

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
 - <u>Requisition Approval</u> (Release & Approve)
 - <u>Receive Goods</u> / <u>Receive Services</u>
 - <u>Create Supplier Invoice</u>
- A Purchase Order **must** be <u>printed</u> (print preview) before goods can be **received**.

Ribbon Access: *Procurement > Orders*

	•						BPO: Version 2.1	.0.29 - Example	e Compa	ny				-		×
9	Equipment and L	ocations	Contract	Financ	e and HR	Inven	tory Maintena	nce and Projects	Man	ufacturing	Procurement	Sales	Service	Reporting	Utilities	
Supplers	Requisitions	Orders	Expediting	Invoices	Debit Notes	S Returns	Goods Received Notes	Warranties	Claims							
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VIEW PURCHASE ORDERS

The *Purchase Order Listing* screen will be displayed.

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



Home Equipment				Pu	rcnase Order List	ing - BPU: version	2.1.0.65 - Example Company				1.00	
	and Locations	Contract	Finance a	and HR I	nventory Mair	ntenance and Projec	ts Manufacturing Procu	irement S	ales Service	Reporting	Utilities	- 8 3
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	▶ PO0000440	MAINT	SUPPLIER	WOAS	WKOR	WO0001469	1234	N	Bianca Du Toit		SPR001	Sprint Distributor
Notes	PO0000448	MAINT	SUPPLIER	WOAS	WKOR	WO0000890	Tier - Commercial Tier Test	N	Abigail Milne	Copier	SPR001	Sprint Distributor
	PO0000449	MAINT	SUPPLIER	WOAS	WKOR	WO0000890	Tier - Commercial Tier Test	N	Abigail Milne	Copier	MET001	Metro Peach
	PO0000426	MAINT	INV		WHSE	Main Warehouse	Main Warehouse	N	Abigail Milne		TON002	Tonys Copy Sho
Addresses	PO0000470	MAINT	INV		WHSE	Main Warehouse	Main Warehouse	N	Bianca Du Toit		SPR001	Sprint Distributor
	PO0000471	MAINT	INV		WHSE	OTC Whee DBN	OTC Whse DBN	N	Judith Mudzengi		TON002	Tonys Copy Shop
	PO0000472	MAINT	INV		WHSE	OTC Whee DBN	OTC Whee DBN	N	Judith Mudzengi		SPR001	Sprint Distributor
Delivery Instructions	PO0000473	MAINT	INV		WHSE	Main Warehouse	Main Warehouse	N	Bianca Du Toit		SPR001	Sprint Distributo
	PO0000474	MAINT	INV		WHSE	Main Warehouse	Main Warehouse	N	Abigail Milne		SPR001	Sprint Distributo

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.



					Pu	rchase Order List	ting - BPO: Versi	on 2.1.0.65 - Examp	le Company			87.	
	Iquipment	t and Locations	Contract	Finance	and HR I	nventory Mair	ntenance and Proj	ects Manufactu	ring Procurement	Sales Service	Reporting	Utilities	- 8 >
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Functions		9					V						
		+ PO000044	MAINT	SUPPLIER	WOAS	WKOR	WO000146	1234	N	Bianca Du Toit		SPR001	Sprint Distributor
Notes		P0000044	B MAINT	SUPPLIER	WOAS	WKOR	WO000089	Tier - Commerce	ial Tier Test N	Abigail Milne	Copier	SPR001	Sprint Distributor
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Addresses		P0000047	MAINT	INV		WHSE	Main Warehous	e Main Warehous	e N	Bianca Du Toit		SPR001	Sprint Distributor
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and the second		PO000047	2 MAINT	INV		WHSE	OTC Whee DBN	OTC Whee DBN	I N	Judith Mudzeng		SPR001	Sprint Distributor
Delivery Instructio	ons	PO000047	B MANT	INV		WHSE	Main Warehous	e Main Warehous	e N	Bianca Du Toit		SPR001	Sprint Distributor
		P0000047	A MAINT	INV		WHSE	Main Warehous	e Main Warehous	e N	Abigail Milne		SPR001	Sprint Distributor
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ORDER STATUS - PRINTED

- 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. <u>Create a Non Stock GRN</u> (for non stock purchase orders e.g. service orders)



