can then Select Part Min or Part Max or Part Order Point as well as all any combination to be considered as the Order Point that the Order Qty will be calculated using. Follow the same steps as the other Order to Order Point Purchase orders and select Linecodes and click the Get Products button.



### Buyout Return

Users should select to use this PO Type to return Buyout Products that were sold at the Point of Sales and Returned. Buyouts are a specific type of Special Buy that is done at the Point Of Sales and is for a particular Account. Generally these are products that are not usually kept in stock in inventory but can be purchased for Accounts if they need that particular product. When those products are Returned at the Point of Sales and the Users chooses not to Automatically create a Return Purchase Order from Point of Sales, Fuse5 will suggest to Return all of the Returned Buyout Returns using this PO Type. Similar to the other Return Purchase Orders the Vendor and Linecodes need to be selected to automatically generate this type of Purchase Order. If the Product was already returned with another type of Return PO such as a Special Buy or Reorder No, then the product will not appear when generating this type of Purchase Order. In addition users have the ability to select Normal Returns, Core Returns, Warranty Returns or Defect Returns when generating this PO Type.

### Additional Options After Filling Out Purchase Order Information Section

Any automatically generated purchase order, such as the Forecast PO or one of the "Order to X" (Order to Min, Order to Max, Or Order to Order Point) types presents Users with some further options which allow you to refine how the Purchase Order is populated.

**You're ordering from a Distribution Center: Select additional locations you're ordering for.** - If the location you are ordering from is a Distribution Center, which is set up in the Company Details, then users will have the option to select multiple locations other than their current location to be considered in the Purchase Order Order Qty as well.



### Select Linecodes:

This is used to choose which lines you want to include on the PO. The list of lines presented to you to choose from comes from the “Lines Purchased” setting in the vendor record. You can either check each individual line with the check box next to it or use the Select/Deselect All button at the bottom to choose all lines at the same time. The Lines Purchased in the Vendor Record represent the products lines that you order from that vendor. For Order To X type purchase orders and Forecasting type Purchase Orders this must be selected in the vendor otherwise users will not have any options for Linecodes to select here.

**Alternate Part Ordering Options :**

Fuse5 has the ability to automatically reduce the Order Qty of a product based on whether an Alternate Product to the part being ordered has Quantity On Hand to fulfill the Order Point or Suggested Order Quantity based on the Forecast Variables. An Alternate Part in Fuse5 is defined as an interchangeable part that both fit the same vehicle. An example of this would be a generic and an OE Part.

**Reduce Purchase Qty Based on Alternate Parts** - This is the most commonly used option for Alternate Part Ordering and when checked will not suggest the ordering of additional quantity of inventory of products when there are enough quantity of Alternate to fulfill the Order point.

**Only Reorder No** – By default, Reduce Purchase Qty Based on Alternate Parts will reduce purchase quantity based on all *Alternate Part #'s* in the Product record. When **Only Reorder No** is also selected, Fuse5 will only reduce purchase quantity when the *Alternate Part #'s* in the Product record are Reorder = No Products. Only Reorder No is available to select when the option for Reduce Purchase Qty Based on Alternate Parts is also selected.

**Only O2X = 0** - By default, *Reduce Purchase Qty Based on Alternate Parts* will reduce purchase quantity based on all *Alternate Part #'s* in the Product record. When Only O2X = 0 is also selected, Fuse5 will only reduce purchase quantity when the *Alternate Part #'s* in the Product record also have all three O2X values (Part Min, Part Max & Part Order Point) set to 0. Only O2X = 0 is available to select when the option for Reduce Purchase Qty Based on Alternate Parts is also selected.

Note: If you are ordering with Alternates or use Alternate or have Alternate products populated in the Part Record, Fuse5 will Automatically display the number of Alternates that are currently in your system by default when ordering. Under the TA Column is where you will see this information. The Number is bolded and will say 'Summed Total of Alternate QOH.

QoH		TA
121	WH	70
MTD: 0	YTD: 0	65, 0, 0, --N, W
LYS: 110	L12: 1	, W
YDR: 0	LYR: 0	<b>0</b>
		<b>149</b>
		Summed total of Alternate QoH

When users click on this number Fuse5 will display in a pop up the Linecode, Part #, Part Name, Qty On Hand, Sell Price and List Price of the Alternate products. This is another way to determine if the Alternate Part needs to be ordered without automatically reducing the Inventory.

