

## 2004-209 - Setting Up Material for Auto-ordering by UoM 2.

Open the **Inventory** tab on the OPTO ribbon and **click** on the 'New/Edit Materials' icon. Create a new material or **press** <F2> and select the required Material from the pop-up list and **click** OK. For this example the material is a 250 litre Drum of Liquid.

The screenshot shows the 'Material' setup window. Key fields are highlighted with red boxes and green callouts:

- The amount by which the material is distributed:** Points to the 'Bom T' field, which is set to 250.0000.
- The amount in which the material is purchased:** Points to the 'UoM 2 Price' field, which is set to 375.0000.
- The capacity by which the material is purchased:** Points to the 'UoM 2' dropdown menu, which is set to DRUM.

The 'Purchasing' section includes the following fields:

- Min Order: .0000
- Max Level: .0000
- Safety Level: .0000
- Reorder Level: .0000
- Stock Type:
- On Order: .0000
- To Order: .0000

The 'UOM Conversion Factor' section includes the following fields:

- UoM2 > UoM1: 250.000000
- Margin: 89.61
- Sell Price: 2.3100

Ensure the areas circled above are completed correctly and that the "Pur UoM 2" box is ticked.

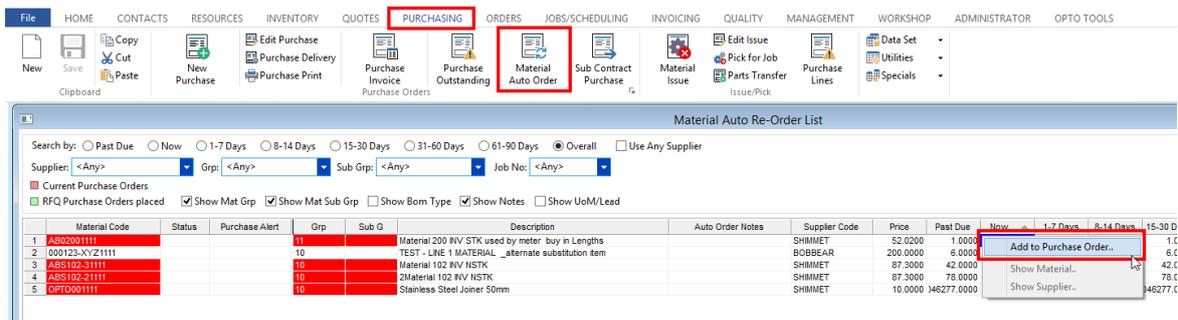
(Pur UoM 2 = *Purchase by Unit of Measure 2 (UoM 2)*)

In the "Purchasing" area enter the minimum order amount (Min Order = 250, which is 250 litres), "Reord Level"(Re-order level) is the level at which the material needs to be re-ordered, for this example, 75 litres has been entered. So when the material level get down to 75 litres remaining, the Auto Order feature will record - 250 litres needs to be ordered. **Press** <F9> to save Material Detail window.

## To Complete the Auto Order Process

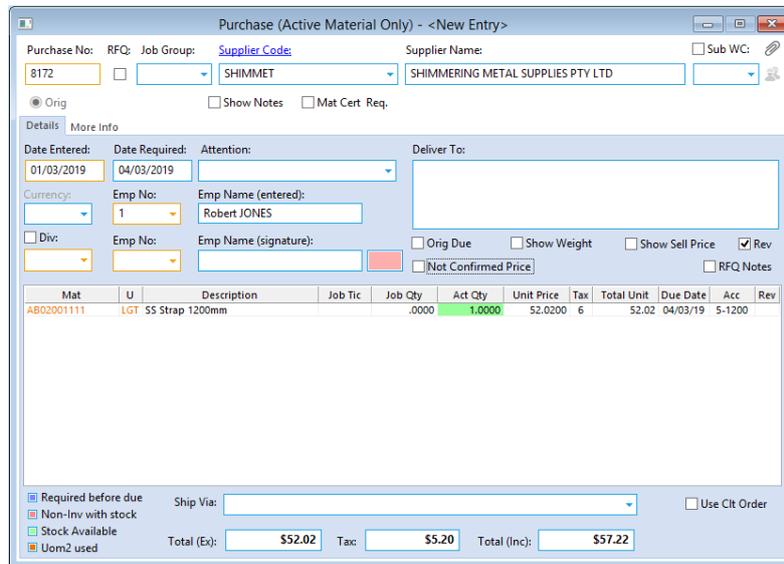
Open the **Purchasing** tab on the OPTO ribbon and **click** on the 'Material Auto Order' icon to open the auto order window. **Click** on the **Refresh** button to display all the materials to be ordered.

**Right-mouse-click** in the "Now" column of the required material and **click** on the 'Add Material to Purchase Order'



A new Purchase Order opens with the material already recorded with quantity and price.

**Note:** the 'Act Qty' is 1 (1 = 1x 250ltr Drum).



Complete purchase order as normal and **press** <F9> to save.