

# How to create a Purchase Order and received with Mobile Inventory

The purpose of this document is to give a quick overview of how to create a Purchase Order and receive it using the Inventory app, mainly based on screenshots. The screenshots are taken from LS Retail NAV 11.00.01.

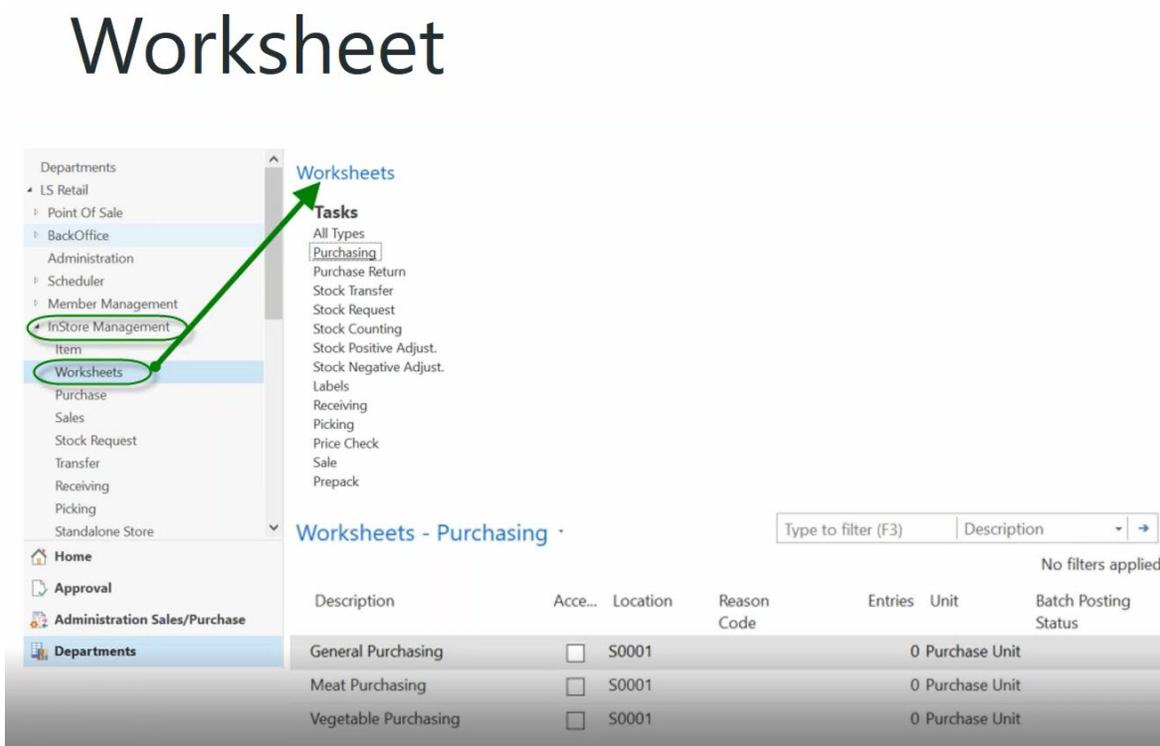
## 1. Create Inventory Masks and Worksheets in NAV

The screenshot shows the LS Retail NAV interface. On the left is a navigation menu with 'Mobile Inventory' selected. The main area displays the 'Mobile Inventory' section with sub-sections: Lists, Tasks, Administration, Web Service, and Troubleshooting. The 'Inventory Mask Setup' option under Administration is highlighted with a red box.

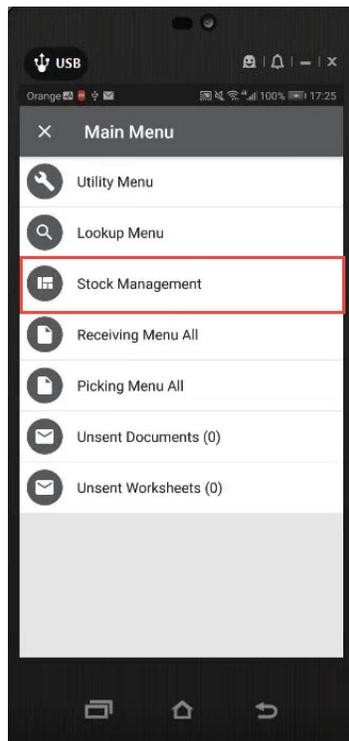
Below this, a window titled 'Edit - Inventory Mask Setup' is open, displaying a table of inventory masks. The table has the following columns: Entry Type, Templates, Batch, Description, Store No., Handheld User, Type of Entering, Unit, Source Code, Reason Code, Inv. Adjust. Group, and Location. The first row is highlighted in red.

