

# PROCUREMENT

## INTRODUCTION TO PURCHASE ORDERS

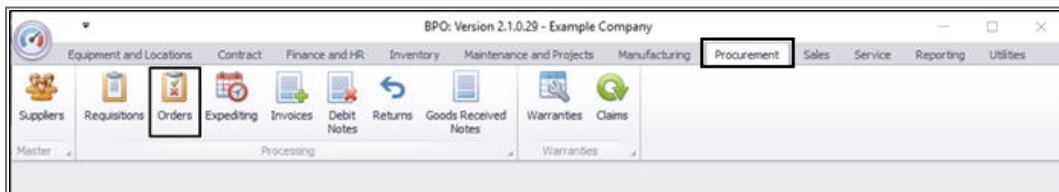
Purchase Orders are orders to suppliers for goods, services, or repairs required.

- The procurement process has the following steps:
  - [Create a Purchase Requisition](#)
  - Request for Quote
  - [Requisition Approval](#) (Release & Approve)
  - [Receive Goods](#) / [Receive Services](#)
  - [Create Supplier Invoice](#)
- A Purchase Order **must** be [printed](#) (print preview) before goods can be **received**.

---

**Ribbon Access:** *Procurement > Orders*

---



## VIEW PURCHASE ORDERS

---

The *Purchase Order Listing* screen will be displayed.

- Select the **site** in which you wish to work.

Purchase Order Listing - BPO: Version 2.1.0.65 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

View Order | Delete | Approve | Decline | Non Stock GRN | Collection Agent | Save Layout | Workspaces | Print Collection Voucher | Print | Export | Durban | New | Refresh

Links: Enter text to search...

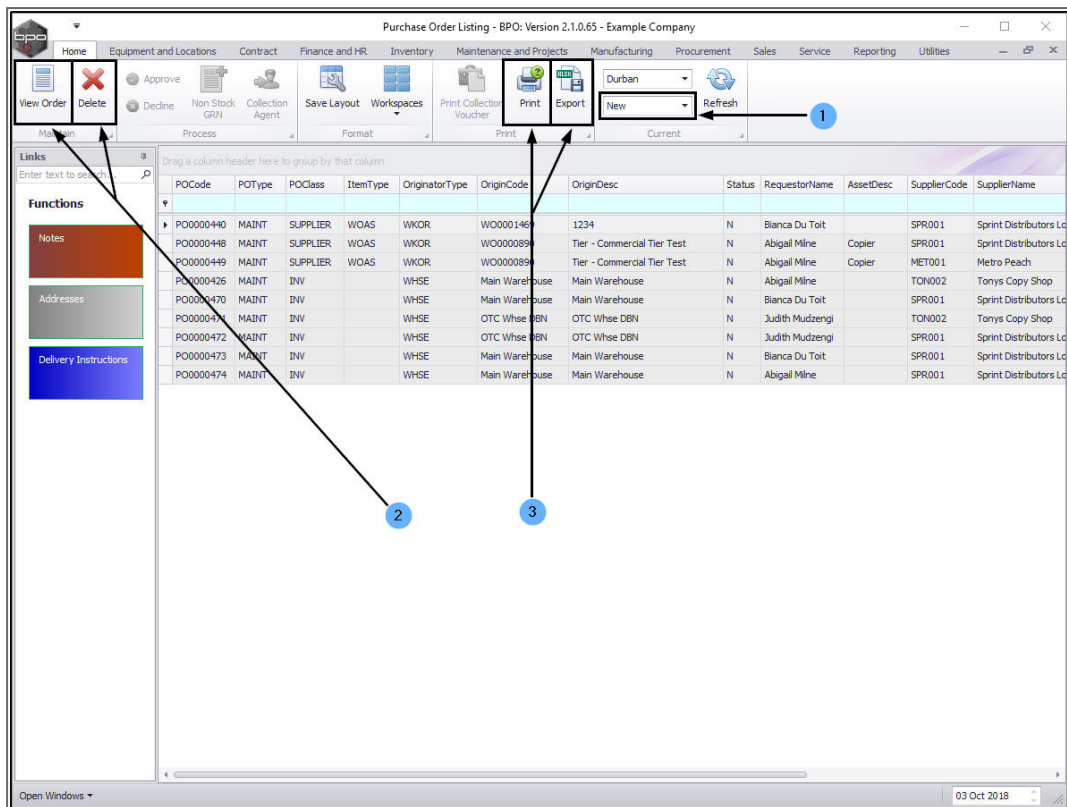
Functions: Notes, Addresses, Delivery Instructions

