



User Guide

Scheduled Purchasing
V21.1.0200

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EFI PrintStream | V21.1.0200 *Scheduled Purchasing User Guide*

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Table of Contents

Introduction	4
Overview	4
Contact Information	4
Task List.....	5
Task List: Search Results	6
Search Criteria	7
Completed Jobs Selection.....	7
Need to Order Selection.....	8
Order Items.....	9
Ordered Selection.....	10
Other Selection Options	11
Inventory	12
Inv Type Sort Option	12
Type Sort Option.....	13
Category Sort Option	14
Sub Category Sort Option	14
Below Min Qty Sort Option	15
Negative Available Option	15
Other Sort Options	16
All jobs that have Reservations for an Item.....	16
Place an Order	17
Purchasing: Create, View, or Edit a PO.....	18
Add Line Item – Job Related Multi Item	19
Add Line Item – Job Related	20
Job Related Item Screen.....	21
PO Line Item Notes.....	22
List of AP Codes	22
Add Line Item – Non-Inventory	23
Add Line Item – Finished Goods and Search button.....	24
Edit or Delete a Purchase Order Line Item	25
Preview, Print, Export / E-mail a PO	25
Sheeting	26
PO Monitor.....	27
Reports.....	28
Scheduled Purchasing - Paper Notes.....	29



Introduction

Overview

This user guide provides details regarding Scheduled Purchasing, including:

- Task List
- Inventory
- Purchasing, etc.

Contact Information

EFI Support

US Phone:	855.334.4457 (first select option 3, then press option 8, then press option 1)
US Fax:	415.233.4157
US E-mail:	printstream.support@efi.com
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

US Phone:	651.365.5321
US Fax:	651.365.5334
E-Mail:	ProfessionalServicesOperations@efi.com
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.	



Task List

The Scheduled Purchasing module was created to facilitate managing your purchasing and inventory departments. The statuses of all purchasing transactions and inventory requirements can be viewed in this screen. This program was developed primarily for the print and print and mail industry. The module works in conjunction with the Paper Reservation screen found in both the print and print and mail programs.

Material Requirement

File Task List Inventory Purchasing Sheeting PO Monitor Reports

Search Criteria

☐ All ☐ Direct.sql

Start Date: 3/24/2010 End Date: 3/24/2010

Selection Type: Key Word:

Vendor:

☐ View all Plants ☐ Mail Jobs ☒ Print Jobs ☐ Ignore unscheduled tasks ☒ Ignore Mail Components

Job

Job #: Title:

Cust.Code: Name:

Est Delv Dt:

Job#	Qty	UOM	Details	Size	Part	Vendor	POMO	Sch Dt	Recvd	PO Due	Workflow
------	-----	-----	---------	------	------	--------	------	--------	-------	--------	----------

Job No: **Title:**

Cust Code: **Name:**

CSR: **Estimator:** **Planner:**

Press: **Press Size:** **Paper Size:**

Notes:

Save Notes

Help Print Search Select Order

Task List – The task list screen is used to display the status of inventory materials attached to jobs. The filters allow you to sort by a single job or filter selection by inventory statuses on jobs. To sort by job, enter the **Job #** and click **Search**.

Task List: Search Results

The screenshot shows the 'Material Requirement' software window. It has a menu bar (File, Task List, Inventory, Purchasing, Sheeting, PO Monitor, Reports) and a toolbar. The 'Task List' tab is active.

Search Criteria:

- ☐ All
- Start Date: 6/25/2008
- End Date: 6/25/2008
- Selection Type: [Dropdown]
- Key Word: [Text Box]
- Vendor: [Dropdown]
- ☐ Direct sql
- ☐ View all Plants
- ☒ Mail Jobs
- ☒ Print Jobs
- ☐ Ignore unscheduled tasks

Job Details:

- Job #: 1227
- Title: State Mailer
- Cust. Code: AAA
- Name: AAA Insurance

Inventory Table:

Job#	Qty	UOM	Details	Size	Part	Vendor	PONO	Sch Dt	Recvd	PO Due	Workflow
1227	28314.00	shs	Carnival Cover 0100	28 x 40	Cover 4 Versions	Draper Paper	0	N/A	6/20/2008		Reserved
1227	336411.00	shs	Carnival Text 0100	23 x 35	48 pg. Text	Draper Paper	0	N/A	6/20/2008		Reserved
1227	100000.00		Diecut Buyout 02		48 pg. Text		0	N/A			Buyouts

Bottom Section:

- Job No: [Text Box]
- Cust Code: [Text Box]
- CSR: [Text Box]
- Press: [Text Box]
- Title: [Text Box]
- Name: [Text Box]
- Estimator: [Text Box]
- Press Size: [Text Box]
- Planner: [Text Box]
- Paper Size: [Text Box]
- Notes: [Text Area]
- Save Notes: [Button]
- 3 records loaded.
- Buttons: Help, Print, Search, Select, Order

All inventory items related to this job are displayed on the screen. The workflow column indicates the status of each inventory item on the job. The statuses are as follows.

- **Ord/Rsv** – This status indicates the inventory item has been ordered and also reserved. The purchase order number is displayed in the PONO column. You can view or edit the PO for this item by right clicking the line.
- **Un-Confirmed** – Indicates the inventory item has not been reserved for the job.
- **Reserved** – These inventory items have been reserved for this job.

If you want to update the status for any of these items, highlight and then double-click the line. The Paper Reservation screen for this job will open. See *Paper Reservation Notes* for more information on making changes in the Paper Reservation screen. As you click each line, the relevant information for that item is displayed at the bottom of the screen.

Search Criteria

This feature allows you to select the dates for filtering the information displayed on the screen. The search criteria are used with the Selection feature. You can search by the following methods:

- **All** – Includes all inventory items for all dates sorted by job and job due date.
- **Start Date/End Date** – Includes all items for all jobs with due dates between start and end date specified.
- **Selection Type** – Filters the information displayed on the screen by category and search criteria
- **Vendor** – Displays information for selected Vendor Only.
- **Key Word** - Filters display of Details based on Key Words entered.

Completed Jobs Selection

Completed Jobs – Displays inventory items for all jobs invoiced as final.

The screenshot displays the 'Material Requirement' software interface. The top menu bar includes 'File', 'Task List', 'Inventory', 'Purchasing', 'Sheeting', 'PO Monitor', and 'Reports'. The 'Search Criteria' section on the left contains several input fields and checkboxes:

- ☒ All
- Start Date: 6/25/2008
- End Date: 7/31/2008
- Selection Type: Completed Jobs
- Key Word: (empty)
- Vendor: (empty)
- ☒ Direct sol
- ☐ View all Plants
- ☒ Mail Jobs
- ☒ Print Jobs
- ☒ Ignore unscheduled tasks

The 'Job' section on the right contains input fields for Job #, Title, Cust. Code, and Name.

The main data table lists various jobs with columns: Job#, Qty, UOM, Details, Size, Part, Vendor, PONO, Sch Dt, Recd, PO Due, Workflow, and a status icon. The table contains 15 rows of data, including jobs like 1304, 1280, 1284, 1231, 1112, 1263, 1201, 1283, 1280, 1231, 1231, 1231, 1251, and 1251.

Below the table, the 'Job Details' section shows information for Job No. 1243, including Title (Multi Drop Job), Name (AAA Insurance), CSR (Monika Rynkiewicz), Press (640 Heidelberg), and various size specifications.

The bottom of the interface includes a 'Notes' section with a 'Save Notes' button and a status bar indicating '115 records loaded'.

Need to Order Selection

Need to Order – Displays all items by job number that have been reserved or unconfirmed where the inventory commitment is more than the available on hand quantity.

Material Requirement

FileTask ListInventoryPurchasingSheetingPO MonitorReports

Search Criteria

☒ All

Start Date6/25/2008End Date7/31/2008

Selection TypeNeed To OrderKey Word

Vendor

☒ Direct sql

☐ View all Plants

☐ Mail Jobs

☒ Print Jobs

☒ Ignore unscheduled tasks

Job

Job #

Title

Cust Code

Name

Job#	Qty	UOM	Details	Size	Part	Vendor	PO#	Sch Dt	Recvd	PO Due	Workflow
1112	4196.00	Shts.	Carnival Cover~0100	23 x 35	Canadian Cover	Draper Paper	0	N/A			UnConfirmed
1214	3503.00	shts	Carnival Cover~0100	28 x 40	Postcards	Draper Paper	0	N/A	5/29/201		Reserved
1214	3503.00	shts	Carnival Cover~0100	28 x 40	Postcards	Draper Paper	0	N/A	5/29/201		Reserved
1214	3503.00	shts	Carnival Cover~0100	28 x 40	Postcards	Draper Paper	0	N/A	5/29/201		Reserved
1214	3503.00	shts	Carnival Cover~0100	28 x 40	Postcards	Draper Paper	0	N/A	5/29/201		Reserved
1214	3503.00	shts	Carnival Cover~0100	28 x 40	Postcards	Draper Paper	0	N/A	5/29/201		Reserved
1214	50000.00	lbs.	2 COLOR POSTCARDS ON CARNIVAL C		Postcards	Draper Paper	0	N/A	5/29/201		Reserved
1263	3931.00	Shts.	Carnival Cover~0100	28 x 40	Cover		0	N/A			UnConfirmed
1263	0.00	Shts.		0 x 0			0	6/11/2008			UnConfirmed
1112	195427.00	Shts.	Booklet Envelope 9 x 12 white		CF ep.		0	6/26/2008	0		
1214	3503.00	shts	Carnival Cover~0100	28 x 40	Postcards	Draper Paper	0	N/A	5/29/201		Reserved
1214	3503.00	shts	Carnival Cover~0100	28 x 40	Postcards	Draper Paper	0	N/A	5/29/201		Reserved
1214	3503.00	shts	Carnival Cover~0100	28 x 40	Postcards	Draper Paper	0	N/A	5/29/201		Reserved
1214	3503.00	shts	Carnival Cover~0100	28 x 40	Postcards	Draper Paper	0	N/A	5/29/201		Reserved
1214	3503.00	shts	Carnival Cover~0100	28 x 40	Postcards	Draper Paper	0	N/A	5/29/201		Reserved
1214	3503.00	shts	Carnival Cover~0100	28 x 40	Postcards	Draper Paper	0	N/A	5/29/201		Reserved

