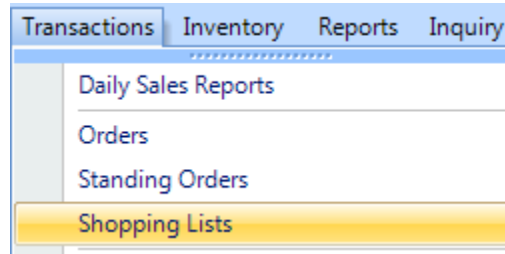


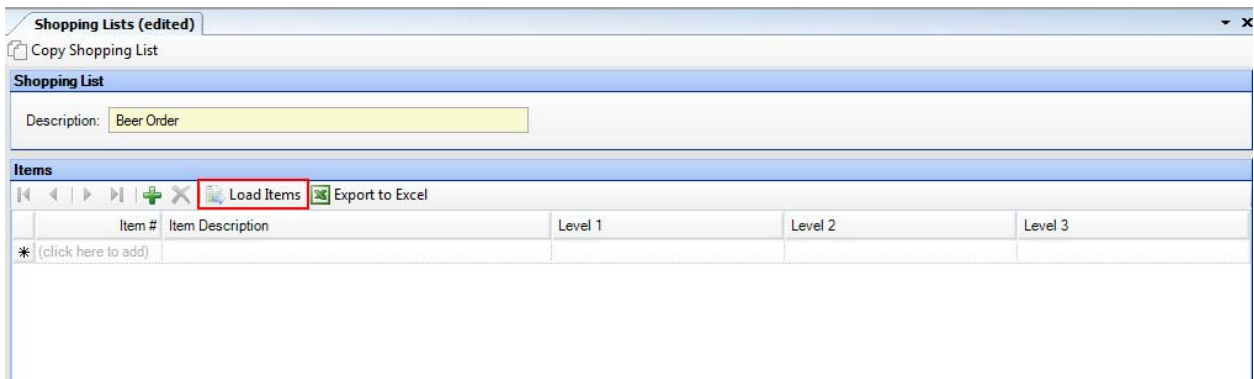
Suggest Orders by Shopping List

Compeat has the ability to suggest purchase orders based on either the preferred vendor status, or, if the item is marked as a bid item, Compeat will suggest the vendor with the lowest price imported from the Vendor Price Maintenance Tool.

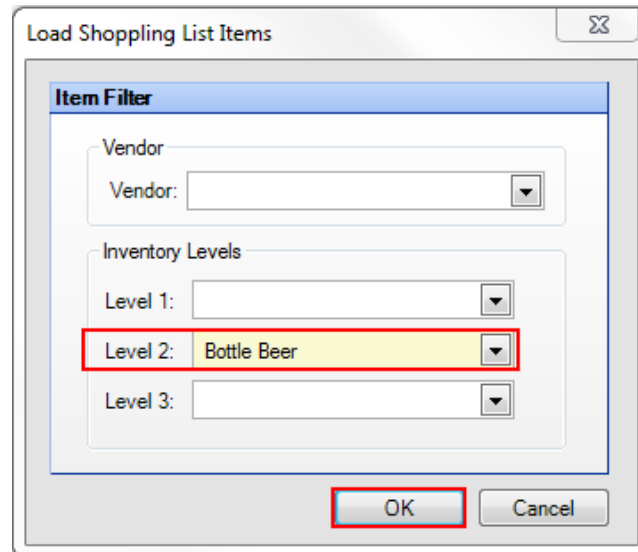
To utilize this feature, a shopping list must be created, navigate to Transactions→Shopping Lists:



Once on this screen, type in an applicable description and then click the load items button:



The following screen will appear, asking you to choose one of 2 ways to load in a group of items, either by vendor or Inventory Level, in my example, I am loading in all inventory items with a Level 2: Bottle Beer:



The list will populate with the applicable items:

Shopping Lists (edited)

