

Auto-Submit Vendor Order

Quick Start Guide

Document Details

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Overview

Vendor Delivery Schedules are used to remind managers when they need to place Vendor Orders, as well as guide Auto-Order dates and times. This guide will show you how to configure these schedules.



Download the latest version of this document here:

<https://links.crunchtime.com/NCQS-AutoSubmitVendorOrder>

... or scan the QR code to the left.

Related Documentation

- NCQS – Configure Vendor Delivery Schedules:
<https://links.crunchtime.com/NCQS-VendorDeliverySchedules>

Related User Group Permissions

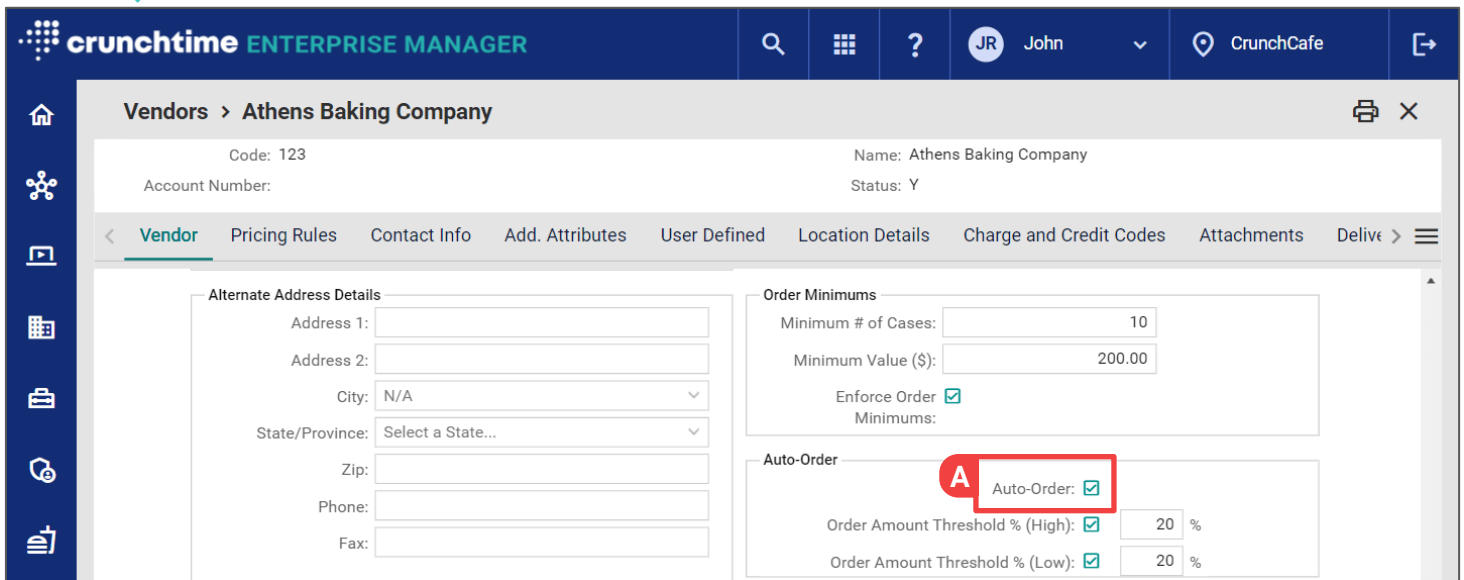
Screen Name	Control Name	Description
Vendors	Details	Enables <i>Vendors</i> on the Purchasing menu and the Vendor Name link that opens vendor details.
Vendor Details	Add/Delete/Save	Allows users to make and save changes to vendor details.
NC-Administrative Options	Vendor Information	Enables this option on the Purchasing menu.
NC-Daily Store Tasks	Vendor Order	Enables <i>Create Vendor Order</i> on the Purchasing menu.
NC-Other Store Tasks	View/Edit Recent Vendor Orders	Enables <i>Recent Vendor Orders</i> on the Purchasing menu.