Alternate Parts					
Line Code : <b>CJG</b>		Product # : <b>0003</b>			
Alternate Parts					
Linecode	Part #	Part Name	Qty on Hand	Sell Price \$	List Price \$
CJG	<b>0009</b>	Training Product	149	21.600	21.600

**Round Up Options-**

If you have a rule in the product record that applies to “Factoring Minimum Order Qty”, “Buy Qty”, “Vendor Order Increment”, “Purchase Increment”, or “Per Car Qty”.....by selecting the appropriate Round Up Option you will ensure that the PO follows the rule within the product record.

**Factor Minimum Order Quantity:** Set in the product record under FORECASTING INFORMATION. This is the minimum size of an order specified by the vendor. Can also be used if user gets a “discount” for a certain quantity and wants to set that quantity here.

**Buy Qty:** Set in the product record under FORECASTING INFORMATION. This is determined by the user rather than the vendor. If you have a minimum that you would want included on a PO you would set that in the product record using this line item.

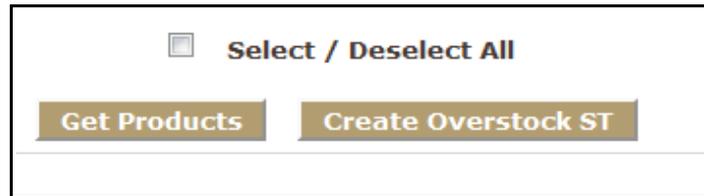
**Vendor Order Increment (PUOM):** Set in the product record under PURCHASING INFORMATION. This is determined by the vendor rather than the user and corresponds to the Vendor Order Increment (PUOM). The unit of measure is chosen under the Vendor Order Increment (PUOM), the number of units is selected here.

**Purchase Increment:** Set in the product record under PURCHASING INFORMATION. This is determined by the user rather than the vendor. If you have a minimum that you would want included on a PO you would set that in the product record using this line item. Same functionality as the BUY Qty, just depends on which number you are used to using.

**Per Car Qty:** (TARGET INVENTORY STOCKING LEVEL RATHER THAN A PURCHASE INCREMENT) Set in the product record under FORECASTING INFORMATION. This is determined by the subscriber rather than the vendor. The line to make this yes/no selection is labeled “Multiply FCST By Per Car”. If set at no, it does nothing. If set at yes, the system will order in increments designated by the user under “Per Car Qty” which is the last item on the left side of the product record under LOCATION INFORMATION. (ex. Rotors, you will sell one, but when ordering you want to

ensure you have sets of two)

**Create Overstock ST** – will generate a series of store transfers from other locations that are over the ordering point selected in the From Location and are Under the Order Point in the To Location. As the user you will get a pop up that shows all the overstock products in each combination of locations To and From. Users then have the ability to create store transfers prior to finishing your Purchase Order.



When creating store transfers from the PO, the Fuse5 system will use your Store Transfer priorities to determine where to pull the product from. Meaning that if two locations need the same product to fullfill their overpoint Fuse5 will use a priority list to determine which location will receive the Store Transfer.

### Setting up Location Priority for Store Transfers

This can be done under Personal & Admin > Settings > Company Details. Select the EDIT button for the location you want to set up. Towards the very bottom of the pop up box is the Location Priority for Store Transfers setting. Simply push the stores from left to right in the order that you would prefer to do store transfers. This will probably be driven by proximity or transportation costs. This is used if you are doing automated store transfers, particularly from a PO.



**TEMPLATES:** Users can save a set of critria that is routinely used to geneate Purchase Orders as a Template. This template can then be shared with others users and set to generate a Purchase Order Automatically. The Purcahse Order template can be accessed again, similar to doing templates with Store Transfers. After Selecting the criteria for the Purchase Order, users can then enter a name (make sure it's something you will remember) in the “Save Data As Template” box and clicking SAVE TEMPLATE. By Naming and Saving the Template, the Template will now be avalaibe in the Saved Templates Drop Down at the top of the Create Purchase Order screen.

## Fuse5 Training Materials



The calendar icon with the orange x allows you to delete templates.