Entry Type	Templates	Batch	Description	Store No.	Handheld User	Type of Entering	Unit	Source Code	Reason Code	Inv. Adjust. Group	Location
Receiving	ITEM	S0001	Receiving Test	S0001		Add to Qty	Base Unit				S0001
Prepack	PREPACK		Explosive prepacks			Add to Qty	Purchase Unit				S0001
Purchase	REQ	S0001	General Purchasing	S0001		Add to Qty	Base Unit				S0001
Positive	ITEM	S0013	Positive Adjns. S0013	S0013		Add to Qty	Base Unit		-ADIM.		S0013
Positive	ITEM	S0004	Positive Adjns. S0004	S0004		Add to Qty	Base Unit		-ADIM.		S0004
Positive	ITEM	S0001	Positive Adjns.	S0001		Add to Qty	Base Unit		-ADIM.		S0001
Negative	ITEM	S0001	Best Before Date	S0001		Add to Qty	Base Unit		BEDATE		S0001
Counting	PHYS. INV.	S0004	Stock Counting S0004	S0004		Add to Qty	Base Unit		STOCKADIM		S0004
Counting	PHYS. INV.	S0001	Stock Counting	S0001		Add to Qty	Base Unit		STOCKADIM		S0001
Stock Req.			Stock Requests	S0001		Add to Qty	Base Unit				S0001
Transfer	RECLASS	S0001	Transfer to s0002	S0001		Add to Qty	Base Unit				S0001
Purchase	REQ	S0001	Meat Purchasing	S0001		Add to Qty	Purchase Unit				S0001
Purchase	REQ	S0001	Vegetable Purchasing	S0001		Add to Qty	Purchase Unit				S0001
Purch.Return			Purchase Return	S0001		Add to Qty	Base Unit				S0001
Counting	PHYS. INV.	S0001	Stock Counting w/Area	S0001		Add line	Base Unit		STOCKADIM		S0001
Negative	ITEM	S0001	Damaged by Customer	S0001		Add to Qty	Base Unit		DAMCUSTOM		S0001
Negative	ITEM	S0001	Damaged by Staff	S0001		Add to Qty	Base Unit		DAMSTAFF		S0001
Negative	ITEM	S0001	Stolen	S0001		Add to Qty	Base Unit		STOLEN		S0001
Labels	0	38X70ZEBRA	Continuous labels 38x70 mm	S0001		Add to Qty	Base Unit				S0001
Labels	0	38X70ZEBRA	Adhesive lns, w/gap 71x120 mm	S0001		Add to Qty	Base Unit				S0001
Price Check	C1		Compett Big Stores	S0001		Add to Qty	Base Unit				S0001
Sale	ITEM	S0001	Sale	S0001		Add to Qty	Base Unit				S0001
Counting	PHYS. INV.	S0013	Stock Counting w/Area	S0013		Add to Qty	Base Unit		STOCKADIM		S0013
Positive	ITEM	W0001	Pos. Adj. for W0001 - Batch Post...	HO		Add to Qty	Base Unit		-ADIM.		W0001
Positive	ITEM	S0009	Positive Adj. S0009	S0009		Add to Qty	Base Unit		-ADIM.		S0009
Negative	ITEM	W0001	Neg. Adj. for W0001 - Batch Post...	HO		Add to Qty	Base Unit		-ADIM.		W0001
Positive	ITEM	S0007	Positive Adj. S0007	S0007		Add to Qty	Base Unit		-ADIM.		S0007
Counting	PHYS. INV.	W0001	Stock Count W0001 - Batch Post...	HO		Add to Qty	Base Unit		STOCKADIM		W0001
Positive	ITEM	S0003	Positive Adjns. S0003	S0003		Add to Qty	Base Unit		-ADIM.		S0003

