

Getting Started with the PULSE P/O Generator

Updated 10/29/19

The Pulse P/O Generator is tailored to follow your unique business rules

The Pulse P/O Generator provides quick and convenient set-up options to customize the software to meet your unique business rules. The price includes up to six hours of setup programming. Here are basic questions to discuss and consider:

- How to select what items are to be reordered?
- What locations need to be included or excluded?
- How to prevent ordering something if an excess quantity exists at another location?
- What is the company's definition of 'Recommended Order Quantity'?
- How should 'Order Up-To Level' and 'Order Multiple' quantities be treated?
- How is the 'P/O Request' date calculated?

Information that needs to be supplied to Leahy Consulting:

1. Which Items are to be ordered - options are:
 - Reorder levels in the Item/Location file
 - Computer planned orders ('CP' orders) in the Macola® MRP detail
 - Are there any items or locations to be excluded?
2. Purchase order due date
 - Should the 'Planning Lead Time' or the 'P/O Lead Time' from the Item/Location file be used?
3. Recommended Order Quantity
 - This is the quantity that will be ordered. For example, can it be calculated based on the current On-Hand quantity, existing quantities already On-Order, the Order Multiple and the Order Up-To Level.
4. Order Up-To Level
 - Should the Order Up-To Level in the Item/Location file be considered?
 - Should the Order Up-To Level include historical monthly usage over the past 3,6 or 12 months?

Note: It is unadvisable to have more than 2 months of usage on-hand in Inventory.

**The Order Up-To setting will be ignored if the Macola® MRP software is used.

5. Purchasing unit price, order multiple, lead time days
 - Should the Vendor/Item File be used to obtain the correct purchasing unit price and the Order Multiple?
 - The Order Multiple and Lead Time days in this file will supersede the same fields in the Item/Location file.

Purchase Order Generator

The screenshot shows the 'Purchase Order Generator' application window. At the top, there are input fields for 'Buyer/Planner', 'Location', and 'Cutoff Date' (set to 10/29/2019). Below these are buttons for 'Display All Items', 'Refresh', 'Expand All', 'Smart', 'Include On Order', 'Settings', and 'Collapse All'. The main section is titled 'Create Purchase Order' and shows a 'Vendor Description' for '330 - Sherris Corporation'. Below this is a table with columns: Order #, Loc, Rec Ord Qty, On H, Alloc, D/O, Reorder Lvl, Max Qty, SQQ, P/O Multi, Last P/O, Last sale, 3-year, 6-year, 12-year, Last Yr, Unit Cost, Vendor Code, Item No, Available, PO Min, PO L/T, Buyer, Rec Dt, and Std Cost. The table contains three rows of data. At the bottom, there is a list of 'Create PO' buttons for various vendors: 330 - Sherris Corporation, 330 - Spengler Manufacturing, 330 - Conspicuous Manufacturer, 400 - Tremble Products Co., and 600 - Heritage Logging.

P/O Generator Settings Options

The screenshot shows the 'Query Designer' application window. It has a sidebar with 'Queries' and 'Options' tabs. The 'Options' tab is selected, showing two main sections: 'Request Dates' and 'Other Settings'.
Request Dates:

- ☒ Today + PO Lead Time
- ☐ Today + x Calendar Days
- ☐ Today + x Business Days
- X Days:
- ☐ Propagate request date of first line item to all line items
- ☐ Copy request date to promise date

Other Settings:

- PO Status:
- ☐ Enforce Multiples
- ☐ Recalculate Expected Unit Cost
- ☐ Enforce Minimums: Unit Cost Decimal Places
- ☐ Refresh Main Screen After Creating PO
- Collect/Prepaid:
- Mapper Database:
- Mapping Settings:

Item Detail:

{0} = Space(2)	{12} = PrimaryLocReOrder
{1} = ItemNumber	{13} = PrimaryLocMax
{2} = ItemDesc1	{14} = NegotiatedPrice1
{3} = ItemDesc2	{15} = NegotiatedQuantity1
{4} = ProductCategory	{16} = NegotiatedPrice2
{5} = POLeadTime	{17} = NegotiatedQuantity2
{6} = AverageCost	{18} = NegotiatedPrice3
{7} = Excess	{19} = NegotiatedQuantity3
{8} = PrimaryLoc	{20} = ContractDate
{9} = PrimaryLocOnHand	{21} = VendorItemNumber
{10} = PrimaryLocAllocated	{22} = TotalOnHand
{11} = PrimaryLocOnOrder	{23} = LastPONumber

Item Detail Text (use token numbers at left):

For more information or a demonstration, call (513) 723-8091

Leahy Consulting is an independent ERP consulting company with over 25 years of experience supporting and optimizing Macola® ERP systems. Leahy Consulting is not Macola® software reseller or associated with ECi® Software.

Visit: www.PulseDashboard.com

Copyright © 2019 by Leahy Consulting, Inc., 441 Vine Street – Suite 4100 Cincinnati, Ohio 45202 USA

LEAHY
ERP SOLUTIONS

Independent ERP and Macola® Specialists
Expert Support/Optimization for 25 years
Developer of Pulse Dashboard software