The orange triangle allows the user to create PO alerts.

To create an alert choose the template you want and push the alert button. The “Add Report Alerts for \_\_\_\_\_” pops up.

**Create PO Alert**

---

**Add Report Alerts for Gates Alert Test** **Fuse5**

Generate Report on :

Every :  Monday  Tuesday  Wednesday  Thursday  Friday » And / Or ↻

Every : -- of Each Month » And / Or ↻

Time : 00 » And ↻

Create PO :  Save as Pending

Based On PPD? :

PPD(%) : 100

**Add Report Alert** **Close**

---

**List of Alerts for Gates Alert Test Report**

Showing 1 - 6 of 6

#	Alert At	Tool	#	Alert At	Tool
1	On 03-07-2013 <b>Time:</b> 00:00:00		2	Every Monday <b>Time:</b> 00:00:00	
3	Every Tuesday <b>Time:</b> 00:00:00		4	Every Wednesday of Month <b>Time:</b> 00:00:00	
5	Every Thursday of Month <b>Time:</b> 00:00:00		6	Every Friday <b>Time:</b> 00:00:00	

Generate Report on: - choose the date you want the alert to start

Every: - choose the weekdays you want to receive the alerts

Every: - use the drop down if you want to receive on a certain day each month

Time: - choose what time you want the alert to pop up

The above options can be used together to specify when the PO Template will run. For example: A PO Template can Run every Monday and/or Every 15<sup>th</sup> of the Month.

Create PO: - if checked a pending PO will be created based on the PPD criteria

Based on PPD?: - check to base on PPD

PPD(%) - choose the PPD % you want as the benchmark for creating the PO

The third icon allows you to choose which users will have access to the template.

**Once you have set up the PO the way you want it, use the GET PRODUCT button to populate line items for forecast or order to X purchase orders.**

**Product Details Line Items**

Del	#	Transaction	Line Code	Product #	Product Name
<input type="checkbox"/>	1	Normal Purchase	WIX	BOTEST	

**Transaction** - For Purchase PO types there is one transaction type that can be chosen...normal purchase. Purchase PO Types include Order to Order Point Purchase Orders, Special Buy, Forecast-Simple, Forecast-Simple W/ Order Points and Highest Order Points. For Return PO type Purchase Orders there are four types of transactions that you may use: “Normal Return”, “Core Return”, “Warranty Return”, and “Defect Return”. These can be mixed in the same Purchase Order For Return PO Types. You can also set the “Default Transaction Code” at the top, which will make every new transaction default to that selection. This saves time in the case of a long, repetitive Return Purchase Orders.

**Line Code** – Line Code of the product being added to the Purchase Order

**Product Number** – Product number of the product being added to the Purchase Order

**Add Comments** – PO Part Notes is a field in the product record. Comments can be added to the Purchase Order either from the product record or when creating a Purchase Order. These notes will default to NOT print on the hard copy of your purchase order. Do you want to have PO Part notes printed on the your Purchase Orders? There is a custom setting called 'Print PO Part Notes on Purchase Orders' that will allow you to do so. To find this setting go to Personal and Admin > Settings > Custom Settings > Print PO Part Notes on Purchase Orders.

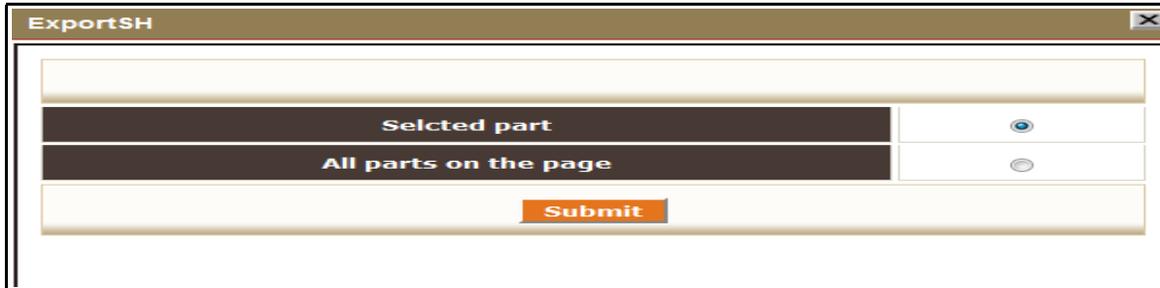
When this setting is turned ON, PO Part notes will print on PO's. When this setting is OFF, PO Part notes will not print on PO's.