POCode	POType	POClass	ItemType	OriginatorType	OriginCode	OriginDesc	Status	RequestorName	AssetDesc	SupplierCode	SupplierName
PO0000440	MAINT	SUPPLIER	WOAS	WKOR	WO0001469	1234	N	Bianca Du Toit		SPR001	Sprint Distributors Lc
PO0000448	MAINT	SUPPLIER	WOAS	WKOR	WO0000890	Tier - Commercial Tier Test	N	Abigail Mine	Copier	SPR001	Sprint Distributors Lc
PO0000449	MAINT	SUPPLIER	WOAS	WKOR	WO0000890	Tier - Commercial Tier Test	N	Abigail Mine	Copier	MET001	Metro Peach
PO0000426	MAINT	INV	WHSE			Main Warehouse	N	Abigail Mine		TON002	Tonys Copy Shop
PO0000470	MAINT	INV	WHSE			Main Warehouse	N	Bianca Du Toit		SPR001	Sprint Distributors Lc
PO0000471	MAINT	INV	WHSE			OTC Whse DBN	N	Judith Mudzengi		TON002	Tonys Copy Shop
PO0000472	MAINT	INV	WHSE			OTC Whse DBN	N	Judith Mudzengi		SPR001	Sprint Distributors Lc
PO0000473	MAINT	INV	WHSE			Main Warehouse	N	Bianca Du Toit		SPR001	Sprint Distributors Lc
PO0000474	MAINT	INV	WHSE			Main Warehouse	N	Abigail Mine		SPR001	Sprint Distributors Lc

Open Windows | 03 Oct 2018

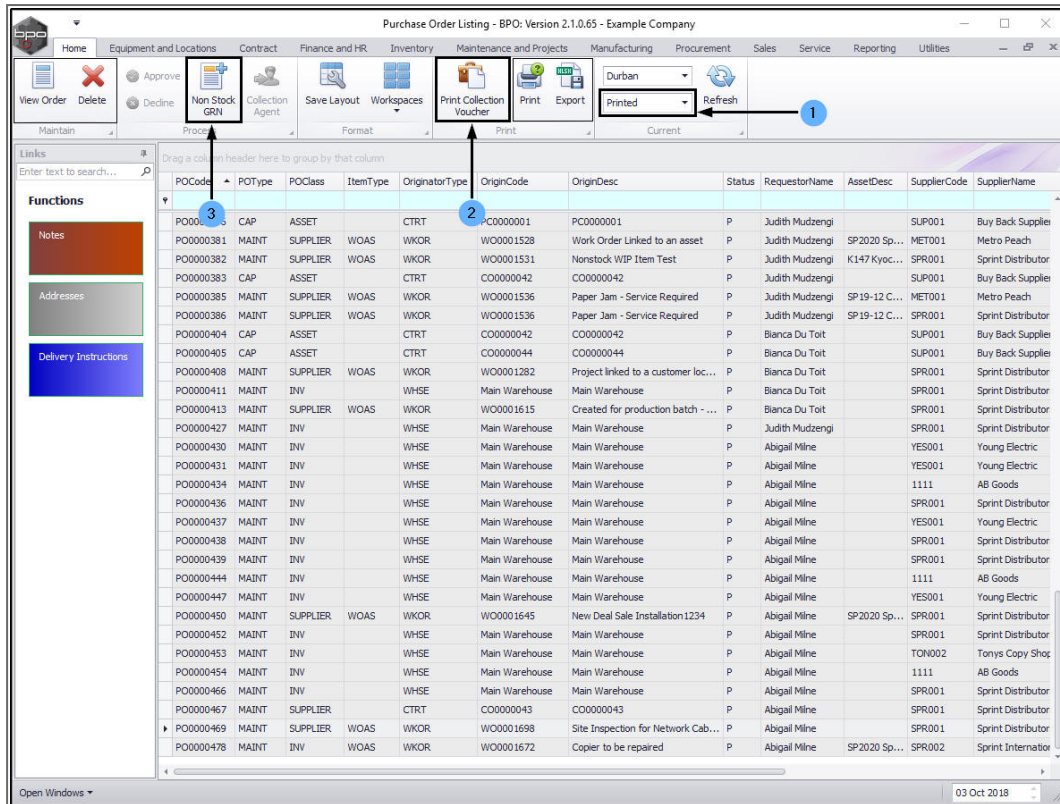
## ORDER STATUS – NEW

1. This screen will open by default in the **New** status. In this status, you can:
2. **View** or **Delete** a selected order.
3. **Print** or **Export** a selected order.



