



CREATE OUTSIDE PURCHASES IN VAST ENTERPRISE

The material in this document is applicable for ALL VAST Enterprise Retail versions and for ALL VAST Enterprise Multi-Store versions

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Introduction


VAST Enterprise Retail tracks Outside Purchases using an Outside Purchase Order (OPO) number that is assigned when the Outside Purchase is created. The following document shows how to setup and use Outside Purchases within VAST Enterprise Retail.

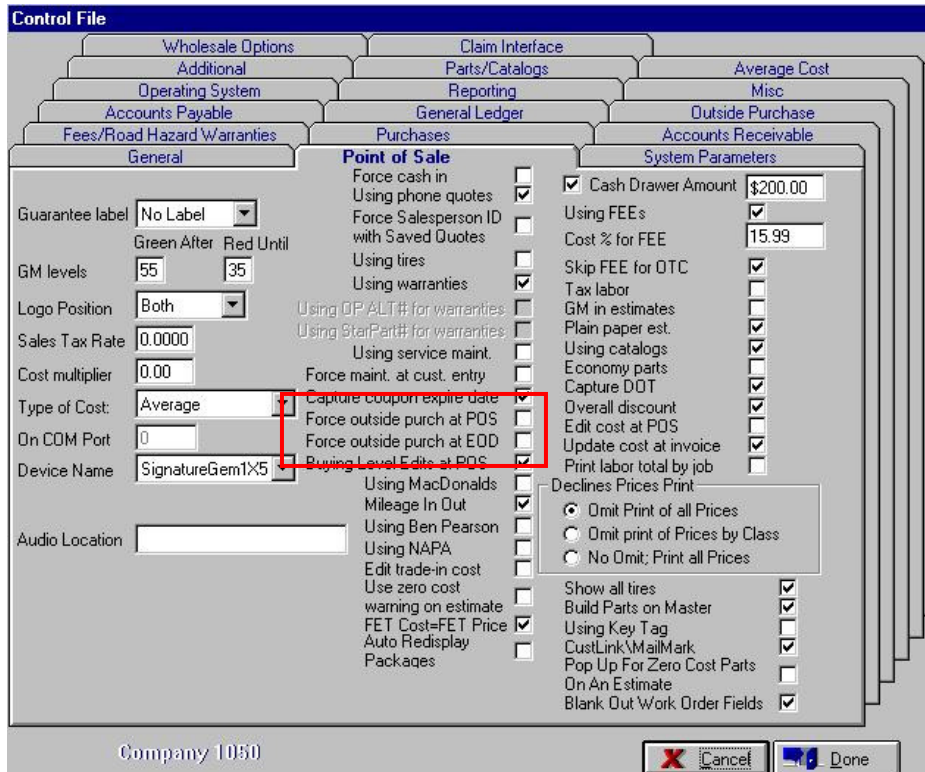
Setup Outside Purchases

Outside Purchases are setup in VAST Maintenance in Controls on the Point of Sale tab and the Outside Purchase tab. This section will guide you through setting up Outside Purchases to be used at your shop.

1. VAST Maintenance

Double click on the VAST Maintenance icon displayed on your computer desktop. Enter the shops Access code and click **OK**.

- A. Using the Index button  click on the letter 'C'.
- B. Click on the **Controls** icon.
- C. Click on the **Point of Sale** tab.
 - **Force outside purch at POS** – Place a checkmark in this checkbox if you want VAST to automatically demand that all Parts that are without sufficient quantities has an Outside Purchase created and received before generating an Invoice.
 - **Force outside purch at EOD** – Place a checkmark in this checkbox if you want VAST to automatically demand Outside Purchases be received prior to running the End of Day procedure.