**Icons Under the Product Number (you can hover over them to see the names)**

**Camera Icon** – Allows you to see the product image if it's available in the catalog (this only pulls the Epicor Catalog Images)

**Calendar Icon** – Allows you to go into the product record

**Export ST Detail Icon** – Allows you to export the product(s) from the ST to a spreadsheet



**Sales History Graph** – Allows you to access the sales history graph for that product. Changes to Order Points and Reorder Statuses can be done for all locations from this Pop Up. Users can even create Store Transfer from this pop up

**BG (Buyers Guide) Icon** – Allows you to access the buyers guide in the catalog for this product (if you have the catalog service and if the product is in the catalog)

**Trash Can** – Allows you to delete products from the Purchase Order.

**Add Comments** – Allows you to add a comment to an individual product on the Purchase Order.

**Product Name** – Product name from product record, generally used to store the Product Description.

QoH		TA	Order Qty	VOQ	Cost	Core Cost
0   WH		0	1		1.84	0.00
MTD: 0	YTD: 0	0, 0, , X	2, 5, 15		Cost Ext: 0.00	Core Cost Ext: 0.00
LYS: 0	L12: 0		1, 0, 0, 1			
YDR: 0	LYR: 0					

**QoH** – Quantity On Hand 0 (or number) – Quantity you currently have on hand.

WH – Part availability at Vendor's Warehouse (if you have access to it, This is set up in the Vendor see the Training Materials for EDI.

MTD - Month to Date Sales

YTD - Year to Date Sales

LYS: Last Year Sales (last calendar year)

## Fuse5 Training Materials

L12: Last 12 Months Sales

YDR: Year to Date Returns

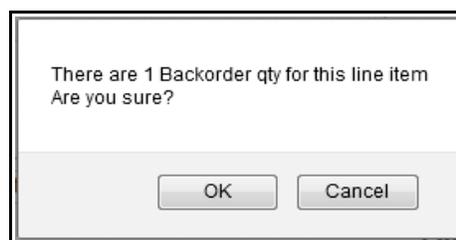
LYR: Last Years Returns (last calendar year)

**TA** – Total Available in your inventory. If you hover over the numbers underneath you will see that you have access to Quantity on Order, Vendor Backorder Quantity, Customer Backorder Quantity, Sales Rank, Qty of Alterate Parts and the Vendor Pop Code (if these fields are populated in the product record). The Customer Backorder Quantity is highlighted in orange to draw your attention. Additionally, if you attempt to delete a product that is on backorder for a customer you will get a pop up that reminds you it is on backorder.

In the example below you see that there is 0 Total Available, 0 Quantity on Order, 0 Vendor Backorder Quantity, and 1 on Customer Backorder. This PO was an order to min. Notice that because there is 0 Total Available, 1 on Backorder, and a Part Min of 5, the Purchase order Logic is seeking to order a quantity of 6. A Quantity of 5 to fulfill the Part Min and then 1 for the Quantity that is on backorder.

TA	Order Qty
0	<input type="text" value="6"/>
0, 0	5, 15, 10
1	0, 0, 0, 0

If you attempt to delete this product from the PO you get the following pop up which forces the user to be extra cautious when deleting parts that are on customer backorder.



**Order Qty** – This is the quantity that you are set to order. If you hover over the numbers underneath you will see that you have access to the Part Min, Part Max and Part Order point. Additionally, you can see the Purchase Increment, Vendor Increment, Buy Quantity, and Minimum Order Quantity if they have been set in the product records. In this column users are able to update the Part Min, Part Max, and Part Order Point that will be saved to the product record using the pencil icon that comes up when you hover over them.

**VOQ** – Vendor Order Quantity, these populate when using the Round Up Options for Vendor Order Increment (PUOM).

**Cost** - The value in the cost column is pulled from the product record. There are several cost fields in the product record, so how does Fuse5 decide which one to use? This distinction is established in the Vendor Record field “Pull Cost Price From” field. This setting allows the Users to select where the Cost will pull from such as the Current Cost, Alternate Cost 1, Alternate Cost 2 or Alternate Cost 3. This gives you the ability to import different vendor prices into different cost fields in a product record.

