

# PROCUREMENT

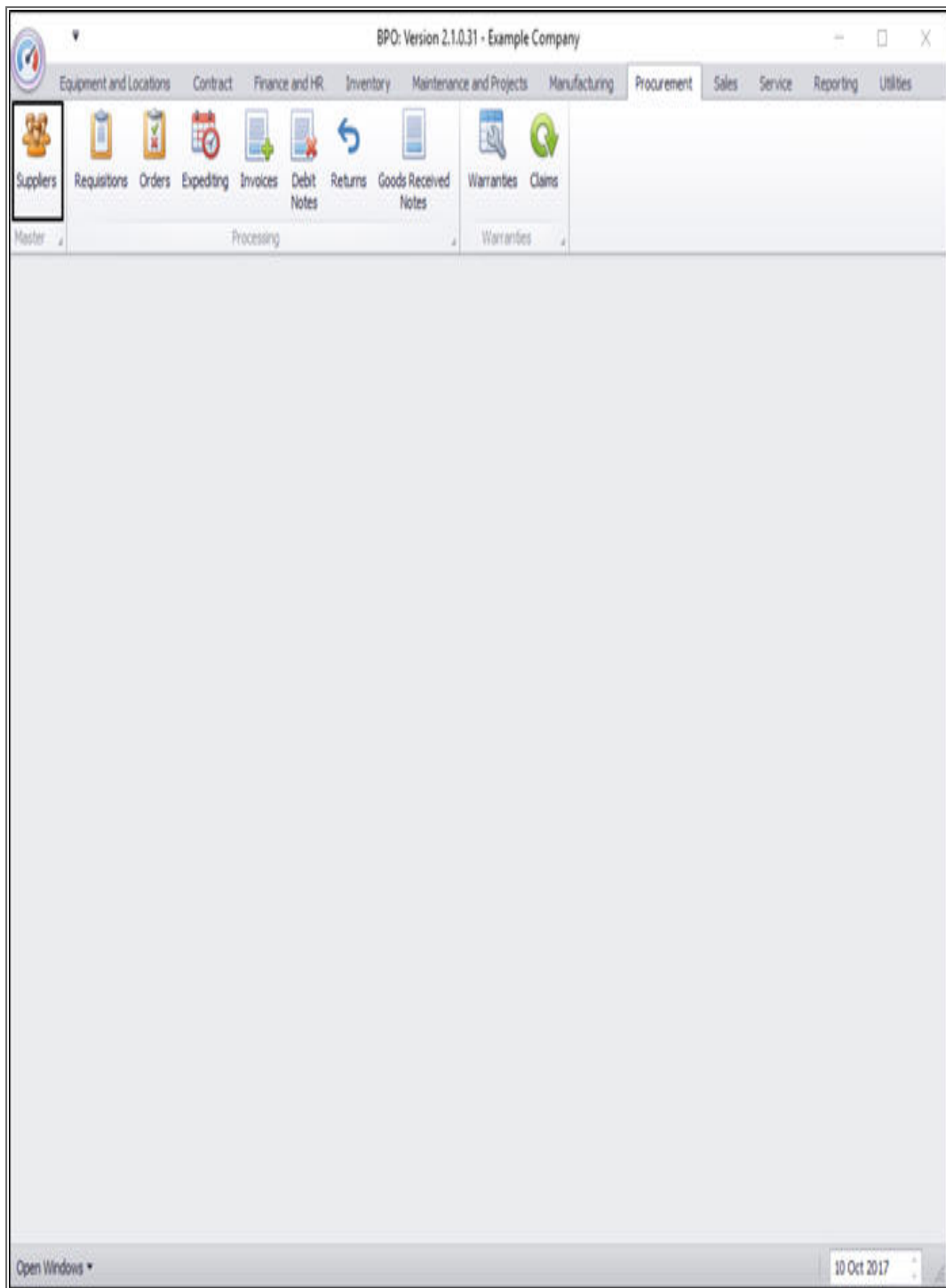
## ADD / EDIT SUPPLIER ORDER METHOD

To create a purchase order, an **Order Method** must be set up on the supplier, this will be the *preferred* method of ordering items and/or services.

There are several methods to choose from:

- Cellular telephone
- Email
- Facsimile
- Telephone
- Web Order

**Ribbon** Select *Procurement > Suppliers*



The ***Supplier Listing*** screen will be displayed.

***Select the Site***

Your employee user record should be linked to a default site. In this case, the site will auto populate with this default, otherwise the site must be manually selected.

Another site can be selected, if required, and if you have the security rights to access the site.

If **All Sites** displays here, then you do not have a default site configured on your user record, and need to select the required site.

## SELECT SUPPLIER

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- Select the **row** of the **Supplier** whose **Order Details** you wish to add or edit.
- Click on **Edit**.