Auto-Submit Vendor Order

Required Setup – Enterprise Manager

Each vendor that will auto-submit orders must have one of the following enabled:

Enterprise Manager > Purchasing: Vendors > Vendor Details



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Vendors > Athens Baking Company

Code: 123 Name: Athens Baking Company
Account Number: Status: Y

< Vendor Pricing Rules Contact Info Add. Attributes User Defined Location Details Charge and Credit Codes Attachments Deliver >

Alternate Address Details

Address 1:
Address 2:
City: N/A
State/Province: Select a State...
Zip:
Phone:
Fax:

Order Minimums

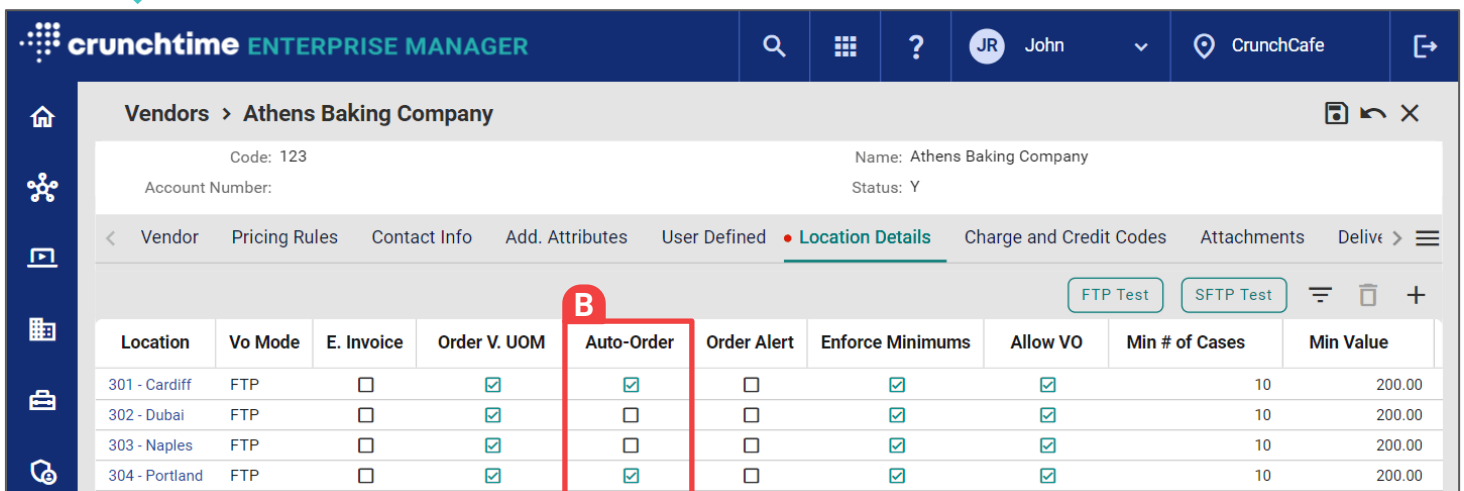
Minimum # of Cases: 10
Minimum Value (\$): 200.00
Enforce Order ☒
Minimums:

Auto-Order

A Auto-Order: ☒
Order Amount Threshold % (High): ☒ 20 %
Order Amount Threshold % (Low): ☒ 20 %

A The Auto-Order flag in the Vendor header record will enable this for all locations.

Enterprise Manager > Purchasing: Vendors > Vendor Details > Location Details



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Vendors > Athens Baking Company

Code: 123 Name: Athens Baking Company
Account Number: Status: Y

< Vendor Pricing Rules Contact Info Add. Attributes User Defined Location Details Charge and Credit Codes Attachments Deliver >

FTP Test SFTP Test

Location	Vo Mode	E. Invoice	Order V. UOM	Auto-Order	Order Alert	Enforce Minimums	Allow VO	Min # of Cases	Min Value
301 - Cardiff	FTP	☐	☒	☒	☐	☒	☒	10	200.00
302 - Dubai	FTP	☐	☒	☐	☐	☒	☒	10	200.00
303 - Naples	FTP	☐	☒	☐	☐	☒	☒	10	200.00
304 - Portland	FTP	☐	☒	☒	☐	☒	☒	10	200.00

B The Auto-Order flag on the Location Details tab will enable this for specific locations.



Note: Repeat this for each vendor who will use Auto-Submit.

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Auto-Submit Vendor Order (Continued)

Vendor Delivery Schedule Setup

Each vendor using Auto-Submit **must** have a delivery schedule.

