



## User Guide

Manage Supply Codes  
V21.1.0200

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EFI PrintStream | V21.1.0200 Manage Supply Codes User Guide

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# Introduction

## Overview



The Manage Supply Codes module was designed for the purpose of creating supply codes and generating purchase orders by department in cases where materials that are not tracked through the PrintStream Inventory modules may be ordered on a repetitive basis by one or more departments.

Manage Supply Codes allows the creation of new codes for materials that are not tracked through the PrintStream Inventory modules as well as the editing of existing codes. It is also possible to flag a supply code as Active or Inactive or to delete a code, provided there is not an open purchase order for the item.

It features a Supply Order List that displays an Order Quantity based on open purchase orders by department. The printed list is distributed to each department. Additional columns on the list, On Hand Quantity, and Order Quantity are filled out manually by each department and the list is returned to Purchasing for use in the creation of PO's.

There are options to print the list of supply codes by individual department or for all departments, to view purchase orders created within the module and in other Purchasing modules, and to search for existing purchase orders. Purchase orders can be viewed, edited, previewed, and printed from within the module. The Search PO screen displays the status of a purchase order as "no receipt", "partial receipt", or "final receipt" as well as the due date on the PO number and description of supply code and also AP invoice status.

## Contact Information

### EFI Support

<b>US Phone:</b>	855.334.4457 (first select option 3, then press option 8, then press option 1)
<b>US Fax:</b>	415.233.4157
<b>US E-mail:</b>	<a href="mailto:printstream.support@efi.com">printstream.support@efi.com</a>

Regular Service Desk hours are 8:00 AM to 7:00 PM Central Time, Monday – Friday. Outside of these hours, you may leave a voice mail message and an on-call support representative will be paged. Response time is based on the severity of the issue.

**Note** For problems involving infrastructure (i.e., computers, networks, operating systems, backup software, printers, third-party software, etc.), contact the appropriate vendor. EFI cannot support these types of issues.

### EFI Professional Services

<b>US Phone:</b>	651.365.5321
<b>US Fax:</b>	651.365.5334
<b>E-Mail:</b>	<a href="mailto:ProfessionalServicesOperations@efi.com">ProfessionalServicesOperations@efi.com</a>

EFI Professional Services can help you perform EFI software installations, upgrades, and updates. This group can also help you implement, customize, and optimize your EFI software plus offer a range of training options.

## Add New Supply Code

**Add New Supply Code**

Code: GBC COMBS-101  
 Desc: GBC COMBS 1"  
 Uom: BOX  
 Default Department: 7 BINDERY  
 Default Vendor: 500 Draper Paper  
 Default Vendor Price: 35 Per: 250

Vendor: Price: Per: 1

Delete Vendor Add to Grid

**Search Dissection**

Tag	Code	Dept Name	Dissc	Diss Search
1	10	Labor WIP Department		Dissc
2	11	suel		Dissc
3	2	CONSULTING		Dissc
4	3	DATA PROCESSING		Dissc
5	4	PREPRESS		Dissc
6	5	PRINTING		Dissc
7	6	LASER		Dissc
8	7	BINDERY		Dissc
9	8	MAILING		Dissc
10	9	WAREHOUSE		Dissc

Save Cancel

1. Enter a **Code** (20 character maximum).
2. Enter a **Description** (25 character maximum).
3. Enter a **UOM** (Unit of Measure-alpha-numeric 25 character maximum).
4. Select a **Default Department**. Departments are set up in **Master Files Reports** under **Production Departments**.
5. Select a **Default Vendor** (populates from Master Files Vendor).
6. Enter a **Price per UOM**.
7. Tag one or more Departments that may order this item. Then select a **Dissection Code** and click **Save**.
8. To select additional vendors, select a different **Vendor** and enter the **Price** and **UOM**. Then click **Add to Grid**.

