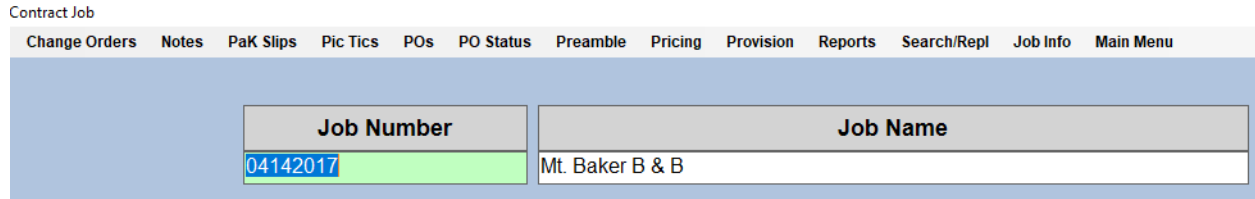# PO Status Monitor

This powerful enhancement affords the SFH user to monitor purchase order statuses for all POs or by a single job. You can also monitor both non-exported and exported POs. The screen will also monitor Contract Job Change Order generated POs and also POs generated from within a Sales Order. The screen is color-coded to visually alert those monitoring POs and contains a color key at the bottom of the screen.

The PO Status Monitor can be accessed two ways – from the Logo screen and from within a Contract Job. When the PO Status Monitor is opened from the Logo screen all POs are loaded into the grid. POs from Contract Jobs and Sales Orders are all visible in the grid along with their associated total PO dollar amount. There are ways to filter the POs displayed.

How it works:

1. Launch Software for Hardware.
2. In this example, we will access the PO Status Monitor from within a Contract Job. Regardless of access method the program is identical in functionality.
3. Open a *Contract Job*.

Contract Job

Change Orders	Notes	PaK Slips	Pic Tics	POs	PO Status	Preamble	Pricing	Provision	Reports	Search/Repl	Job Info	Main Menu

Job Number	Job Name
04142017	Mt. Baker B & B

4. Click the *PO Status* menu selection.
5. The PO Status Monitor appears containing all POs for the Contract Job:
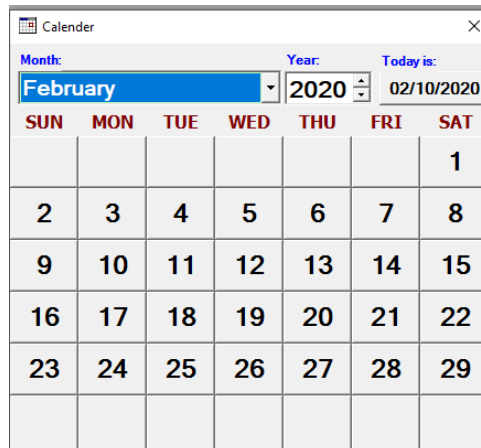
PO Status Monitor

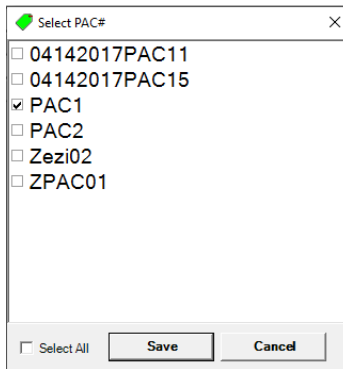|	PO #	Manf	Job #	Date Issued	Required Ship Date	Manf Promised Ship Date	Acknowledge Date	Shipping Confirmation	Received Date	Shipped Via
▶	04142017-00	CECO	04142017	02/23/2018					02/23/2018	Best Way
	04142017-02	HHC	04142017	11/07/2018	11/15/2018	11/13/2018	11/08/2018	🟥		LTL
	04142017PO	HHC	04142017	11/07/2018	02/04/2020		🟥	🟥		CPU
	04142017PO	CRPI	04142017	09/17/2018	04/08/2020				09/17/2018	Best Way
	04142017PO	HHC	04142017	12/18/2018					01/15/2020	UPS
	04142017PO	CRPI	04142017	08/06/2019			🟥	🟨		OT
	04142017PO	APD	04142017	11/04/2019			🟥	🟨		Best Way
	14	CECO	04142017	09/19/2019					09/19/2019	Best Way
	CECOBB01	CECO	04142017	08/08/2019					08/08/2019	FedX