Job No1250

Cust Code50023

CSRHouse Account

Press640 Heidelberg

TitleSkyler's First Birthday Mailing

NameNelsen ,Company

EstimatorNorma Nelsen

Press Size17 1/2 x 23

Planner

Paper Size23 x 35

Notes

Save Notes

115 records loaded.

HelpPrintSearchSelectOrder

Order Items

Items can be directly ordered through this screen by clicking the box for the line item to order and then clicking the **Order** button.

Task List	Inventory	Purchasing	Sheeting	PO Monitor	Reports																																																																														
Search Criteria:																																																																																			
Job# _____ Job _____																																																																																			
All																																																																																			
Start Date	6/25/2008																																																																																		
Select Type	Need To Order																																																																																		
Vendor																																																																																			
<input checked="" type="checkbox"/> Direct sq <input type="checkbox"/> View all Plants <input type="checkbox"/> Mail Jobs																																																																																			
Created for Company : Order # : 620 Date : 6/25/2008 Ordered By: LS Ref.: Rev # : 0 Rev Dt.: Rev By.:																																																																																			
Vendor : _____ Currency Type: _____ Address : _____ Ph: _____ _____ Fax: _____ Ship To : _____ Ship Via: _____ Address : _____ Ship To Attention: _____ _____ _____																																																																																			
<table border="1"> <thead> <tr> <th>Jobs#</th><th>Qty</th><th>UOM</th><th>Description</th></tr> </thead> <tbody> <tr><td>1112</td><td>4136.00</td><td>Shts.</td><td>Carnival Cover**01C</td></tr> <tr><td>1214</td><td>3503.00</td><td>shts</td><td>Carnival Cover**01C</td></tr> <tr><td>1214</td><td>50000.00</td><td>lbs.</td><td>2 COLOR POSTCAP</td></tr> <tr><td>1214</td><td>3503.00</td><td>shts</td><td>Carnival Cover**01C</td></tr> <tr><td>1214</td><td>3503.00</td><td>shts</td><td>Carnival Cover**01C</td></tr> <tr><td>1214</td><td>3503.00</td><td>shts</td><td>Carnival Cover**01C</td></tr> <tr><td>1214</td><td>50000.00</td><td>lbs.</td><td>2 COLOR POSTCAP</td></tr> <tr><td>✓ 1263</td><td>3931.00</td><td>Shts.</td><td>Carnival Cover**01C</td></tr> <tr><td>1263</td><td>0.00</td><td>Shts.</td><td></td></tr> <tr><td>1112</td><td>195427.00</td><td>Shts.</td><td>Booklet Envelope 9:</td></tr> <tr><td>1214</td><td>3503.00</td><td>shts</td><td>Carnival Cover**01C</td></tr> <tr><td>1214</td><td>3503.00</td><td>shts</td><td>Carnival Cover**01C</td></tr> <tr><td>1214</td><td>3503.00</td><td>shts</td><td>Carnival Cover**01C</td></tr> <tr><td>1214</td><td>3503.00</td><td>shts</td><td>Carnival Cover**01C</td></tr> <tr><td>1214</td><td>3503.00</td><td>shts</td><td>Carnival Cover**01C</td></tr> <tr><td>1214</td><td>50000.00</td><td>lbs.</td><td>2 COLOR POSTCAP</td></tr> </tbody> </table> <table border="1"> <thead> <tr> <th>Details</th><th>Due Date</th><th>Job #</th><th>Quantity</th><th>Amount</th></tr> </thead> <tbody> <tr> <td>Carnival Cover**0100 --28 x 40</td><td>6/25/2008</td><td></td><td>3931</td><td>\$835.34</td></tr> </tbody> </table>						Jobs#	Qty	UOM	Description	1112	4136.00	Shts.	Carnival Cover**01C	1214	3503.00	shts	Carnival Cover**01C	1214	50000.00	lbs.	2 COLOR POSTCAP	1214	3503.00	shts	Carnival Cover**01C	1214	3503.00	shts	Carnival Cover**01C	1214	3503.00	shts	Carnival Cover**01C	1214	50000.00	lbs.	2 COLOR POSTCAP	✓ 1263	3931.00	Shts.	Carnival Cover**01C	1263	0.00	Shts.		1112	195427.00	Shts.	Booklet Envelope 9:	1214	3503.00	shts	Carnival Cover**01C	1214	3503.00	shts	Carnival Cover**01C	1214	3503.00	shts	Carnival Cover**01C	1214	3503.00	shts	Carnival Cover**01C	1214	3503.00	shts	Carnival Cover**01C	1214	50000.00	lbs.	2 COLOR POSTCAP	Details	Due Date	Job #	Quantity	Amount	Carnival Cover**0100 --28 x 40	6/25/2008		3931	\$835.34
Jobs#	Qty	UOM	Description																																																																																
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Details	Due Date	Job #	Quantity	Amount																																																																															
Carnival Cover**0100 --28 x 40	6/25/2008		3931	\$835.34																																																																															
<p>Job No 1263 Cust Code 50016 CSR Sue Smith Press 640 Heidelberg</p>																																																																																			
<p>Add Line... Edit Line... Delete Line... Receiving Instructions Update Job changes Total: \$835.34 (in Currency)</p> <p>Header Notes Email PO Preview Print Save Close</p> <p>Press Size 17 1/2 x 23 Paper Size 28 x 40</p>																																																																																			
Notes																																																																																			
Save Notes																																																																																			
Print Search Select Order																																																																																			

The PO screen opens with the line item information for the selected line. Fill in the **Vendor** and **Ship To** information and then edit the line to enter due dates and confirm quantities and pricing. Then save the PO.

You can select multiple lines for inventory on the same job and different jobs as long as they are for the same vendor and they will all be added as different line items on the PO. Once the PO's have been created and saved, the screen refreshes and all the ordered items drop off the listing.

Ordered Selection

Ordered – Displays all items that are currently ordered. You can view or edit the PO for any item by right-clicking the line you want to edit or view. This screen also shows the PO due date and receipt date of the PO.

Material Requirement

File

Task List

Inventory

Purchasing

Sheeting

PO Monitor

Reports

Search Criteria

☒ All

Start Date 6/25/2008

End Date 6/25/2008

Selection Type Ordered

Key Word

Vendor

☐ Direct sql

☐ View all Plants

☐ Mail Jobs

☒ Print Jobs

☐ Ignore unscheduled tasks

Job

Job #

Title

Cust Code

Name

Job#	Qty	UOM	Details	Size	Part	Vendor	PONO	Sch Dt	Recvd	PO Due	Workflow
249	7240.00	Shts.	Env 248 Non-W/ndow	4 1/8 x 9 1/2	#10 Envelope	Unisource Paper Company	456	6/15/2004	0	0	Ordered
249	1035.00	Shts.	Husky Offset 70#	23 x 35	Laser Letter	Unisource Paper Company	456	6/30/2004	0	0	Ordered
637	29565.00	Shts.	Husky Offset 70#	23 x 35	16pg 8 1/2 x 11 Sht	Unisource Paper Company	394	4/10/2004			Ord/Rsv
731	1.00		DATA ENTRY (Buyout)				440	5/10/2004		5/10/2004	Ordered
731	1.00		PROGRAMMING (Buyout)				440	5/9/2004		5/9/2004	Ordered
731	50000.00		PURCHASE LIST				440	5/9/2004		5/9/2004	Ordered
963	1.00		DATA ENTRY (Buyout)				562	1/11/2007	11/20/2007	1/11/2008	Ordered
1079	5880.00	Shts.	Carnival Cover 0100	20 x 26	Cover 8.5x11 2up	Draper Paper	576	3/18/2008			Ord/Rsv
1211	1517.00	lbs.	Husky Offset 0100	35	Text AAA	Draper Paper	599	5/27/2008			Ord/Rsv
1219	6017.00	shts.	Carnival Text 0100	23 x 35	Main	Draper Paper	598	6/5/2008	6/4/2008	6/5/2008	Ord/Rsv
1230	34926.00	lbs.	Husky Offset 0100	35	48pg Text		593	6/10/2008	0	0	Ordered
1279	10000.00		Die Cut Buyout 01		TEXT		603	6/17/2008	6/17/2008	6/17/2008	Ordered
1302	0.00	shts.	Carnival Cover 0100	28 x 40	cvr	Draper Paper	609	6/23/2008	6/23/2008	6/23/2008	Ord/Rsv

Job No

Cust Code

CSR

Press

Title

Name

Estimator

Press Size

Planner

Paper Size

Notes

Save Notes

13 records loaded.

