Optomate
Premier Series

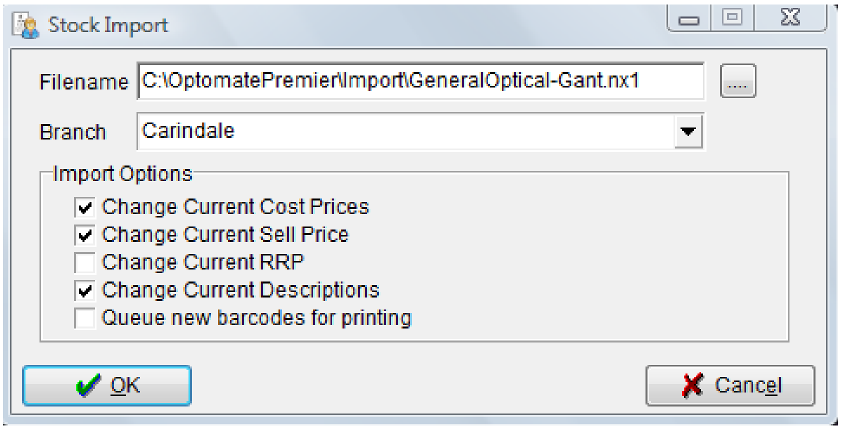
Importing Supplier Stock Files & Creating Purchase Orders

Optomate has the ability to import a stock file supplied by Optical Suppliers, where that file has been created in the appropriate format.

The benefit of this facility is two-fold. The Optomate customer can import a Suppliers digital catalogue, saving data entry time. The Sales Representative can then help the customer generate and send an electronic Purchase Order in far less time than they currently spend on-site.

Step A – Importing a Stock File
In advance, either download the file from the supplier or download from the Monkey Software website. If you have the file on a CD or USB memory stick, ensure that it is in the PC.

At the main screen of Optomate, go to: ***File ► Import Data ► Stock File***



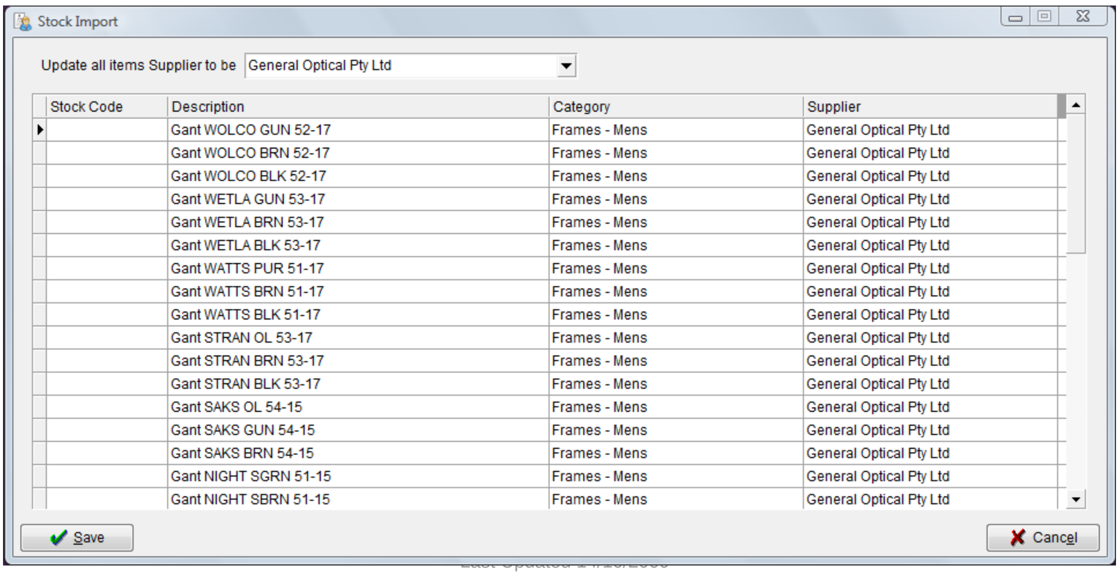
In the filename line, click on the browse button at the end, and locate the file, either where you have downloaded it to, or where it is on your CD or USB memory stick. In our example above, the stock file is has been saved to a folder named C:\OptomatePremier\Import – but you can select the appropriate location you have the file stored in.