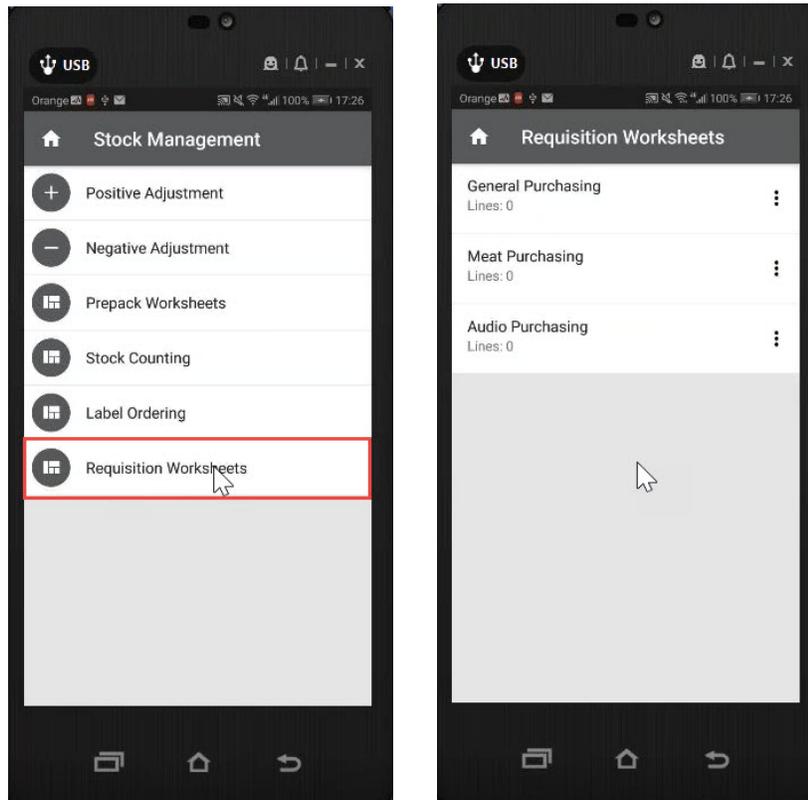
- Under InStore Management you will be able to see the Worksheets that derive from the Inventory Mask created.



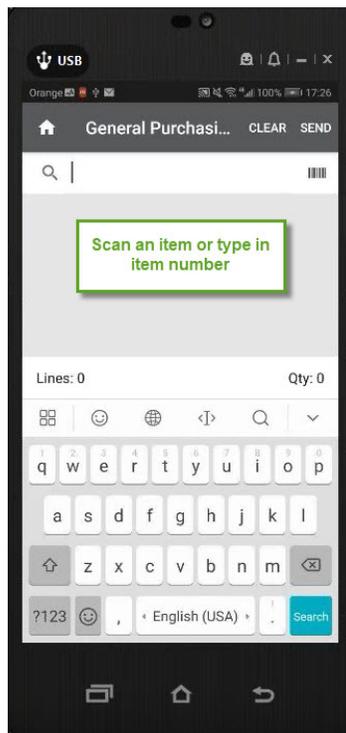
- Go to the App in your device and find Stock Management in the Main Menu.