Help

Print

Search

Select

Order

Other Selection Options

Planner Replaced – This feature works with the Paper Reservation screen and shows any items where the paper selected on the order does not match the reserved paper. These changes were made through the Paper Reservation screen.

Purchasing Replaced – Displays items where the paper selected on the order does not match the paper reserved. In this case, the reservation change was made through Scheduled Purchasing by clicking the line item to bring up the Paper Reservation screen.

Reserved – Shows all items by search criteria that are reserved.

Un-Confirmed – Shows all items by search criteria that are not reserved.

Special Order – Displays a list of all paper items that are not in inventory where the **Order** button was clicked in the Paper Reservation screen. All these items are flagged to be ordered on Job Related PO's.

Key Word – Displays information for all items in search criteria that match the key word entered. The key word must match part of the inventory description.

Vendor – Displays information for all items that are from the vendor selected. The vendors are attached to the inventory items in the Inventory Master File, Item Links screen.

Material Requirement

File Task List Inventory Purchasing Sheeting PO Monitor Reports

Search Criteria

☒ All

Start Date: 6/25/2008 End Date: 6/25/2008

Selection Type: Reserved Key Word: Husky

Vendor:

☐ Direct sql ☐ View all Plants ☐ Mail Jobs ☒ Print Jobs ☐ Ignore unscheduled tasks

Job

Job #:

Title:

Cust Code:

Name:

Job#	Qty	UOM	Details	Size	Part	Vendor	PONO	Sch Dt	Recvd	PO Due	Workflow
420	2257.00	shs	Husky Offset 50#	23 x 35	8pg 8 1/2x11 2up	Unisource Paper Company	296	N/A	7/23/2001	7/23/2001	Ord/Rsv
421	15817.00	shs	Husky Offset 50#	23 x 35	16pg 8 1/2 x 11	Unisource Paper Company	0	N/A	7/23/2001	7/23/2001	Reserved
421	13400.00	shs	Husky Offset 50#	25 x 38	16pg 8 1/2 x 11	Unisource Paper Company	0	N/A	7/23/2001	7/23/2001	Reserved
421	3365.00	shs	Husky Offset 50#	23 x 35	8pg 8 1/2x11 2up	Unisource Paper Company	0	N/A	7/23/2001	7/23/2001	Reserved
422	0.00	shs	Husky Offset 50#	23 x 35	16pg 8 1/2 x 11	Unisource Paper Company	0	N/A	7/23/2001	7/23/2001	Reserved
422	0.00	shs	Husky Offset 50#	23 x 35	8pg 8 1/2x11 2up	Unisource Paper Company	0	N/A	7/23/2001	7/23/2001	Reserved
637	29565.00	shs	Husky Offset 50#	23 x 35	16pg 8 1/2 x 11 Sh	Unisource Paper Company	394	4/10/2004			Ord/Rsv
637	3295.00	shs	Husky Offset 50#	23 x 35	8pg 8 1/2x11 2up	Unisource Paper Company	0	N/A	3/5/2004	3/5/2004	Reserved
888	1625.00	lbs	Letter for User Guide		Letter		0	N/A	9/10/2001	9/10/2001	Reserved
1108	105195.00	lbs	48pp text extras for inventory		text		0	N/A	4/23/2001	4/23/2001	Reserved
1211	2811.00	lbs	Husky Offset Web ***0100	35	Text AAA	Draper Paper	589	5/27/2008			Ord/Rsv

11 records loaded.

Job No: 1211 Title: Big Huge Quote to test Combo Work Ticket

Cust Code: 60016 Name: Botsch, Company

CSR: Sue Smith Estimator: Betty White Planner: Jack Summer

Press: 640 Heidelberg Press Size: 28 x 40 Paper Size: 28 x 40

Notes

Save Notes

Help Print Search Select Order

Inventory

The Inventory screen allows you to sort and manage all inventory items. The screen displays reservation information and PO status for each inventory item in the display. Inventory items can be ordered for stock or related to specific jobs in this screen.

Inv Type Sort Option

Inv Type – Selecting any of these options and clicking **Search** filters the inventory display by these categories:

- **Paper Rolls/Sheets:** Has dollar value/asset account. For example, Paper, 60# Offset White. **Print system only.**
- **Materials:** Has dollar value/asset account. For example, Ink, Labels, Plates, Film, Boxes.
- **Finished Goods:** Has dollar value/asset account. For example, Binders, Pre-Printed Shells, Boxes, Diskettes used for a job.

Note All of these options can be used in conjunction with any of the other options on this screen to narrow your search.

The screenshot shows the 'Material Requirement' window with the 'Inventory' tab selected. The 'Inv Type' is set to 'Paper-Rolls'. The 'Job' field is empty. The 'Item' field is empty. The 'Prod Cd' field is empty. The 'Due Dt Range' is set to '3/24/2010' to '4/23/2010'. The 'Reserve Due Dt' field is empty. The 'Key' field is empty. The 'Color' field is empty. The 'Weight' field is empty. The 'Size' field is empty. The 'X' field is empty. The 'Negative Avail' checkbox is checked. The 'Incl On Order' checkbox is unchecked. The 'Below Min Qty' checkbox is unchecked. The 'Excl zero Qty' checkbox is unchecked. The table below shows the inventory items:

Tag	Item #	Inv Code	Details	On Hand	On Order	Curr Allocated	Calc Allocated	Available	Min Lvl	Vendor Cd	Vendor Name
1175	1175		Husky Offset**0100 White 18	0	0	1328		-1328	0	500	Draper Paper
390			Husky Offset Web**0100 White 35	39464	1302	241408		-200642	0	500	Draper Paper
543	543		50# Finch Opq Web - Supplied White 38	0	0	4		-4	0		
701	35		Husky Offset 50# White 35	0	0	130		-130	0	UNISOURC	Unisource Paper C
872	872		Husky Offset**0100 White 38	0	0	3576		-3576	0	500	Draper Paper

The 'Reservations' section shows a table with columns: Job #, Customer, Job Name, Required, Allocated, Issued, PO No, C, Task completed. The 'Existing Open PO's' section shows a table with columns: Due Date, PO No, Vendor, Ord Qty, Recd Qty. The 'Preview' button is disabled. The 'Print' button is disabled. The 'Sort By' dropdown is set to 'Item #'. The 'Color items that are inactive for' field is set to '180' days. The 'Search' button is disabled. The 'Create PO' button is disabled. The 'Show tasks's' button is disabled. The 'Show All Jobs in Reservation list' checkbox is unchecked.

Type Sort Option

Type – There is a field in Master Files - Inventory in the Main Information screen that allows you to apply an Inventory classification to each item. The inventory can then be filtered by these classifications: **House**, **Consignment**, **Customer Owned**, **Others**.

The screenshot shows the 'Material Requirement' software interface. The 'Inventory' tab is selected. The interface includes several filter fields: 'Inv Type' (set to 'House'), 'Type' (set to 'House'), 'Category', 'Sub Category', 'Job', 'Item', 'Prod Cd', 'Due Dt Range' (3/24/2010 to 4/23/2010), 'Reserve Due Dt', 'Key', 'Color', 'Weight', 'Size', and 'X'. There are also checkboxes for 'Negative Avail', 'Incl On Order', 'Below Min Qty', and 'Excl zero Qty'. A 'Clear all' button is present.

Tag	Item #	Inv Code	Details	On Hand	On Order	Curr Allocated	Calc Allocated	Available	Min Lvl	Vendor Cd	Vendor Name
	186	186	New Item for testing	0	12500	0		12500	0		
	783	038-35.000 M	Husky Offset 60# w/eb White 17.5	893	0	0		893	0	UNISOURC	Unisource Paper C
	784	038-35.000 Ck	Husky Offset 60# w/eb White 23.5	172	0	0		172	0	UNISOURC	Unisource Paper C
	845	20254-TEST-4	TEST-MFG ITEM-V12_3	10000	0	10000		0	0		
	851	GLS BK 60# 2	Centura Gloss Bk 60# White 23 x 35	200000	0	28295		171715	0	UNISOURC	Unisource Paper C

Below the table, there are sections for 'Reservations' and 'Existing Open PO's'. The 'Reservations' section includes a table with columns: Job #, Customer, Job Name, Required, Allocated, Issued, PO No, C, Task completed. The 'Existing Open PO's' section includes a table with columns: Due Date, PO No, Vendor, Ord Qty, Recd Qty. At the bottom, there are buttons for 'Preview', 'Print', 'Sort By' (Item #, Inv Cd), 'Color items that are inactive for' (180 Days), 'Search', 'Create PO', and 'Show tasks's'.