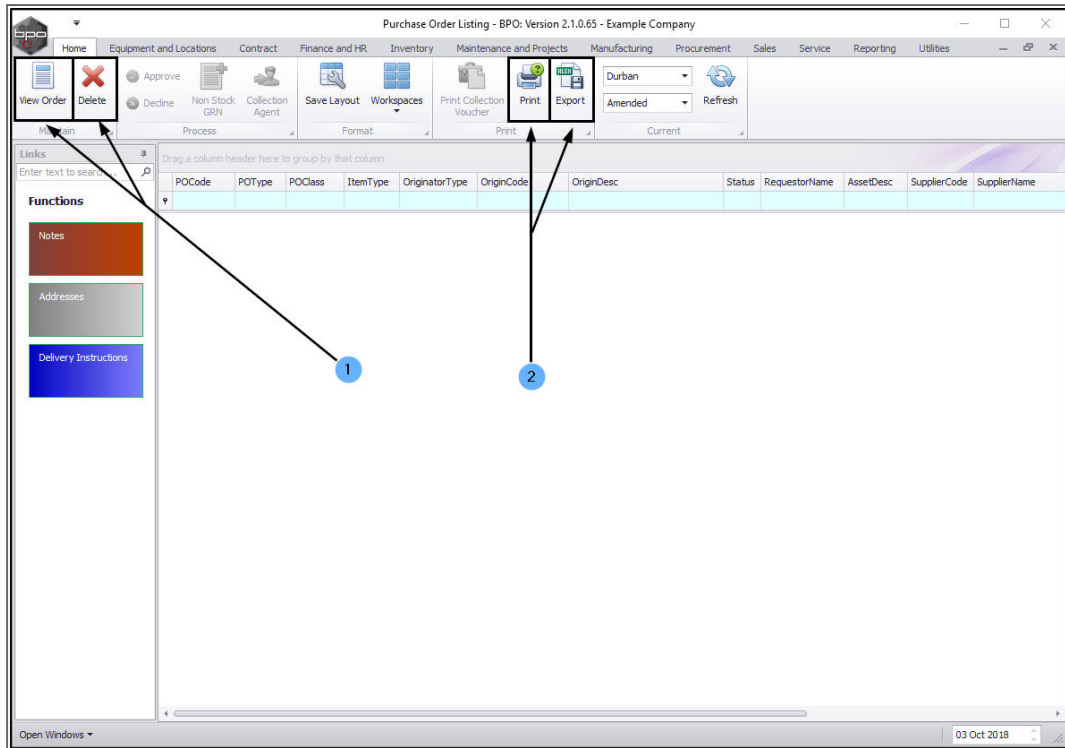
## ORDER STATUS – PRINTED

1. Click on the drop-down arrow and select the **Printed** status. In this status, as well as **View Order**, **Delete**, **Print** and **Export**, you can also:
2. Print a **Collection Voucher** and
3. Create a Non Stock GRN (for non stock purchase orders e.g. service orders)