Creating one supply code with multiple vendors attached allows the PO creator to switch vendors on any supply code that has multiple attached vendors.



# Search for Supply Codes

- 1. To view all supply codes, leave the options blank and select **Search**.
- 2. To search by options, select one or more of the available options (i.e., Supply Code, Description, Department, Vendor, and Dissection Code). The options displayed are available as view only Active supply codes.

Manage Supply Codes

Print Lists

Order Supply Codes

Created PO's

Search PO

Search

☐ Supply Code

☐ Desc like

☐ Department

☐ Vendor

☐ Dissection Code

☐ Active Codes Only

Search

	Active	Code	Desc	UOM
1	Y	101	Blanket for 40" SF Press	Blanket
2	Y	102	Kraftwrap	20" Roll
3	Y	400	Film	1
4	Y	401	Test save	1
5	Y	402	Lower case film	1
6	Y	411	Staple	1000
7	Y	GBC COMBS-101	GBC COMBS 1"	BOX

Add Supply Code

Edit Supply Code

Delete Supply Code

Activate / Deactivate

Vendor(s) for

Department(s) using

Default	Ac No	Vendor Name	Price
---------	-------	-------------	-------

Dept Id	Dept Name
---------	-----------

Cancel

## Edit Supply Codes

1. Highlight the Supply Code and click **Edit Supply Code**.

Active	Code	Desc	UOM
1	Y	101	Blanket for 40" SF Press
2	Y	102	KraftWrap
3	Y	400	Film
4	Y	401	Test save
5	Y	402	Lower case film
6	Y	411	Staple
7	Y	GBC COMBS-101	GBC COMBS 1"

Default	Ac No	Vendor Name	Price
1	Y	500	Draper Paper

Dept Id	Dept Name	UOM
1	7	BINDERY

2. Enter changes and click **Save**.

Ac No	Vendor Name	Price
1	500	Draper Paper

Tag	Code	Dept Name	Dissc	Diss Search
1	10	Labor WIP Department		Dissc
2	11	suel		Dissc
3	2	CONSULTING		Dissc
4	3	DATA PROCESSING		Dissc
5	4	PREPRESS		Dissc
6	5	PRINTING		Dissc
7	6	LASER		Dissc
8	7	BINDERY	0101011350	Dissc
9	8	MAILING		Dissc
10	9	WAREHOUSE		Dissc

3. There are additional options to edit Code, Description, UOM, Default Dep't, add new Vendor, select/deselect departments (the same options that are available when adding new code).

# Print Lists

Selection Options:

- Select All Departments
- Unselect All Departments
- Select 1 or more Departments Report Options

Report Options:

- Preview to Screen
- Print
- Export

Manage Supply Codes

Manage Supply Codes

Print Lists

Order Supply Codes

Created PO's

Search PO

	Tag	Dept Code	Dept Name
1	<input type="checkbox"/>	10	Labor WIP Department
2	<input type="checkbox"/>	11	suel
3	<input type="checkbox"/>	2	CONSULTING
4	<input type="checkbox"/>	3	DATA PROCESSING
5	<input type="checkbox"/>	4	PREPRESS
6	<input type="checkbox"/>	5	PRINTING
7	<input type="checkbox"/>	6	LASER
8	<input checked="" type="checkbox"/>	7	BINDERY
9	<input type="checkbox"/>	8	MAILING
10	<input type="checkbox"/>	9	WAREHOUSE

Select All

Un Select All

Preview

Print

Cancel



# Supply Order Sheet

Supply Order Sheets can be printed and distributed to each department.

