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** <u>OK</u>. For this example the material is a 250 litre Drum of Liquid.

Material Code: OPTO250L1111 Details Allocation History More Active Inventory It Fill to Maximum Auto Order Material Group: 30 Drum N Supplier Code Sup Mat Code STATEWIDE_METAL_SUF ABC21	Material Material Description: Drum of Liquid - Drum of 250 litres Info Purchase Quotes Used In Invo em Actual Purchase in Multiple Job Group Otv in Multiple Bom T: Multiple Length Wid 1 250.0000 The Supplie Drum of Liquid 250L	The amount is which the material is distributed oices Financial Hist Notes Dummy Pre Order Em Web Site th Weight: Surface: Volume: Meight: Surface: Volume: Dumnt in ich the terial is rchased	Arrow Contraction of the contrac	apacity by iich the terial is 'chased
Sub Material Group Spacing: Border: Last Purchase Price S.2400 0% 09/08/2012 .00 S.7091 Avg Price: S.2400 Std Price:	Inventory On Hand: 341.0000 Bin Location: Used In: Allocated: 3.0000 Plan: .0000 3.0000 338 Available: 338.0000	Purchasing Min Order: .0000 Max Level: .0000 Safety Level: .0000 Reorder Level: .0000 Stock Type: .0000 On Order: .0000 To Order: .0000	UOM Conversion Factor UoM2 > UoM1: 250.00000 Margin 2.31 89.61 2.31 Sell Price 2.3100 Account Details Purch Acc: Sales Acc: 4-1500 v Asset Acc: 1-1600 v	

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 Compete 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'

Image: Second	File HOME CONTACT	S RESOURC	ES INVENTORY	QUOTES	PURCHASING	RDERS JOB	S/SCHEDULING	INVOICING	QUALITY	MANAGEMENT	WORKSHOP	ADM	INISTRATOR	OPTO TOOLS	
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A new Purchase Order opens with the material already recorded with quantity and price.

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

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8172		 SHIMMET 	•	SHIMM	IERING MET	AL SUPPLIES PT	Y LTD		- 2
Orig		Show Notes	Mat Cert Req.						
Details More I	nfo								
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01/03/2019	04/03/2019		•						
Currency:	Emp No:	Emp Name (entered):							
-	1 🗸	Robert JONES							
Div:	Emp No:	Emp Name (signature):		Orig	j Due	Show Weig	ht 🗌 Sh	ow Sell Price	Rev Rev
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AB02001111	LGT SS Strap 1	200mm		.0000	1.0000	52.0200	5 52.0	2 04/03/19	5-1200
Required be Non-Inv wit	fore due Shij h stock	p Via:					•	Use	Clt Order
 Stock Availa Uom2 used 	ble Tota	I (Ex): \$52.02	Tax:	\$5.2	0 Total	(Inc):	\$57.22		

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