Copy Shopping List

Shopping List

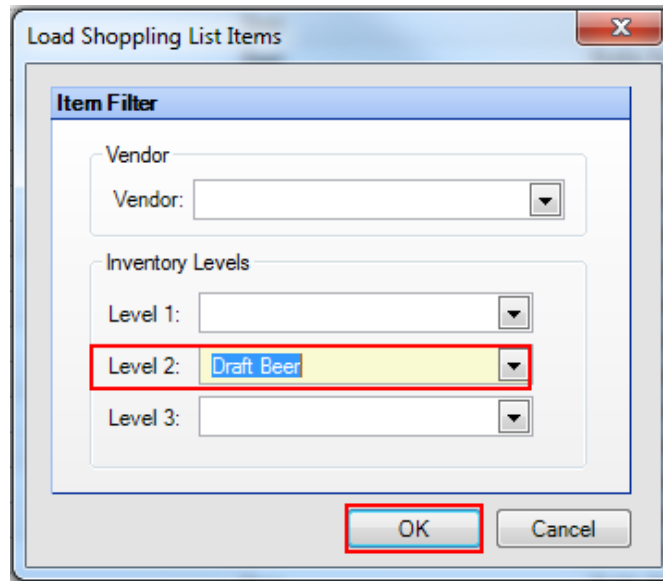
Description: Beer Order

Items

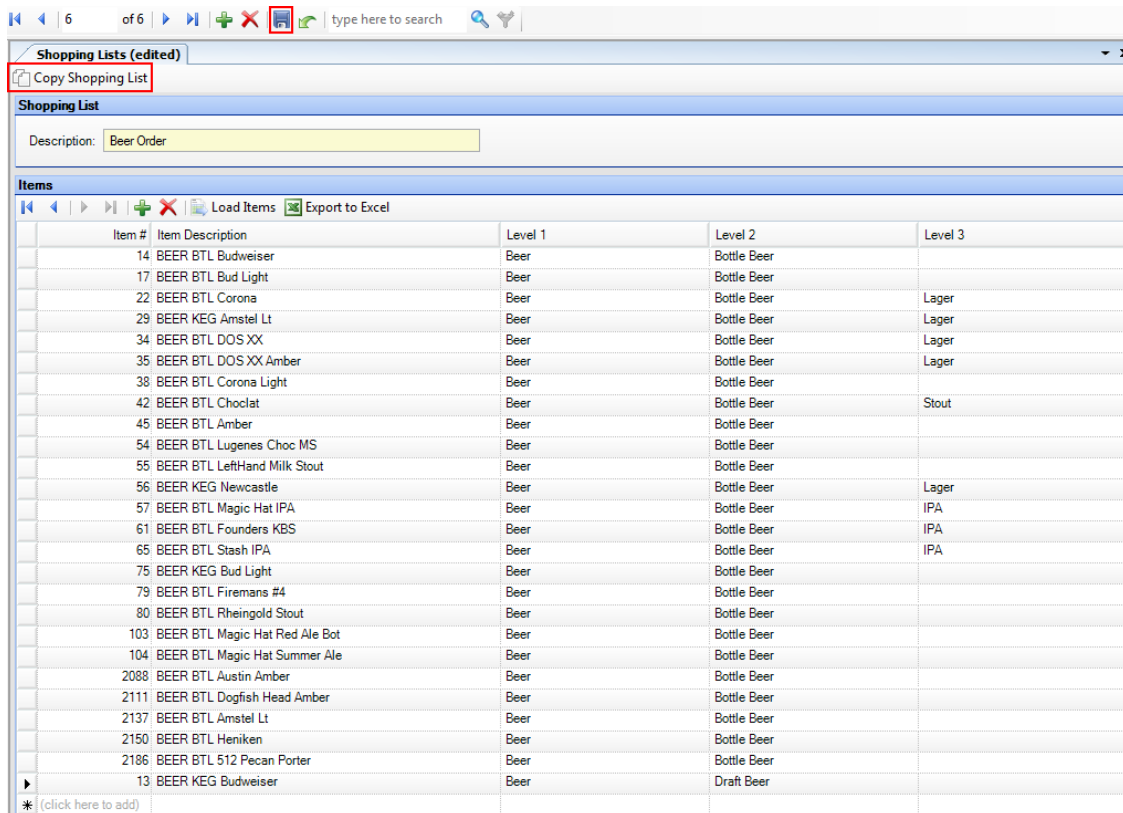
Load Items Export to Excel

Item #	Item Description	Level 1	Level 2	Level 3
14	BEER BTL Budweiser	Beer	Bottle Beer	
17	BEER BTL Bud Light	Beer	Bottle Beer	
22	BEER BTL Corona	Beer	Bottle Beer	Lager
29	BEER KEG Amstel Lt	Beer	Bottle Beer	Lager
34	BEER BTL DOS XX	Beer	Bottle Beer	Lager
35	BEER BTL DOS XX Amber	Beer	Bottle Beer	Lager
38	BEER BTL Corona Light	Beer	Bottle Beer	
42	BEER BTL Choctat	Beer	Bottle Beer	Stout
45	BEER BTL Amber	Beer	Bottle Beer	
54	BEER BTL Lugenes Choc MS	Beer	Bottle Beer	
55	BEER BTL LeftHand Milk Stout	Beer	Bottle Beer	
56	BEER KEG Newcastle	Beer	Bottle Beer	Lager
57	BEER BTL Magic Hat IPA	Beer	Bottle Beer	IPA
61	BEER BTL Founders KBS	Beer	Bottle Beer	IPA
65	BEER BTL Stash IPA	Beer	Bottle Beer	IPA
75	BEER KEG Bud Light	Beer	Bottle Beer	
79	BEER BTL Firemans #4	Beer	Bottle Beer	
80	BEER BTL Rheingold Stout	Beer	Bottle Beer	
103	BEER BTL Magic Hat Red Ale Bot	Beer	Bottle Beer	
104	BEER BTL Magic Hat Summer Ale	Beer	Bottle Beer	
2088	BEER BTL Austin Amber	Beer	Bottle Beer	
2111	BEER BTL Dogfish Head Amber	Beer	Bottle Beer	
2137	BEER BTL Amstel Lt	Beer	Bottle Beer	