6. Scrolling to the right you will see the remaining columns:

Notes	Quote #	Manf Order #	SFH PAC #	Shipped to Jobsite	Authorized By
					Mary Smith
					John Doe
					John Doe
			PAC1		John Doe
					John Doe
					John Doe
					John Doe
					John Doe
					John Doe

7. The following fields are filled directly from the PO screen. These fields are non-editable except for the exception of the two below denoted with an *:
   a. *PO #*
   b. *Manf*
   c. *Job #*
   d. *Date Issued*
   e. *Required Ship Date*
   f. *Manf Promised Ship Date*
   g. *Received Date*
   h. *Shipped Via*
   i. *Quote #*
   j. *Manf Order #*
   k. *Authorized By*
8. When the *Required Ship Date* and/or *Manf Promised Ship Date* fields are blank in the PO they will also be blank in the PO Status Monitor. If they are filled out in the PO the fields will be populated in the PO Status Monitor. If blank in the PO, then you can click on the empty cell in the PO Status Monitor and fill in the date using the following date picker. When saved the date will appear in the PO also.

9. All remaining fields can be modified only within the PO Status Monitor:
   a. *Acknowledgement Date*
   b. *Shipping Confirmation*
   c. *SFH PAC #*
   d. *Shipped to Jobsite*
   e. *Notes*
10. Opening a PO is as simple as clicking on the *PO #* cell. The SFH PO screen will appear. Closing the PO returns you to the PO Status Monitor.
11. Updating date fields will pop up the above calendar.
12. *SFH PAC #* – when this cell is clicked a pop-up will appear listing all the current packing slips associated to this job. **Note:** Dark blue PAC# cells indicate Packing Slips exist.

Select PAC#

- ☐ 04142017PAC11
- ☐ 04142017PAC15
- ☑ PAC1
- ☐ PAC2
- ☐ Zezi02
- ☐ ZPAC01

☐ Select All   Save   Cancel

13. Select the packing slip you wish to assign to this purchase order. Then Click *Select* and the Packing Slip # will display in the associated cell.
    a. **NOTE –** this is a free-form selection. Please verify you are assigning the correct packing slip number to selected purchase order. Also, multiple Packing Slips can be selected.
14. *Notes* – this cell allows you to enter notes relevant to those monitoring the PO.
15. At the bottom of the PO Status Monitor you will find the following:

Job #:
04142017

Search For:
Non-Exported

Change Order:
--All--

Manf:
--All--

View PO's

16. Here you will find different methods to filter the purchase orders by. For example, if you wish to see all Exported POs for Job # 04142017 simply select Exported from the *Search For* drop down then click the *View PO's* button to filter the grid.
    a. **Note** – You can enter the entire PO number or partial. For example, by entering 0414 will populate the grid with all POs starting with the entered sequence of numbers.
    b. **Note** – If the PO Status Monitor is opened from the Logo screen then the *Change Order* drop down will be replaced with *Sales Order*.
17. Also located at the bottom are color-coded legends for the *Acknowledgement Date*, SFH PAC#, and the *Shipping Confirmation* date fields for easy reminder.

Acknowledgement Date
🟥 2 days past Date Issued and no Acknowledment

SFH PAC#
🟦 PAC Slip available to assign

Shipping Confirmation
🟥 1 day or more past Manf Promised Ship Date
🟨 Waiting for Shipping Confirmation
🟩 Shipping confirmed

18. The *Amount* column is an added enhancement to the PO Status Monitor. Listed in the cells for this column are the total dollar amounts for the associated POs.