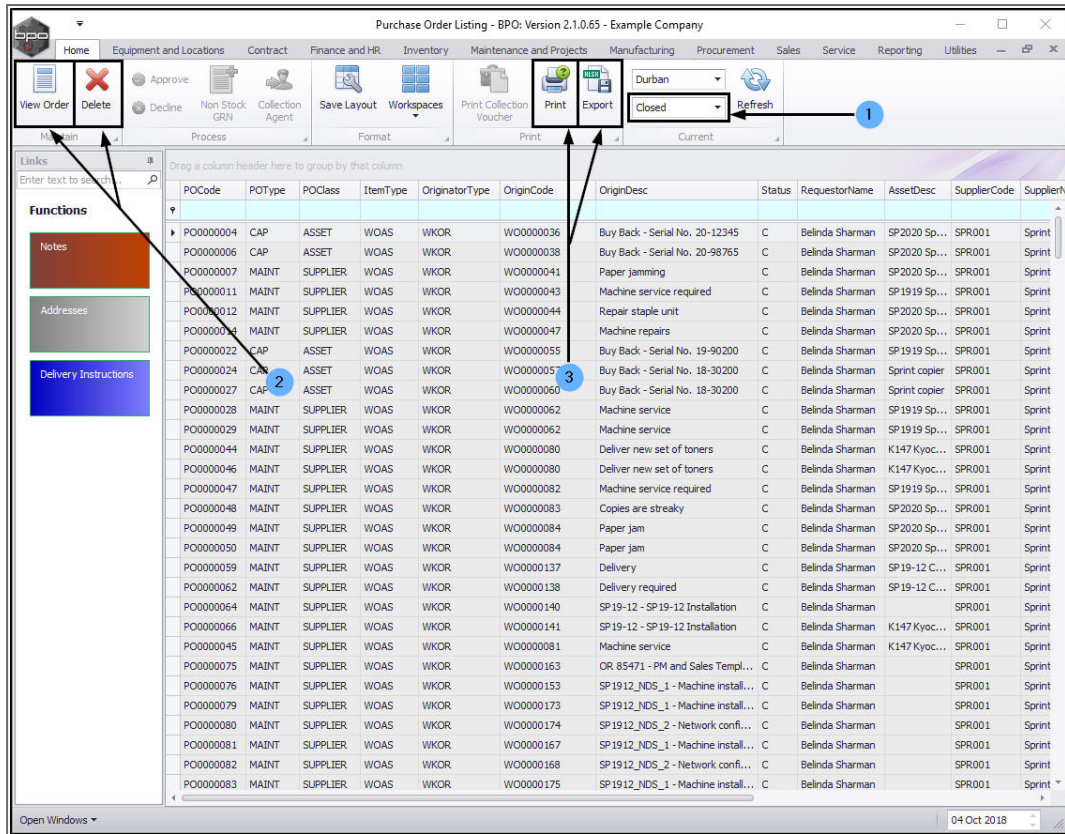
## ORDER STATUS – AMENDED

1. Click on the drop-down arrow and select the **Amended** status. In this status, you can:
2. **View** or **Delete** the order.
3. **Print** or **Export** the order.



## ORDER STATUS - CLOSED

1. Click on the drop-down arrow and select the ***Closed*** status. In this status, you can:
2. ***View*** or ***Delete*** the order.
3. ***Print*** or ***Export*** the order.

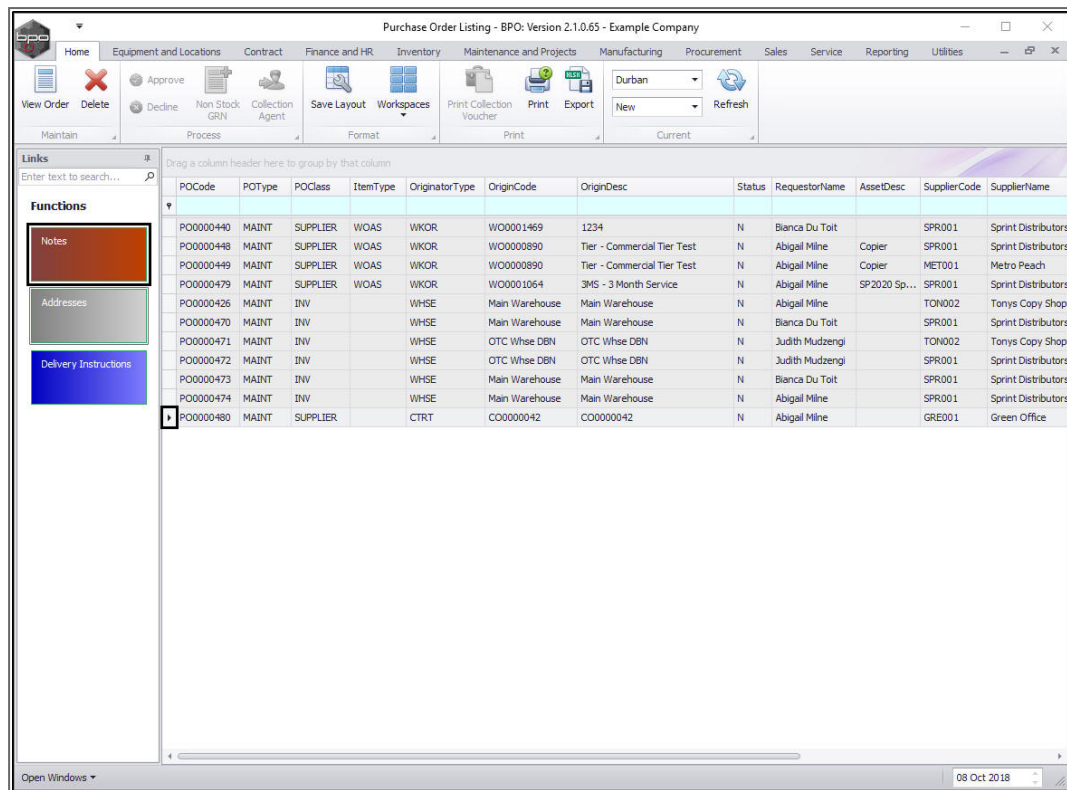


## FUNCTIONS TILES

You can click on any one of the **Functions** tiles in any status to view more information concerning **Notes**, **Addresses** or **Delivery Instructions** for any selected purchase order.