Net-Chef > Purchasing: Vendor Information > {Edit}

The screenshot shows the 'Vendor Information' page for 'Athens Baking Company'. The 'Vendor Details' section is expanded, showing the 'Default Schedule' and 'Schedule Overrides' tabs. Red boxes and letters A, B, and C highlight specific features:

- A** highlights the 'Order Day' column in the 'Default Schedule' table, where days are checked or unchecked.
- B** highlights the 'Order By Time' column in the 'Default Schedule' table, showing times and clock icons.
- C** highlights the 'Schedule Overrides' section, which is currently empty with the message 'No data exists'.

The 'Default Schedule' table has the following data:

Order Day	Order By Time	Delivery Day
☒ Monday	13:00	Tuesday
☐ Tuesday	00:00	Thursday
☒ Wednesday	13:00	Thursday
☐ Thursday	00:00	Tuesday
☐ Friday	00:00	Tuesday
☐ Saturday	00:00	Tuesday
☐ Sunday	00:00	Tuesday

The 'Schedule Overrides' section is currently empty with the message 'No data exists'.

The 'Contact Information' section shows the following details:

Name	Title	Phone
Susan Boardman	Product Sales Mgr	617-963-7734

The 'Message' field contains: 'Please deliver before 9am on Tues and Thurs.' The 'Private Notes Regarding Vendor' field contains: 'Open side entrance for driver; always deliver on time.'

A Auto-Submit will **only** occur on days checked as an *Order Day*.

B *Order By Time* determines when the application will attempt to **submit** the order.

C **Tip:** To define a different delivery schedule for a particular week, say to allow for a holiday, see the following guide for details how: <https://links.crunchtime.com/NCQS-VendorDeliverySchedules>



Warning: Transmission can occur up to 15 minutes after the designated *Order By Time*, so be sure the *Order By Time* for each Order Day is set accordingly.

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Auto-Submit Vendor Order (Continued)

Auto-Submit Process

Net-Chef > Purchasing: Create Vendor Order

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Vendor Order - Athens Baking Company

Expected Delivery Date: 09/17/2024 Reference Number: 000009103122 Do not transmit: ☐ Total Quantity: 58.00
 Consumption Days: 3 20 Purchase Order Number: ORD22103100000947306 VO Mode: Phone **Total Value: 124.78 US Dollar**

Product #	Product Name	On Hand Qty.	Order Qty.	Vendor Unit	Vendor Conv.	Inventory Qty.	Inv. Unit	Vendor Price (\$)	Extended Value (\$)
Dry Storage									
265	Bread-Sourdough	49.74	11.00	Loaf	1.0000	11.00	Loaf	2.2200	24.42
106	Bread-Texas Toast	29.50	4.00	Loaf	1.0000	4.00	Loaf	2.0300	8.12
103	Bread-Wheat	53.00	7.00	Loaf	1.0000	7.00	Loaf	2.2200	15.54
102	Bread-White	49.00	6.00	Loaf	1.0000	6.00	Loaf	2.1600	12.96
088	Bun-8" Jumbo Hot Dog	21.00	4.00	1/2 Dozen	1.0000	4.00	1/2 Dozen	1.3300	5.32
189	Bun-Hogie Hot Dog	1.00	1.00	Dozen	1.0000	1.00	Dozen	2.9200	2.92
069	Bun-Wheat	17.00	2.00	Dozen	1.0000	2.00	Dozen	2.4500	4.90
055	Bun-White	188.50	23.00	Dozen	1.0000	23.00	Dozen	2.2000	50.60

1. Create a Vendor Order using any of the usual options:

- Create Vendor Order menu option
- Vendor Order – Need to Order Dashboard task

2 Save (do not submit) the order.

Net-Chef > Purchasing: Recent Vendor Orders

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Recent Vendor Orders

All 1,419 **Ready for Submit 1** Ready for Invoice 8 Ready for Reconcile 48 Canceled 41 Closed 1,321

Vendor	Reference #	PO #	Order Date	Exp. Del. Date	Type	Status	Actions
Not Sent							
Athens Baking Company	000009103122	ORD22103100000947306	09/16/2024	09/17/2024	VO	Not Sent	View Edit Submit Cancel

3 The order must be in the *Ready for Submit* status.

4. At (or soon after) the *Order By Time*, the application will transmit the order using the configured transmission method.



Reminder: Transmission can occur up to 15 minutes after the *Order By Time*, so be sure that the *Order By Time* is set accordingly.