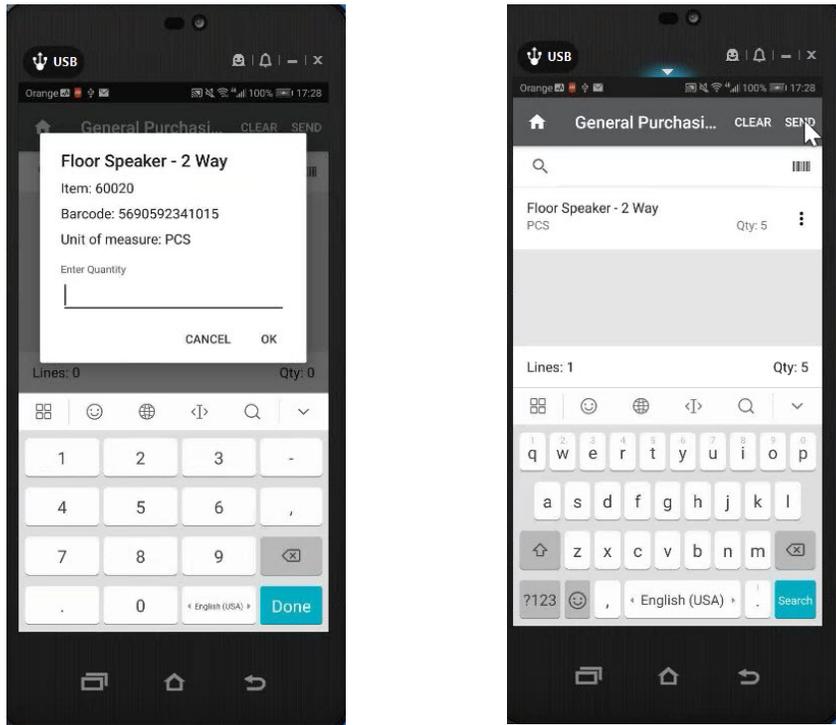
- Click on the Requisition Worksheets where you will see the same worksheets created on the Back Office.



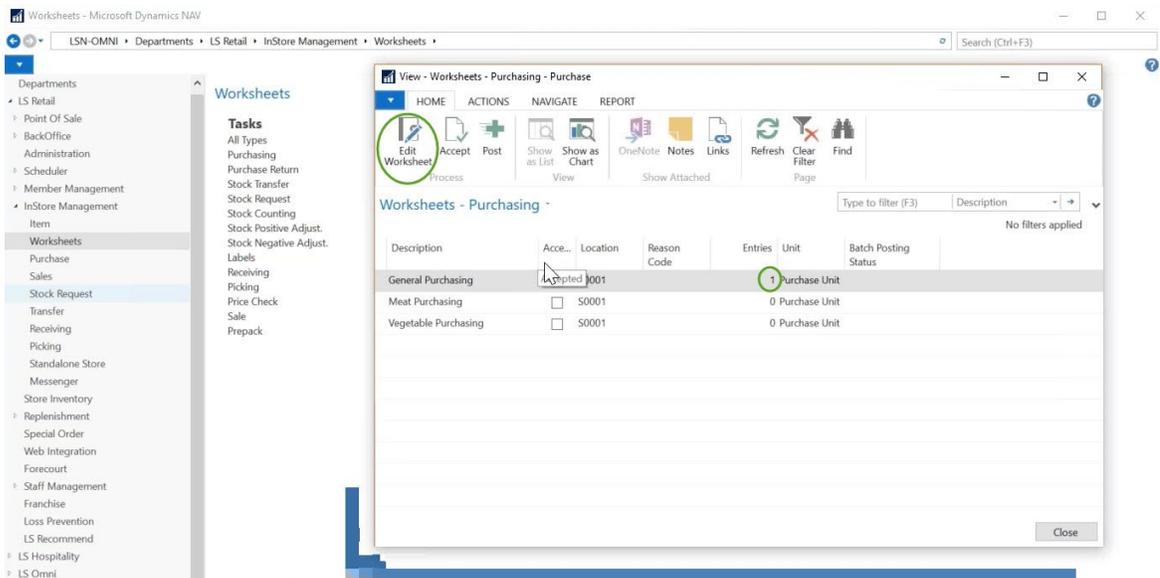
- Open one of the Worksheets and scan an item or key in the barcode number.