### Notes

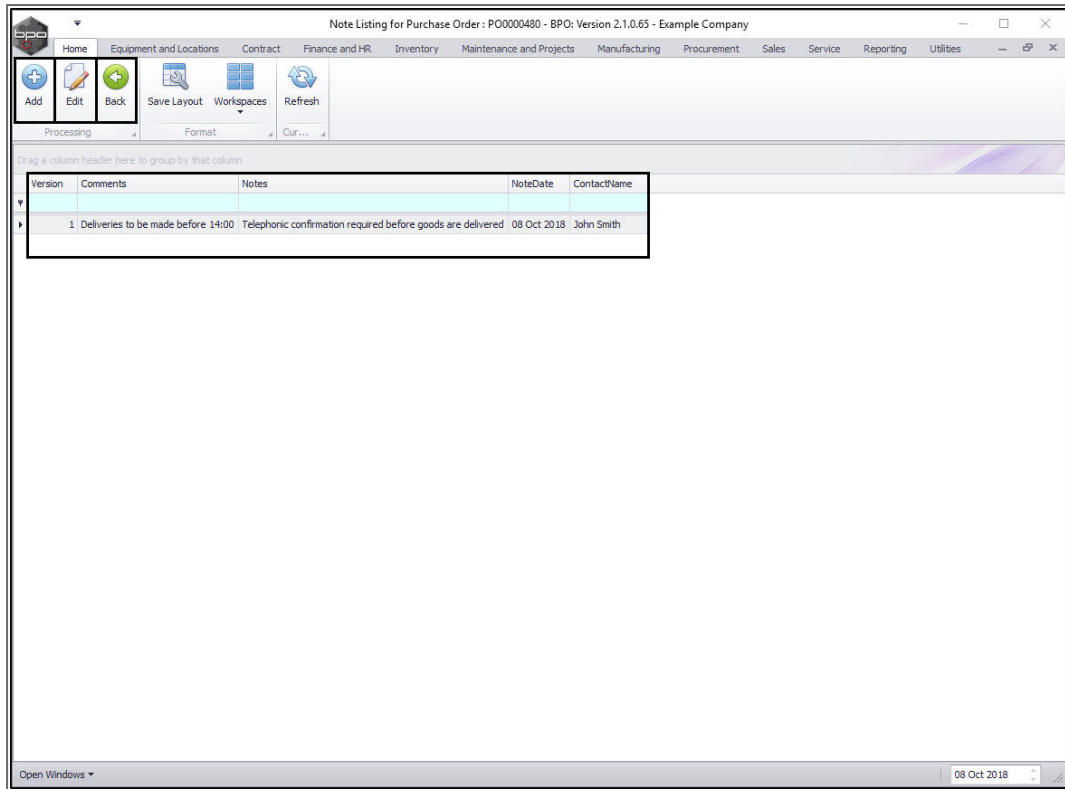
- Click on the **row selector** in front of the **purchase order** that you wish to view the **Notes** of.
- Click on the **Notes** tile.



The **Note Listing for Purchase Order** screen will be displayed.

- Here you can view, **Add** and **Edit** the Notes and Comments relating to this purchase order.
- Click on **Back** to return to the **Purchase Order Listing** screen.





Version	Comments	Notes	NoteDate	ContactName
1	Deliveries to be made before 14:00	Telephonic confirmation required before goods are delivered	08 Oct 2018	John Smith

## Addresses

- Click on the row selector in front of the **Purchase Order** that you wish to view the **Address** details of.
- Click on the **Addresses** tile.



Purchase Order Listing - BPO: Version 2.1.0.65 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

View Order Delete Approve Decline Non Stock GRN Collection Agent Save Layout Workspaces Print Collection Voucher Print Export Durban New Refresh

Maintain Process Format Print Current

Links: Enter text to search...

Functions: Notes, Addresses, Delivery Instructions

Drag a column header here to group by that column

POCode	POType	POClass	ItemType	OriginatorType	OriginCode	OriginDesc	Status	RequestorName	AssetDesc	SupplierCode	SupplierName
PO0000440	MAINT	SUPPLIER	WOAS	WKOR	WO0001469	1234	N	Bianca Du Toit		SPR001	Sprint Distributors
PO0000448	MAINT	SUPPLIER	WOAS	WKOR	WO0000890	Tier - Commercial Tier Test	N	Abigail Milne	Copier	SPR001	Sprint Distributors
PO0000449	MAINT	SUPPLIER	WOAS	WKOR	WO0000890	Tier - Commercial Tier Test	N	Abigail Milne	Copier	MET001	Metro Peach
PO0000479	MAINT	SUPPLIER	WOAS	WKOR	WO0001064	3MS - 3 Month Service	N	Abigail Milne	SP 2020 Sp...	SPR001	Sprint Distributors
PO0000426	MAINT	INV		WHSE	Main Warehouse	Main Warehouse	N	Abigail Milne		TON002	Tonys Copy Shop
PO0000470	MAINT	INV		WHSE	Main Warehouse	Main Warehouse	N	Bianca Du Toit		SPR001	Sprint Distributors
PO0000471	MAINT	INV		WHSE	OTC Whse DBN	OTC Whse DBN	N	Judith Mudzengi		TON002	Tonys Copy Shop
PO0000472	MAINT	INV		WHSE	OTC Whse DBN	OTC Whse DBN	N	Judith Mudzengi		SPR001	Sprint Distributors
PO0000473	MAINT	INV		WHSE	Main Warehouse	Main Warehouse	N	Bianca Du Toit		SPR001	Sprint Distributors
PO0000474	MAINT	INV		WHSE	Main Warehouse	Main Warehouse	N	Abigail Milne		SPR001	Sprint Distributors
PO0000480	MAINT	SUPPLIER		CTRT	CO0000042	CO0000042	N	Abigail Milne		GRE001	Green Office

