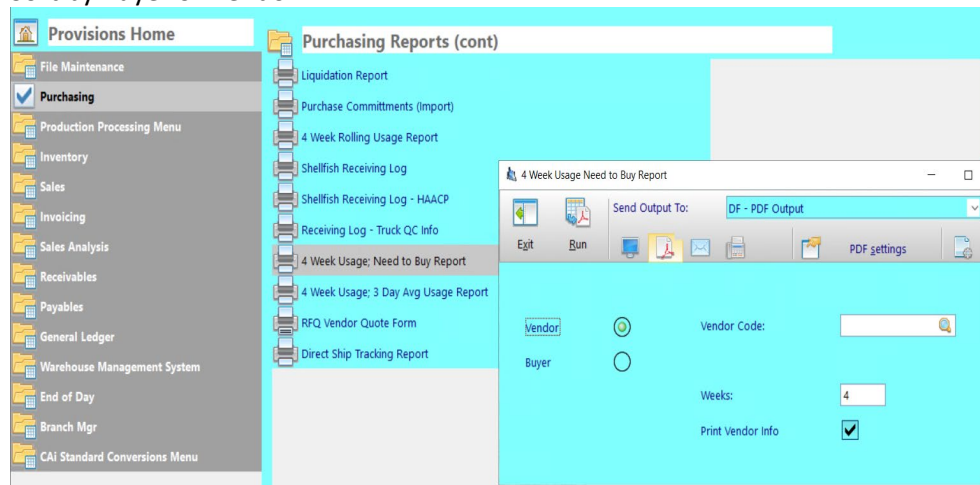


Standard Operating Procedure

Provisions - Purchasing

Determining Products to Buy

1. Go to Purchasing → Inquiries & Reports → Purchasing Reports (cont)
 - a. Choose 4 Week Usage: Need to Buy Report
 - b. Sort by Buyer or Vendor.



- c. Run the report to PDF

Creating a Purchase Order

Address Tab -

1. Enter PO Number (New)
2. Enter Vendor Code or search with the magnifying glass (the system automatically searches through the first column on the left. Click on the Vendor Name and then search in all CAPS and it will sort the list to find the vendor.

Purchase Order Query

Filters View Export

From: JA

Sort by: Vendor Name

PO #	Rcpt Status	Vendor	Vendor Name	Reg
700041	Suspended	10001	20 RAILROAD PUBLIC HOUSE	03/03
700057	Open	10006	A GREENER WORLD	03/07
700022	Suspended	10137	ACME SMOKED FISH CORP	02/17
700042	Suspended	10069	ACP WATERJET	03/03
700003	Open	11160	BELLA BELLA GOURMET LLC	02/08
700033	Open	11725	BOSTON SWORD & TUNA	03/01
700056	Open	15490	CLEMENS FOOD GROUP, LLC	03/07
700024	Open	13389	CREEKSTONE FARMS PREM BEEF	02/20
700061	Open	16134	JA/JJ PIEROGI	03/08
700035	Open	16498	KVAROY SALMON	03/01
700023	Open	17683	MEYER FOOD GROUP LLC	02/22
700025	Open	19120	OXFORD TRADING	02/21
700004	Suspended	20290	SAMUEL HOLMES INC.	02/10
700020	Open	20290	SAMUEL HOLMES INC.	02/16
700021	Suspended	20290	SAMUEL HOLMES INC.	02/17
700017	Suspended	20517	SHARON FOODS	02/17
700040	Suspended	10002	TESTING CAI TESTING CAI	03/03
700046	Suspended	21447	TEYS USA	03/04

Another way to search for the vendor is to first create a new PO, then type some of the vendor's name in the Vendor Code field and hit F2. Options for you to choose from should pop up.

Exit Accept Delete Repeat

P.O. Number: *NEW* New Rsy

Vendor Code: JAJ

Exit New Order

Document	Vendor Name	Vendor Address
700061	JAJU PIERO...	271 WESTERN AVE

P.O. Number: 700010 New Rsy Reset P.O. Type: 5

Vendor Code: 10075 JOHN ACCARDI Rev.#:

1. Address	2. Header	3. Lines	4. Instructions	5. Totals
<p>Order From:</p> <p>Name: JOHN ACCARDI</p> <p>Address1: 85 COMMERCIAL ST</p> <p>Address2:</p> <p>City: MEDFORD State: MA</p> <p>Zip Code: 02155</p> <p>Attn To:</p> <p>Confirm To:</p> <p>Fax No: 17813914494 Phone: (781) 391-2400</p> <p>Currency: USD Exchg Rate: 1.0000 Use in Entry</p>			<p>Ship To:</p> <p>Location:</p> <p>Name: Dole and Bailey</p> <p>Address1: 16 CONN ST.</p> <p>Address2:</p> <p>City: WOBURN State: MA</p> <p>Zip Code: 01801</p> <p>Required Date: 03/07/23 Date Code:</p> <p>Cancel/MSB Date: 00/00/00 Ship Via: OT</p> <p>Vendor Ack. Date: 03/07/23 Rcpt Status:</p> <p>Dflt. Load Number:</p> <p>Dflt. Package Type: Freight Terms: 00</p> <p>Vendor PO Number: Harvest Loc:</p>	

- Fill in Attention to: and Confirm To:
- Alter Ship To address to either D&B or Lineage
- Change Required Date to due date
- Change Ship Via according to freight charges associated with the vendor. The most common choices are OT = Our Truck, CC = Common Carrier, or UPS

Table Code	Description
AIR	AIR
CC	COMMON CARRIER
FED	FEDERAL EXPRESS
IN	INTER BRANCH TRANSFER
OT	OUR TRUCK
U	UPS
UO	UPS OVERNIGHT
UA	UPS AIR
UC	UPS COD
UOA	UPA ACKNOWLEDGEMENT
WATR	WATER
WC	WILL CALL
YT	YOUR TRUCK

- Change Freight Terms to: 01 if the product is delivered, 02 if we pay freight on a separate invoice (Greylawn & AC Motors), and 03 Backhaul if we pick it up.

Frts Terms	Description
00	Prepaid
01	Delivered
02	Collect
03	Backhaul
IN	Interbranch

Header Tab –

P.O. Number: 700010 P.O. Type: S

Vendor Code: 10075 JOHN ACCARDI Rev.#:

1. Address	2. Header	3. Lines	4. Instructions	5. Totals
P.O. Date: 03/06/23	Branch Buyer: 01 <input type="button" value="Q"/> Default Buyer Cod			
Required Date: 03/07/23	Price Basis: P <input type="button" value="Q"/> Update Last Cost <input checked="" type="checkbox"/>			
Required Code: <input type="text"/>	Print Status: Unprinted <input type="button" value="Q"/> PO Hold: <input type="button" value="Q"/>			
Vendor Due Date: 03/07/23	Entered by: KSTA Time: 21.23 Entered Date: 03/06/23			
Vendor Terms: 30 <input type="button" value="Q"/>	Vendor Ref #: <input type="text"/>			
Freight Terms: 00 <input type="button" value="Q"/> Prepaid	Import Tracking #: <input type="text"/>			
Ship Via: OT <input type="button" value="Q"/> FOB: DLVD <input type="button" value="Q"/>	Major Group Code: <input type="text"/>			
Basis Location: <input type="text"/>	SAFIS Information			
Waybill Number: <input type="text"/>	Trip Report #: <input type="text"/>			
ICCAT SSD#: <input type="text"/>	Landed Port: <input type="text"/>			
Customs Entry #: <input type="text"/>	Catch Location: <input type="text"/>			
	Gear Type: <input type="text"/>			
	Date Caught: 00/00/00 Date Landed: 00/00/00			

- Change Required Date
- Freight Terms
- Ship Via and FOB
- Enter Branch Buyer

Lines Tab –

P.O. Number: 700010 P.O. Type: S

Vendor Code: 10075 JOHN ACCARDI Rev.#:

1. Address	2. Header	3. Lines	4. Instructions	5. Totals		
Item Number: <input type="text"/> <input type="button" value="Rem"/>	Base Price: .0000 Est. Landed Price: .0000 <input type="button" value="OK"/>					
Description 1: <input type="text"/>	Due Dt: 03/07/23 Harvest Date: 00/00/00 Price: .0000 <input type="button" value="Q"/>					
Description 2: <input type="text"/>	Tools <input type="button" value="Q"/> Harvest Loc: <input type="text"/> Discount: .00 % <input type="button" value="Q"/>					
Qty Ordered: .00 Qty Recvd: .00	Sales Order: <input type="text"/> Extension: \$0.00 <input type="button" value="Q"/>					
U/M Purch: <input type="text"/> WGT 0	Customer: <input type="text"/> Ref Cost: .0000 <input type="button" value="Q"/>					
Load Number: <input type="text"/> Mfr #: <input type="text"/>	Order Line: <input type="text"/> Est Frt: .00 <input type="button" value="Q"/>					
Lot Text: <input type="text"/>	Update Last Bulk <input checked="" type="checkbox"/> Project Code: <input type="text"/>					
Brand: <input type="text"/>	C.O.O.L. Compliance					
Package Type: <input type="text"/>	Harvested <input type="text"/> All Natural <input type="text"/> Processed <input type="text"/>					
	Organic/ABF <input type="text"/> Sustainability <input type="text"/> M.O.P <input type="text"/>					
Line	Item Number	Description	Quantity	U/M	Price	Extension

- Click magnifying glass and search for items or type in the item code
- Check that Due Date is correct
- Change Quantity Ordered and make sure to check the U/M Purch drop down menu.
- Brand and Manufacturer # should autofill but make sure to change those fields if you're buying an alternate brand.
- Update Price if necessary and press Okay or hit Enter to add that item.
- Repeat process to create full PO.
- Choose Accept to finalize the PO.