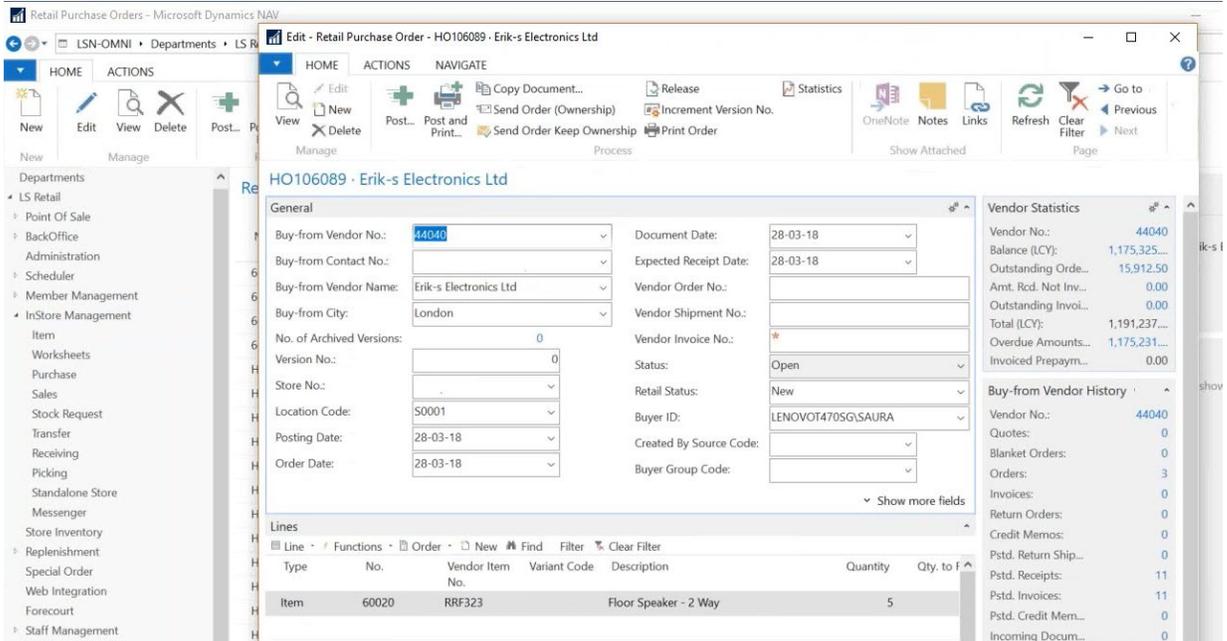
- Once the item is scanned, the system finds the item and then asks the user to insert the Qty to purchase. A line is created and all you need is to press Send.



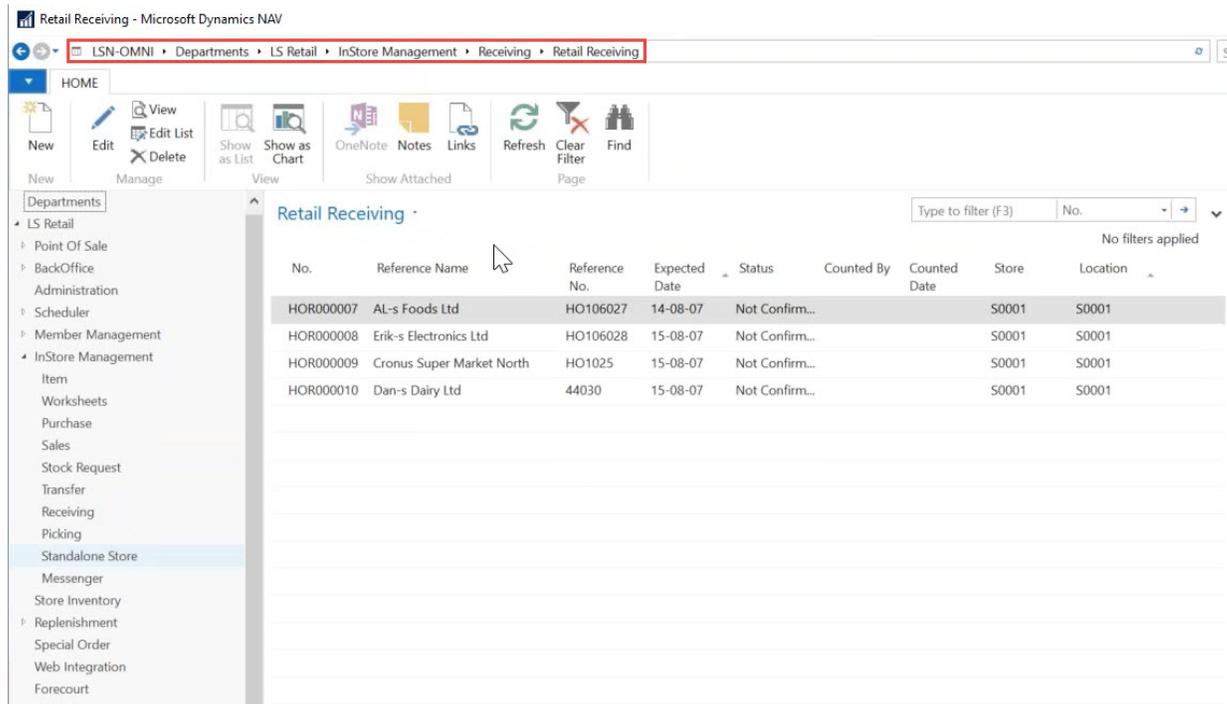
- This worksheet journal will be sent to the Back Office. One final step, before the PO is created, go to the Back Office and open the Worksheets –Purchasing again. You will see now that you have 1 entry. If you open the worksheet by pressing the button “Edit Worksheets”, you will find the request from the store, created with the Inventory app.