For example, maybe you always import price sheets from a certain vendor into the “Alternate Cost 1” field. This allows Fuse5 to keep multiple vendor prices in a single product record, and then automatically call up the correct price to populate your Purchase Orders for that vendor. Current Cost and the three alternate cost fields are located under the Purchasing Information section for each product.

*Note: The “M” Cost fields in the product record are not used for pulling prices into purchase orders. Only the current cost and alternate cost fields in the product record are used for this purpose.*

Of course, you can change the purchase order cost directly on the page when creating a Purchase Order. If the Cost on the Purchase Order is changed from what is pulled in the product record, Fuse5 automatically generates a Pop up. Choosing Yes will update the Price in the Product Record. Choosing No will Update the Cost on this Purchase Order but will not update the Cost in the Product Record. Choosing Cancel will change the Cost back to the Original Cost pulled from the Part record.



*Note: If you edit the product record or the vendor record to change the product cost, you will need to delete and re-add the affected product(s) to the purchase order for the new price to populate, or simply manually change the cost field(s) to the new value. Updating the product or vendor record while you are in the process of creating a purchase order will not update the cost fields on it that are already populated. Caution: simply refreshing the purchase order page will clear any products you have already entered and begin the purchase order creation from the beginning.*

**Core Cost** – Cost to purchase the Core(s) from your vendor. This cost is stored in the Core Cost Field in the Product Record.

**Trash Can** – Allows you to delete a line on the Purchase Order.

**Freight PPD and other Billing Information**

<b>Freight PPD Based On:</b>	<b>Units</b>	<b>Freight PPD:</b>	<b>0.00</b>	<b>Current:</b>	<b>17.00</b>	<b>Remaining:</b>	<b>0</b>
<b>Total Qty</b>						<b>17</b>	
<b>(+) Shipping &amp; Handling Charges</b>						<input type="text" value="0"/>	
<b>(+) Surcharge</b>						<input type="text" value="0"/>	
<b>(+) Small Order Charge</b>						<input type="text" value="0"/>	
<b>Cost Price Total :</b>						<b>127.50</b>	
<b>Core Price Total :</b>						<b>0.00</b>	
<b>(-) Discount</b>						<b>0.00</b>	
<b>Grand Total</b>						<b>127.50</b>	

**Freight PPD Based On** - Based on Weight, Dollars, or Units and taken from the vendor record.

**Freight PPD** – The weight, dollar, or unit requirement necessary to receive discounted freight charges from your vendor, set up in the vendor record.

**Current** – Current PPD based on what is on the PO.

**Remaining** – Remaining quantity needed to order to achieve the PPD.

**Shipping & Handling Charges** – Freight charges that you expect to pay to this vendor. These do not carry over to the Vendor Invoice Reconciliation Process.

**Surcharge** – Insurance surcharge charged by your vendor (if applicable).

**Small Order Charge** – Additional charge that your vendors may establish based on the size of the order.

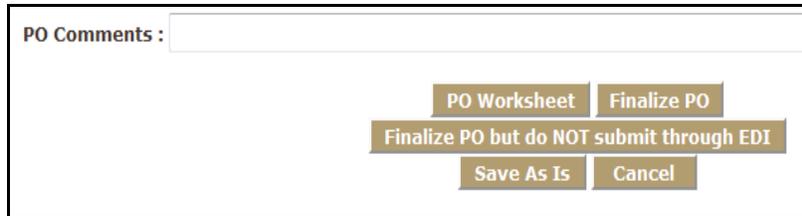
**Cost Price Total** – Total Cost from all line items on the Purchase Order.

**Core Price Total** – Total Core Cost from all line items on the PO.

**Discount** – Discount from vendor based on quantity ordered.

**Grand Total** – Total of all the charges.

## Saving and Finalizing a PO



### PO Worksheet

This button opens a printer friendly listing of the items on this purchase order, along with all the amplifying information that is available for each line (such as stocking information, sales, etc.).