Open Windows 08 Oct 2018

The **Address Listing for Purchase Order: [ ]** screen will be displayed.

- Here you can view, **Add** and **Edit** the delivery addresses listed.
- Click on **Back** to return to the **Purchase Order Listing** screen.

Address Listing for Purchase Order : PO0000480 - BPO: Version 2.1.0.65 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Back Save Layout Workspaces Refresh

Processing Format Cur...

Drag a column header here to group by that column

RdAddressContactName	RdAddress1	RdAddress2	RdAddress3	RdCity	RdPostalCode	RdCounty	RdCountry	RdTelNo	RdTelExt	RdFaxNo	RdEmailAddress
John Smith	1 Old Main Road	Hillcrest		Durban	3610	KZN	South Africa	0123456789	123	0110220222	someone@email.co.za

Open Windows 08 Oct 2018

## Delivery Instructions

- Click on the row selector in front of the **Purchase Order** that you wish to view the **Delivery Instructions** details of.
- Click on the **Delivery Instructions** tile.

Purchase Order Listing - BPO: Version 2.1.0.65 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

View Order | Delete | Approve | Decline | Non Stock GRN | Collection Agent | Save Layout | Workspaces | Print Collection Voucher | Print | Export | Durban | New | Refresh

Links: Enter text to search... Drag a column header here to group by that column

Functions: Notes, Addresses, **Delivery Instructions**

POCode	POType	POClass	ItemType	OriginatorType	OriginCode	OriginDesc	Status	RequestorName	AssetDesc	SupplierCode	SupplierName
PO0000440	MAINT	SUPPLIER	WOAS	WKOR	WO0001469	1234	N	Bianca Du Toit		SPR001	Sprint Distributors
PO0000448	MAINT	SUPPLIER	WOAS	WKOR	WO0000890	Tier - Commercial Tier Test	N	Abigal Milne	Copier	SPR001	Sprint Distributors
PO0000449	MAINT	SUPPLIER	WOAS	WKOR	WO0000890	Tier - Commercial Tier Test	N	Abigal Milne	Copier	MET001	Metro Peach
PO0000479	MAINT	SUPPLIER	WOAS	WKOR	WO0001064	3MS - 3 Month Service	N	Abigal Milne	SP 2020 Sp...	SPR001	Sprint Distributors
PO0000426	MAINT	INV		WHSE	Main Warehouse	Main Warehouse	N	Abigal Milne		TON002	Tonys Copy Shop
PO0000470	MAINT	INV		WHSE	Main Warehouse	Main Warehouse	N	Bianca Du Toit		SPR001	Sprint Distributors
PO0000471	MAINT	INV		WHSE	OTC Whse DBN	OTC Whse DBN	N	Judith Mudzengi		TON002	Tonys Copy Shop
PO0000472	MAINT	INV		WHSE	OTC Whse DBN	OTC Whse DBN	N	Judith Mudzengi		SPR001	Sprint Distributors
PO0000473	MAINT	INV		WHSE	Main Warehouse	Main Warehouse	N	Bianca Du Toit		SPR001	Sprint Distributors
PO0000474	MAINT	INV		WHSE	Main Warehouse	Main Warehouse	N	Abigal Milne		SPR001	Sprint Distributors
PO0000480	MAINT	SUPPLIER		CTRT	CO0000042	CO0000042	N	Abigal Milne		GRE001	Green Office

Open Windows | 08 Oct 2018

The **Agent Listing for Purchase Order: [ ]** screen will be displayed.

