

Anthology Online Training

Basic Purchase Order Syllabus

If all you had to do to run a bookstore was to buy a single title, buy all you need at one time, at one price and have the books arrive at your store in one shipment, business life would be easy and you wouldn't need purchase orders.

As soon as you offer more titles, buy those titles at different percentages at different times, order for your needs within a set selling cycle and have the books ordered at one time arrive in different shipment – you inventory becomes hard to manage.

Purchase Orders and Receiving Memos provide you a system for controlling your inventory.

Without a system, it becomes hard to control, you over or under order, customers don't receive their purchases in a timely manner and the accountant must go through mountains of paperwork to calculate to true value of inventory sold. What a mess! The combination of Purchase Orders and Receiving Memos saves you from all that!

To prepare for the Basic Purchase Order webinar, please fill in two to four titles (either ISBN or Title) you are considering ordering, who you may order from and what percent discount the vendor will likely give you.

Vendor _____

Purchase Discount _____

ISBN/Title:

1. _____ 2. _____

3. _____ 4. _____

PO Syllabus

I. Entering a simple Purchase Order

II. Detail review of the screen

Header

PO # - Tools | Options Create your own/ Anthology #

Ordered By – Set up Master File | Users

Promo – Promotion (discount) code from vender

Status- Different status defines where the PO is in the system

PO statuses:

1) Draft-

2) Open-

3) Shipment -

4) Complete-

Vendor – Sets the defaults

Edited – Last date a change was made

Due – any date meaningful to you

EO Status- different statuses represent what process has been done

- 1) Not Sent – All PO's begin with this status
- 2) Sent w/date – Order file was sent to Vendors FTP site to your folder.
(EO may timeout – come back later to Get Confirmation.)
- 3) Confirm w/date – Order has been placed, confirmation was received and Anthology has processed the PO.

Cancelled (Void) – Important on Receiving Memo

Disc – Header Discount: sets default and overrides Vendor Discount Schedule

Allow BO – Sets defaults – If you EO and you do not Allow BO - will 'cascade' BO titles to new PO. Notes Field – “Cascaded from PO # xxxxxx on x/x/xx”

SKU Format – PO Print/EO options to change to vendors requirements:

ISBN 10 – Prints/EO ISBN 10 number on PO

ISBN 13 – Prints/EO ISBN 13 number on PO

GTIN – Print GTIN number on PO

Item/UPC – Prints Item/UPC number on PO which is non-book Vender's reorder # if entered into Inventory record

Grid

Can not edit in grid

Columns: Sort and move to right and left

Entry Order – F3 Changes back to the order originally entered in

Line Item Entry Fields

Add or edit items in grid

Enter Line/Save Line Item Arrow – enters data into grid

Fetching (Creates Inventory record) – Enter a new title into the system by entering it's ISBN and hitting 'Enter' on the keyboard.

Reorder (searching your inventory) – Ellipse button brings up Inventory Assistant.

SuperFetching (Searching by title for an ISBN to enter into your system) – Type title in the Inventory Assistant search field under Keywords, Fetch in ISBN #.

Info Panel – Comprehensive ordering tool

Inventory – On Hand, On Order and Sales Totals

Sales – Last 12 months – view “seasons”

PO's – Is it already on another PO? Double ordering issue

Returns – Has it been returned to Vendor? Why?

CBO's – Are there any customer back orders?

Buttons – Actions you can take

F2 – look up inventory or vender

F3 – Change back to the original order entered in

F5 – Add new item to the grid

F8 – Find item in grid

F7 – Delete line in grid – only on Draft PO

F10 – saves without taking action on the screen

F11 – Prints in grid order

F6 – Electronic order – ordered through Anthology
1) Modem – Analog (dial up) 2) FTP – Internet
Stock Check – Checks the stock of entire PO
Send Order-
Confirmation – if didn't get it when sent order
Cancel –
Received quantities are filled in on RM
Posts PO
F12 – Post – ordered outside of Anthology

Action Menu –Menu options change to what screen is open. “I know I can do this, but I can't find it” – look at the actions menu.

III Your turn – We'll enter real examples of purchase orders based on the ISBN/Titles you bring.