Instructions Tab – Add special instructions if needed.

P.O. Number: 700002 P.O. Type: S

Vendor Code: 19120 OXFORD TRADING Rev.#: 4

1. Address	2. Header	3. Lines	4. Instructions	5. Totals																								
Special Instructions: <input type="text"/> Special Instructions 2: <input type="text"/> Special Instructions 3: <input type="text"/> Location/Configuration: <input type="text"/> Routing Information: <input type="text"/> Pick-Up Date: 00/00/00 Time: <input type="text"/>																												
<hr/> Required Certifications <table border="1"> <thead> <tr> <th>Code</th> <th>Description</th> <th>Certification Number</th> <th>Expiration Date</th> </tr> </thead> <tbody> <tr><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td>00/00/00</td></tr> <tr><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td>00/00/00</td></tr> <tr><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td>00/00/00</td></tr> <tr><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td>00/00/00</td></tr> <tr><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td>00/00/00</td></tr> </tbody> </table>					Code	Description	Certification Number	Expiration Date	<input type="text"/>	<input type="text"/>	<input type="text"/>	00/00/00	<input type="text"/>	<input type="text"/>	<input type="text"/>	00/00/00	<input type="text"/>	<input type="text"/>	<input type="text"/>	00/00/00	<input type="text"/>	<input type="text"/>	<input type="text"/>	00/00/00	<input type="text"/>	<input type="text"/>	<input type="text"/>	00/00/00
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<input type="text"/>	<input type="text"/>	<input type="text"/>	00/00/00																									

Totals Tab – Update Freight/LB, especially for items procured through Greylawn and AC Motors. The Freight is added at the bottom of the 5. Totals page using the weight in the Dimensions section. Say it's an AC Motors delivery of Bella that weights 154 lbs. The total freight charge for the delivery is \$138.60 so the Rate per 100 lbs. is $100 * (\$138.60/154 \text{ lbs}) = \90.00 .

P.O. Number: 700002 P.O. Type: S

Vendor Code: 19120 OXFORD TRADING Rev.#: 4

1. Address	2. Header	3. Lines	4. Instructions	5. Totals										
<hr/> P.O. Totals <table border="1"> <tbody> <tr><td>Merchandise Amount:</td><td>\$272.50</td></tr> <tr><td>Freight Amount:</td><td>\$0.00</td></tr> <tr><td>Misc. Header Charges:</td><td>\$0.00</td></tr> <tr><td>Misc. Line Charges:</td><td>\$0.00</td></tr> <tr><td>Grand Total Amount:</td><td>\$272.50</td></tr> </tbody> </table>					Merchandise Amount:	\$272.50	Freight Amount:	\$0.00	Misc. Header Charges:	\$0.00	Misc. Line Charges:	\$0.00	Grand Total Amount:	\$272.50
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Misc. Header Charges:	\$0.00													
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Grand Total Amount:	\$272.50													
<hr/> Dimensions <table border="1"> <tbody> <tr><td>Total Weight:</td><td>49.00</td></tr> <tr><td>Total Cube:</td><td>4.80</td></tr> <tr><td>Total Load Factor:</td><td>.00</td></tr> </tbody> </table>					Total Weight:	49.00	Total Cube:	4.80	Total Load Factor:	.00				
Total Weight:	49.00													
Total Cube:	4.80													
Total Load Factor:	.00													
<hr/> Receipt Comment <div style="border: 1px solid black; height: 40px; width: 100%;"></div>														
<hr/> Freight <table border="1"> <tbody> <tr><td>Rate per 100 lbs:</td><td>.00</td></tr> <tr><td>Add On Amount:</td><td>0.00</td></tr> </tbody> </table> <div style="text-align: right;"> <input type="button" value="Reset Freight"/> <input type="button" value="Misc. Charges"/> </div>					Rate per 100 lbs:	.00	Add On Amount:	0.00						
Rate per 100 lbs:	.00													
Add On Amount:	0.00													