

# PROCUREMENT

## INTRODUCTION TO PURCHASE ORDERS

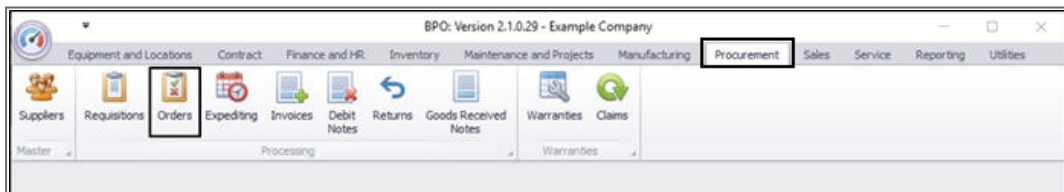
Purchase Orders are orders to suppliers for goods, services, or repairs required.

- 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**.

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

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## VIEW PURCHASE ORDERS

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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

Main | Process | Format | Print | Current

Links: Enter text to search...

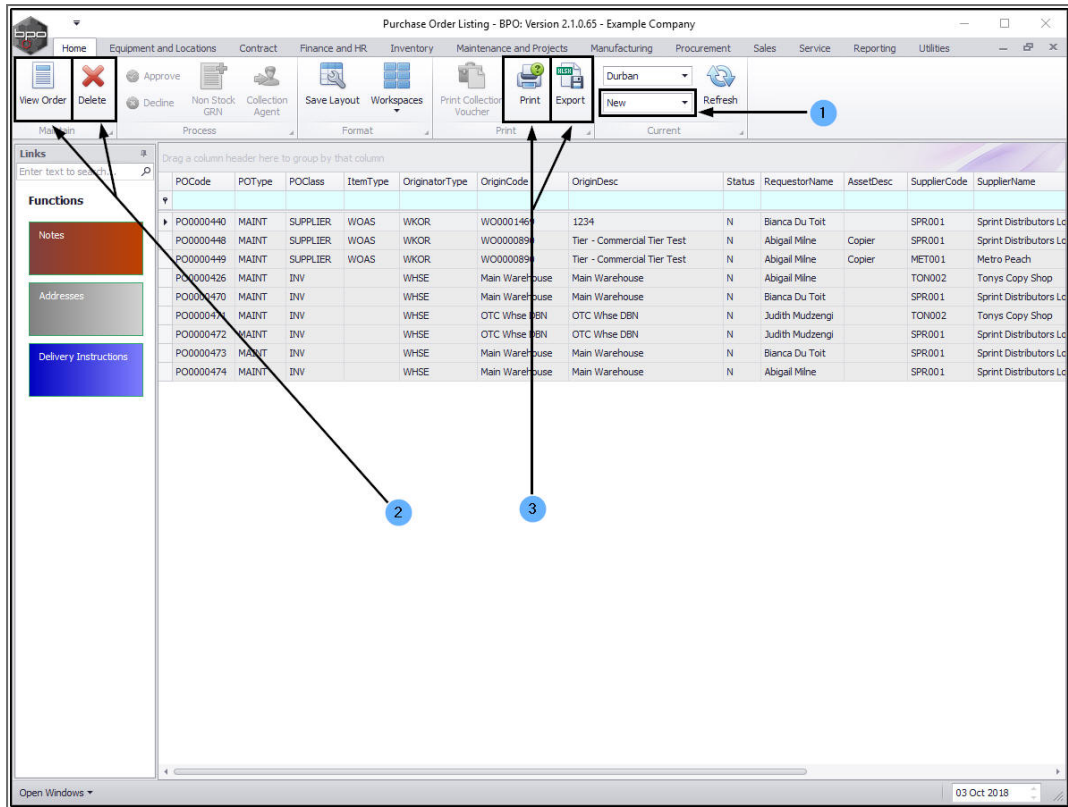
Functions: Notes, Addresses, Delivery Instructions

