

Material Auto Order

Overview:

Material Auto Order is set-up in the 'Material Details' window. Inventory materials set to 'Auto Order' will be displayed in the 'Material Auto Re-Order List' to enable companies to manage their purchasing. See example below.

Material - <New Entry>

Material Code: AUTO-TEST Material Description: Aut-Order Test Material Rev: Date Entered: 05/02/2019

Details Allocation History More Info Purchase Quotes Used In Invoices Financial Hist Notes

☒ Active ☒ Inventory Item ☐ Actual Purchase in Multiple ☐ Dummy ☐ Pre Order Emp: 1 Robert JONES

☐ Fill to Maximum ☒ Auto Order ☐ Job Group Qty in Multiple ☐ Web Site ☐ Pur UoM 2

Material Group: 11 Material by Length M Bom T: Multiple Length Width Weight Surface: .000 Volume: EACH UoM 1: LGT UoM 2: Thick Lead/T: 1

Supplier Code	Sup Mat Code	Supplier Description	Date Price	UoM 1 Price	UoM 2 Price	Pref.	QPrf
BOBBEAR	AUTO-TEST	Aut-Order Test Material		.0000	.0000	Yes	Yes

Sub Material Group

Spacing: Border:

☐ Last Purchase Price .0000 0%

.0000 Avg Price: .0000 Std Price: .0000

Plan: .0000 .0000 0 Available: .0000

Inventory

On Hand: 0

Bin Location:

Used In:

Allocated: .0000

Purchasing

Min Order: 20.0000

Max Level: 25.0000

Safety Level: 8.0000

Reorder Level: 5.0000

Stock Type: On Order

UoM Conversion Factor

UoM2 > UoM1: 0.00

Margin: .00

☐ Sell Price

Account Details

Purch Acc: Sales Acc: Asset Acc:

From the OPTO ribbon, select the 'Purchasing' tab and **click** on the 'Material Auto Order' icon to display the 'Material Auto Re-Order List'.

Open the **Purchase** module and then **click** on the 'Material Auto Order' icon to display the 'Material Auto Re-Order List'.

Refresh the information in the following two ways -

- Click** on one of the radio buttons at top of the window. This will display only the materials that are required within the period.
- Click** the green **Refresh** icon at far top right hand side of window to display the overall materials that are due to be ordered.

The list can be refined by using the drop-down menus or tick-boxes.

File HOME CONTACTS RESOURCES INVENTORY QUOTES **PURCHASING** ORDERS JOBS/SCHEDULING INVOICING QUALITY

New Save Copy Cut Paste New Purchase Edit Purchase Purchase Delivery Purchase Print Purchase Invoice Purchase Outstanding Material Auto Order Sub Contract Purchase Material Issue Issue/Pick

Material Auto Re-Order List

Search by: ☐ Past Due ☐ Now ☐ 1-7 Days ☐ 8-14 Days ☐ 15-30 Days ☐ 31-60 Days ☐ 61-90 Days ☒ Overall ☐ Use Any Supplier

Supplier: <Any> Grp: <Any> Sub Grp: <Any> Job No: <Any>

☒ Current Purchase Orders ☒ RFQ Purchase Orders placed ☒ Show Mat Grp ☒ Show Mat Sub Grp ☒ Show Bom Type ☒ Show Notes ☒ Show UoM/Lead

	Material Code	Status	Purchase Alert	Grp	Sub G	Description	Auto Order Notes
1	000123-KYZ1111			10		TEST - LINE 1 MATERIAL _alternate substitution item	
2	AB02001111			11		Material 200 INV STK used by meter buy in Lengths	
3	ABS102-21111			10		2Material 102 INV NSTK	
4	ABS102-31111			10		Material 102 INV NSTK	
5	OPT0001111			10		Stainless Steel Joiner 50mm	

To generate a purchase order for a supplier for multiple items, **click** on the 'Supplier' drop-down list and select a supplier.

Only materials ticked for auto order for that supplier will be displayed. In the Columns "Now" through to "Overall", **click** on the quantity shown for the required material to be added to a purchase order. (For this example the "Now" column has been used, the quantity will change to green in that cell. When all items to be purchased are selected, **right-mouse-click** to display options list, then **click** to select the "Add Selected Material to a New Purchase Order" Option. A new purchase order will be opened and the selected material will be added to the order. Process the purchase order in the normal way and adjust the quantities in the "Act Qty" as necessary. **Press** <F9> to save.

Mat	U	Description	Job Ttr	Job Qty	Act Qty	Unit Price	Tax	Total Unit	Due Date	Acc	Rev
000123-XVZ1111	UNI	Bobbear description		.0000	6.0000	200.0000	6	1200.00	12/02/2019		

To print **click** on the 'Print' icon on the top right side of the 'Material Auto Re-Order List' window to display the 'Print Table Data' window. Select or de-select tick-box options and **click** on 'Print'.