Instructions for “PurchasingAssistant” Use

Involved Documents:

- **Bill of Materials** : *Section B of MMR “Inputs” Sheet*
    - Contains information for the approved materials including validated description, component type, and required quantity
- **Requisition Log** : *Master Inventory “Requisition Log” Sheet*
    - Contains information for materials currently being sourced. Entries in this sheet should include the associated Job, selected Vendor, and confirmed pricing
- **PO LOG** : *Master Inventory “PO LOG” Sheet*
    - Contains a record of materials purchased by the Purchasing Team. Entries in this sheet should include every data point captured in the Requisition Log, and additionally include the Purchase Order Number, Tracking Number, and optionally the Vendor’s version of the item description.
    - This Log is utilized by Purchasing Team, and by Inventory Team upon receiving materials in-house. There are checkboxes to denote the status of Purchase Order approval, and status of materials in the Inventory system.
- **Ledger** : *Master Inventory “Ledger” Sheet*
    - Contains a record of materials received and removed. All materials should be recorded in the Ledger with entries for quantities received on order, and quantities consumed by jobs. This sheet is the primary data source for the inventory system, including the Pivot Table reports, so it is crucial that this sheet maintains integrity.

Available Functions:

- **Add Requisitions to PO Log** : In Toolbar → InventoryAssistant → PurchasingAssistant
    - This function scans the data stored in the Requisition Log and copies that data into the PO Log as new entries.
    - For a row to be copied into the PO Log, the checkbox in the column “Purchase” must be set to TRUE. Upon making an entry, the checkbox will be updated to FALSE, and the cell in the column “Status” will be updated to “ADDED TO PO LOG”.

- **Check-In Newly Received** : In Toolbar → InventoryAssistant → PurchasingAssistant
    - This function scans the data stored in the PO Log and adds appropriate materials into the Ledger
    - For a row to be copied into the Ledger, the checkbox in the column “Received” must be set to TRUE and the checkbox in the column “Added to Ledger” must be set to False. Upon making an entry, the “Added to Ledger” checkbox will be set to TRUE.

Use Cases:

Purchasing Materials for a New Job:

- Open the MMR for the job which needs materials.
- Navigate to Section B of the “Inputs” Sheet, Bill Of Materials.
- Copy the Information in columns C-F from the Bill of Materials into the Requisition Log, using paste values only (Ctrl+Shift+V) to maintain the formatting/data validation of Requisition Log. Update the “Job” column to reflect the Product Lot on the MMR.
- Determine whether each material now on the Requisition Log is already stocked in the required quantity, using the Stock Check Pivot Table.
- If the material is not in stock, determine the required quantity and update the “Ordered Qty” value.
- Determine which vendor will supply the material and update the “Vendor”, “Pack Unit”, “Due Date”, and “Price” values accordingly.
- Check the “Purchase” box for all these materials that need to be added to the PO Log.
- In the toolbar below the Spreadsheet title, find the “InventoryAssistant” Menu. Select this menu, and select the SubMenu “PurchasingAssistant”. Choose the “Add Requisitions to PO Log” item and wait for the script to complete.
- If there are any error messages or the script fails, tag ecloin@sawgrassnutralabs.com in a comment.

Receive Materials into Ledger:

- Inventory Team will check the “Received” box whenever an item in the Log is received in-house.
- In the toolbar below the Spreadsheet title, find the “InventoryAssistant” Menu. Select this menu, and select the SubMenu “PurchasingAssistant”. Choose the “Check-In Newly Received” item and wait for the script to complete.
- If any materials are marked Received, and not Added to Ledger, the script will make a ledger entry and check the “Added to Ledger” box.