

How to raise a Purchase Order using the Barcode Scanner

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Objective:

Some businesses may wish to raise a Purchase Order as a result of visually inspecting the stock levels in a stock-room or warehouse.

This facility is provided for, and combines the Stock Take functionality with the re-order levels and re-order quantity that can be set within Sage Line 50.

Description:

To begin, set the product re-order level, re-order quantity, and default supplier within Sage Line 50.

The screenshot displays the Sage Line 50 Financial Controller interface for a 'Product Record - Whiteboard - Drywipe (900 x 1200)'. The 'Supplier A/C' field is highlighted with a red circle and set to 'UNI001'. The 'Re-order Level' and 'Re-order Qty' fields are also highlighted with a red circle and set to '1.00' and '2.00' respectively. The 'Status' section shows 'In Stock' at 4.00, 'Free Stock' at 3.00, and 'On Order' at 2.00. The 'Ordering' section shows 'Last Cost Price (Standard)' at 1.59, 'Last Cost Price (Discounted)' at 0.00, 'Last Ord Qty' at 2.00, and 'Last Ord Date' at 25/09/2005. The 'Sales Price' section shows 'Price' at 20.00 and 'Unit of Sale' as 'Each'. The 'Stock Take' section shows 'Date' at 28/09/2005 and 'Quantity' at 5.00. The 'Details' tab is selected, and the 'Product Details' section shows 'Product Code' as 'BOARD001', 'Item Type' as 'Stock Item', 'Description' as 'Whiteboard - Drywipe (900 x 1200)', and 'Category' as '6 Presentation Supplies'. The 'Defaults' section shows 'Nominal Code' as '4000', 'Tax Code' as 'T1 17.50', 'Supplier A/C' as 'UNI001', and 'Part No.' as 'U143'. The 'Status' section shows 'In Stock' at 4.00, 'Free Stock' at 3.00, 'On Order' at 2.00, 'Re-order Level' at 1.00, and 'Re-order Qty' at 2.00. The 'Ordering' section shows 'Last Cost Price (Standard)' at 1.59, 'Last Cost Price (Discounted)' at 0.00, 'Last Ord Qty' at 2.00, and 'Last Ord Date' at 25/09/2005. The 'Sales Price' section shows 'Price' at 20.00 and 'Unit of Sale' as 'Each'. The 'Stock Take' section shows 'Date' at 28/09/2005 and 'Quantity' at 5.00.

Fig 1 – Setting the product Re-Order level and default supplier in Sage Line 50

The 3 columns of interest are:

Re-Order Level	Enter here the quantity of stock at which fresh stock should be ordered. If the actual stock level is below this figure, the stock item will appear when filtering for 'Items below re-order level' in the stock review
Re-Order Qty	Enter here the quantity of stock that you would normally re-order. The quantity you enter here appears automatically for you when you raise a Purchase Order for this product, but can be overwritten within Sage Line 50.
Supplier A/C	New Purchase Orders created from the stock-take will be raised for this supplier account.

Create a Stock List

Before commencing, you will need to either choose an existing Stock List or create a new Stock List using the 'List Builder' facility in Barcode Admin.

Assign to a User

On the 'Assign to Users' tab, right-click on a chosen Stock-List in the left-hand window and select the name of the person to receive the stock take.

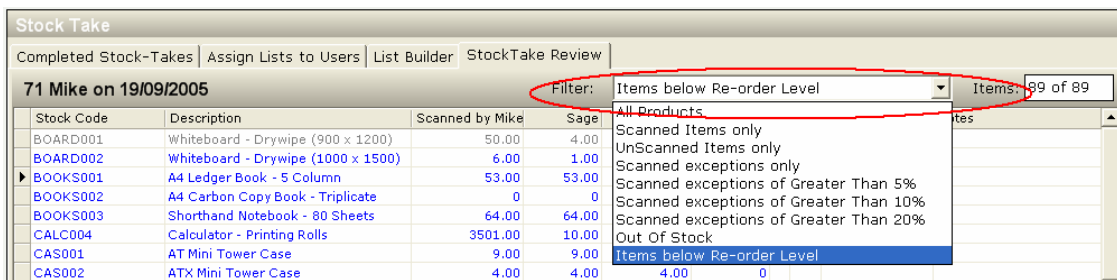
Complete and Finish the Stock-Take

Run the stock take in the normal manner. If you are working with an 'Empty List' then simply scan those items (or shelf labels) for the products you wish to re-order.

When you have finished scanning, click 'FINISH and SAVE' and input your PIN number to confirm the stock take as complete.

To create the Purchase Order(s) in Sage

1. Start 'Barcode Admin',
2. Press 'Stock Take' and select the 'Completed Stock Takes' tab.
3. In the 'Filter' box, select 'Items below Re-Order Level'
4. Press 'Select All' button.
5. In the 'Filter' box, select 'All Products'
6. Optionally, you can tailor the list of selected products to add or remove products that you wish to include or exclude from the Purchase Order(s).
7. Press 'Raise PO' button. A blue flag will identify the chosen products.
8. Press 'Save' when complete.



Stock Code	Description	Scanned by Mike	Sage
BOARD001	Whiteboard - Drywipe (900 x 1200)	50.00	4.00
BOARD002	Whiteboard - Drywipe (1000 x 1500)	6.00	1.00
BOOKS001	A4 Ledger Book - 5 Column	53.00	53.00
BOOKS002	A4 Carbon Copy Book - Triplicate	0	0
BOOKS003	Shorthand Notebook - 80 Sheets	64.00	64.00
CALC004	Calculator - Printing Rolls	3501.00	10.00
CAS001	AT Mini Tower Case	9.00	9.00
CAS002	ATX Mini Tower Case	4.00	4.00

The screen can be filtered to show only those products which need to be re-ordered.

A Purchase Order will be created for each item selected in the stock-take review.

If all the products have the same default Supplier account within Sage Line 50 then a single Purchase Order will be created with all of the selected products. If the products selected are to be purchased from different suppliers, then a different Purchase Order will be created for each supplier.

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