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 Milne	Copier	SPR001	Sprint Distributors Lc
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 Shop
PO0000470	MAINT	INV		WHSE	Main Warehouse	Main Warehouse	N	Bianca Du Toit		SPR001	Sprint Distributors Lc
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 Lc
PO0000473	MAINT	INV		WHSE	Main Warehouse	Main Warehouse	N	Bianca Du Toit		SPR001	Sprint Distributors Lc
PO0000474	MAINT	INV		WHSE	Main Warehouse	Main Warehouse	N	Abigail Milne		SPR001	Sprint Distributors Lc

Open Windows | 03 Oct 2018

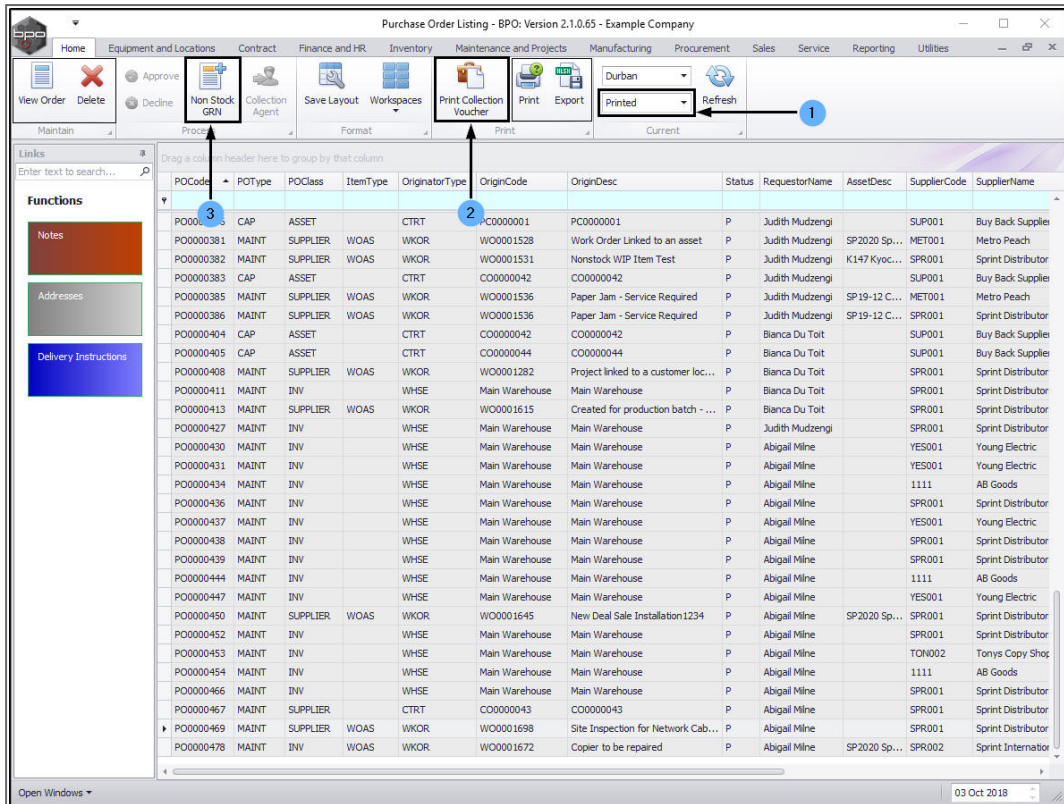
## ORDER STATUS – NEW

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.