2150	BEER BTL Heniken	Beer	Bottle Beer	
2186	BEER BTL 512 Pecan Porter	Beer	Bottle Beer	
* (click here to add)				

You can continue to load items by pressing the Load Items button, it will continue to load items below the previously loaded items:

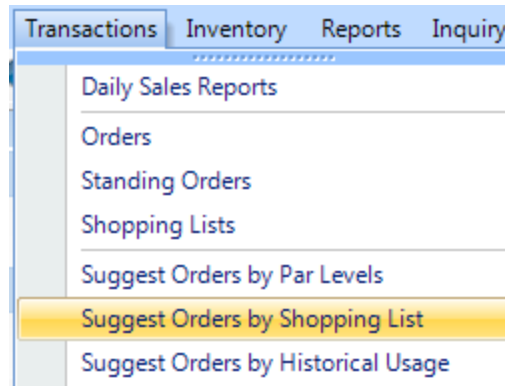


I added the one keg I currently carry to the bottom of my list. You can also copy shopping lists to other entities with the copy Shopping List button in the top left corner. Make sure to save your changes with the blue disk at the top of the screen:

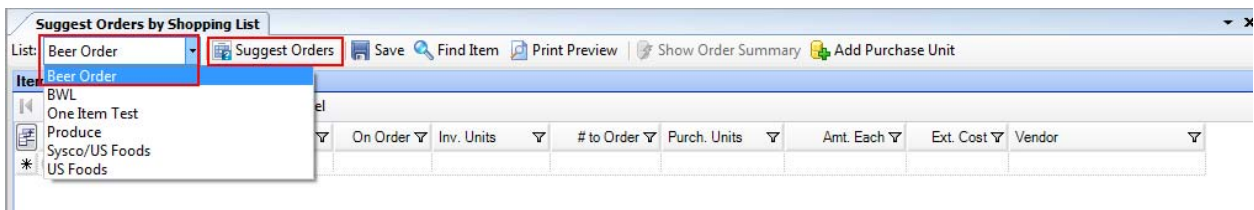


Now you are ready to use the shopping list. Navigate to Transactions → Suggest Orders by Shopping

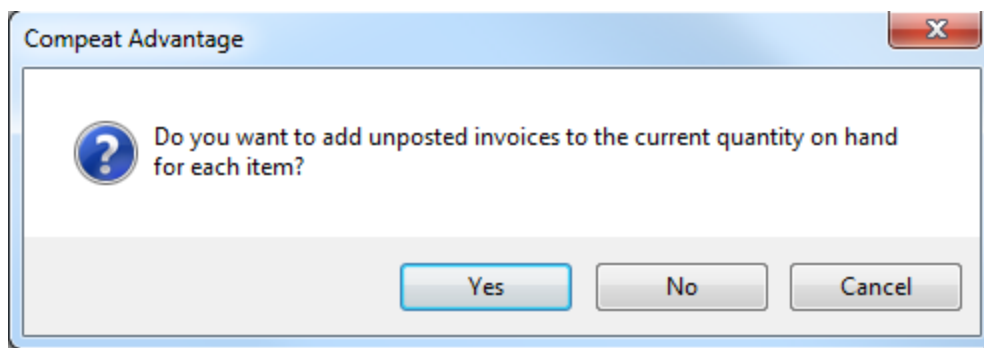
List:



With the drop-down in the top left corner of the screen, choose the newly created shopping list and then click “Suggest Orders”:



The following screen will ask if you want to included unposted invoices to the theoretical quantity on hand amount, we suggest always saying “Yes” to this prompt. (Since this specific suggestion will not be using a formula to suggest a quantity to order, it is really only important to have updated theoretical on hands as a “checkpoint” to establish the system’s theoretical on hand calculation is accurate.)