Category Sort Option

Category – This option applies to **print** and **print and mail** customers only. It allows you to sort by the **Paper Types** setup in Master Files - Print under **Miscellaneous**. These paper types are linked to each paper in the Paper Master File. (For example, Coated Book, Uncoated Book, Envelopes...)

Material Requirement

File

Task List

Inventory

Purchasing

Sheeting

PO Monitor

Reports

Inv Type

Type

Category

Sub Category

Clear all

Job

Item

Prod Cd

☐ Due Dt Range:

3/24/2010

4/23/2010

Reserve Due Dt

Key

Color

Weight

Size

X

Load

☐ Negative Avail
☐ Incl On Order
☐ Below Min Qty
☐ Excl zero Qty

Tag	Item #	Inv Code	Details	On Hand	On Order	Curr Allocated	Calc Allocated	Available	Min Lvl	Vendor Cd	Vendor Name
	318	Carnival Text	Carnival Text~~0100 white 23 x 35	621000	1211094	1800169		31925	1500	500	Draper Paper
	330	Husky Offset V	Husky Offset Web ~~~0100 White 35	39464	1302	241408		-200642	0	500	Draper Paper
	531	531	50# Finch Opq Web - Supplied White 30	0	0	0		0	0	500	Draper Paper
	538	538	Carnival Text~~0100 white 25	0	0	0		0	0	500	Draper Paper
	543	543	50# Finch Opq Web - Supplied White 38	0	0	4		-4	0	500	Draper Paper
	549	Carnival Text	Carnival Text~~0100 white 18 x 24	16001	64799	68562		12238	0	500	Draper Paper
	551	Carnival Text	Carnival Text~~0100 white 25 x 38	849000	0	330249		518751	0	500	Draper Paper
	594	Book Makers	Book Makers 50# Opq Sheet~~010000 White 25 x 38	0	0	0		0	0	500	Draper Paper
	607	607	Carnival Text~~0100 white 8 1/2 x 11	873036	0	200000		230000	0	500	Draper Paper
	619	619	50# Finch Opq Web - Supplied White 30	0	1615641	1567634		53907	0	1111111111	Draper Paper

Reservations

☐ Include Inactive Resv

Total Commit

Total Used

Job #	Customer	Job Name	Required	Allocated	Issued	PO No	C	Task completed
-------	----------	----------	----------	-----------	--------	-------	---	----------------

Preview

Print

Sort By:

☒ Item #
☐ Inv Cd

Color items that are inactive for:

180

Days

Search

Create PO

☐ Show All Jobs in Reservation list

Existing Open PO's

Due Date	PO No	Vendor	Ord Qty	Recd Qty
----------	-------	--------	---------	----------

Show task's

Sub Category Sort Option

Sub Category – Works in conjunction with the **Category** option. It is also designed for **print** and **print and mail** customers only. The sub categories are setup in Master Files Print in the Paper Types screen and are attached to the individual papers in the Paper File.

Material Requirement

File

Task List

Inventory

Purchasing

Sheeting

PO Monitor

Reports

Inv Type

Type

Category

Sub Category

Clear all

Job

Item

Prod Cd

☐ Due Dt Range:

3 /24/2010

4 /23/2010

Reserve Due Dt

Key

Color

Weight

Size

X

Load

☐ Negative Avail
☐ Incl On Order
☐ Below Min Qty
☐ Excl zero Qty

Tag	Item #	Inv Code	Details	On Hand	On Order	Curr Allocated	Calc Allocated	Available	Min Lvl	Vendor Cd	Vendor Name
	531	531	508 Finch Opq Web - Supplied White 30	0	0	0		0			
	543	543	508 Finch Opq Web - Supplied White 30	0	0	4		-4			
	594	Book Makers	508 Opq Sheet "0" 1000 White 25 x 38	0	0	0		0			
	619	Wausau Vellum	Wausau Vellum Opaque Book***0100 Beige 23 x 35	0	1615641	1562634		53007	0	UNISOURC	Unisource Paper C
	638	WVQ 23 875 x	Wausau Vellum Opaque Book***0100 Sea Green 23 x 35	0	200000	200000		0	0	UNISOURC	Unisource Paper C
	748	Wausau Vellum	Wausau Vellum Opaque Book***0100 Sea Green 23 x 35	0	0	0		0	0	UNISOURC	Unisource Paper C
	769	Wausau Vellum	Wausau Vellum Opaque Book***0100 Sea Green 23 x 35	212300	50000	36006		13994	0	UNISOURC	Unisource Paper C

Reservations

☐ Include Inactive Resv

Total Commit

Total Used

Job #	Customer	Job Name	Required	Allocated	Issued	PO No	C	Task completed

Existing Open PO's

Due Date	PO No	Vendor	Ord Qty	Recd Qty

Preview

Print

Sort By:

☒ Item #
☐ Inv Cd

Color items that are Inactive for:

180

Days

Search

Create PO

Show All Jobs in Reservation list

Show task's

Below Min Qty Sort Option

Below Min Qty – Displays all inventory items which have a minimum level set in Inventory Master File and the current amount on hand is less than the minimum level.

Material Requirement

File Task List **Inventory** Purchasing Sheeting PO Monitor Reports

Inv Type: [Dropdown] Job: [Dropdown] Key: [Text]
 Type: [Dropdown] Item: [Dropdown] Color: [Dropdown] Load
 Category: [Dropdown] Prod Cd: [Dropdown] Weight: [Text] Size: [Text] X [Text]
 Sub Category: [Dropdown] Reserve Due Dt: [Text] ☐ Negative Avail ☐ Incl On Order ☒ Below Min Qty ☐ Excl zero Qty

Clear all

Tag	Item #	Inv Code	Details	On Hand	On Order	Curr Allocated	Calc Allocated	Available	Min Lvl	Vendor Cd	Vendor Name
	39	BLK-INK	Black Ink	0	0	0	0	0	50		
	40	PROC-MAG-INK	Process Magenta Ink	0	0	0	0	0	50		
	42	PROC-YELLOW	Process Yellow Ink	0	100	0	0	100	50		
	43	PMS195-INK	PMS 195 Ink	0	0	0	0	0	50		
	48	CARTON-1145	12 x 18 x 11 Carton	0	500	17145	0	-16645	150		
	50	DSK-3456	Jani Disk for January Update Catalog	0	0	0	0	0	50		
	51	SKU-7890	EN Associated Foods Promotional #10 Envelope	0	0	0	0	0	50000		
	291	CB INSERT	OF Flat 8.5 x 9.5 insert	0	0	0	0	0	3000		
	900	80-1325-900	S Sequis Matte Book 80# 11x10 White 19 x 25	0	0	0	0	0	10000		
	901	70-1075-901	M Vista offset 70# 11x10 White 19 x 25	6377	0	0	0	6500	10000		

Reservations: ☐ Include Inactive Resv Total Commit: [Text] Total Used: [Text]

Job #	Customer	Job Name	Required	Allocated	Issued	PO No	C	Task completed

Existing Open PO's:

Due Date	PO No	Vendor	Ord Qty	Recd Qty

Preview Print Sort By: ☒ Item # ☐ Inv Cd Color items that are inactive for: 180 Days Search Create PO

☐ Show All Jobs in Reservation list

Negative Available Option

Negative Available – Displays all inventory items that have a negative balance due to over reservation of the inventory item.

Material Requirement

File Task List **Inventory** Purchasing Sheeting PO Monitor Reports

Inv Type: Paper-Rolls Job: [Dropdown] Key: [Text]
 Type: [Dropdown] Item: [Dropdown] Color: [Dropdown] Load
 Category: [Dropdown] Prod Cd: [Dropdown] Weight: [Text] Size: [Text] X [Text]
 Sub Category: [Dropdown] Reserve Due Dt: [Text] ☒ Negative Avail ☐ Incl On Order ☐ Below Min Qty ☐ Excl zero Qty

Clear all

Tag	Item #	Inv Code	Details	On Hand	On Order	Curr Allocated	Calc Allocated	Available	Min Lvl	Vendor Cd	Vendor Name
	1175	1175	Husky Offset 11x17 White 18	0	0	1328	0	-1328	0	500	Draper Paper
	290	Husky Offset	Husky Offset Web 11x17 White 35	39464	1302	241408	0	-200642	0	500	Draper Paper
	543	543	50# Finch Opg Web - Supplied White 38	0	0	4	0	-4	0		
	701	35" Rolls Husk	Husky Offset 50# White 35	0	0	130	0	-130	0	UNISOURC	Unisource Paper C
	872	872	Husky Offset 11x17 White 38	0	0	3576	0	-3576	0	500	Draper Paper

Reservations Grid Total Open rsvd Qty 241408

Job #	Customer	Job Name	Required	Allocated	Issued	PO No	C	Task completed
1211	Botsch & Company	Big Huge Quote to be 5/18/2008	2611	0	0	C	N	
1411	Rowan Rocks, Inc	Print & Mail Job 8/15/2008	1473	0	0	C	N	
1441	Rowan Rocks, Inc	Scheduled Purchasin 9/15/2008	1383	0	0	C	N	
1349	Rowan Rocks, Inc	Test 11/1/2008	11196	0	0	C	N	
1349	Rowan Rocks, Inc	Test 11/1/2008	11247	0	0	C	N	
1349	Rowan Rocks, Inc	Test 11/1/2008	11501	0	0	C	N	

Existing Open PO's:

Due Date	PO No	Vendor	Ord Qty	Recd Qty
9/17/2008	654	REF01	1302	0

Preview Print Sort By: ☒ Item # ☐ Inv Cd Color items that are inactive for: 180 Days Search Create PO

☐ Show All Jobs in Reservation list

Other Sort Options

Job – Display a listing of the reserved materials for the job entered.