The screenshot shows the 'Control File' dialog box with the 'Point of Sale' tab selected. The 'Force outside purch at POS' and 'Force outside purch at EOD' checkboxes are highlighted with a red box. Other visible options include 'Force cash in', 'Using phone quotes', 'Force Salesperson ID with Saved Quotes', 'Using tires', 'Using warranties', 'Using OP ALTI# for warranties', 'Using StarPart# for warranties', 'Using service maint.', 'Force maint. at cust. entry', 'Capture coupon expire date', 'Buying Level Edit at POS', 'Using MacDonalds', 'Mileage In Out', 'Using Ben Pearson', 'Using NAPA', 'Edit trade-in cost', 'Use zero cost warning on estimate', 'FET Cost=FET Price', 'Auto Redisplay Packages', 'Cash Drawer Amount', 'Using FEEs', 'Cost % for FEE', 'Skip FEE for OTC', 'Tax labor', 'GM in estimates', 'Plain paper est.', 'Using catalogs', 'Economy parts', 'Capture DDT', 'Overall discount', 'Edit cost at POS', 'Update cost at invoice', 'Print labor total by job', 'Declines Prices Print', 'Omit Print of all Prices', 'Omit print of Prices by Class', 'No Omit; Print all Prices', 'Show all tires', 'Build Parts on Master', 'Using Key Tag', 'CustLink\MailMark', 'Pop Up For Zero Cost Parts', 'On An Estimate', and 'Blank Out Work Order Fields'.

D. Click on the **Outside Purchase** tab.

The screenshot shows the 'Outside Purchase' tab in a software application. The window title is 'Company 1050'. The interface includes several sections with checkboxes and radio buttons:

- Allow manual entry of selling price** (checked)
- Prefill unit cost in outside purchase screen** (unchecked)
- Allow manual entry of item not included in estimate during parts entry** (checked)
- Use alternate item number on estimate/invoice printout** (checked)
- Regular item selling price is**: selling price (dropdown)
- Override selection with Advertisement price** (unchecked)
- Allow zero selling price for package part** (checked)
- Asterisk part selling price is**: cost x cost multiplier (dropdown)
- Hold open for vendor invoice** (unchecked)
- Required qty only** (unchecked)
- Stock vendor for star part only** (unchecked)
- Reason code prompt**: No Reason Code Entry (dropdown)
- OP Reports: Include Core cost in Gross Profit/Margin** (unchecked)
- Use Extended Purchase Limits** (checked)
- Update Lineitem with Average Cost** (unchecked)
- Outside Purchase line item**:
 - Do Not Require Estimate Nbr** (selected)
 - Require Estimate Nbr** (unchecked)
 - Require Outstanding Estimate Nbr** (unchecked)
- Outside Purchase Ordering**:
 - Do Not check Closest Shops inventory** (selected)
 - Check Closest Shops inventory before ordering** (unchecked)
 - Check Closest Shops inventory before ordering but EXCLUDE warehouse shops** (unchecked)

Buttons at the bottom right: Cancel, Done.

- **Allow manual entry of selling price** – If checked, you will be able to manually change the amount listed in the **Price** column on the Outside Purchase screen.
- **Prefill unit cost in outside purchase screen** – If checked, the VAST system will automatically enter the Part Cost in the **Unit Cost (w/o Core)** column on the Outside Purchase screen.
- **Allow manual entry of item not included in estimate during parts entry** – If checked, you will be able to enter in the **Item Number** column on the Outside Purchase screen a part number that is **not** entered on the work order. If this is **not** checked then you will not be allowed to enter a part in the Item Number column.
- **Use alternate item number on estimate/invoice printout** – If checked, the part number entered in the **Alternate Item Number** column will print as the part number on the estimate and invoice as shown on the following page.

AFS Retail - 1050
32 Pond Road
ALLENTOWN,PA 18104
(610)222-7777

PAGE 1

Customer ID: 1050300053
Name: BETH HARTMAN
 Address: 5251 CHRISTMAS LANE
 Address 2:
 City,State,Zip/Postal Code: COPLAY, PA, 18037
 Home Phone: (610) 666-6666
 Work Phone: (610) 610-6100
 Other Phone: (610) 295-8978
 Tax Exempt #:

Year: 05
 Make: DODGE
 Model: NEON SXT
 Lic No: NEON SXT
 VIN: 54684613212316546
 Color: WHITE
 Engine: L4-1996cc-122ci
 Mileage In: 58363
 Mileage Out: 58363

Date/Time: 07/28/11 15:03:22
 Workorder #: 5001984
 Invoice #: 5000679
 Key Tag:
 PO Number:
 Email Address:
 Fleet/Wholesale: N
 Unit Number:

Reason: RETURN CUSTOMER

Service comments:
 Salesperson: F. D'NOFRO

Qty.	Part #	RFR	Loc	Description	Parts	Labor	Total	DRIVER MUST CHECK LUG NUTS AT 50 MILES
2	OP/4886912			F PREMIUM ROTOR	38.56	0.00	77.12	
1	OP/AZ5320		RF	F RT REB CALP w/PAD	92.48	69.99	162.47	
1	OP/AZ5319		* LF	F LT REB CALP w/PAD	96.95	69.99	166.94	

*** Customer Wishes To Discard Old Parts ***

- **Regular item selling price is** – Click on the drop down arrow to select the item Sell Price to be used in Outside Purchases. The options are:

- **Override selection with Advertisement price** – If checked, any **Pricing Policies** that have been created and applied to an **Ad Event Area** and the **Pricing Tables** are then **Populated**, the dollar amount that has been set in the Pricing Policy is applied.

NOTE: If Buying Levels or Contract Prices are setup, both the Buying Levels and Contract Prices override the Ad Event Area Pricing Policies.*

- **Allow zero selling price for package part** – If checked, the VAST Warning message in Outside Purchases advising that “At least one item on the PO has a unit cost greater than the selling price” is disabled when the item number is a package part with a zero price.



- **Asterisk part selling price is** – Click on the drop down arrow to select the item Sell Price to be used in Outside Purchases when the item is an asterisk part. The options are:

- **Hold open for vendor invoice** – If checked, you will not be able to receive the Outside Purchase until the Vendor’s Invoice number is entered on the Outside Purchase screen.
- **Required qty only** – If checked, additional parts cannot be added to the Outside Purchase order that is not already entered on the work order.
- **Stock vendor for star part only** – If checked, only asterisk (*) or star parts can be added to an Outside Purchase Order where the Vendor is a Stocking Vendor.

Definition of Stocking Vendors: In VAST Maintenance under Vendors on the Vendor Purchase Order Info tab place a checkmark in “Purchasing Vendor”.

The following message will be displayed.



- **Reason Prompt Code** – Click on the drop down arrow to select one of the following options.
 - a. **Reason Code Entry Forced** – Before leaving the Outside Purchase screen you must enter a numeric Reason Code which describes why the item is an Outside Purchase.
 - b. **Reason Code Entry Optional** – Before leaving the Outside Purchase screen you have the option to enter a numeric Reason Code which describes why the item is an Outside Purchase.
 - c. **No Reason Code Entry** – There is no Reason Code to be entered and the field is not visible on the Outside Purchase screen.



Reason Code Optional or Forced

Vendor Name AUTOZONE INC						Vendor Address/Phone No. 1999 STATE HIGHWAY, STE 201 PITTSBURGH, PA 15222 (412) 444-4444						
PO Number 99		<input type="checkbox"/> Invoice On hold		Ordered by 000015								
Note: Decimal point required when entering dollar values												
Number	Item Number	Order Qty	Recd Qty	Unit Cost (w/o Core)	Fet Cost	Has Core	Core Cost	Customer Kept Core	Price	Alternate Item Number	Reason Code	
5002000	D1004	1	0	\$28.85	\$0.00	<input type="checkbox"/>	\$0.00	<input type="checkbox"/>	\$50.42	D1004	251	
*						<input type="checkbox"/>		<input type="checkbox"/>				