Once the screen populates, press the Print Preview button:

Suggest Orders by Shopping List

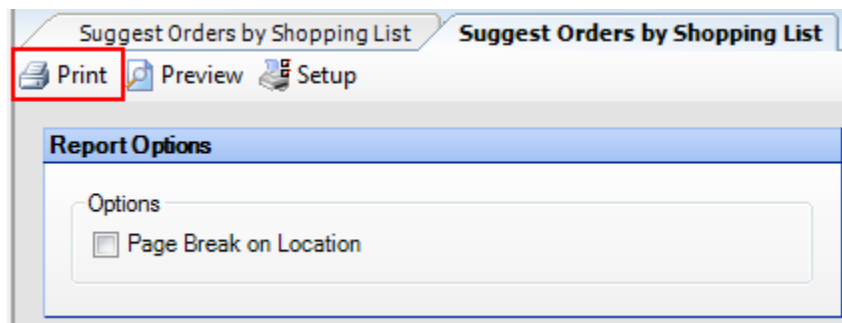
List: Beer Order | Suggest Orders | Save | Find Item | **Print Preview** | Show Order Summary | Add Purchase Unit

Items to Order

Export to Excel

Item Description	On Hand	On Order	Inv. Units	# to Order	Purch. Units	Amt. Each	Ext. Cost	Vendor
BEER BTL Corona	12.00	0.00	Each		Case = 24/Each	\$35.65	\$0.00	Republic Beverage
BEER BTL Amstel Lt	0.00	0.00	Each		CS = 24/Each	\$20.00	\$0.00	Republic Beverage
BEER BTL DOS XX Amber	0.00	0.00	Each		Case = 24/Each	\$34.56	\$0.00	Republic Beverage
BEER BTL Amber	12.00	0.00	Each		CS = 24/Each	\$0.00	\$0.00	US Foodservices
BEER BTL 512 Pecan Porter	62.00	48.00	Each		Case = 24/Each	\$57.00	\$0.00	Republic Beverage
BEER BTL Bud Light	0.00	0.00	Each		Case 24 = 24/Ea...	\$27.50	\$0.00	Spec's Liquor
BEER KEG Budweiser	1.00	0.00	keg (15.5g)		Keg = 1/keg (15...	\$56.23	\$0.00	Republic Beverage
BEER KEG Amstel Lt	5.00	0.00	Each		Case = 24/Each	\$37.80	\$0.00	Republic Beverage
BEER BTL Austin Amber	0.00	0.00	Each		CS = 24/Each	\$41.56	\$0.00	Republic Beverage
BEER KEG Bud Light	-0.94	0.00	Each		Pack = 12/Each	\$11.00	\$0.00	Republic Beverage
BEER BTL Budweiser	0.00	0.00	Each		Case = 24/Each	\$30.24	\$0.00	Republic Beverage
BEER BTL Corona Light	1.00	0.00	Each		Case = 24/Each	\$28.69	\$0.00	Republic Beverage
BEER BTL Dogfish Head Am...	0.00	0.00	Each		CS = 24/Each	\$35.69	\$0.00	Republic Beverage
BEER BTL LeftHand Milk Sto...	0.00	0.00	Each		Case 24 = 24/Ea...	\$42.79	\$0.00	Spec's Liquor
BEER BTL DOS XX	0.00	0.00	Each		Case = 24/Each	\$34.56	\$0.00	Republic Beverage
BEER BTL Firemans #4	2.00	0.00	Each		Case = 24/Each	\$25.39	\$0.00	Republic Beverage
BEER BTL Lugenes Choc MS	0.00	0.00	Each		Case = 24/Each	\$38.96	\$0.00	Republic Beverage
BEER BTL Choclat	0.00	0.00	Each		Case = 24/Each	\$42.99	\$0.00	Spec's Liquor
BEER BTL Heniken	0.00	0.00	Each		Case = 24/Each	\$0.00	\$0.00	
BEER BTL Founders KBS	0.00	0.00	Each		Case = 24/Each	\$35.46	\$0.00	Republic Beverage
BEER BTL Magic Hat IPA	0.00	0.00	Each		Case = 24/Each	\$37.89	\$0.00	Republic Beverage
BEER BTL Magic Hat Red AL...	0.00	0.00	Each		Case = 24/Each	\$39.85	\$0.00	Spec's Liquor
BEER BTL Magic Hat Summ...	0.00	0.00	Each		Case = 24/Each	\$37.15	\$0.00	Spec's Liquor
BEER KEG Newcastle	0.00	0.00	Each		Case = 24/Each	\$34.23	\$0.00	Republic Beverage
BEER BTL Stash IPA	0.00	0.00	Each		Case = 24/Each	\$29.85	\$0.00	Republic Beverage
							\$0.00	