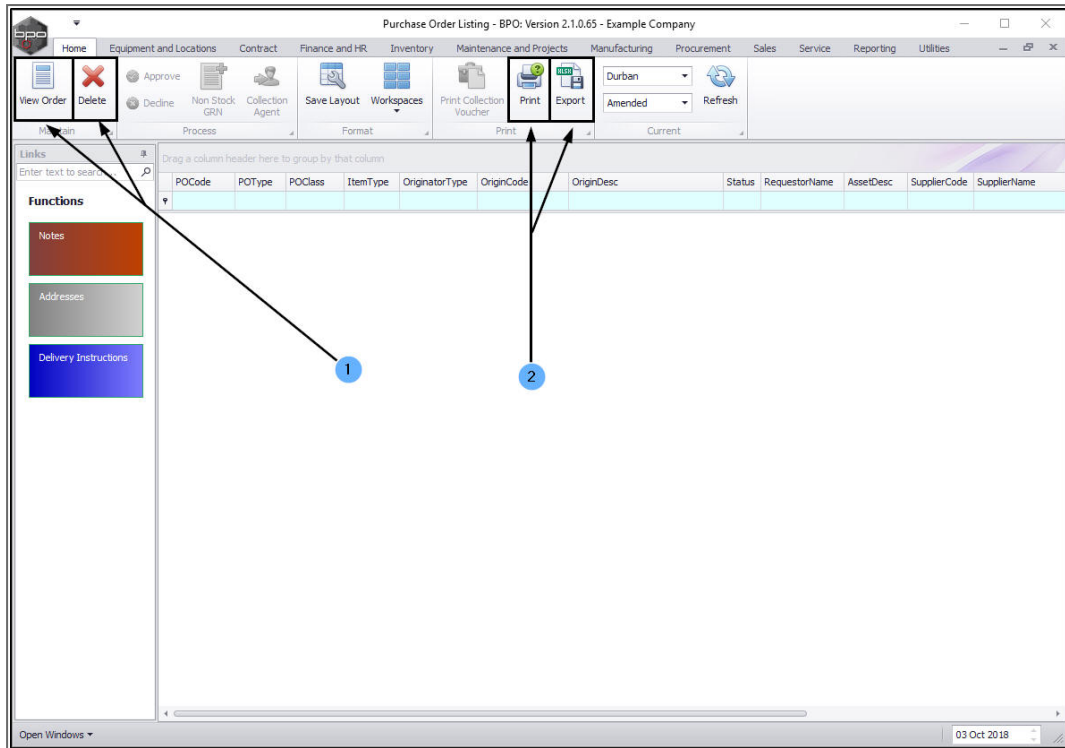
## ORDER STATUS – PRINTED

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)