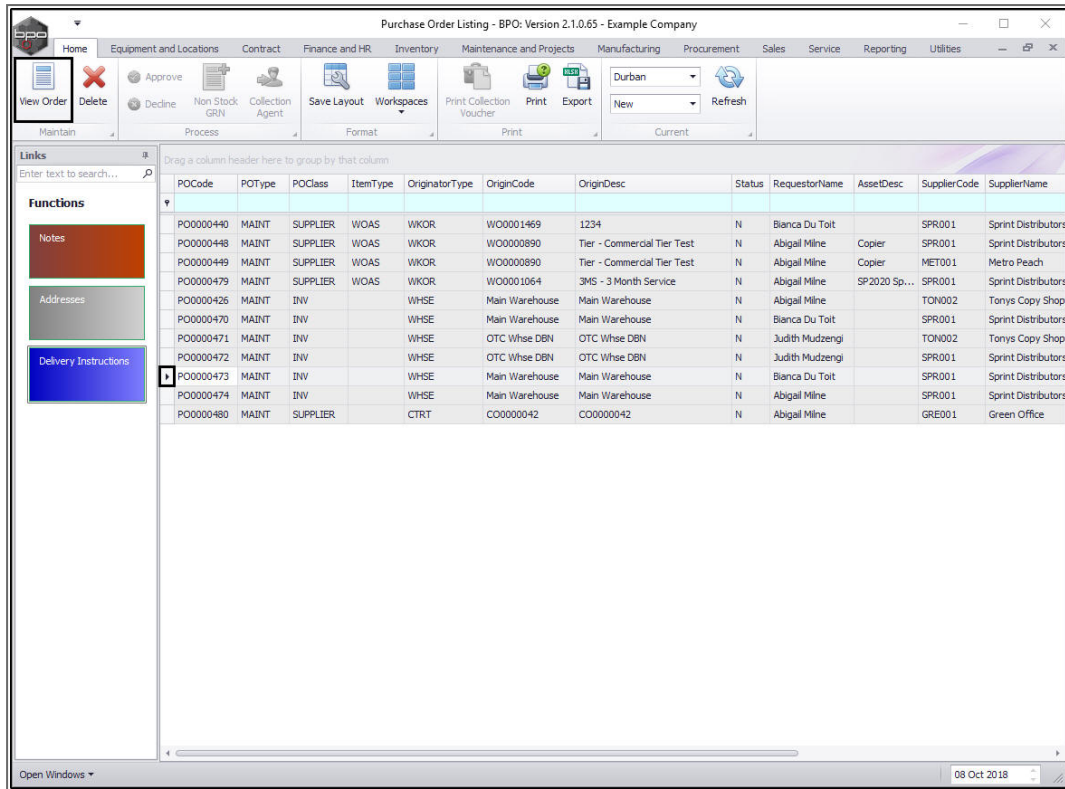
- Here you can view, **Add**, **Edit** and **Delete** Delivery Instruction details.
- Click on **Back** to return to the **Purchase Order Listing** screen.

Agent Listing for Purchase Order : PO0000480 - BPO: Version 2.1.0.65 - Example Company

Status	AgentType	SupplierCode	SupplierName	SpecialInstructions
A	SHPA	TON002	Tonys Copy Shop	Deliveries to be made before 14:00 to Receiving Warehouse A

## VIEW ORDER DETAILS

- Click on the row selector in front of the **Purchase Order** you wish to view the details of.
- Click on **View Order**.



The **View Purchase Order: [ ]** screen will be displayed.

## Order Header Details

- Here you can view the purchase order **header details** including the linked purchase requisition number.

View Purchase Order : PO0000473 - BPO: Version 2.1.0.65 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Back Save Layout Workspaces Print

Pro... Format Print

**Order Header**

Order Originator: Main Warehouse

Originator Type: WHSE Warehouse

Sub Item - Location: - Asset

PO Type: MAINT Maintenance Requisition

Requisition No: PR0000484

Originator Description: Main Warehouse

Classification: Inventory

Supplier Code: SPR001

Supplier Name: Sprint Distributors Local

VAT No: 456789123

Contact Name: Harry Jackson

Payment Terms: 3 60 Days from Invoice

Shipping Terms: 1 5 Days - Signature

Supplier Details Requestor Details Request Source

Drag a column header here to group by that column

PartType	InventoryCode	Description	QtyReceived	QuantityPerUOP	SupplierItemCode	Quantity	Currency	UnitCost	BaseCcyUnitCost	TaxRate	ExpDelDate	WarehouseName	Priority
PART	204-147C	SP204 Cyan Toner	0.00	1.00		1.00	ZAR	350.00	350.00	14.00	25 Sep 2018	Main Warehouse	3

Open Windows 08 Oct 2018

## Order Supplier Details

- Click on the **Supplier Details** tab.
- In this frame you can view information regarding the **supplier** linked to this purchase order.