And then select Print:



A report that looks similar to the following prints. The box on the right of the form is for writing in the quantity you would like to order on this specific item:

Suggest Orders by Shopping List					
Entity:		#1 - Austin	Report Run: 8/18/2014 5:20:11 PM		
Page Break on Location:		No	Page: 1 of 2		
Shopping List:		Beer Order			
Item #	Item Description	Purchase Unit	On Hand	Unit Price	Qty
Item Code	Item Description 2	Vendor	On Order		to Order
Bar Cooler					
22	BEER BTL Corona	Case = 24/Each	0.50	35.65	0
1238		Republic Beverage	0.00		
2137	BEER BTL Amstel Lt	CS = 24/Each	0.00	20.00	0
86135		Republic Beverage	0.00		
Bar Reach In					
35	BEER BTL DOS XX Amber	Case = 24/Each	0.00	34.56	0
1241		Republic Beverage	0.00		
Beer Cooler					
45	BEER BTL Amber	CS = 24/Each	0.50	0.00	0
654		US Foodservices	0.00		
2186	BEER BTL 512 Pecan Porter	Case = 24/Each	2.58	57.00	0
684384		Republic Beverage	2.00		
17	BEER BTL Bud Light	Case 24 = 24/Each	0.00	27.50	0
		Spec's Liquor	0.00		
13	BEER KEG Budweiser	Keg = 1/keg (15.5g)	1.00	56.23	0
123456		Republic Beverage	0.00		
Z-Storage Shelf					
29	BEER KEG Amstel Lt	Case = 24/Each	0.21	37.80	0
56122135		Republic Beverage	0.00		
2088	BEER BTL Austin Amber	CS = 24/Each	0.00	41.56	0
123651		Republic Beverage	0.00		
75	BEER KEG Bud Light	Pack = 12/Each	-0.08	11.00	0
1257		Republic Beverage	0.00		
14	BEER BTL Budweiser	Case = 24/Each	0.00	30.24	0
56654321		Republic Beverage	0.00		
38	BEER BTL Corona Light	Case = 24/Each	0.04	28.69	0
1242		Republic Beverage	0.00		
2111	BEER BTL Dogfish Head Amber	CS = 24/Each	0.00	35.69	0
6511		Republic Beverage	0.00		
55	BEER BTL LeftHand Milk Stout	Case 24 = 24/Each	0.00	42.79	0
		Spec's Liquor	0.00		

Once you have physically written down the amount of each item you would like to order, enter those numbers into Compeat. Also note that Compeat is selecting a vendor on the right side of the screen based on the lowest price per inventory unit – if the item is not marked as a bid item, Compeat will prefill this column with the preferred vendor. You also have the option to change the vendor listed with the drop-down on each line.