SupplyCode	Item Desc	UOM	On Order Qty	PO No	Due Dt	OnHandQty	OrderQty
#00	Film	1	72.00				
			2.00	947	10/5/09		
			10.00	943	10/7/09		
			10.00	944	10/7/09		
			5.00	946	10/7/09		
			5.00	946	10/7/09		
			15.00	944	10/9/09		
			25.00	948	10/25/09		
#01	Test save	1					
#02	Lower case film	1					

Supply Order Sheets show:

- Supply Code
- Item Desc
- UOM
- On Order Quantity\*
- PO No
- Due Dt
- On Hand Qty\*\*
- Order Quantity\*\*\*

\*On Order Quantity - will display the quantity not yet received on an open PO

\*\*On Hand Qty - is used to write in the amount currently on hand in the department

\*\*\*Order Qty - is used to write in the amount the department is requesting to be added to a PO

Completed sheets are returned to Purchasing for use in creating purchase orders.

## Order Supply Codes

The opening screen defaults to show all items in all departments.

1. Select the check box next to the department in order to close the list for departments that are not ordering supplies.

The screenshot shows the 'Manage Supply Codes' window. At the top, there are buttons for 'Manage Supply Codes', 'Print Lists', 'Order Supply Codes', 'Created PO's', and 'Search PO'. Below these buttons is a table with columns for 'Dept #', 'Name', 'Code', 'Desc', 'UOM', 'B/O Qty', 'Ord Qty', 'Due Dt', 'Vendor Id', 'Vendor Name', and 'Price'. The table is divided into sections for different departments: DATA PROCESSING, PREPRESS, PRINTING, BINDERY, and WAREHOUSE. Each section has a checkbox next to the department number. The 'Show only Dept with Items' checkbox is checked at the bottom left. The 'Refresh' button is in the center, and the 'Create PO' and 'Cancel' buttons are on the right.

Dept #	Name	Code	Desc	UOM	B/O Qty	Ord Qty	Due Dt	Vendor Id	Vendor Name	Price
3	DATA PROCESSING									
4	PREPRESS									
400	Film	1	72.00					100	Printing Company	5.25
401	Test save	1	0.00					100	Printing Company	1.00
402	Lower case film	1	0.00					100	Printing Company	15.00
5	PRINTING									
101	Blanket for 40" SF Press	Blanket	26.00					BAS01	Bailey's Supplies	35.00
400	Film	1	72.00					100	Printing Company	5.25
7	BINDERY									
GBC CC	GBC COMBS 1"	BOX	0.00					500	Draper Paper	35.00
9	WAREHOUSE									
102	KraftWrap	20" R	0.00					REP01	Red Paper Supply	25.00

☒ Show only Dept with Items    Refresh    Create PO    Cancel

2. Select the item and enter the **Order Quantity** and **Due Date**. Use the default vendor or use the option to select other vendors.

The 'Manage Supply Codes' window displays a list of items organized by department. The 'Search Vendor' dialog box is open, showing a list of vendors for selection.

Dept #	Name	Code	Desc	UOM	B/O Qty	Ord Qty	Due Dt	Vendor Id	Vendor Name	Price
3	DATA PROCESSING									
4	PREPRESS									
400	Film			1	72.00	15.00	12/22/011	100	Printing Company	5.25
401	Test save			1	0.00			100	Printing Company	1.00
402	Lower case film			1	0.00			100	Printing Company	15.00
5	PRINTING									
101	Blanket for 40" SF Press			1						
400	Film			1						
7	BINDERY									
GBC CC	GBC COMBS 1"			BO						
9	WAREHOUSE									
102	Kraftwrap			20'						

The 'Search Vendor' dialog box shows the following vendors:

Vendor Id	Vendor Name
100	Printing Company
200	Mail Company

Buttons: Manage Supply Codes, Print Lists, Order Supply Codes, Created PO's, Search PO, Show only Dept with Items, Refresh, Select, Cancel.

3. After entering **Quantities** and **Dates** for all items, click **Create PO** and then **OK**.

The 'ManageSupplyCode' dialog box displays the message: "1 PO(s) created." with an OK button.