Item – Displays the status of the inventory item entered on the screen.

Product Code – Searches by Product Code attached to Inventory

Due Date Range – If this check box is cleared, all items that meet the search criteria are displayed on the screen regardless of the job status. If this check box is selected, you can set the date range to filter the display based only for items on jobs that fall in that date range. The criteria the date range uses is based on the **Reserve Due Dt** type selected.

Reserve Due Dt – This works with the date range selected and filters the information based on date range in the following ways: **Job Due Date**, **Scheduled Paper Approval Date**, **Paper Due Date**, **Scheduled plate making date**, or **Scheduled printing date**.

Key - Displays inventory items whose descriptions match the text entered.

Color – Allows you to sort by paper color. This is only available for **print** and **print and mail** customers.

Note Before you can select a color, you must first click the **Load** button which will load all of the paper colors into the color window.

Weight – The display sorts papers by the basis weight entered. This is only available for **print** and **print and mail** customers.

Size – For **print** and **print and mail** customers only. Sorts papers by size entered. If searching for roll stock only, the roll width or first dimension is required.

The screenshot shows the 'Material Requirement' software interface. The 'Inventory' tab is active. Search filters include 'Inv Type' (Paper-Sheets), 'Job', 'Item', 'Prod Cd', and 'Due Dt Range' (10/1/2009 to 4/23/2010). A table lists inventory items with columns: Tag, Item #, Inv Code, Details, On Hand, On Order, Curr Allocated, Calc Allocated, Available, Min Lvl, Vendor Cd, and Vendor Name. Below the table are sections for 'Reservations Grid' and 'Existing Open PO's'.

Tag	Item #	Inv Code	Details	On Hand	On Order	Curr Allocated	Calc Allocated	Available	Min Lvl	Vendor Cd	Vendor Name
34	CE5025x38	Centura Glom Bl 60# White 25 x 38	186300	95589	263349	238613	17919	0	UNISOURC	Unisource Paper C	
549	Carnival Text	Carnival Text 0100 white 18 x 24	16001	64739	68562	50800	12238	0	500	Draper Paper	
875	Carnival Cover	Carnival Cover 0100 white 20 x 25	0	0	71888	56140	-71888	0	UNISOURC	Unisource Paper C	
1151	80-2026-1151	Carnival Cover 0100 white 20 x 26	10000	0	13364	13364	-3364	0	UNISOURC	Unisource Paper C	

All jobs that have Reservations for an Item

For each inventory item displayed, you can see the status for: **on hand**, **on order**, **allocated**, **available**, **minimum level**, **vendor code**, and **name**.

If the inventory item shows numbers in the **On order** or **Allocated** columns, you can click the item and it will show you in the bottom left corner all of the jobs that have reservations for that item.

If there are numbers in the **On order** column, when you click the item it will show you the PO status for each PO written for that item.

Place an Order

If you want to place an order for items such as house inventory items that are not specifically related to a job, click the **Tag** column box in front of the line item information and click the **Create PO** button.

Material Requirement

Task List | **Inventory** | Purchasing | Sheeting | PO Monitor | Reports

Inv Type: Paper-Sheets
Type:
Category:
Sub Category:

Job:
Key:
Size: 25 X 38
Load

PO
Created for Company:

Order #: 622 Date: 6/25/2008 Ordered By: LS Ref:
Rev #: 0 Rev Dt: Rev By:

Vendor:
Address:
City:
State:
Zip:
Phone:
Fax:
Currency Type:
PAPER APPROVAL

Ship To:
Address:
City:
State:
Zip:
Ship Via:
Ship To Attention:

Details	Due Date	Job #	Quantity	Amount
Book Makers 50# Opg Sheet**0**0200-White-25 x 38			0	\$0.00

Add Line... Edit Line... Delete Line... Receiving Instructions Update Job changes
 Header Notes Email PO Preview Print

Total: \$0.00 (in Currency)

Save Close

Preview Print Sort By: Item # Inv Cd Color items that are inactive for: 180 Days Search Create PO

Reservations

Job #	Customer	Job Name	Required

Vendor | **Ord Qty** | **Recd Qty**

Vendor Cd	Vendor Name

Purchasing: Create, View, or Edit a PO

To create a new PO

1. Select the **Purchasing** tab and click the **Create New** button.
2. Select a **Vendor** and enter or edit the **Ship To Address**.

Six Types of PO Line items:

- **Job Related Multi Item:** Gives ability to create multiple line items for a job on one PO. These items are directly ordered for the job and do not go through inventory.
- **Job Related:** These items are directly ordered for the job and do not go through inventory.
- **Non-Inventory:** Expense immediately. Will not get used on a job. For example, office supplies.
- **Paper Inventory:** Has dollar value/asset account. For example, paper, envelopes. **Print system only.**
- **Finished Goods:** Has dollar value/asset account. For example, binders, diskettes used for a job.
- **Material Inventory:** Has dollar value/asset account. For example, Raw Materials: Ink, Labels, Plates.

To view, add, or edit an existing PO

1. Select the **Purchasing** tab.
2. Search by **PO Number**, **Job Number**, **Vendor code**, or enter text.
3. To select the PO, double-click the **PO #** or highlight the PO # and click the **Select** button.

The screenshot displays the 'Purchasing' tab in the EFI PrintStream software. On the left, a table lists various POs with columns for Order #, Vendor, Details, Due Date, Job #, Item #, ETL Code, Status, Part/Final, and Orig Co. PO 3071 is highlighted. On the right, a detailed view for PO 3071 is shown, including fields for Order #, Date, Ordered By, Rev #, Rev Dt, Rev By, Vendor, Address, Ship To, and a 'Select PO Type' dropdown menu. The dropdown menu is open, showing options: Job Related Multi Item..., Job Related..., Non-Inventory..., Paper Inventory..., Finished Goods..., Material Inventory..., and Customer Billable... The 'Job Related Multi Item...' option is selected. Below the dropdown, a table shows the details for the selected PO type, including Job #, Quantity, and Amount. At the bottom, there are buttons for 'Add Line...', 'Edit Line...', 'Delete Line...', 'Receiving Instructions', 'Update Job changes', 'Header Notes', 'Email PO', 'Preview', 'Print', 'Save', and 'Close'.

Order #	Vendor	Details	Due Date	Job #	Item #	ETL Code	Status	Part/Final	Orig Co
3063	DMH Test	VI 07/25/2014 PG 8/7/25/2014	Misc	127423	01-01-01-14C	No Invoice y	PART	32	
3070	ACME WIDQ	Multipoint test 8/1/2014	Misc	97825	01-01-01-14C	No Invoice y	PART	100	
3071	Printing Com	JOB ITEM 1 8/4/2014	Misc	11316	01-01-01-12C	Not Receive	PART	15.25	
3073	Printing Com	PO return test 8/6/2014	Misc	128628	01-01-01-14C	No Invoice y	FINAL	1000	
3074	Just In Time	0718 New Itg 8/7/2014	Misc	1315	01-01-01-13C	No Invoice y	FINAL	375	
3072	Hogwarts Vel	PROGRAMM 8/8/2014	Misc	11318	01-01-01-12C	No Invoice y	FINAL	75	
3075	ACME WIDQ	BID-EBB test 8/8/2014	Misc	128726	01-01-01-14C	No Invoice y	FINAL	137.5	
3076	ACME WIDQ	BID-EBB test 8/8/2014	Misc	128726	01-01-01-14C	No Invoice y	FINAL	206.25	
3077	Printing Com	PURCHASE 8/11/2014	Misc	11323	01-01-01-12C	No Invoice y	FINAL	150	
3078	adid	Pageflex test 8/11/2014	Misc	78126	01-01-01-14C	No Invoice y	FINAL	300	
3081	Printing Com	Centura Glos 8/21/2014	Misc	11336	01-01-01-12C	No Invoice y	FINAL	1057.84	
3082	NWC Print	PURCHASE 8/21/2014	Misc	11323	01-01-01-12C	No Invoice y	FINAL	150	
3083	Just In Time	Non-Inventor 8/22/2014	Misc		01-10-10-50C	No Invoice y	FINAL	74	
3083	Just In Time	Job-Related 8/22/2014	Misc	11337	01-01-01-12C	No Invoice y	FINAL	85	

Add Line Item – Job Related Multi Item

To add a line item

1. Click the **Add Line** button (bottom/left) and select **Job Related Multi Item** to add multiple line items.
2. Enter the **Job number** and select **Load** to see a list of all the papers and buyouts for the job that was entered.

You can click multiple items to add to the PO as long as they are all for the same vendor.