Suggest Orders by Shopping List									
List: Beer Order									
Suggest Orders Save Find Item Print Preview Show Order Summary Add Purchase Unit									
Items to Order									
Export to Excel									
Item Description	On Hand	On Order	Inv. Units	# to Order	Purch. Units	Amt. Each	Ext. Cost	Vendor	
BEER BTL Corona	12.00	0.00	Each	1	Case = 24/Each	\$35.65	\$35.65	Republic Beverage	
BEER BTL Amstel Lt	0.00	0.00	Each	2	CS = 24/Each	\$20.00	\$40.00	Republic Beverage	
BEER BTL DOS XX Amber	0.00	0.00	Each	3	Case = 24/Each	\$34.56	\$103.68	Republic Beverage	
BEER BTL Amber	12.00	0.00	Each	1	CS = 24/Each	\$0.00	\$0.00	US Foodservices	
BEER BTL 512 Pecan Porter	62.00	48.00	Each	1	Case = 24/Each	\$57.00	\$57.00	Republic Beverage	
BEER BTL Bud Light	0.00	0.00	Each	1	Case 24 = 24/Ea...	\$27.50	\$27.50	Spec's Liquor	
BEER KEG Budweiser	1.00	0.00	keg (15.5g)	2	Keg = 1/keg (15...	\$56.23	\$112.46	Republic Beverage	
BEER KEG Amstel Lt	5.00	0.00	Each	2	Case = 24/Each	\$37.80	\$75.60	Republic Beverage	
BEER BTL Austin Amber	0.00	0.00	Each	1	CS = 24/Each	\$41.56	\$0.00	Republic Beverage	
BEER KEG Bud Light	-0.94	0.00	Each	1	Pack = 12/Each	\$11.00	\$11.00	Republic Beverage	
BEER BTL Budweiser	0.00	0.00	Each	1	Case = 24/Each	\$30.24	\$30.24	Republic Beverage	
BEER BTL Corona Light	1.00	0.00	Each	1	Case = 24/Each	\$28.69	\$28.69	Republic Beverage	
BEER BTL Dogfish Head Am...	0.00	0.00	Each	1	CS = 24/Each	\$35.69	\$0.00	Republic Beverage	
BEER BTL LeftHand Milk Sto...	0.00	0.00	Each	1	Case 24 = 24/Ea...	\$42.79	\$0.00	Spec's Liquor	
BEER BTL DOS XX	0.00	0.00	Each	3	Case = 24/Each	\$34.56	\$103.68	Republic Beverage	
BEER BTL Firemans #4	2.00	0.00	Each	1	Case = 24/Each	\$25.39	\$25.39	Republic Beverage	
BEER BTL Lugenes Choc MS	0.00	0.00	Each	1	Case = 24/Each	\$38.96	\$0.00	Republic Beverage	
BEER BTL Choclat	0.00	0.00	Each	1	Case = 24/Each	\$42.99	\$42.99	Spec's Liquor	
BEER BTL Heniken	0.00	0.00	Each	1	Case = 24/Each	\$0.00	\$0.00	Republic Beverage	
BEER BTL Founders KBS	0.00	0.00	Each	1	Case = 24/Each	\$35.46	\$35.46	Republic Beverage	
BEER BTL Magic Hat IPA	0.00	0.00	Each	2	Case = 24/Each	\$37.89	\$75.78	Republic Beverage	
BEER BTL Magic Hat Red AL	0.00	0.00	Each	1	Case = 24/Each	\$39.85	\$0.00	Spec's Liquor	
BEER BTL Magic Hat Summ...	0.00	0.00	Each	1	Case = 24/Each	\$37.15	\$0.00	Spec's Liquor	
BEER KEG Newcastle	0.00	0.00	Each	3	Case = 24/Each	\$34.23	\$102.69	Republic Beverage	
BEER BTL Stash IPA	0.00	0.00	Each	1	Case = 24/Each	\$29.85	\$29.85	Republic Beverage	

Once you have all quantities transferred from paper to screen, press the show order summary button:

Suggest Orders by Shopping List

List: Beer Order | Suggest Orders | Save | Find Item | Print Preview | **Show Order Summary** | Add Purchase Unit