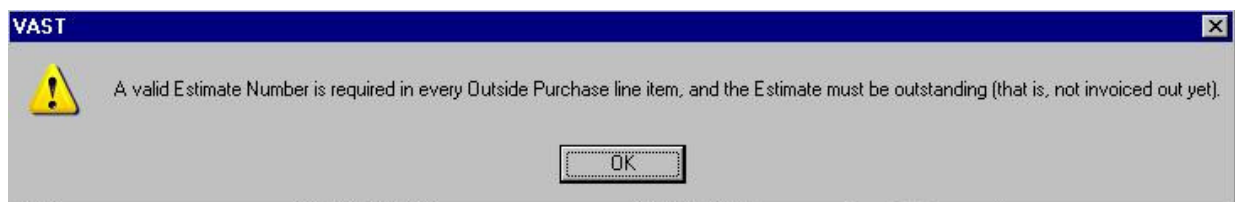
No Reason Code

Vendor Name AUTOZONE INC						Vendor Address/Phone No. 1999 STATE HIGHWAY, STE 201 PITTSBURGH, PA 15222 (412) 444-4444					
PO Number 98		<input type="checkbox"/> Invoice On hold		Ordered by 000015							
Note: Decimal point required when entering dollar values											
Number	Item Number	Order Qty	Recd Qty	Unit Cost (w/o Core)	Fet Cost	Has Core	Core Cost	Customer Kept Core	Price	Alternate Item Number	Reason Code
5001999	D1004	1	0	\$28.85	\$0.00	<input type="checkbox"/>	\$0.00	<input type="checkbox"/>	\$62.66	D1004	
*						<input type="checkbox"/>		<input type="checkbox"/>			

- **OP Reports: Include Core cost in Gross Profit/Margin** – When generating any outside purchase reports, if checked, the Core cost will be included in the Gross Profit/Margin column.
- **Use Extended Purchase Limits** – If checked, On the Outside Purchase screen there are six numerical character's allowed to be entered in the FET Cost column.
If **not** checked the FET Cost column is limited to the same number of numerical character's entered in the Unit Cost column.
- **Update Lineitem with Average Cost** – If checked and using Average Cost as the Type of Cost set in Controls on the Point of Sale tab, then VAST will use the current Average Cost to update the Sell Price for the item on the Part Entry screen.
If **not** checked or **not** using Average Cost, then this rule does **not** apply and the Outside Purchase cost is used to update the Sell Price.
- **Outside Purchase line item** - Select one of the following options.
 - a. **Do Not Require Estimate Nbr** – When creating an Outside Purchase from the Part Entry screen, an Estimate number does **not** need to be populated.
 - b. **Require Estimate Nbr** – When creating an Outside Purchase from the Part Entry screen, an *Estimate* number must be populated. This ties the outside purchase to the estimate.



- c. **Require Outstanding Estimate Nbr** - When creating an Outside Purchase from the Part Entry screen, an *Estimate* number must be populated and the Estimate can **not** be invoiced.



- **Outside Purchase Ordering** – When creating an Outside Purchase, VAST will notify the user if there is any inventory at one or more of the other shops that have been selected as a Closest Shops in VAST Maintenance under Other Shops. Select one of the following options.
 - a. **Do not check Closest Shops inventory** – If checked, VAST will **not** look at the inventory at the designated closest shops.
 - b. **Check Closest Shops inventory before ordering** – If checked, VAST will look at the inventory at the designated closest shops.
 - c. **Check Closest Shops inventory before ordering but EXCLUDE warehouse shops** – If checked, VAST will only look at the Closest Shops that do **not** have the Store Type set as a Warehouse Shop in VAST Maintenance under Company.

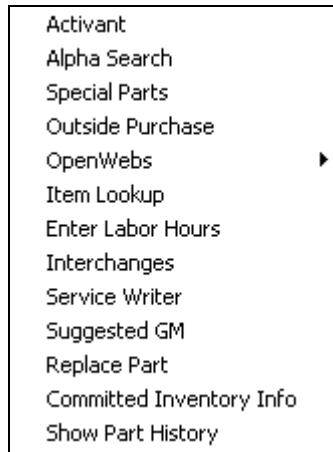
Setup is complete. Please refer to the Creating & Receiving an Outside Purchase.

Creating & Receiving an Outside Purchase

There are two ways to create an Outside Purchase in VAST Enterprise Retail; they are in Point of Sale and in Inventory Management.

1. VAST Point of Sale

1. Create or open an existing workorder. When the **Work Order** screen appears, right-click the part in which a pop-up menu appears, as shown below. Select **Outside Purchase**.



2. The **Outside Purchase** screen appears as shown below.

Vendor Name F1 Vendor Address/Phone No.