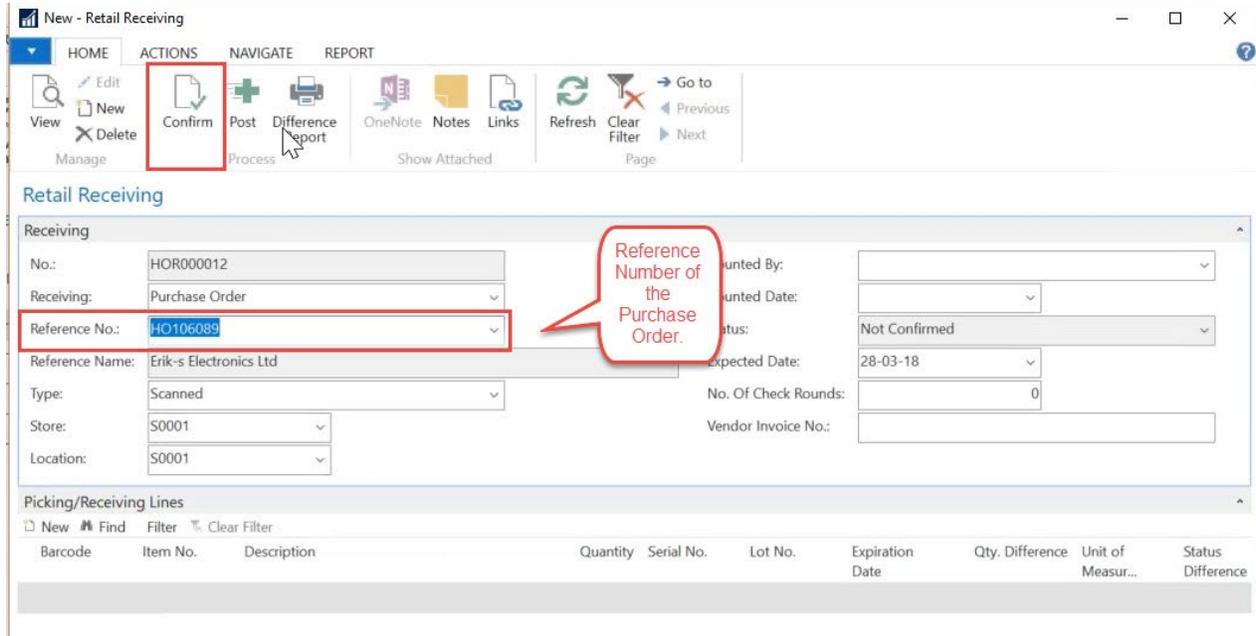


- Once the entry is reviewed, click „Accept“ upon which the flag for the „Accepted“ field is enabled. And then „Post“ it. Once it's posted, a Retail Purchase Order is created. You can see it by navigating to the Retail Purchase Order section in the Back Office. Fill up the „Vendor Invoice No.“ since it is mandatory.