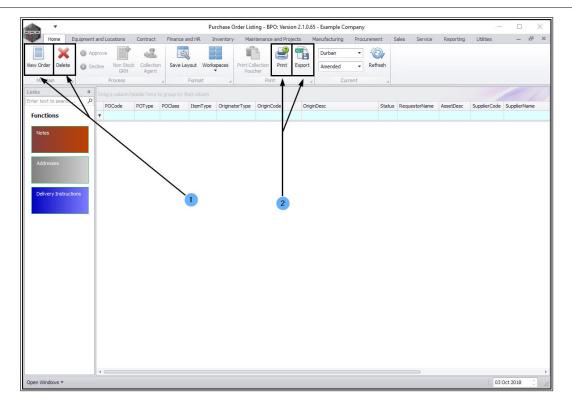
Introduction to Purchase Orders

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14010.3	PO0000381	MAINT	SUPPLIER	WOAS	WKOR	WO0001528	Work Order Linked to an asset	P	Judith Mudzengi	SP2020 Sp		Metro Peach
	PO0000382	MAINT	SUPPLIER	WOAS	WKOR	WO0001531	Nonstock WIP Item Test	P	Judith Mudzengi	К147 Куос		Sprint Distribu
	PO0000383	CAP	ASSET		CTRT	CO0000042	C00000042	P	Judith Mudzengi		SUP001	Buy Back Supp
Addresses	PO0000385	MAINT	SUPPLIER	WOAS	WKOR	WO0001536	Paper Jam - Service Required	P	Judith Mudzengi	SP19-12 C		Metro Peach
	PO0000386	MAINT	SUPPLIER	WOAS	WKOR	WO0001536	Paper Jam - Service Required	P	Judith Mudzengi	SP19-12 C		Sprint Distribu
	PO0000404	CAP	ASSET		CTRT	CO0000042	CO0000042		Bianca Du Toit		SUP001	Buy Back Sup
Delivery Instructions	PO0000405	CAP	ASSET		CTRT	CO0000044	C00000044	P	Bianca Du Toit		SUP001	Buy Back Supp
	PO0000408	MAINT	SUPPLIER	WOAS	WKOR	WO0001282	Project linked to a customer loc		Bianca Du Toit		SPR001	Sprint Distribu
	PO0000411	MAINT	INV		WHSE	Main Warehouse	Main Warehouse	P	Bianca Du Toit		SPR001	Sprint Distribu
	PO0000413	MAINT	SUPPLIER	WOAS	WKOR	WO0001615	Created for production batch		Bianca Du Toit		SPR001	Sprint Distribu
	PO0000427	MAINT	INV		WHSE	Main Warehouse	Main Warehouse	P	Judith Mudzengi		SPR001	Sprint Distribu
	PO0000430	MAINT	INV		WHSE	Main Warehouse	Main Warehouse	P	Abigail Milne		YES001	Young Electric
	PO0000431	MAINT	INV		WHSE	Main Warehouse	Main Warehouse	P	Abigail Milne		YES001	Young Electric
	PO0000434	MAINT	INV		WHSE	Main Warehouse	Main Warehouse	P	Abigail Milne		1111	AB Goods
	PO0000436	MAINT	INV		WHSE	Main Warehouse	Main Warehouse	P	Abigail Milne		SPR001	Sprint Distribu
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	PO0000444	MAINT	INV		WHSE	Main Warehouse	Main Warehouse	P	Abigail Milne		1111	AB Goods
	PO0000447	MAINT	INV		WHSE	Main Warehouse	Main Warehouse	P	Abigail Milne		YES001	Young Electric
	PO0000450	MAINT	SUPPLIER	WOAS	WKOR	WO0001645	New Deal Sale Installation 1234	P	Abigail Milne	SP2020 Sp		Sprint Distribu
	PO0000452	MAINT	INV		WHSE	Main Warehouse	Main Warehouse	P	Abigail Milne		SPR001	Sprint Distribu
	PO0000453	MAINT	INV		WHSE	Main Warehouse	Main Warehouse	P	Abigail Milne		TON002	Tonys Copy S
	PO0000454	MAINT	INV		WHSE	Main Warehouse	Main Warehouse	P	Abigail Milne		1111	AB Goods
	PO0000466	MAINT	INV		WHSE	Main Warehouse	Main Warehouse	P	Abigail Milne		SPR001	Sprint Distribu
	PO0000467	MAINT	SUPPLIER		CTRT	CO000043	CO0000043	P	Abigail Milne		SPR001	Sprint Distribu
	▶ PO0000469	MAINT	SUPPLIER	WOAS	WKOR	WO0001698	Site Inspection for Network Cab		Abigail Milne		SPR001	Sprint Distribu
	PO0000478	MAINT	INV	WOAS	WKOR	WO0001672	Copier to be repaired	P	Abigail Milne	SP2020 Sp	SPR002	Sprint Interna
	4											