### Finalize PO

Once you are finished creating the Purchase Order, you need to click the “Finalize PO” button. This will take the default action to initiate the order for that Vendor. For all the Products on the Purchase Order, the Qty on Order will increase in the product record by the quantity that is on the Finalized PO. Qty on Order is used in the Purchasing Logic to determine if the Part is still needed to be Ordered. For example if the Quantity On Hand of a Part is 5, Order Point is 5, but there is 5 in the Qty On Order field in the part Record, the purchase order logic will not populate this product on a Purchase Order to Order. The product can still manually be added to a Special Buy or at the end of a Suggested Purchase Order.

### Finalize PO but do NOT submit through EDI

Allows you to finalize the PO without sending to your vendor via the EDI (Electronic Data Interchange) if you have one established. The EDI is set up in the Vendor record.

### Finalize PO and submit through EDI

Allows you to finalize the PO and immediately send to your vendor via the EDI (Electronic Data Interchange) if you have one established.

### Save As Is

If you want to save a PO and come back to it later, just hit the “Save As Is” button at the bottom. This saves the PO, but does not finalize it. To return to the Purchase Order, open the Purchase Orders list by going to Product Management at the top and selecting “Purchase Orders” from the first drop-down list. This brings you to a searchable listing of all Purchase Orders in the system. You can search by PO number, vendor, etc. to find the saved PO (it will have a status of “Approved”, not “Finalized”). Once

## Fuse5 Training Materials

you have identified the proper PO, click on the edit icon in the “Action” column at the far right of the screen. This will take you back to the familiar “Create PO” screen where you left off, and you can continue to add or remove products from the Purchase Order. The Purchase Order can also be Finalized or Deleted. Once a Purchase Order is Finalized Products can be Canceled from the Purchase Order but they can not be Deleted.

### Cancel

Allows you to cancel the PO you are currently working on.

### Equivalent Parts and Ordering Lowest Costs:

Fuse5 allows you to order “Equivalent” parts from different vendors. You may have a part number that is available from other vendors using either the same or different / equivalent part numbers. The first step in doing so is to establish equivalent part relationships within the part records. This can be done one of two ways:

1. Within an individual product record go to the EQUIVALENT PART INFORMATION towards the bottom of the product record.



Part #	Line Code	Vendor Name	Current Cost	Core Cost	Action
No Equivalent part Found.					

Click on ADD EP. At this point you can add the line code, product number, current cost, vendor name, vendor line code (their abbreviation and nothing to do with product line codes), etc.



2. You can import equivalent parts by going to PRODUCT MANAGMENT > PRODUCTS > EQUIVALENT PARTS. When you get to the listings page you will see any equivalent parts for which you have created relationships. You can import using the import button at the top right.

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Select the spreadsheet you want to import and hit next.

**Import Equivalent Parts**

**Step 1 of 3 : Select the .CSV File**  
 Import system supports importing records from .csv ( **Comma Separated Values** ) files. To start import, browse to locate the .CSV file and click on the Next button to Continue. **Field Delimiter should be , (comma)**

File Location : Z:\Training\Subscriber Training\Training Set 1   Has Header

The mandatory fields for importing include the line code, product #, master line code, master product #, vendor line code, and vendor name. Other information can be imported. We recommend importing current cost of the equivalent part for ordering purposes. (Note: You must have a vendor record set up for the equivalent parts vendor prior to doing the import and you need to make the MASTER LINE CODE available for purchase from that vendor, even if they use a different line code for the parts)

**Import Equivalent Parts**

**Step 2 of 3 : Equivalent Parts List & Mapping**  
 The following tables shows the imported Equivalent Parts and other details. To map the fields, select the corresponding in combi

Use Saved Mapping : --Select--

Mapping	Headers :
-- Do not map this field --	Line Code
-- Do not map this field --	List Price
-- Do not map this field --	Product Name
-- Do not map this field --	Product Number
-- Do not map this field --	QtyOn Hand
-- Do not map this field --	Unit Barcode
-- Do not map this field --	Alternate Part #
-- Do not map this field --	Comments
-- Do not map this field --	Avg Landed Cost
-- Do not map this field --	Current Cost

## Fuse5 Training Materials

Once equivalent parts have been added to Fuse5 you have the ability to order from your vendors to purchase lower cost equivalent parts. Doing so potentially requires doing a Purchase Order for each of the vendors you want to order from. Let's look at an example. Below is a list of my original parts, line code TRN, Product # Part1-Part12. I have established equivalent parts with line code NRT, PartA-PartL. The relationship for these was set up by doing an import.