3. Click **Create PO Line Item**.

A PO with all the line items marked will be created.

Planned Purchases

Job # / Customer Ac No / Job Details
1003 AAA User Manual

Load

Ord#	Ta	Desc	Section	Formula	Color	Size	Supplier	Order #	Quote #	Qty	Amt
1	N	Book Makers 60# Opq St 16 pg 8.5 x 11			White	23 x 35		0	0	22702	1997.78
2	N	Book Makers 60# Opq St 8 pg 8.5 x 11			White	23 x 35		0	0	5915	520.52
3	N	Springhill 10PT C1S Cove Cover 8.5 x 11			White	19 x 25		0	0	5913	384.35

PO 598

Created for Company :

Order #: 598 Date: 6/25/2008 Ordered By: LS Ref:
Rev #: 0 Rev Dt: Rev By:

Vendor: UNISOURCE Unisource Paper Company Currency Type: USA
Address: 589 South 33rd Avenue
Salt Lake City
84655
Ph: 801-572-8974
Fax:

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

Details	Due Date	Job #	Quantity	Amount
<input checked="" type="checkbox"/> Book Makers 60# Opq Sheet***0200-White - 23 x 35	7/1/08	1003	22702	\$1,997.78
<input checked="" type="checkbox"/> Book Makers 60# Opq Sheet***0200-White - 23 x 35	7/1/08	1003	5915	\$520.52
<input checked="" type="checkbox"/> Springhill 10PT C1S Cover***0200-White - 19 x 25	7/1/08	1003	5913	\$384.35

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

Header Notes EmailPO Preview Print

Total: \$2,902.65 (in Currency)

Save Close

Create PO Line Item Cancel

Add Line Item – Job Related

To add a line item

1. Click the **Add Line** button (bottom/left).
2. Select **Job Related** to add a new line item.

Six Types of PO Line items:

- **Job Related Multi Item:** Gives ability to create multiple line items for a job on one PO. These items are directly ordered for the job and do not go through inventory.
- **Job Related:** Purchases directly tied to a job. For example, Buyout.
- **Non-Inventory:** Expense immediately. Will not get used on a job. For example, office supplies.
- **Paper Inventory:** Has dollar value/asset account. For example, paper, envelopes. **Print system only.**
- **Finished Goods:** Has dollar value/asset account. For example, binders, diskettes used for a job.
- **Material Inventory:** Has dollar value/asset account. For example, Raw Materials: Ink, Labels, Plates.

Job Related Line Item : Streamline Solutions

Line #: Order Date:

Job #:

Details :

Formula
 Modifier Desc:

Qty/Hrs: Price: Per: Desc:

Discount %: ☒ Price after Disc: ☐

Cost: Unders/Overs %:

Due Date: Quote #:

Activity :

Charge Type: FSC ☐

Re work Id:

G/L Code:

Tax Code: 0% (non taxable)

Job Related Item Screen

Select a **Job #** and enter the details of the item or click the **List Purchases** button to view a list of buyouts or materials related to the job number. Double-click to select a line item or highlight and click **OK**. Enter all mandatory fields (in bold): **Qty/Hrs.**, **Price**, **Price Per**, **Due Date**, **Activity Code**, and **Tax Code**. System will calculate the cost.

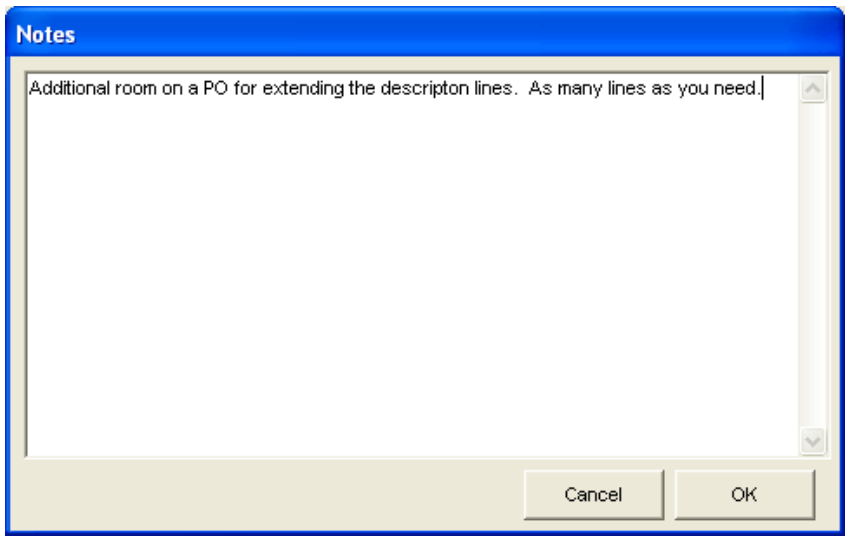
Note If you receive the error message, "activity code has an invalid A/P dissection code" after you click the **OK** button; then your system is not yet setup to utilize the Purchasing module or you have not properly linked or setup your A/P Dissection codes in 'Master File – General' or Master File - Vendor. Consult your system administrator or your EFI PrintStream Support contact.

Purchases List									
Description	Section	Formula Modi...	Color	Size	Vendor	Ord...	ID/Q No.	Quantity	Cost
Centura Gloss Bo...	Print 1		White...	25 x 38		3137	9804	10833	1360.08
Centura Gloss Bo...	Print 2		White...	25 x 38		2845	9804	5908	741.75

Job Related Line Item : Streamline Solutions	
Line # :	1
Order Date :	9/5/2014
Job # :	9796
ALASKA	Alaska Inc.
Copy of SBI - Test	
<div> <div>Details :</div> <div> <div>Centura Gloss Book 60#</div> <div>White - 23 x 35</div> <div></div> <div></div> </div> <div> <div>Planned Purchases</div> <div>Notes...</div> <div>PQBD</div> </div> </div>	
Formula Modifier Desc	
Qty/Hrs :	10833
Price :	97.6500
Per	1000.00
Desc :	Shts.
Discount %:	0.00
Price after Disc:	97.6500
Cost :	1057.84
Unders/Overs %:	10
Due Date :	9/5/2014
Quote # :	
<input type="button" value="Print Cutting Slip"/>	
Activity :	50000
Charge Type :	
FSC	<input type="checkbox"/>
Re work Id	
G/L Code :	1200
wpip	
Tax Code :	00
0% (non taxable)	
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	

PO Line Item Notes

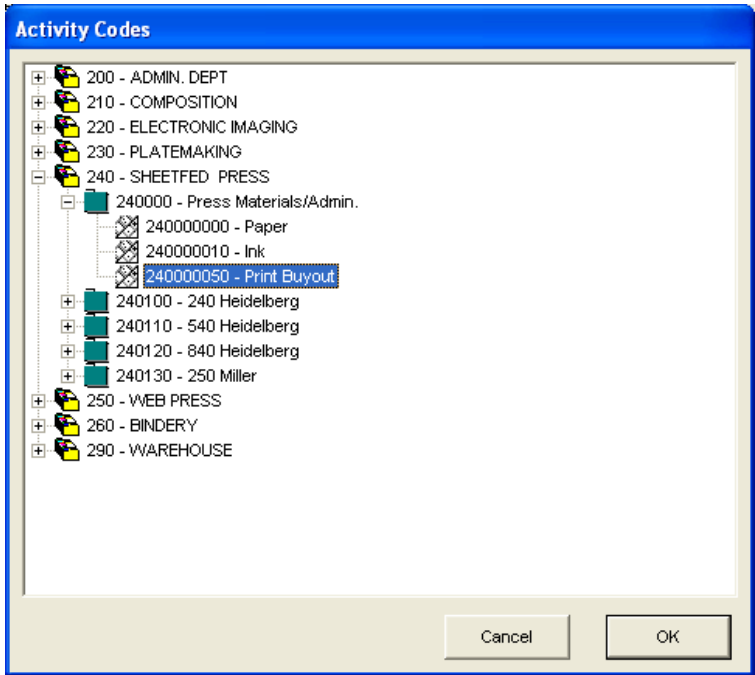
Click the **Notes** button to enter line item descriptions. If a script was attached to a buyout, the script answers will appear in the **Notes** field.



List of AP Codes

Enter a required **Activity Code** directly in the field, scroll using the mouse or up and down arrow keys, or select the **binocular** icon to search for a list of activity codes. Double-click to select or highlight and click **OK**.

Note If you receive the error message "activity code has an invalid A/P dissection code" after you click **OK**, your system is not yet setup to utilize the Purchasing module or you have not properly linked or setup your A/P Dissection codes in 'Master File – General' or Master File - Vendor. Consult your system administrator or your EFI PrintStream Support contact.



Add Line Item – Non-Inventory

To add a line item

1. Click the **Add Line** button.
2. Select **Non Inventory**.
3. Enter all mandatory fields (in bold): **Qty/Hrs.**, **Price**, **Price Per**, **Due Date**, **Activity Code** and **Tax Code**. The system will calculate the cost.