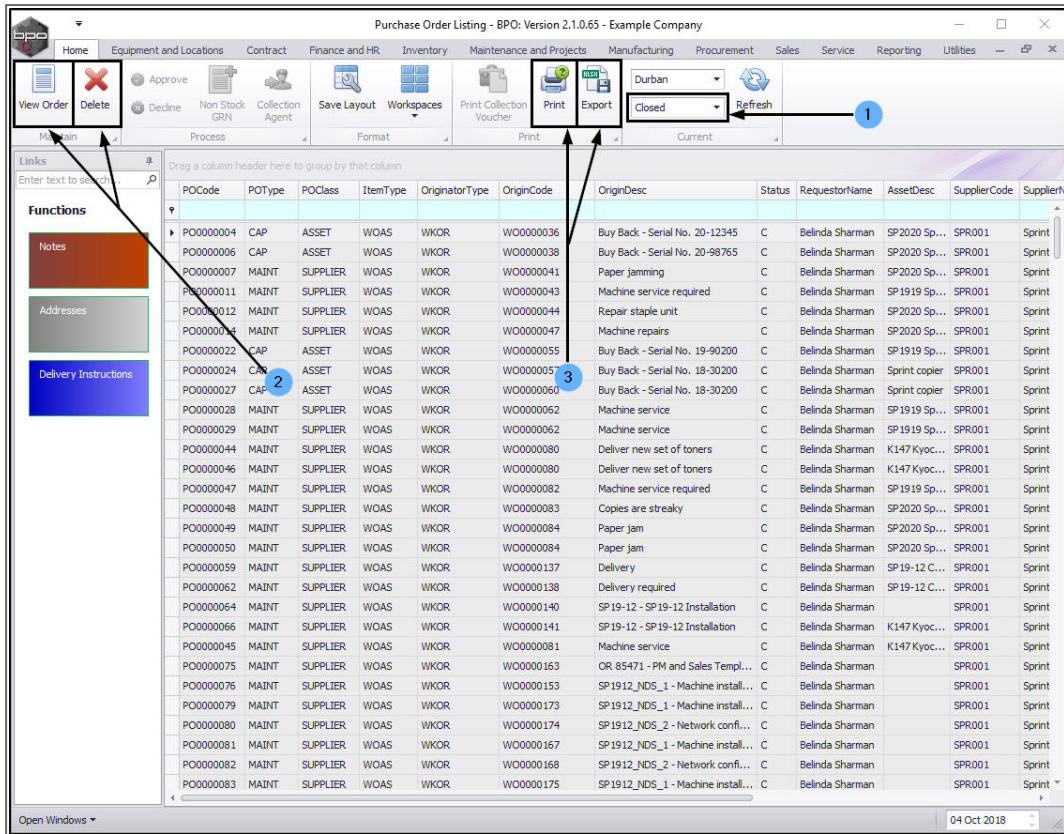
## ORDER STATUS – AMENDED

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.

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
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	SP2020 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

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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.

Note 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

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

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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.



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

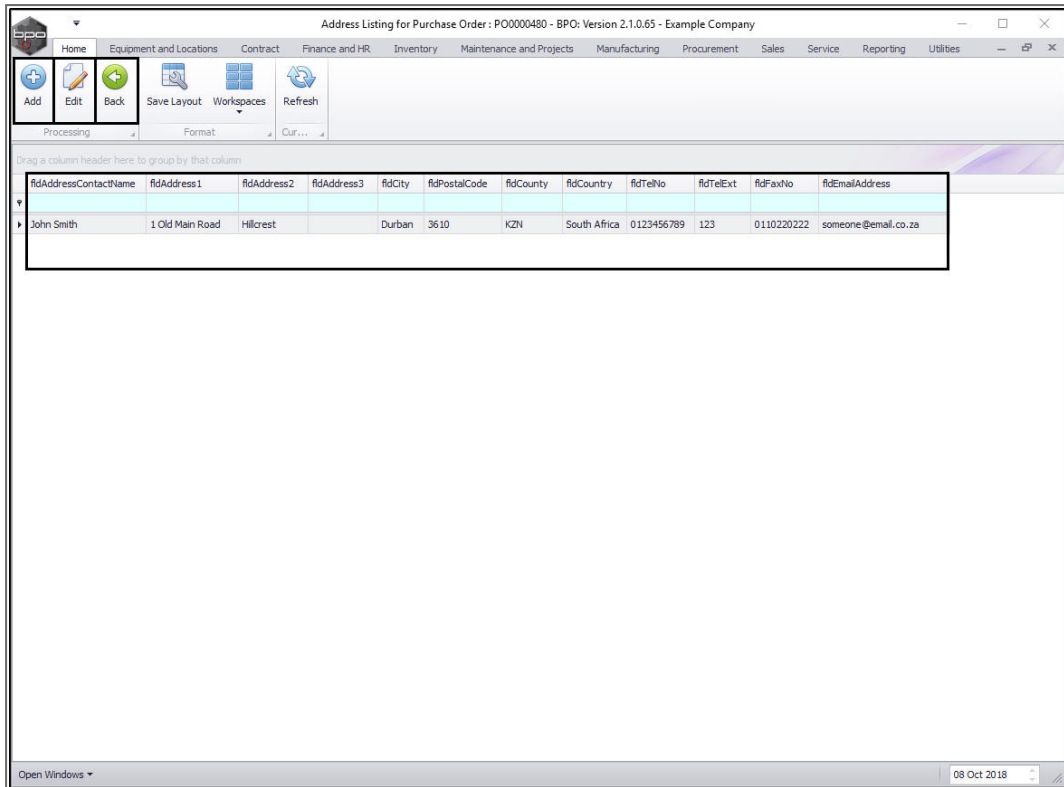
Links: Enter text to search...  
 Functions: Notes, Addresses, Delivery Instructions

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
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	SP2020 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

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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...