4. The Purchase Orders created in the current session display when **Created PO's** is selected.

The screenshot shows the 'Manage Supply Codes' window with the 'Created PO's' button selected. A table titled 'List of PO(s) created in this session' displays the following data:

	Order #	Ord Date	Vendor AcHo	Vendor Name
1	1274	12/2/2011	100	Printing Company

5. Double-click the PO number to view the line item.

The screenshot shows the 'Manage Supply Codes' window with the details for PO 1274. The window is titled 'PO 1274' and 'Created for Company : Alaska Incorp'. The details are as follows:

**Order #:** 1274 **Date:** 12/2/2011 **Ordered By:** LS **Ref:**   
**Rev #:** 0 **Rev Dt:** **Rev By:**   
**Vendor:** 100 Printing Company **Currency Type:** USA   
**Address:** 1234 Washington Way **Ph:**   
**West Jordan, UT 84122** **Fax:** 115623654   
**Ship To:** Alaska Inc. **Ship Via:**   
**Address:** Loading Dock **Ship To Attention:**   
**12300 S Alley Way**   
**Sandy, UT 84090-4534**

Details	Due Date	Job #	Quantity	Amount
UL Film	12/22/20...	0	15	\$78.75

**Total:** \$78.75 (in Currency)

Buttons: Add Line..., Edit Line..., Delete Line..., Receiving Instructions, Update Job changes, Header Notes, Email PO, Preview, Print, Save, Close, Cancel

6. Select the option to **Preview** or **Print** the Purchase Order.

Purchase Order

Page 1 of 1

**efi** print to win.

**Purchase Order**

**1274**

*File copy*

---

Ac No : **100**  
 Vendor : **Printing Company**  
 1234 Washington Way  
 West Jordan, UT 84122  
 Fax : 1115623654

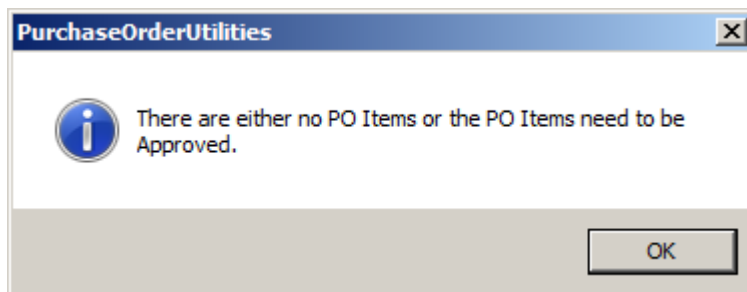
Order Date 12/2/2011  
 Due Date 12/22/2011  
 Ordered By LS  
 Reference  
 Ship Attention

Ship To : Joe  
**Alaska Inc.**  
 Loading Dock  
 12300 S Alley Way  
 Sandy, UT 84090-4534

Ship Via :

#	Job #	Item / Quote	Quantity	Item Description	Unit Price	Per	Disc. %	Gross Amt	Tax
1	0	400	15	Film	5.2500	11	0.00	78.75	0.00
{GL:01-01-01-6200}									

**PO Approval** - If activated, the system allows the creation of PO, but no ability to Print/Preview PO.



**Receive PO** - Normal method. Relieves B/O quantity in Order Supply Codes screen for item.

# Search PO

The Search PO screen provides search capability for purchase orders.

- 1. Enter the appropriate filters and click **Search**.