Six Types of PO Line items:

- **Job Related Multi Item:** Gives ability to create multiple line items for a job on one PO. These items are directly ordered for the job and do not go through inventory.
- **Job Related:** Purchases directly tied to a job. For example, Buyout.
- **Non-Inventory:** Expense immediately. Will not get used on a job. For example, office supplies.
- **Paper Inventory:** Has dollar value/asset account. For example, paper, envelopes. **Print system only.**
- **Finished Goods:** Has dollar value/asset account. For example, binders, diskettes used for a job.
- **Material Inventory:** Has dollar value/asset account. For example, Raw Materials: Ink, Labels, Plates.

Note If you receive the error message "activity code has an invalid A/P dissection code" after you click **OK**, your system is not yet setup to utilize the **Purchasing** module or you have not properly linked or setup your A/P Dissection codes in 'Master File – General' or Master File - Vendor. Consult your system administrator or your EFI PrintStream Support contact.

Non-Inventory Line Item : 01 Streamline Solutions			
Line # :	5	Order Date :	9/5/2014
Details :	Ink Mixing Trays - 150 per pack		
	Notes		
Qty/Hrs :	10	Price :	45.7500
		Per :	1
		Desc :	Each
Discount %:	0.00000	<input checked="" type="radio"/> Price after Disc:	45.7500
Cost :	457.50	Unders/Overs %:	10
Due Date :	9/22/14	Quote # :	
AP Code :	0101016615	AA	Non Inv Usage Fee Expense
G/L Code :	6615	Non Inv Usage Fee Expense	01
Tax Code :	00	0% (non taxable)	
			OK
			Cancel

Add Line Item – Finished Goods and Search button

To add a line item

1. Click the **Add Line** button.
2. Select **Finished Goods**.
3. You have the option to click the **Search** button (to the right of the **Item #** field) to select from a list of Finished Goods items (click **Name** to order items alphabetically, **Code** to list in item # order, or **Inv. Code** to list in Inventory Code order). To select, **double-click** or highlight and click **OK**.

Six Types of PO Line items:

- **Job Related Multi Item:** Gives ability to create multiple line items for a job on one PO. These items are directly ordered for the job and do not go through inventory.
- **Job Related:** Purchases directly tied to a job. For example, Buyout.
- **Non-Inventory:** Expense immediately. Will not get used on a job. For example, office supplies.
- **Paper Inventory:** Has dollar value/asset account. For example, paper, envelopes. **Print system only.**
- **Finished Goods:** Has dollar value/asset account. For example, binders, diskettes used for a job.
- **Material Inventory:** Has dollar value/asset account. For example, Raw Materials: Ink, Labels, Plates.

Note If you receive the error message “activity code has an invalid A/P dissection code” after you click **OK**, your system is not yet setup to utilize the **Purchasing** module or you have not properly linked or setup your A/P Dissection codes in ‘Master File – General’ or Master File - Vendor. Consult your system administrator or your EFI PrintStream Support contact.

The feature **Exclude this line item from inventory Valuation. It will be billed directly to the Customer** will put a - (minus sign) in the ORDERLIN table under the **Charge Type** column (which is normally a + sign for valued inventory and an O for a buyout). This data can be exported and sorted for additional reporting.

Item #	Inv Code	Rev	Details	On Hand	On Order	Allocated	Available	Min Lvl	Customer	Customer
218	218		User Group Manual	3500	0	0	3500	0		
258	258		Test Manufactured Item	0	0	0	0	0		
295	295		Printstream Brochure	0	0	0	0	0	AAA	AAA Insumax

Loaded 3 records. Click continue to load next 300 Continue Search Select

Edit or Delete a Purchase Order Line Item

To edit or delete a line item

1. Highlight the line and select **Edit Line** or **Delete Line**.
2. Click **Save**.

PO 599

Created for Company :

Order #: 599 Date: 6/25/2008 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
 Book Makers 60# Opq Sheet^^0200-White - 23 x 35	7/1/08	1003	22702	\$1,997.78
<input checked="" type="checkbox"/> Book Makers 60# Opq Sheet^^0200-White - 23 x 35	7/1/08	1003	5915	\$520.52
<input checked="" type="checkbox"/> Springhill 10PT C1S Cover^^0200-White - 19 x 25	7/1/08	1003	5913	\$384.35

Total: (in Currency)

Preview, Print, Export / E-mail a PO

To print a PO

- Click the **Print** button (bottom / center).

To preview a PO

1. Click the **Preview** button (bottom / center).
2. Once previewed, you have the option to print to your **Default** printer or a **Network** printer or **Export / E-mail** icon (envelope with red arrow) at the top/center of the preview screen.
3. Select the red 'X' to close the preview screen (left corner of screen above your company logo).

Note If you receive a message, "This PO Requires Approval First" when trying to print, you will need someone from your Purchasing Dept. to approve before continuing.

If you want the **Purchasing Approval** option turned *on* or *off*, contact your System Administrator.

Sheeting

This program was designed to be used with Book Estimating only. It allows reserved inventory rolls to be sheeted down to sheets for running through sheet fed presses.

Material Requirement

Task ListInventoryPurchasingSheetingPO MonitorReports

Reserved Date: All Yesterday Today Week Range 6/18/2008 6/25/2008 Job No. Load Date Clear all

Tag	Item #	Inv Code	Description	Roll Qty	Sheet size	Sheet Qty	Job #	Job Due
	200	UD-BKMAK	Book Makers 50# Opq Web***0200 White	2548	37 1/2 x 38	0	886	U
	200	UD-BKMAK	Book Makers 50# Opq Web***0200 White	15941	37 1/2 x 38	0	924	N
	200	UD-BKMAK	Book Makers 50# Opq Web***0200 White	15941	37 1/2 x 38	0	925	1/22/2005 H
	201	UD-BKMAK	Book Makers 50# Opq Web***0200 White	4318	52 1/2 x 46	0	878	T
	202	UD-BKMAK	Book Makers 50# Opq Web***0200 White	5812	37 1/2 x 38	0	884	P
	202	UD-BKMAK	Book Makers 50# Opq Web***0200 White	3057	37 1/2 x 38	0	887	9/15/2005 P

Step 1 -> Load Locations

From Item: UD-BKMAK-50 Book Makers 50# Opq Web***0200 On Hand 32,452 Pulled 2548

ID	Location	Cartons	Pcs/Ctn	Loose	Total Qty	Notes	Cartons	Loose	Total Qty
	Floor	0.00			32452.00		0.00	2548.00	2548.00

Step 2 -> Print slitting sheet

Create New Inventory

To Item: UD-BKMAK-50 Book Makers 50# Opq Sheet***0200 Calc Req 16386 Tot Rsvd 0 On Hand 25888 Recvd 0

Location	Search	Sheet Qty
1.1.1.1	...	16390

Notes: Step 3 -> Convert the selected item

PO Monitor

This screen allows you follow the current status of PO's based on specific criteria.

Job#	Customer	Cust.	Activity	PONO	Line #	Status	Key Date	PO Details	Vond Name	Contact	PH
975 ALASKA	Alaska Inc.	PAPER	590	1	PO Due 04/29	4/29/2008	Envelopes - 1 Unsource Paper Cor John Hinckle 801-E				
975 ALASKA	Alaska Inc.	PAPER	590	2	PO Due 04/29	4/29/2008	Husky 70# Q Unsource Paper Cor John Hinckle 801-E				
991 AAA	AAA Insurnal	DIE CUT BU	585	1	PO Due 05/16	5/16/2008	Die Cut (Buy) ADME WIDGETS IN Fred Jackson 4151				
991 AAA	AAA Insurnal	PAPER	583	1	PO Due 05/15	5/15/2008	Envelopes - 1 Unsource Paper Cor John Hinckle 801-E				

Job Delivery Date Range - Date range is actually entered based on PO due date range not job delivery date.

Not Ordered - Displays a list of materials on jobs which have not been ordered.

Final Delivered - Displays a list of PO's which have been flagged as **Finally Delivered**.

Waiting for Rcpt - Displays a list of PO's which have not been received.

Partial Delivered - Displays a list of PO's which have partial delivery status.

All of the above selection types can be filtered by any of the following as well: **CSR, Activity Code, Customer, Sales Rep, Job Number, Product Type, Vendor, and Estimator**.

You can generate a report for any of the items on the grid by selecting all or specific items and then clicking **Report**.

Reports

Stock on Order Report – This report shows the status on all paper items currently on order. It allows you to filter by PO date range and for all items, a specific item, or by a specific vendor. Selecting the **Include Items not Linked to a Job** check box will include any PO's that were ordered for inventory rather than for a specific job.