PO Number F2 Invoice Ordered by F3 On hold

Note: Decimal point required when entering dollar values

	Number	Item Number	Order Qty	Recd Qty	Unit Cost (w/o Core)	Fet Cost	Has Core	Core Cost	Customer Kept Core	Price	Alternate Item Number	Reason Code
▶	33373	*brake pad	2	0	\$69.99	\$0.00	<input type="checkbox"/>	\$0.00	<input type="checkbox"/>	\$174.98	*brake pad	251
*							<input type="checkbox"/>		<input type="checkbox"/>			

Description: **PO Receivings Total: \$0.00**

Vendor Invoice

Invoice No. Reference No. Invoice Date

Packing Slip No. Vendor PO No. Paid By:

None AP Terms Installments

Payment

Shipping/Handling

Invoice Total (w/ Core)

[Outside Purchase](#)

3. Click the **F1** button next to the Vendor Name field. The **Search Vendors** screen appears as shown below. Select a vendor.

Vendor Name	Number
ACCENT AUTO GLASS LLC	ACCE01-10
ACME AUTO SUPPLY, INC.	ACME01-10
ACORN THOMPSON	ACOR01-10
ADVANCE AUTO PARTS	ADVA02-10
AMERICAN GLASS CO. INC.	AMER10-10
AMERICAN RACING	AMER05-10
APPLUS TECHNOLOGIES	APPLUS-10
ARITE USED AUTO PARTS	ARIT01-10
AUTOPART INTERNATIONAL	FORE01-10
AUTOZONE INC.	AZ 0409
AZ COMMERCIAL	AUTO02-10

Search Vendors

4. The vendor address and phone information appear automatically on the right side of the screen. The PO Number also appears in the Number field.
5. Click the **F3** button next to the Ordered By field and select an employee name.
6. Locate the Has Core checkbox on the part line item. Double-click the checkbox for all parts that contain a core.
7. Enter the value of the core in the Core Cost field.
8. Tab over to the Reason Code field. An Ellipsis button appears automatically. Click the button and select a reason from the pop-up menu, examples shown below.

Buyout
Override

9. The **Reason** screen appears as shown below. Click the **Select** button after highlighting a code to return to the **Outside Purchase** screen.

Code	Description
251	NOT IN STOCK

Buyout Reason

10. Click **Done** to post the outside purchase and return to the **workorder** screen, as shown on the following page.

2002 BUICK CENTURY **EDWARD QUINTO** **Workorder #33373**

All	Sum	Job	Total Parts	Total Labor	Discount	Total Sale	GM
Brakes			\$349.96	\$175.38	0.00	\$525.34	
Shop Supplies			\$1.50	\$0.00	0.00	\$1.50	

Parts	\$351.46
Labor	\$175.38
Discount	\$0.00
	\$526.84
Tax	\$31.61
Total:	\$558.45

Service comments
 Technicians
 Disposal
 Work Order Status

Authorizations
 Car Info
 Declines History
 Tire Sizes
 Estimate Profile

Part Number	Loc	RFR	Description	Qty	Sell Price	Labor	AV	Additional Info
FEE		0	SUPPLY CHARGE	1	0.00	0.00	0	ABDG
EC		0	ENERGY SURCHARGE	1	1.50	0.00	0	OTHER
*BRAKE PAD	F		PADS (DISC BRAKE)	2	174.98	87.69	0	ABDG
*								