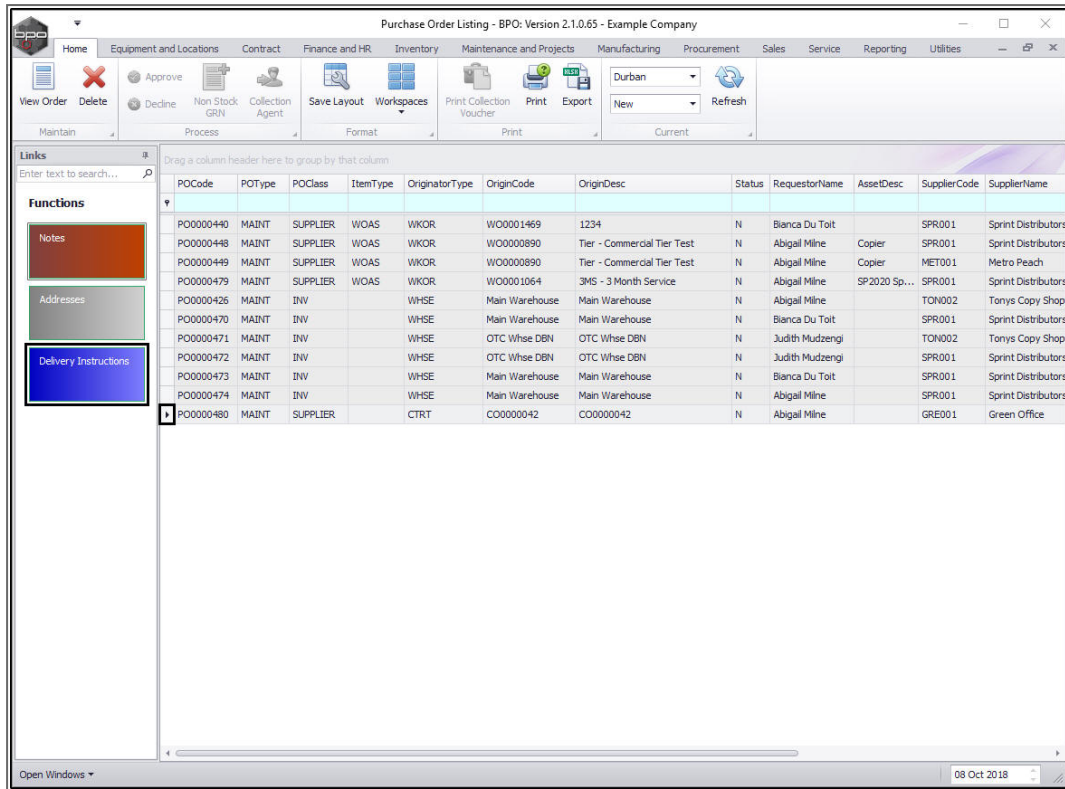
Drag a column header here to group by that column

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

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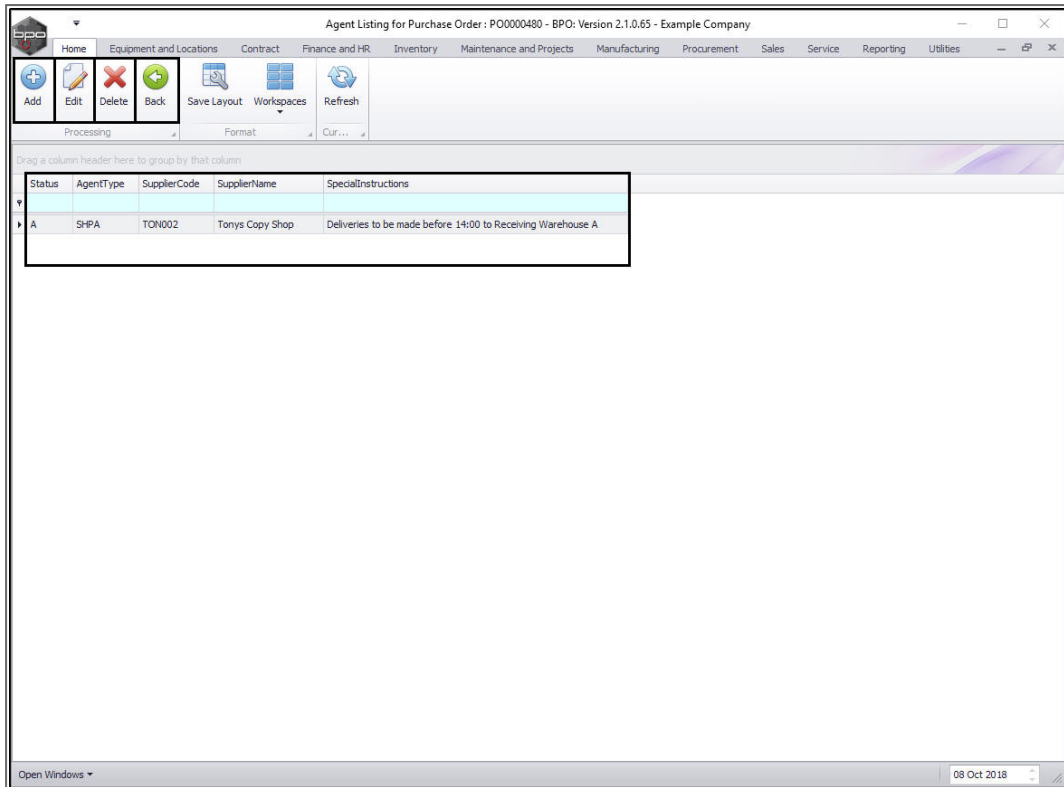
## ***Delivery Instructions***