If you are an Enterprise/Multi-branch site, you can choose to only update details for one particular Branch, or remove the name of the branch and this will add/update the details for **All Branches.**
If you would like to update the cost prices, tick the next box.
If you would like to update your Sell prices, tick the next box

> ***Tip***– the formula stored in ***File ► System Settings ► Stock Markup Formulas*** will be used to recalculate your sell prices for this stock.

If you would like to update the Descriptions of existing items, tick the next box.

Click the OK button, and the file will be checked – presenting you with the following screen:

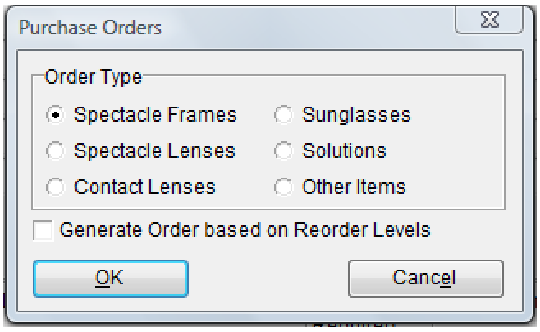


Stock Code	Description	Category	Supplier
	Gant WOLCO GUN 52-17	Frames - Mens	General Optical Pty Ltd
	Gant WOLCO BRN 52-17	Frames - Mens	General Optical Pty Ltd
	Gant WOLCO BLK 52-17	Frames - Mens	General Optical Pty Ltd
	Gant WETLA GUN 53-17	Frames - Mens	General Optical Pty Ltd
	Gant WETLA BRN 53-17	Frames - Mens	General Optical Pty Ltd
	Gant WETLA BLK 53-17	Frames - Mens	General Optical Pty Ltd
	Gant WATTS PUR 51-17	Frames - Mens	General Optical Pty Ltd
	Gant WATTS BRN 51-17	Frames - Mens	General Optical Pty Ltd
	Gant WATTS BLK 51-17	Frames - Mens	General Optical Pty Ltd
	Gant STRAN OL 53-17	Frames - Mens	General Optical Pty Ltd
	Gant STRAN BRN 53-17	Frames - Mens	General Optical Pty Ltd
	Gant STRAN BLK 53-17	Frames - Mens	General Optical Pty Ltd
	Gant SAKS OL 54-15	Frames - Mens	General Optical Pty Ltd
	Gant SAKS GUN 54-15	Frames - Mens	General Optical Pty Ltd
	Gant SAKS BRN 54-15	Frames - Mens	General Optical Pty Ltd
	Gant NIGHT SGRN 51-15	Frames - Mens	General Optical Pty Ltd
	Gant NIGHT SBRN 51-15	Frames - Mens	General Optical Pty Ltd

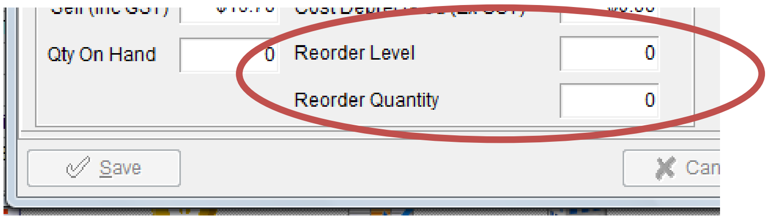
In the drop-down field at the top, select the matching Supplier from the Optomate list. This will make sure these match across the board. You will however, need to go down through each item and select which category that item belongs in, in Optomate.

Once these two columns are completed for every item, you can click Save, and the items will be imported into the Optomate stock file.