Manage Supply Codes

Print Lists

Order Supply Codes

Created PO's

Search PO

PO No

Supply Code

Vendor

Aspace

adfdf

Item #

Search Text

Due Dt greater than

11/5/2012

Part

Final

Order	Vendor	Details	Due Date	Job #	Item #	GL Code	Status	Part/Final	Org Cd
1019	adfdf	Testing Job F	12/12/2099	1235		01-01-01-120	Invoice	FINAL	22.5
1019	adfdf	Testing .NET	12/12/2099	Misc			Invoice	FINAL	3.85
1965	adfdf	Centura Glos	11/11/2012	7920	90926	01-01-01-120	No Invoice y	FINAL	1051.46
1965	adfdf	Die Cut (Buy	11/11/2012	7920		01-01-01-120	No Invoice y	FINAL	175
1965	adfdf	INKJET BUY	11/11/2012	7920		01-01-01-120	No Invoice y	FINAL	152.4
1965	adfdf	DATA ENTR	11/11/2012	7920		01-01-01-120	Not Receive		75.5
1965	adfdf	COURIER B	11/11/2012	7920		01-01-01-120	Not Receive		50
2054	adfdf	DO somethin	12/12/2021	Misc		01-01-01-100	Not Receive		0.57
2064	adfdf	test item	12/9/2012	Misc	79098	01-01-01-140	No Invoice y	FINAL	850
2094	adfdf	TREST	12/12/2012	Misc		01-01-01-100	Not Receive		1500
2094	adfdf	Centura Glos	12/12/2012	9010	92507	01-01-01-610	Not Receive		12.3
2452	adfdf	TEST MARK	1/4/2013	0		01-15-10-600	Not Receive		34

Create New

Search

Select

Cancel

2. Choose the PO from the display list and click **Select** to view the PO.

Manage Supply Codes

Manage Supply Codes

PO No:  Supply Code:  Vendor:  Item #:  Search Text:

Order	Vendor	Item
1019	adidf	Te
1019	adidf	Te
1965	adidf	Ce
1965	adidf	Die
1965	adidf	INK
1965	adidf	DA
1965	adidf	CO
2054	adidf	DO
2064	adidf	test
2094	adidf	TR
2094	adidf	Ce
2452	adidf	TE

Create New

**PO 1965**  
Created for Company : Streamline Solutions

Order #: 1965 Date: 11/8/2011 Ordered By: ls Ref:   
Rev #: 0 Rev Dt:  Rev By: js

Vendor: Aspace adidf Currency Type: USA  
Address: Line #1  Ph:   
Line#2  Fax:   
Line#3 ZIP NUM

Ship To: Streamline Solutions Ship Via:   
Address: 100 American Way Ship To Attention:   
DETROIT, MI 48204

Details	Due Date	Job #	Quantity	Amount
Centura Gloss Bk 60#-White - 23 x 35	11/11/20...	7920	11068	\$1,051.46
Die Cut (Buyout)--PIH	11/11/20...	7920	1	\$175.00
INKJET BUYOUT--PIH	11/11/20...	7920	10000	\$152.40
DATA ENTRY (Buyout)--	11/11/20...	7920	1	\$75.50
COURIER (Buyout)--	11/11/20...	7920	1	\$50.00

Add Line... Edit Line... Delete Line... Receiving Instructions Update Job changes

Header Notes EmailPO Preview Print

Total: \$1,504.36 (in Currency)

Save Close

3. Click **Create New** to create a new PO.

Manage Supply Codes

Manage Supply Codes

PO No:  Supply Code:  Vendor:  Item #:  Search Text:

Order	Vendor	Item
1019	adidf	Te
1019	adidf	Te
1965	adidf	Ce
1965	adidf	Die
1965	adidf	INK
1965	adidf	DA
1965	adidf	CO
2054	adidf	DO
2064	adidf	test
2094	adidf	TR
2094	adidf	Ce
2452	adidf	TE

Create New

**PO 2453**  
Created for Company :

Order #: 2453 Date: 1/4/2013 Ordered By: LS Ref:   
Rev #: 0 Rev Dt:  Rev By:

Vendor:  Currency Type:   
Address:  Ph:   
 Fax:

Ship To:  Ship Via:   
Address:  Ship To Attention:

Details	Due Date	Job #	Quantity	Amount

Add Line... Edit Line... Delete Line... Receiving Instructions Update Job changes

Header Notes EmailPO Preview Print

Total: \$0.00 (in Currency)

Save Close