Items to Order

Export to Excel

Item Description	On Hand	On Order	Inv. Units	# to Order	Purch. Units	Amt. Each	Ext. Cost	Vendor
BEER BTL Corona	12.00	0.00	Each	1	Case = 24/Each	\$35.65	\$35.65	Republic Beverage
BEER BTL Amstel Lt	0.00	0.00	Each	2	CS = 24/Each	\$20.00	\$40.00	Republic Beverage
BEER BTL DOS XX Amber	0.00	0.00	Each	3	Case = 24/Each	\$34.56	\$103.68	Republic Beverage
BEER BTL Amber	12.00	0.00	Each	1	CS = 24/Each	\$0.00	\$0.00	US Foodservices
BEER BTL 512 Pecan Porter	62.00	48.00	Each	1	Case = 24/Each	\$57.00	\$57.00	Republic Beverage
BEER BTL Bud Light	0.00	0.00	Each	1	Case 24 = 24/Ea...	\$27.50	\$27.50	Spec's Liquor
BEER KEG Budweiser	1.00	0.00	keg (15.5g)	2	Keg = 1/keg (15...	\$56.23	\$112.46	Republic Beverage
BEER KEG Amstel Lt	5.00	0.00	Each	2	Case = 24/Each	\$37.80	\$75.60	Republic Beverage
BEER BTL Austin Amber	0.00	0.00	Each	1	CS = 24/Each	\$41.56	\$0.00	Republic Beverage
BEER KEG Bud Light	-0.94	0.00	Each	1	Pack = 12/Each	\$11.00	\$11.00	Republic Beverage
BEER BTL Budweiser	0.00	0.00	Each	1	Case = 24/Each	\$30.24	\$30.24	Republic Beverage
BEER BTL Corona Light	1.00	0.00	Each	1	Case = 24/Each	\$28.69	\$28.69	Republic Beverage
BEER BTL Dogfish Head Am...	0.00	0.00	Each	1	CS = 24/Each	\$35.69	\$0.00	Republic Beverage
BEER BTL LeftHand Milk Sto...	0.00	0.00	Each	1	Case 24 = 24/Ea...	\$42.79	\$0.00	Spec's Liquor
BEER BTL DOS XX	0.00	0.00	Each	3	Case = 24/Each	\$34.56	\$103.68	Republic Beverage
BEER BTL Firemans #4	2.00	0.00	Each	1	Case = 24/Each	\$25.39	\$25.39	Republic Beverage
BEER BTL Lugenes Choc MS	0.00	0.00	Each	1	Case = 24/Each	\$38.96	\$0.00	Republic Beverage
BEER BTL Choclat	0.00	0.00	Each	1	Case = 24/Each	\$42.99	\$42.99	Spec's Liquor
BEER BTL Heniken	0.00	0.00	Each	1	Case = 24/Each	\$0.00	\$0.00	Republic Beverage
BEER BTL Founders KBS	0.00	0.00	Each	1	Case = 24/Each	\$35.46	\$35.46	Republic Beverage
BEER BTL Magic Hat IPA	0.00	0.00	Each	1	Case = 24/Each	\$37.89	\$0.00	Republic Beverage
BEER BTL Magic Hat Red AL	0.00	0.00	Each	1	Case = 24/Each	\$39.85	\$0.00	Spec's Liquor
BEER BTL Magic Hat Summ...	0.00	0.00	Each	3	Case = 24/Each	\$37.15	\$111.45	Spec's Liquor
BEER KEG Newcastle	0.00	0.00	Each	1	Case = 24/Each	\$34.23	\$34.23	Republic Beverage
BEER BTL Stash IPA	0.00	0.00	Each	1	Case = 24/Each	\$29.85	\$29.85	Republic Beverage

Compeat will show the totals for each vendor represented. If all looks good, press the "Create Orders" button to generate the POs.

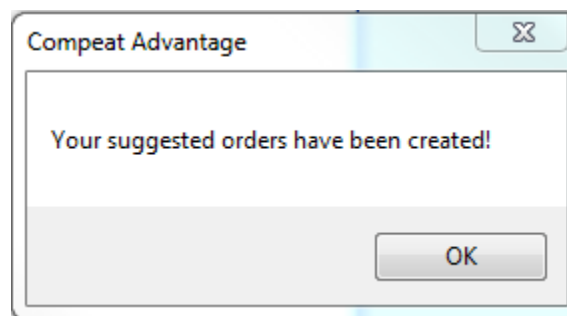
Suggest Orders by Shopping List | **Order Suggestions by Shopping List**

Purchase orders to be created

Navigation: | **Create Orders** | Print | Edit | Delete

PO #	Vendor	Total Ext. Cost
*** UNASSIGNED ***	Republic Beverage	\$722.93
*** UNASSIGNED ***	Spec's Liquor	\$181.94