	A	B	C	D	E
1	Line Code	List Price	Product Name	Product Number	eg part for rev
2	TRN	16.5	wheely bar	Part1	
3	TRN	20.25	tire	Part10	
4	TRN	19.5	trailer hitch	Part2	
5	TRN	18.75	moon roof	Part3	
6	TRN	25.5	Door 1	Part4	
7	TRN	18	Door 2	Part5	
8	TRN	6	t tops	Part6	
9	TRN	9	hood scoop	Part7	
10	TRN	67.5	brake pad	Part8	
11	TRN	84	brake pad2	Part9	
12	TRN	27	Door 3	Part11	
13	TRN	88.5	brake pad3	Part12	
14	NRT			PartA	Part1
15	NRT			PartB	Part10
16	NRT			PartC	Part2
17	NRT			PartD	Part3
18	NRT			PartE	Part4
19	NRT			PartF	Part5
20	NRT			PartG	Part6
21	NRT			PartH	Part7
22	NRT			PartI	Part8
23	NRT			PartJ	Part9
24	NRT			PartK	Part11
25	NRT			PartL	Part12

The vendor for the TRN line code is “Training” and I need to order these parts, with the intent being to do an order to max. Prior to doing so, I set up a PO from “Dennis Part House” who sells the equivalent NRT line code. I select order to max, primary supplier or equivalent parts, and order lowest cost items only. Because Fuse5 knows that there is an equivalent parts relationship between the TRN and NRT line codes, the TRN line code will show up as available for purchase.

Low Demand Rules
Create Purchase Order

---

Saved Templates: -- Select Template --
Order Info | Address | Cancel

**Purchase Order Information**

<b>Vendor Name</b> Dennis Part House	<input checked="" type="checkbox"/> Primary Supplier or Equivalent Parts Only
<b>PO Type</b> ORDER TO MAX	<input checked="" type="checkbox"/> Order Lowest Cost Items Only
<input type="checkbox"/> By Barcode	<input type="checkbox"/> Ignore Overstock Locations
<b>Default Transaction Code</b> Normal Purchase	<input type="checkbox"/> Factor Order Delay
<b>Order From Location</b> Dubuque	<input type="checkbox"/> Include Consignments
<b>Created By</b> admin	

## Fuse5 Training Materials

All of the product that showed up as needing to be ordered from Dennis' Part House are equivalent parts with a lower price than the original product current cost.

### Fuse5 on screen view

Product Detail									
Line Code	Vendor Line Code	Product Number	Product Name	Order Qty	Qty Rcvd	Qty BO	Qty Cancelled	Cost Price	
Showing 1 - 6 of 6									
TRN EP Line Code: NRT	TRN EP Line Code: NRT	Part1 EP Product#: PartA	wheely bar [Transaction: Normal Purchase]	61	0.00	0.00	0.00	\$ 10.000	Cost Ext: \$ 610.000
TRN EP Line Code: NRT	TRN EP Line Code: NRT	Part2 EP Product#: PartC	trailer hitch [Transaction: Normal Purchase]	174	0.00	0.00	0.00	\$ 11.000	Cost Ext: \$ 1914.000
TRN EP Line Code: NRT	TRN EP Line Code: NRT	Part3 EP Product#: PartD	moon roof [Transaction: Normal Purchase]	138	0.00	0.00	0.00	\$ 11.000	Cost Ext: \$ 1518.000
TRN EP Line Code: NRT	TRN EP Line Code: NRT	Part6 EP Product#: PartG	t tops [Transaction: Normal Purchase]	121	0.00	0.00	0.00	\$ 3.000	Cost Ext: \$ 363.000
TRN EP Line Code: NRT	TRN EP Line Code: NRT	Part7 EP Product#: PartH	hood scoop [Transaction: Normal Purchase]	120	0.00	0.00	0.00	\$ 5.000	Cost Ext: \$ 600.000
TRN EP Line Code: NRT	TRN EP Line Code: NRT	Part9 EP Product#: PartJ	brake pad2 [Transaction: Normal Purchase]	62	0.00	0.00	0.00	\$ 50.000	Cost Ext: \$ 3100.000