Supplier Listing - BPO: Version 2.1.0.31 - Example Company

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

Add Edit Delete Sync Save Layout Workspaces Refresh Active Export

Processing Format Current Print

Links

Enter text to search...

Functions

Items Supplied

Notes

Addresses

Processing

Requisitions

Purchase Orders

GRNs

Supplier Invoices

Open Windows

10 Oct 2017

SupplierCode	SupplierName	ContactName	SupplierType	Status	VATNo	MinOrderAmt	FreightCarrier	FreightTerms	Payment
SUP001	Buy Back Supplier	Supplier Contact	BUY	A	0000000000	0.00			2
SPR001	Sprint Distributors Local	Harry Jackson	GEN	A	456789123	0.00	The Courier Guy	30 days from Delivery	3
SPR002	Sprint International	George Matthews	GEN	A	456258741	0.00			2
TON001	Tonys Copy Shop	Tony	SHPA	A	9874561321	0.00	DHL	COO	2
YES001	Young Electric	Grant	GEN	A	3245064654	0.00			3
PRJ010	Printer World	Maggie Sage	GEN	A	456123789	0.00	Wheels with Wings	30 days from delivery	4
TW1001	Twinkle Office Automation ...	Jason King	GEN	A	9876543210	0.00	Wing It Couriers	30 day	2
BON001	Bonsai Bonanza	Teddy Miller	GEN	A	987654321	0.00	Wing It Couriers	30 day	2

## SELECT ORDER METHOD

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- The **Edit Supplier - Code [ ]** screen will be displayed.
- If the **Order Method** field is already populated or if it is empty, click on the drop-down **arrow** in that field.

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

Save
 Back

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GRNs

Supplier Invoices

Type

General Supplier

Class

Parts

Supplier Code

PR1010

Supplier Name

Printer World

Primary Contact

Maggie Sage

VAT No.

456123789

Tax Rate

14.00

Secondary Rate

0.00

Currency

South African Rand

Payment Terms

30 Days from PO

Shipping Terms

30 Days - Signature

Ship Via

Road

Freight Terms

30 days from delivery

Freight Carrier

Wheels with Wings

Sites

☒ Durban
 ☐ Pretoria

Order Method

Cellular telephone

Order Address

Physical Address

Postal Code

Billing Contact

Billing Address

23 Kings Road

Manors

Pretoria

KZN

RSA

Bill Postal Code

3610

Other Data

Open Windows

10 Oct 2017

- The Order Method drop-down **menu** will be displayed.
- From this list, click on the **Order Method** that you wish to assign to this Supplier.
  - In this image **Email** has been selected.

Home
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Enter text to search...

Functions

Items Supplied

Notes

Addresses

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Purchase Orders

GRNs

Supplier Invoices

Type

General Supplier

Class

Parts

Supplier Code

PRI010

Supplier Name

Printer World

Primary Contact

Maggie Sage

VAT No.

456123789

Tax Rate

14.00

Secondary Rate

0.00

Currency

South African Rand

Payment Terms

30 Days from PO

Shipping Terms

30 Days - Signature

Ship Via

Road

Freight Terms

Method

Description

CEL

Cellular telephone

EMAIL

Email

FAX

Facsimile

TEL

Telephone

WEB

Web Order

Freight Carrier

Sites

Order Method

Cellular telephone

Order Address

Physical Address

Postal Code

Billing Contact

Billing Address

23 Kings Road

Manors

Pretoria

KZN

RSA

Bill Postal Code

3610

Open Windows

10 Oct 2017



### ORDER ADDRESS

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- **Order Address:** Type in the *address details* for this order method.
  - In this example the Email Address will be typed in this text box. If you had selected a different method e.g. Cellular telephone - then the relevant cellular number would be included here.

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 Finance and HR
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 Maintenance and Projects
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Save
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Process

Links

Enter text to search...

Functions

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Purchase Orders

GRNs

Supplier Invoices

Type

General Supplier

Class

Parts

Supplier Code

PRI010

Supplier Name

Printer World

Primary Contact

Maggie Sage

VAT No.

456123789

Tax Rate

14.00

Secondary Rate

0.00

Currency

South African Rand

Payment Terms

30 Days from PO

Shipping Terms

30 Days - Signature

Ship Via

Road

Freight Terms

30 days from delivery

Freight Carrier

Wheels with Wings

Sites

☒ Durban
 ☐ Pretoria

Order Method

Email

Order Address

Physical Address

Postal Code

Billing Contact

Billing Address

23 Kings Road

Manors

Pinetown

KZN

RSA

Bill Postal Code

3610

Other Data

Open Windows

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## SAVE ORDER METHOD AND ORDER ADDRESS

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- When you have finished *adding* or *editing* the Order Method and Order Address details,
- Click on **Save**.

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