Step B – Creating a Purchase Order
At the main screen of Optomate, go into the Stock Control section at the bottom. At the top left hand corner, is a button to create a new Purchase Order, which should show the following screen:

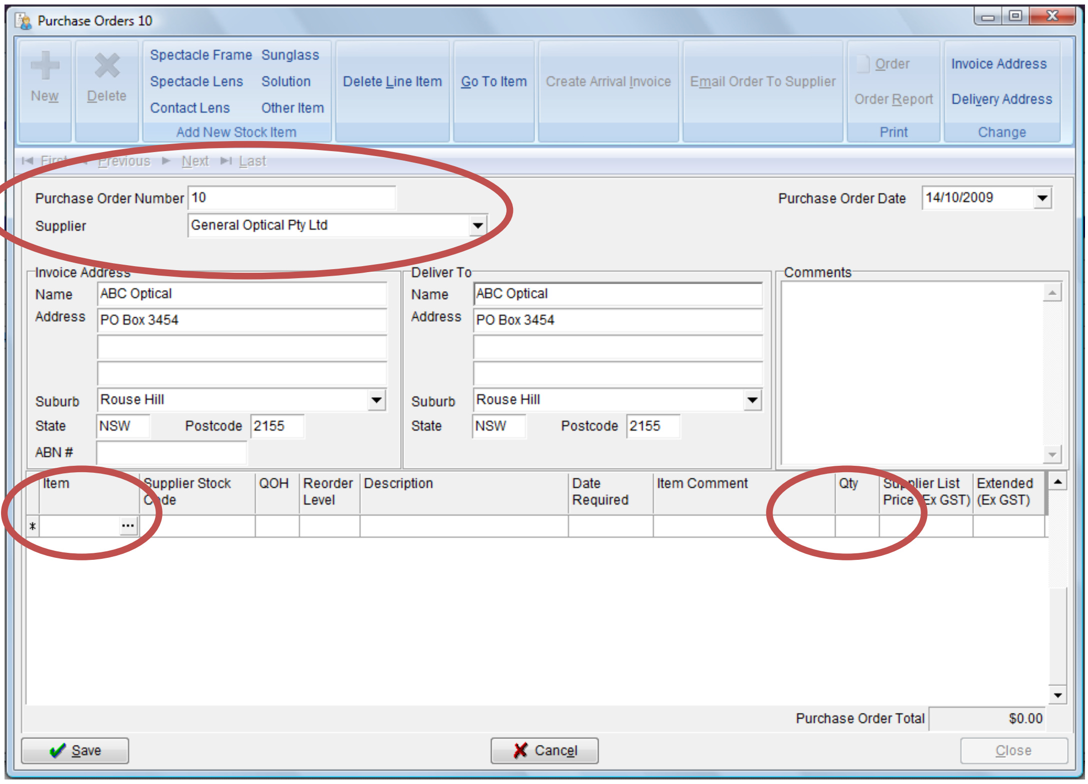


This screen does allow a Purchase Order to be built automatically, from a given supplier, if the user has (in advance) set required stock levels per item. This works well for restocking Contact Lens Solutions, for example. To set these levels, the user opens the item up, and sets the following:



Reorder level, is the threshold – if the QOH is higher, then the item doesn't need re-ordering and won't be on the Purchase Order. If the QOH = or is lower, then the item will appear on the Purchase Order, with the QTY required, as per the Reorder Quantity field.

When you click OK, complete the following Purchase Order screen:



1. Leave Purchase Order Number blank, and Optomate will allocate the next available number.
2. Select Supplier.
3. In the Item field, a barcode can be scanned, or click on the ... button to search for the item.
4. Once the item has been selected, enter the QTY, and tab through to the next line, to select the next item.
5. Finally, save the Purchase Order, and then Email/Print (at the top right) as required. The Email to Supplier button will create a PDF of the Order and attach it to an email. This does require that the Supplier's email has been entered into the Supplier Setup section ***Setup ► Stock ► Suppliers***

When the stock arrives, the staff can re-open the Purchase Order from the Stock Control section, and then click the "Create Arrival Invoice" button at the top, to transfer these items to the Stock Arrivals screen, saving a substantial amount of time.