### Printed PO view

Ord. Qty	Our Line Code	Vendor Line Code	Item Number	Description	Cost	Core	Extended	Vendor LC	Vendor PN
61	TRN	TRN	Part1	wheely bar	10.00	0.00	610.00	NRT	PartA
174	TRN	TRN	Part2	trailer hitch	11.00	0.00	1914.00	NRT	PartC
138	TRN	TRN	Part3	moon roof	11.00	0.00	1518.00	NRT	PartD
121	TRN	TRN	Part6	t tops	3.00	0.00	363.00	NRT	PartG
120	TRN	TRN	Part7	hood scoop	5.00	0.00	600.00	NRT	PartH
62	TRN	TRN	Part9	brake pad2	50.00	0.00	3100.00	NRT	PartJ

Total Cost	Total Core	Total Freight	Total Tax	Total Discount	Invoice Total (- Qty Cancelled)
8105.00	0.00	0.00	0.00	0.00	8105.00

Total Lines	Total Units	ETA Date
6	676	02-Jul-2013

Now that we have ordered the lowest cost equivalent parts, we will do a PO from the "Training" vendor. In this case we would NOT select primary supplier or equivalent parts only nor order lowest cost items only. We do this to ensure we order all the parts that we need to meet our order to max. Realistically, you should only be getting the lowers cost items anyway if you have already created another PO for lowest cost equivalent parts.

Saved Templates: -- Select Template --

Order Info   Address   Cancel

---

**Purchase Order Information**

Vendor Name: Training	Primary Supplier or Equivalent Parts Only: <input type="checkbox"/>
PO Type: ORDER TO MAX	Order Lowest Cost Items Only: <input type="checkbox"/>
By Barcode: <input type="checkbox"/>	Ignore Overstock Locations: <input type="checkbox"/>
Default Transaction Code: Normal Purchase	Factor Order Delay: <input type="checkbox"/>
Order From Location: Dubuque	Include Consignments: <input type="checkbox"/>
Created By: admin	

## Fuse5 Training Materials

The results of the second Purchase Order provides you with the remainder of the parts you need to order for an Order to Max Purchase Order. They are the original parts from your primary supplier that were NOT available at a lower cost from other suppliers.

### Printed PO View

Ord. Qty	Our Line Code	Vendor Line Code	Item Number	Description	Cost	Core	Extended
124	TRN	TRN	Part10	tire	13.50	0.00	1674.00
121	TRN	TRN	Part11	Door 3	18.00	0.00	2178.00
121	TRN	TRN	Part4	Door 1	17.00	0.00	2057.00
120	TRN	TRN	Part5	Door 2	12.00	0.00	1440.00
<b>Total Cost</b>					<b>7349.00</b>	<b>0.00</b>	<b>7349.00</b>
<b>Total Core</b>					<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
<b>Total Freight</b>					<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
<b>Total Tax</b>					<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
<b>Total Discount</b>					<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
<b>Invoice Total (- Qty Cancelled)</b>					<b>7349.00</b>		
<b>Total Lines</b>			<b>Total Units</b>		<b>ETA Date</b>		
4			486		02-Jul-2013		

### Fuse5 on screen view

Product Detail								
Line Code	Vendor Line Code	Product Number	Product Name	Order Qty	Qty Rcvd	Qty BO	Qty Cancelled	Cost Price
Showing 1 - 4 of 4								
TRN	TRN	Part10	tire [Transaction: Normal Purchase]	124	0.00	0.00	0.00	\$ 13.500 Cost Ext: \$ 1674.000 \$
TRN	TRN	Part11	Door 3 [Transaction: Normal Purchase]	121	0.00	0.00	0.00	\$ 18.000 Cost Ext: \$ 2178.000 \$
TRN	TRN	Part4	Door 1 [Transaction: Normal Purchase]	121	0.00	0.00	0.00	\$ 17.000 Cost Ext: \$ 2057.000 \$
TRN	TRN	Part5	Door 2 [Transaction: Normal Purchase]	120	0.00	0.00	0.00	\$ 12.000 Cost Ext: \$ 1440.000 \$