View Purchase Order : PO0000473 - BPO: Version 2.1.0.65 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Back Save Layout Workspaces Print

Pro... Format Print

**Order Header**

Order Originator: Main Warehouse  
 Originator Type: WHSE Warehouse  
 Sub Item - Location: - Asset  
 PO Type: MAINT Maintenance Requisition  
 Requisition No: PR0000484

Originator Description: Main Warehouse  
 Classification: Inventory

Supplier Code: SPR001  
 Supplier Name: Sprint Distributors Local  
 VAT No: 456789123  
 Contact Name: Harry Jackson  
 Payment Terms: 3 60 Days from Invoice  
 Shipping Terms: 1 5 Days - Signature

Supplier Details Requestor Details Request Source

Drag a column header here to group by that column

PartType	InventoryCode	Description	QtyReceived	QuantityPerUOP	SupplierItemCode	Quantity	Currency	UnitCost	BaseCcyUnitCost	TaxRate	ExpDelDate	WarehouseName	Priority
PART	204-147C	SP204 Cyan Toner	0.00	1.00		1.00	ZAR	350.00	350.00	14.00	25 Sep 2018	Main Warehouse	3

Open Windows 08 Oct 2018

## Order Requestor Details

- Click on the **Requestor Details** tab.
- In this frame you can view information regarding the employee who **requested** this purchase order and the **time** and **date** it was requested.



View Purchase Order : PO0000473 - BPO: Version 2.1.0.65 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Back Save Layout Workspaces Print

Pro... Format Print

**Order Header**

Order Originator: Main Warehouse  
Originator Type: WHSE Warehouse  
Sub Item - Location: - Asset  
PO Type: MAINT Maintenance Requisition  
Requisition No: PR0000484

Originator Description: Main Warehouse  
Classification: Inventory

Requestor: DUT001  
Name: Bianca Du Toit  
Telephone No: 031 123 4564 Ext: 1234  
Request Date: 2018/09/25  
Request Time: 2:05:35 AM

Supplier Details Requestor Details Request Source

Drag a column header here to group by that column

PartType	InventoryCode	Description	QtyReceived	QuantityPerUOP	SupplierItemCode	Quantity	Currency	UnitCost	BaseCcyUnitCost	TaxRate	ExpDelDate	WarehouseName	Priority
PART	204-147C	SP204 Cyan Toner	0.00	1.00		1.00	ZAR	350.00	350.00	14.00	25 Sep 2018	Main Warehouse	3

Open Windows 08 Oct 2018

## Order Request Source

- Click on the **Request Source** tab.
- If this purchase order is linked to a part request (**Call** or **Project**), then you will see the related **call** or **project** reference number, **customer code** and **customer name** information here.

View Purchase Order : PO0000473 - BPO: Version 2.1.0.65 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Back Save Layout Workspaces Print

Pro... Format Print

**Order Header**

Order Originator: Main Warehouse Originator Description: Main Warehouse

Originator Type: WHSE Warehouse

Sub Item - Location: - Asset

PO Type: MAINT Maintenance Requisition Classification: Inventory

Requisition No: PR0000484

Supplier Details Requestor Details Request Source

CallReference: PRJ0000087 CustomerCode: TIA001 CustomerName: Titan Group

Drag a column header here to group by that column

PartType	InventoryCode	Description	QtyReceived	QuantityPerUOP	SupplierItemCode	Quantity	Currency	UnitCost	BaseCcyUnitCost	TaxRate	ExpDelDate	WarehouseName	Priority
PART	204-147C	SP204 Cyan Toner	0.00	1.00		1.00	ZAR	350.00	350.00	14.00	25 Sep 2018	Main Warehouse	3

Open Windows 08 Oct 2018

## Order Items

Move down the screen to the **Parts** data grid.

1. Here you can view information regarding the **items/parts** that have been ordered.
2. The **Expected Delivery Date** is calculated based on the **Purchase Order Date** plus the **Supplier Lead Time**. This information is required in order to utilise [Order Expediting](#).
3. Click on **Back** to return to the **Purchase Order Listing** screen.

View Purchase Order : PO0000473 - BPO: Version 2.1.0.65 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Back Save Layout Workspaces Print

Order Header

Order Originator Main Warehouse Originator Description Main Warehouse

Originator Type WHSE Warehouse

Sub Item - Location - Asset

PO Type MAINT Maintenance Requisition Classification Inventory

Requisition No PR0000484

CallReference PRJ0000087 CustomerCode TIA001 CustomerName Titan Group

Supplier Details Requestor Details Request Source

Drag a column header here to group by that column

PartType	InventoryCode	Description	QtyReceived	QuantityPerUOP	SupplierItemCode	Quantity	Currency	UnitCost	BaseCcyUnitCost	TaxRate	ExpDelDate	WarehouseName	Priority
PART	204-147C	SP204 Cyan Toner	0.00	1.00		1.00	ZAR	350.00	350.00	14.00	25 Sep 2018	Main Warehouse	3

1

2

Open Windows 08 Oct 2018

## Related Topics

- [Print Purchase Order](#)
- [Receive Goods into Store \(Non-quarantine\)](#)
- [Receive Goods into Store \(Quarantine\)](#)
- [Receive Services](#)

BPO.MNU.054