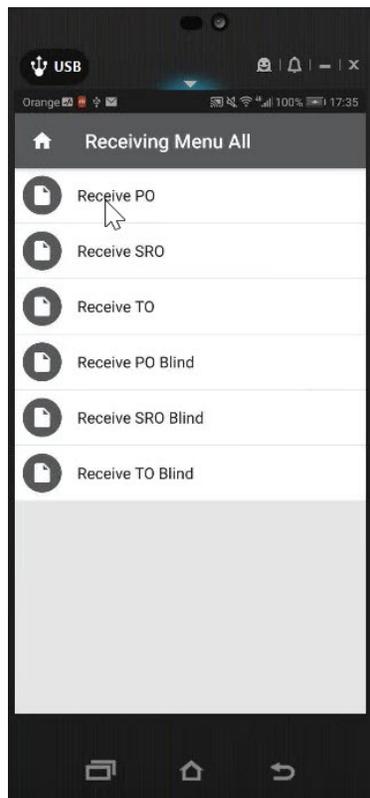


- Since, the goal is to receive the Purchase Order with the Inventory app in the Store, you will need to create a Retail Receiving Worksheet first. Navigate to Retail Receiving and press „New“.

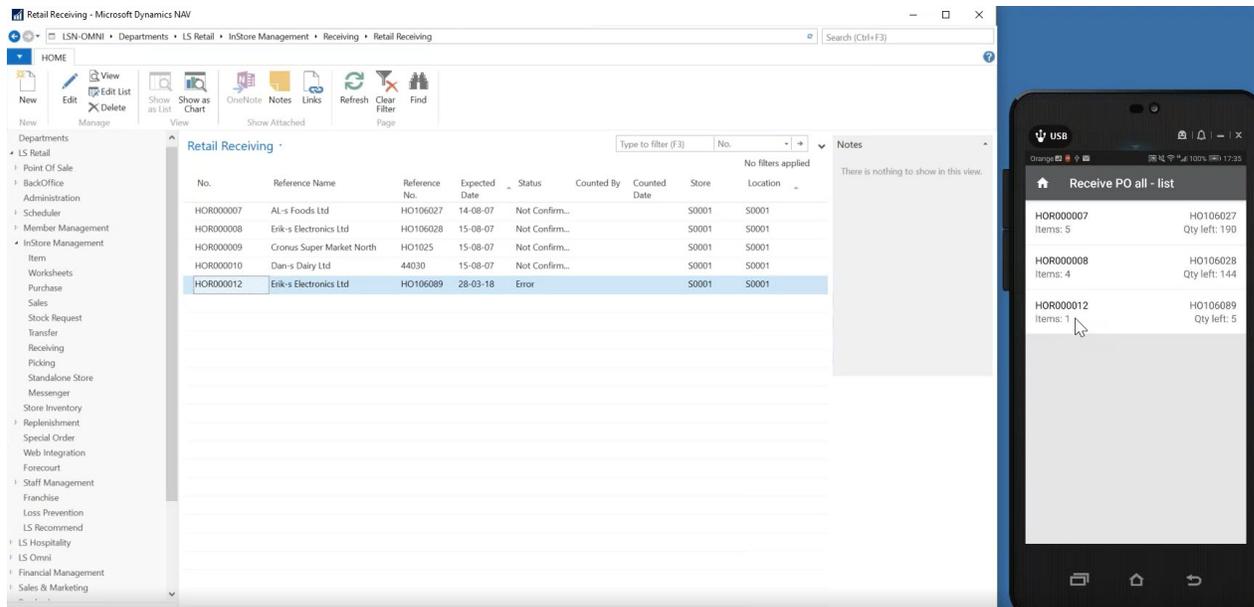




10. Once „Confirm“ is pressed the Picking/Receiving Lines tab will be updated. Close the window (without Confirm it or Post it). Go to the app, and navigate to the Receiving Menu and press Receive PO and open „Receive PO all - list“



11. It's the same Number in the Back Office and in the Inventory app. On the App, open the Receiving Order and if the items had been delivered in the store you update the Qty. and then, click on „Send“ to release the Receiving Order from the local data store to LS NAV.



12. In the Back Office, open the Retail receiving Order again, fill up the „Counted Date“ field and press „Confirm“ and „Post“.