Inventory Report Preview

1 of 1100%Total:15100%15 of 15

Alaska Incomp

Stock On Order

Date Range:From 1/1/07 to 8/30/08

Order By:Due Date

For:LS

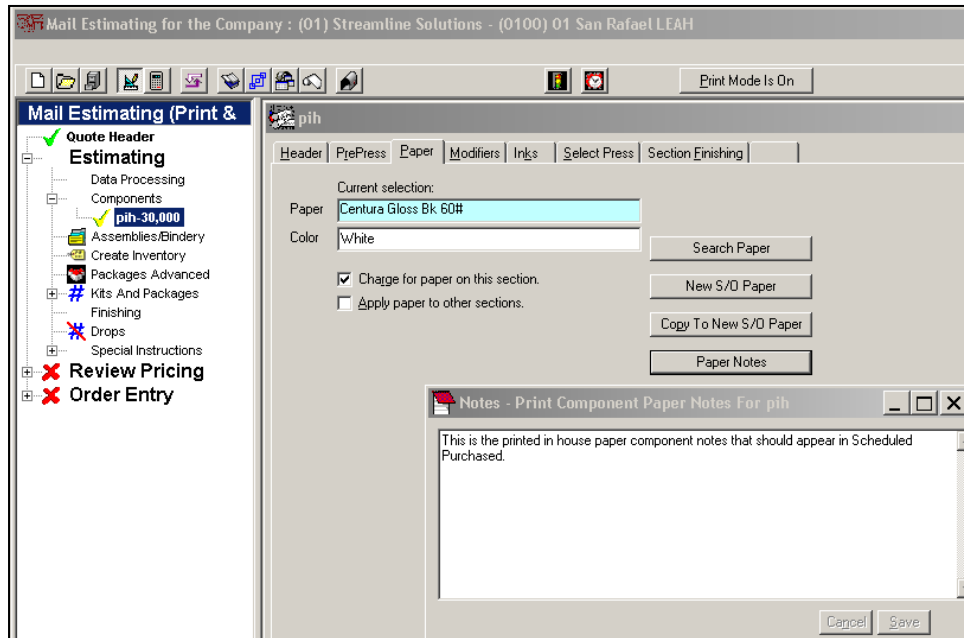
Page:Page 1 of 1

Printed:6/25/2008 12:10:04PM

JobNo	Customer	JobTitle	PONo	Vendor	Item #	InvCode	Item Desc	QtyOrd	Size	OrderDt	PO Due	JobDue	Resv Qty
			562	UNISOURC	250	OFF-BOOK MAK-50-34	Book Makers 60# Op	20,000	34	8/10/07	8/10/07		
907	AAA Insur	Manual	567		208	DJ-STRL-80-25x38	Sterling Gloss 80# Sh	58,694	25 x 38	9/5/07	9/10/07	10/30/05	3,750
891	AAA Insur	Print 05 Boo	568		202	UO-BKMAK-60-37 1/2	Book Makers 60# Op	11,449	37 1/2		9/11/07		5,753
959	AAA Insur	Streamline k	571		269	959-PO#571	Pearl Linen Cover**0:	165	46	10/11/07	10/11/07		165
959	AAA Insur	Streamline k			270	959-PO#571	Springhill 10PT C1S C	4,404	20 x 26		10/11/07		4,404
960	AAA Insur	Hamilton M	573		271	960-PO#573	Eska Board .089**0	3,000	5 13/16 x 9	10/12/07	10/12/07	10/30/07	3,000
960	AAA Insur	Hamilton M			272	960-PO#573	Pearl Linen Cover**0:	165	46		10/12/07	10/30/07	165
					273	960-PO#573	Springhill 10PT C1S C	4,404	20 x 26		10/12/07		
882	AAA Insur	User Group	577	ADPAK	274	882-PO#577	Book Makers 60# Op	30,764		11/13/07	11/17/07	9/22/05	30,764
882	AAA Insur	User Group			275	882-PO#577	Book Makers 60# Op	3,378			11/17/07	9/22/05	3,378
882	AAA Insur	User Group			276	882-PO#577	Book Makers 60# Op	1,933			11/17/07	9/22/05	1,933
882	AAA Insur	User Group			277	882-PO#577	Springhill 10PT C1S C	3,328			11/17/07	9/22/05	3,328
					233	C-100	Cartons - 100 - 6 1/4	500	Burst 200		11/17/07		
			575	UNISOURC	204	UO-BKMAK-60-25 x 38	Book Makers 60# Op	693,821	25 x 38		12/1/07		
958	AAA Insur	Graph Expo	590		202	UO-BKMAK-60-37 1/2	Book Makers 60# Op	8,621	37 1/2	6/12/08	7/1/08	9/29/07	8,621
Total								844,626					65,261

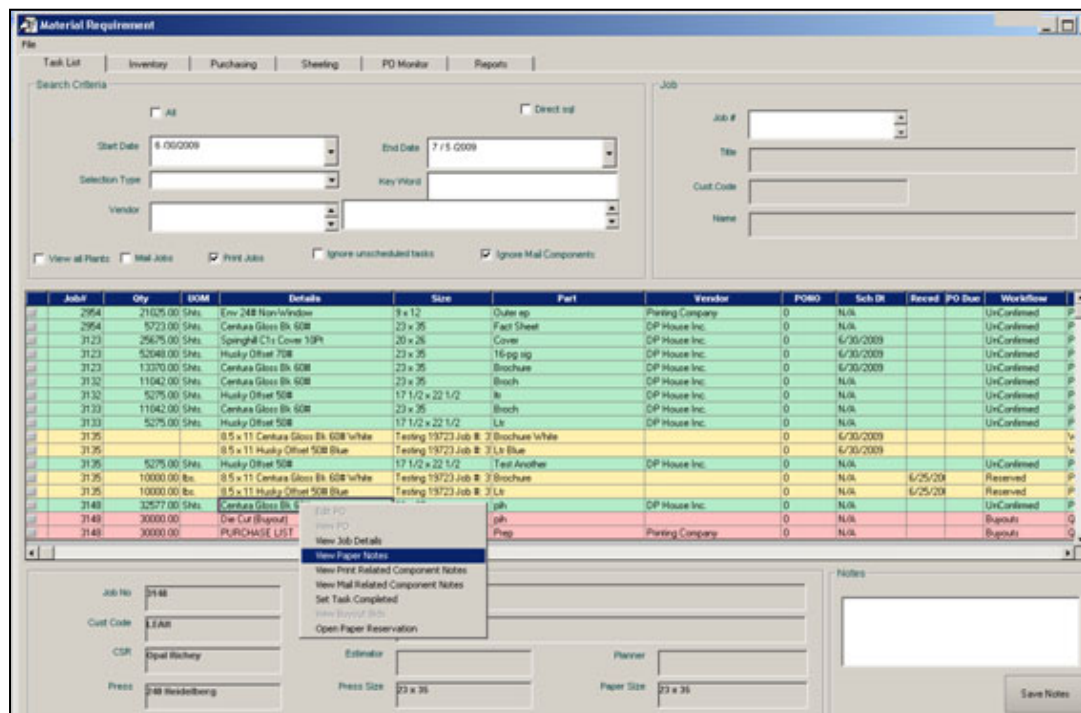
Scheduled Purchasing - Paper Notes

The Paper Notes entered on the **Paper** tab for the printed in house component are available for view only in the Scheduled Purchasing module.



To view Paper Notes

1. Right-click the paper line for the job.
2. Select **View Paper Notes**.



The Notes screen opens for view only.

Material Requirement

File

Task List | Inventory | Purchasing | Sheeting | PO Monitor | Reports

Search Criteria

☐ All

☐ Direct sql

Start Date

6/30/2009

End Date

7/5/2009

Selection Type

Key Word

Vendor

☐ View all Plants

☐ Mail Jobs

☒ Print Jobs

☐ Ignore unscheduled tasks

☒ Ignore Mail Components

Job

Job #

Title

Cust Code

Name

Job#	Qty	UOM	Details	Size	Part	Vendor	PONO	Sch Dt	Reced	PO Due	W
2954	21025.00	Shts.	Env 24# Non/Window	9 x 12	Outer ep	Printing Company	0	N/A			UnCd
2954	5723.00	Shts.	Centura Gloss Bk 60#	23 x 35	Fact Sheet	DP House Inc.	0	N/A			UnCd
3123	25675.00	Shts.	Springhill C1s Cover 10Pt				0	6/30/2009			UnCd
3123	52048.00	Shts.	Husky Offset 70#				0	6/30/2009			UnCd
3123	13370.00	Shts.	Centura Gloss Bk 60#				0	6/30/2009			UnCd
3132	11042.00	Shts.	Centura Gloss Bk 60#				0	N/A			UnCd
3132	5275.00	Shts.	Husky Offset 50#				0	N/A			UnCd
3133	11042.00	Shts.	Centura Gloss Bk 60#				0	N/A			UnCd
3133	5275.00	Shts.	Husky Offset 50#				0	N/A			UnCd
3135			8.5 x 11 Centura Gloss Bk 60# Whi				0	6/30/2009			
3135			8.5 x 11 Husky Offset 50# Blue				0	6/30/2009			
3135	5275.00	Shts.	Husky Offset 50#				0	N/A			UnCd
3135	10000.00	lbs.	8.5 x 11 Centura Gloss Bk 60# Whi				0	N/A	6/25/20		Rese
3135	10000.00	lbs.	8.5 x 11 Husky Offset 50# Blue				0	N/A	6/25/20		Rese
3148	32577.00	Shts.	Centura Gloss Bk 60#				0	N/A			UnCd
3148	30000.00		Die Cut (Buyout)				0	N/A			Buyot
3148	30000.00		PURCHASE LIST		Prep	Printing Company	0	N/A			Buyot

Notes - Print Component Paper Notes For pih

This is the printed in house paper component notes that should appear in Scheduled Purchased

Cancel

Save