



Citrus Inventory

User's Manual

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Overview

Citrus Inventory is used in conjunction with **Citrus Invoicer** and is the main program used to restock Inventoried Items.

The basic routines are:

Manage Inventory Items
Create and Manage Vendor Data
Create and Print a Purchase Order
Create a Pick List
Return Items to Inventory
Create Price Books
RFQ Letter

The Main Menu Screen

This screen has six sub routines.

Options that are grayed out are not available at the time.

This is usually because no file with data required for that routine exists.

For example, if you have not created any vendor records, you can not create a Purchase Order.

Click the radio button for the option you wish to perform, followed by clicking the Goto button, the Selected Routine will begin.

The menu at the top of the form allows you to edit the data on the setup screen, and order forms.

Managing Inventory Items

Add items to your inventory.

Each item is assigned to a category and has the following :

Unit Cost

Price

On-hand

Discount Price

Discount Quantity (at what quantity will the discount price be used)

Reorder When (inventory falls to this amount)

Reorder Amount (how many to reorder)

You can print Tally Sheets used to perform a physical inventory at multiple locations.

Creating Vendors and Suppliers

Select the *Create and Manage Vendors* option button from the main menu

Use this screen to enter and update information about your vendors and suppliers.

When you create a Purchase Order, the supplier names from which to choose, are derived from this list.

Mail to data comes from this list as well.

Creating a Purchase Order

When you started using *Citrus Invoicer*, you created Inventoried Items.

Each item was assigned a low level at which a re-order would be required.

You also assigned a re-order amount for each item.

As you create an invoice and add inventoried items to it, the on-hand count is depleted by the amount you enter.

(You will also deplete the count by creating a Picklist explained later in this document).

You restock inventoried items by creating a Purchase Order, even if you do not submit it to a vendor.

The Purchase Order creation routine allows you to select all inventoried items or only those low in stock.

(You can also create a blank purchase order form with only lines on the face. This is useful for companies with service vehicles for example. Keep a blank on each vehicle).
A blank PO does NOT increment your on-hand item count.

Select the *Create Purchase Order* routine from the main menu.

The *Purchase Order Setup Screen* will be displayed.
Here you will find 3 option buttons as just explained above.
Click on a button to select the type of PO you wish to create.

If creating a Blank PO, the vendor selection will be reset.
If creating a populated PO, select a Vendor from the list.
The next PO Number is automatically generated and displayed.
Click **Create**.
The *Create Purchase Order* window will open.

Depending on your previous selection, the grid will contain all inventoried items or only those low in stock.

You can delete any item from the Purchase Order, or change the quantity to reorder for the item.

Also, you can add non-inventoried items manually to the Purchase Order.
If you make mistakes, you can click the *Oops Button* and reload the grid to its original state.

You have 3 delivery options: the default is to deliver to your Business Address.
You can have the items held for pickup, or delivered to a customer address.

Select either *Add to Inventory w/o Printing a PO* or *Print Purchase Order and add to inventory*.
In both cases, the inventory count for each item is updated, unless the items are delivered directly to a customer account.

If Print was selected, the PO prints.

Creating a Pick List

A Pick list is a document you create to instruct someone to remove items from inventory for some purpose. In general, a Picklist is used to direct items to a construction site or to re-stock a work vehicle.

Select the *Create a Pick List* option button from the main menu.

A grid with all Inventoried Items is displayed.

Click items individually to select them.

Enter the required quantity in the *Add to Picklist Box*.

Click *Add Items to Picklist* Button.

If the entered quantity exceeds the on-hand quantity the selection will be rejected.

(There is no visible display of the quantity entered on the screen) at this time).

Click *Toggle Picklist* to view its current contents.

Continue selecting items until the Picklist is complete.

Click *Items Complete – Print Pick List* button.

When the Picklist prints the on-hand count for each selected item is decremented.

Returning Items to Inventory Screen

You may have an occasion where items picked or delivered directly to a customer account require restocking.

Select the *Return Items to Inventory* option button from the main menu.

A grid with all Inventoried Items is displayed.

Click items individually to select them.

Enter the quantity to return to inventory in the *Return to Inventory Box*.

Click *Save New Item Count* Button.

The New Item Counts are SAVED when you return to the main menu.

CLICKING THE [X] (upper right) will exit without saving the new counts.

Create Price Books

You can create Price books for Sales and Service personnel.

You can include Sales items. Services and Custom items you may have created.

You can include item price, discount price and item cost.

You can arrange the order in which item categories will appear.

Creating a RFQ Document

An RFQ document is a letter to your Supplier(s) requesting pricing on items in your inventory.

This is useful in comparing prices and volume discounts between vendors.

Click *Create RFQ* Menu option

The Instruction display; Click *OK*

Select the items you wish to include in the RFQ.

Click *Prepare RFQ* Button.

You can load a Default statement, or create a new statement, and save it.

Click *Add Selected Items* Button.

All items selected in the grid will be added to the RFQ Form

DO NOT MANUALLY ADD ITEMS TO THE FORM.

Only items selected in the grid will print on the RFQ.

Click *Print RFQ* Button.