

# B2B PO BEST PRACTICES

## GENERAL GUIDELINES

- Owner/GM is very supportive of using new technology like B2B. The company typically uses other RFMS tools such as Schedule Pro, Bid Pro, CMM, Measure, Bar Coded Inventory/Tri Coder
- Clients have been sending POs electronically for an average of 5 years. Uses B2B product catalog, invoices and PO's.
- Updates to the latest RFMS version on a regular basis

## PRODUCT CATALOG MANAGEMENT

- Monitors consistency in data to ensure accurate reporting for sales tracking, purchasing, merchandise management and product performance reporting. No UNREFERENCED lines allowed in most cases. New product requests are sent to/entered by Product Administrator, generally the same day of the request
  - Primary emphasis is on CORE, PROMOTIONAL & STOCKING products
- PO cost is verified by Product Administrator; products file is updated daily/weekly. The E Commerce download screen is checked 2 to 3 times per week for product updates, changes or drops. Leaves the EC DOWNLOAD WORKSTATION (typically the server) open 24/7 so that product catalog, Invoice and PO updates are received
- Private Style/Item names have been edited/customized to make product look-up easier – primary focus is for CORE/STOCKING PRODUCTS

## INVENTORY/PURCHASING

- Centralized Purchasing, orders for all staff, aggregates orders to minimize freight and utilize stock
- PO cost is entered/verified by a Product Administrator – Purchasing only rechecks for special situations
- Utilize B2B electronic purchase orders for roll goods and item products, only exceptions are for special buys, truckloads, job specific pricing or STOCK ORDERS
- Sales Staff checks for vendor inventory availability, Purchasing checks RFMS Inventory (green roll) BEFORE ordering
- Uses the PO acknowledgement for confirmations rather than emails. Checks mill websites for Backorder updates
- Updates the PROMISE DATE on the PO manually for transit time once the PO acknowledgement is received
- Uses internal NOTES for purchase orders, particularly to communicate special pricing, backorder updates
- Uses the PO filter screens DAILY to check for SENT EC, BACKORDERS or REJECTED ORDERS that need follow-up
- EMAILS the PO via a PDF to non-b2b vendors. May use a PDF Editor to type in additional special notes

## PO & INVENTORY REPORTING

- Uses PO Search Filters – saves key search filters
- Uses the 'Needed Inventory Report' or 'Stock Status Report' – for tracking inventory levels for stocking products
- Uses the Schedule Pro 'Material Analysis Report' – tracks line status of materials by vendor

## SYSTEM OPTIONS/SETTINGS & CONTROLS

- All users are on recent version of RFMS, V16 or higher
- Administrative System options:
  - Allow vendor to update the promise date – turned on
  - Verify PO & Account Number for each order – turned on
- Has RFMS Email Configuration set up to send emails with a PO PDF attachment