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. <u>Print</u> 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.



Introduction to Purchase Orders

				Purchas	e Order Listing -	BPO: Version 2.1.0).65 - Example Company				- 0	×
Home Equipm	ent and Locations	Contract	Finance ar	nd HR Inv	ventory Maint	enance and Project	s Manufacturing Procurement	Sale	es Service I	Reporting l	Jtilities —	8
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	PO0000004	CAP	ASSET	WOAS	WKOR	W0000036	Buy Back - Serial No. 20-12345	С	Belinda Sharman	SP2020 Sp	SPR001	Sorin
Notes	PO0000006	CAP	ASSET	WOAS	WKOR	WO0000038	Buy Back - Serial No. 20-98765	c	Belinda Sharman	SP2020 Sp		Sprin
	P00000007	MAINT	SUPPLIER	WOAS	WKOR	WO0000041	Paper jamming	c	Belinda Sharman	SP2020 Sp		Sprin
	P00000011	MAINT	SUPPLIER	WOAS	WKOR	WO0000043	Machine service required	c	Belinda Sharman	SP 19 19 Sp		Sprin
Addresses	P00000012	MAINT	SUPPLIER	WOAS	WKOR	WO0000044	Repair staple unit	c	Belinda Sharman	SP2020 Sp		Sprin
	P0000004	MAINT	SUPPLIER	WOAS	WKOR	WO0000047	Machine repairs	c	Belinda Sharman	SP2020 Sp		Sprin
	PO0000022	CAP	ASSET	WOAS	WKOR	WO0000055	Buy Back - Serial No. 19-90200	c	Belinda Sharman	SP 19 19 Sp		Sprin
Delivery Instructions	PO0000024	2	ASSET	WOAS	WKOR		Buy Back - Serial No. 18-30200	c	Belinda Sharman	Sprint copier		Sprin
Delivery Instructions	PO0000027	CAP 2	ASSET	WOAS	WKOR	WO000005 3 WO0000060	Buy Back - Serial No. 18-30200	c	Belinda Sharman	Sprint copier		Sprin
	PO0000028	MAINT	SUPPLIER	WOAS	WKOR	WO0000062	Machine service	c	Belinda Sharman	SP 1919 Sp		Sprin
1.	PO0000029	MAINT	SUPPLIER	WOAS	WKOR	WO000062	Machine service	c	Belinda Sharman	SP 19 19 Sp		Sprint
	PO0000044	MAINT	SUPPLIER	WOAS	WKOR	WO000080	Deliver new set of toners	C	Belinda Sharman	К147 Куос		Sprin
	PO0000046	MAINT	SUPPLIER	WOAS	WKOR	WO0000080	Deliver new set of toners	с	Belinda Sharman	К147 Куос		Sprin
	PO0000047	MAINT	SUPPLIER	WOAS	WKOR	WO000082	Machine service required	c	Belinda Sharman	SP 1919 Sp		Sprin
	PO0000048	MAINT	SUPPLIER	WOAS	WKOR	WO000083	Copies are streaky	c	Belinda Sharman	SP2020 Sp		Sprin
	PO0000049	MAINT	SUPPLIER	WOAS	WKOR	WO0000084	Paper jam	c	Belinda Sharman	SP2020 Sp		Sprin
	PO0000050	MAINT	SUPPLIER	WOAS	WKOR	WO0000084	Paper jam	c	Belinda Sharman	SP2020 Sp		Sprin
	PO0000059	MAINT	SUPPLIER	WOAS	WKOR	WO0000137	Delivery	c	Belinda Sharman	SP19-12 C		Sprin
	PO0000062	MAINT	SUPPLIER	WOAS	WKOR	WO0000138	Delivery required	c	Belinda Sharman	SP 19-12 C		Sprin
	PO0000064	MAINT	SUPPLIER	WOAS	WKOR	WO0000140	SP19-12 - SP19-12 Installation	c	Belinda Sharman		SPR001	Sprin
	PO0000066	MAINT	SUPPLIER	WOAS	WKOR	WO0000141	SP19-12 - SP19-12 Installation	c	Belinda Sharman	K147 Kyoc	1200	Sprin
	PO0000045	MAINT	SUPPLIER	WOAS	WKOR	WO0000081	Machine service	c	Belinda Sharman	K147 Kyoc		Sprin
	PO0000075	MAINT	SUPPLIER	WOAS	WKOR	WO0000163	OR 85471 - PM and Sales Templ	12	Belinda Sharman	in in hyperin	SPR001	Sprin
	PO0000076	MAINT	SUPPLIER	WOAS	WKOR	WO0000153	SP1912 NDS 1 - Machine install		Belinda Sharman		SPR001	Sprin
	PO0000079	MAINT	SUPPLIER	WOAS	WKOR	WO0000133	SP1912_NDS_1 - Machine install		Belinda Sharman		SPR001	Sprin
	PO0000080	MAINT	SUPPLIER SUPPLIER	WOAS	WKOR	WQ0000174	SP1912_NDS_2 - Network confi		Belinda Sharman		SPR001	Sprin
	PO0000081	MAINT	SUPPLIER	WOAS	WKOR	WO0000174 WO0000167	SP1912_NDS_2 - Network comm SP1912_NDS_1 - Machine install		Belinda Sharman		SPR001	Sprin
	PO0000081	MAINT	SUPPLIER	WOAS	WKOR	WO0000168	SP1912_NDS_2 - Network confi		Belinda Sharman		SPR001	Sprin
	PO0000082	MAINT	SUPPLIER SUPPLIER	WOAS	WKOR	WQ0000188	SP1912_NDS_2 - Network confirm SP1912_NDS_1 - Machine install		Belinda Sharman		SPR001	Sprin
	4 00000000	COMPACIE.	SOFFLIER	WORD	MINON	1000001/3	or to to internos _1 * Machine install	~	Demice Sherner		JFR001	-sprii -