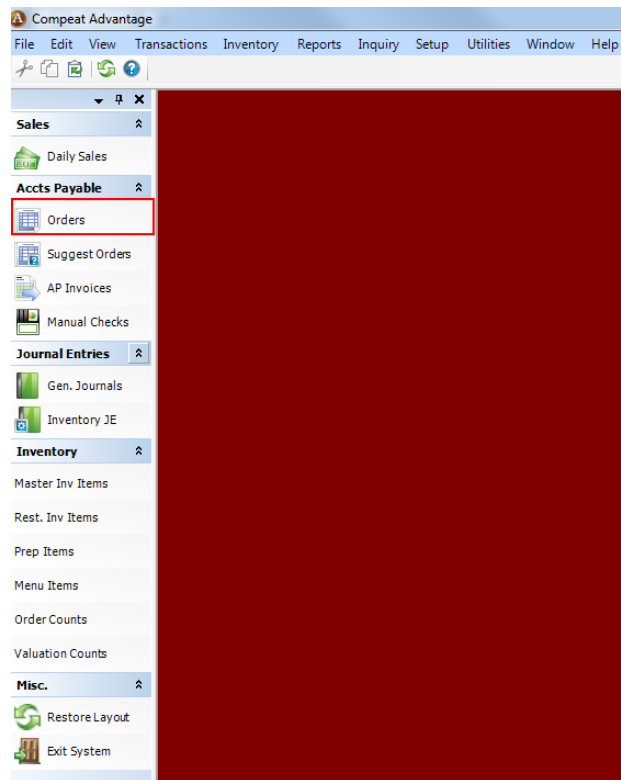
You should see the following message:



Note that the UNASSIGNED flag turns into actual PO numbers that are now available in the system.

Suggest Orders by Shopping List		Order Suggestions by Shopping List	
Purchase Orders			
		Create Orders Print Edit Delete	
PO #	Vendor	Total Ext. Cost	
001-00750	Republic Beverage	\$722.93	
001-00751	Spec's Liquor	\$181.94	

Navigate to Orders with either the quick link on the left toolbar, or under Transactions → Orders:



The two newly created POs are available:

PO #	Order Date	Due Date	Entered By	Vendor Code	Vendor Name
001-00750	08/18/2014	08/19/2014	compeat	REPUB	Republic Beverage
001-00751	08/18/2014	08/19/2014	compeat	SPECS	Spec's Liquor
001-00752	08/18/2014	08/19/2014	compeat	USFOOD	US Foodservices
001-00749	08/12/2014	08/13/2014	compeat	USFOOD	US Foodservices
001-00747	08/08/2014	08/09/2014	compeat	USFOOD	US Foodservices
001-00742	07/30/2014	07/31/2014	compeat	IC 100	Warehouse (Commissary)

Now you can edit if needed, then print, email, or transmit to the vendor.

Item Description	Vendor Item Code	Purchase Unit	Qty	Amt Each	Ext Price	Inventory Level 2	Location	Position	Catch Weight
BEER BTL 512 Pecan Porter	684384	Case = 24/Each	1.00	\$57.000	\$57.00	Bottle Beer	Beer Cooler	6	
BEER BTL Amstel Lt	86135	CS = 24/Each	2.00	\$20.000	\$40.00	Bottle Beer	Bar Cooler	5	
BEER BTL Budweiser	56654321	Case = 24/Each	1.00	\$30.240	\$30.24	Bottle Beer			
BEER BTL Corona	1238	Case = 24/Each	1.00	\$35.650	\$35.65	Bottle Beer			
BEER BTL Corona Light	1242	Case = 24/Each	1.00	\$28.690	\$28.69	Bottle Beer			
BEER BTL DOS XX	1240	Case = 24/Each	3.00	\$34.560	\$103.68	Bottle Beer	Z-Storage Shelf	40	
BEER BTL DOS XX Amber	1241	Case = 24/Each	3.00	\$34.560	\$103.68	Bottle Beer	Bar Reach In	2	
BEER BTL Firemans #4	456	Case = 24/Each	1.00	\$25.390	\$25.39	Bottle Beer	Z-Storage Shelf	41	
BEER BTL Founders KBS	1253	Case = 24/Each	1.00	\$35.460	\$35.46	Bottle Beer	Z-Storage Shelf	52	
BEER BTL Stash IPA	1254	Case = 24/Each	1.00	\$29.850	\$29.85	Bottle Beer	Z-Storage Shelf	68	
BEER KEG Amstel Lt	56122135	Case = 24/Each	2.00	\$37.800	\$75.60	Bottle Beer	Z-Storage Shelf	18	
BEER KEG Bud Light	1257	Pack = 12/Each	1.00	\$11.000	\$11.00	Bottle Beer	Z-Storage Shelf	28	
BEER KEG Budweiser	123456	Keg = 1keg (15.5g)	2.00	\$56.230	\$112.46	Draft Beer	Beer Cooler	9	
BEER KEG Newcastle	1251	Case = 24/Each	1.00	\$34.230	\$34.23	Bottle Beer	Z-Storage Shelf	64	

Order Total: \$722.93