Delete
 Package
 Discount
 Totals
 Catalog
 Customer
 UnDecline

Decline
 Old Warr.
 Inventory
 Specs
 Alternate
 Print
 Exit

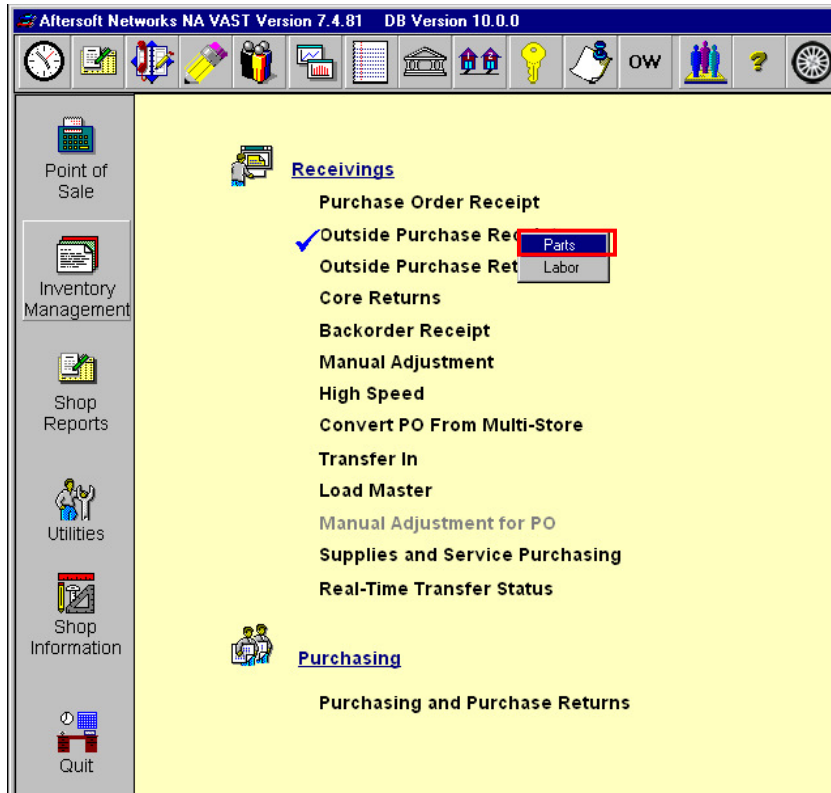
11. Click the **Work Order Status** button and change the status.
12. Click the **Exit** button to return to the **Retail Menu**.

2. VAST Inventory Management

1. Access **VAST Retail Point of Sale** and click on **Inventory Management**.



2. Under the heading '**Receivings**' click on **Outside Purchase Receipt**. Select **Parts**.



3. You will be taken to the **Outside Purchase** screen.

Outside Purchase

Vendor Name: AUTOZONE INC F1
VENDOR

Vendor Address/Phone No.: 1999 STATE HIGHWAY, STE 201
PITTSBURGH, PA 15222
(412) 444-4444

PO Number: 107 F2
B C
OPC Invoice On hold Received by: 000015 F3
B C
TECHS

Note: Decimal point required when entering dollar values

Number	Item Number	Order Qty	Recd Qty	Unit Cost (w/o Core)	Fet Cost	Has Core	Core Cost	Customer Kept Core	Price	Alternate Item Number	Reason Code
0	D1005	1	1	\$32.76	\$0.00	<input type="checkbox"/>	\$0.00	<input type="checkbox"/>	\$74.28	D1005	251
*						<input type="checkbox"/>		<input type="checkbox"/>			

Description: Update Item/Master PO Receipts Total: \$32.76

Vendor Invoice

Invoice No.: 08011101 Reference No.:
Packing Slip No.: 00699326 Vendor PO No.:
Invoice Date: 08/01/2011 Paid By: CHARGE

None AP Terms Installments

Payment

Shipping/Handling: 0.00
Invoice Total (w/ Core): 32.76

Print with Done/Received

Print Add Delete Void Tax Cancel Done

4. Enter the whole or part of the **Vendor Name** then click on **F1**. Select the Vendor.
5. The **PO Number** is automatically populated by the VAST system.
6. To select **Ordered/Received by**, click the **F3** button. Highlight the employee's name. Click **Select**.
7. In the **Number** field, enter the Estimate number if the Outside Purchase is tied to an estimate.
8. In the **Item Number** field, enter the part number.
9. Enter a number in the **Order Qty** field. The default quantity is '1'.
10. Enter the **Recd Qty** when the outside purchase order has been received.
11. If there is not a **Unit Cost** listed, enter the Cost.
12. If an **FET Cost** should be applied, enter it in this field.
13. If the part has a Core, place a checkmark in the **Has Core** field then enter the dollar amount in the **Core Cost** field.
14. Click inside the **Customer Kept Core** field if the Core part was kept by the customer.
15. If there is an Alternate part number, enter the part number in the **Alternate Item Number** field.
16. If a Reason Code is required, click the ellipsis button beside the **Reason Code** field. Select one of the pre-designated Reason Codes.
17. Enter the **Invoice No** and/or **Packing Slip No** when the outside purchase has been received.

18. To select the **Paid By**, click the drop down arrow. Select a Payment type which is set in VAST Maintenance under Payment Types as a '**Payable**'.
19. Click **Done** and then click **OK**.
20. This will save and print the outside purchase when the **Done** button is clicked.