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.



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nter text to search	Q	POCode	POType	POClass	ItemType	OriginatorType	OriginCode	Origi	Desc		Statu	RequestorName	AssetDesc	SupplierCode	SupplierName
Functions	9	,													
		PO0000440	MAINT	SUPPLIER	WOAS	WKOR	WO0001469	1234			N	Bianca Du Toit		SPR001	Sprint Distrib
Notes		PO0000448	MAINT	SUPPLIER	WOAS	WKOR	WO0000890	Tier -	Commercial Tie	er Test	N	Abigail Milne	Copier	SPR001	Sprint Distrib
		PO0000449	MAINT	SUPPLIER	WOAS	WKOR	WO0000890	Tier	Commercial Tie	er Test	N	Abigail Milne	Copier	MET001	Metro Peach
		PO0000479	MAINT	SUPPLIER	WOAS	WKOR	WO0001064	3MS	- 3 Month Servic	ce	N	Abigail Milne	SP2020 Sp	SPR001	Sprint Distrib
		PO0000426	MAINT	INV		WHSE	Main Warehouse	Main	Warehouse		N	Abigail Milne		TON002	Tonys Copy
		PO0000470	MAINT	INV		WHSE	Main Warehouse	Main	Warehouse		N	Bianca Du Toit		SPR001	Sprint Distrib
		PO0000471	MAINT	INV		WHSE	OTC Whse DBN	отс	Whse DBN		N	Judith Mudzengi		TON002	Tonys Copy
Delivery Instructions		PO0000472	MAINT	INV		WHSE	OTC Whee DBN	OTC	Whse DBN		N	Judith Mudzengi		SPR001	Sprint Distrib
		PO0000473	MAINT	INV		WHSE	Main Warehouse	Main	Warehouse		Ν	Bianca Du Toit		SPR001	Sprint Distrib
		PO0000474	MAINT	INV		WHSE	Main Warehouse	Main	Warehouse		N	Abigail Milne		SPR001	Sprint Distrib
		PO0000480	MAINT	SUPPLIER		CTRT	CO0000042	COO	000042		N	Abigail Milne		GRE001	Green Office
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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.



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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.



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Functions	9															
Notes	- Construction	00440	MAINT	SUPPLIER	WOAS	WKOR	WO0001469	1234			N	Bianca Du Toit		SPR001	Sprint E	
notes	-	00448	MAINT	SUPPLIER	WOAS	WKOR	WO0000890		Commercial Tier		N	Abigail Milne	Copier	SPR001	Sprint E	
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	10000	00479	MAINT	SUPPLIER	WOAS	WKOR	WO0001064		- 3 Month Servic	e	N	Abigail Milne	SP2020 Sp		Sprint E	
Addresses		00426	MAINT	INV		WHSE	Main Warehouse		Warehouse Warehouse		N	Abigail Milne Bianca Du Toit		TON002 SPR001	Tonys C Sprint E	
	100000000		MAINT	INV		WHSE	OTC Whee DBN		Warenouse Whse DBN		N	Judith Mudzengi		TON002	Tonys C	
			MAINT	INV		WHSE	OTC Whee DBN		Whse DBN		N	Judith Mudzengi Judith Mudzengi		SPR001	Sprint E	
Delivery Instructions		00472		INV		WHSE	Main Warehouse		Warehouse		N	Bianca Du Toit		SPR001	Sprint	
	- Constant	00474	MAINT	INV		WHSE	Main Warehouse		Warehouse		N	Abigail Milne		SPR001	Sprint	
-		00480	MAINT	SUPPLIER		CTRT	CO0000042		000042		N	Abigail Milne		GRE001	Green (

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 Lis	ting for P	urchase Order :	PO0000480 -	BPO: Version 2	2.1.0.65 - Exam	nple Compa	ny		-		×
Home Equipme	ent and Locations	Contract	Finance and HR	Invent	tory Mainter	nance and Proj	iects Manuf	facturing P	rocurement	Sales S	Service Reporting	Utilities	-	8
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John Smith	1 Old Main Road	Hilcrest		Durban	3610	KZN	South Africa	0123456789	123	0110220222	someone@email.co.za			
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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.



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Home E	quipment	and Locations		Finance			ntenance and Projec	-	lanufacturing	Proc		ales Service	Reporting	Utilities	- 8
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		PO0000449		SUPPLIER	WOAS	WKOR	WO000890		Commercial Tier		N	Abigail Milne	Copier	MET001	Metro Peach
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Addresses		PO0000426	MAINT	INV		WHSE	Main Warehouse		Warehouse		N	Abigail Milne		TON002	Tonys Copy S
		PO0000470 PO0000471		INV		WHSE	Main Warehouse		Warehouse Whse DBN		N	Bianca Du Toit		SPR001 TON002	Sprint Distribu
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		P00000480		SUPPLIER		CTRT	CO0000042		00042		N	Abigail Milne		GRE001	Green Office

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 Listi	ng for Purcha	se Order : PO0000	480 - BPO: \	ersion 2.1.0.65 - E	xample Company	/			-		×
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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*.



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		PO0000474 PO0000480	MAINT	INV SUPPLIER		WHSE	Main Warehouse CO0000042		Warehouse		N	Abigail Milne Abigail Milne		SPR001 GRE001	Sprint Distribu Green Office

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.



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Order Supplier Details

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



	Ŧ				v	iew Purchase Or	der : PO0000473 -	BPO: Vers	ion 2.1.0.65	- Example	Company				- 1		×
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pen Windo	ows 🕶														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.



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PART	204-1470	:	SP204 Cyan Toner	0.00	1.00		1.00	ZAR	350.00	350.00	14.00	25 Sep 2018	Main Warehous			
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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.



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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.
- 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 <u>Order Expediting</u>.
- 3. Click on *Back* to return to the *Purchase Order Listing* screen.



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Related Topics

- Print Purchase Order
- <u>Receive Goods into Store (Non-quarantine)</u>
- <u>Receive Goods into Store (Quarantine)</u>
- Receive Services

BPO.MNU.054