- 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.



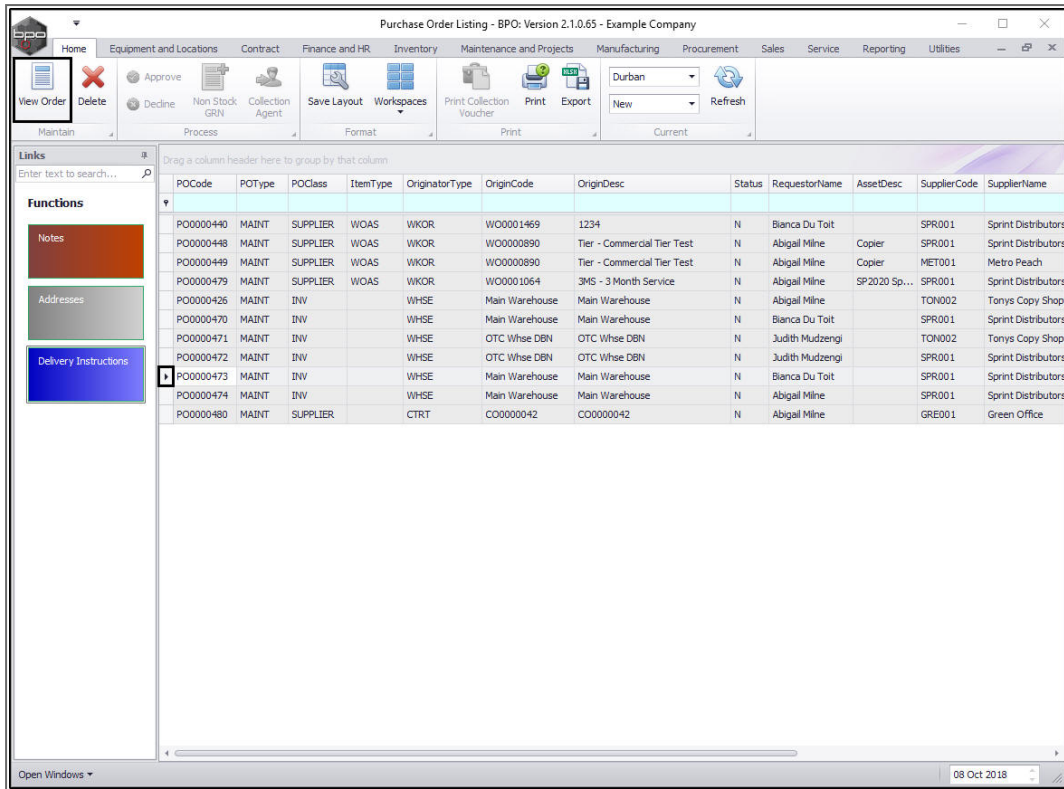
The **Agent Listing for Purchase Order: [ ]** screen will be displayed.

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



## VIEW ORDER DETAILS

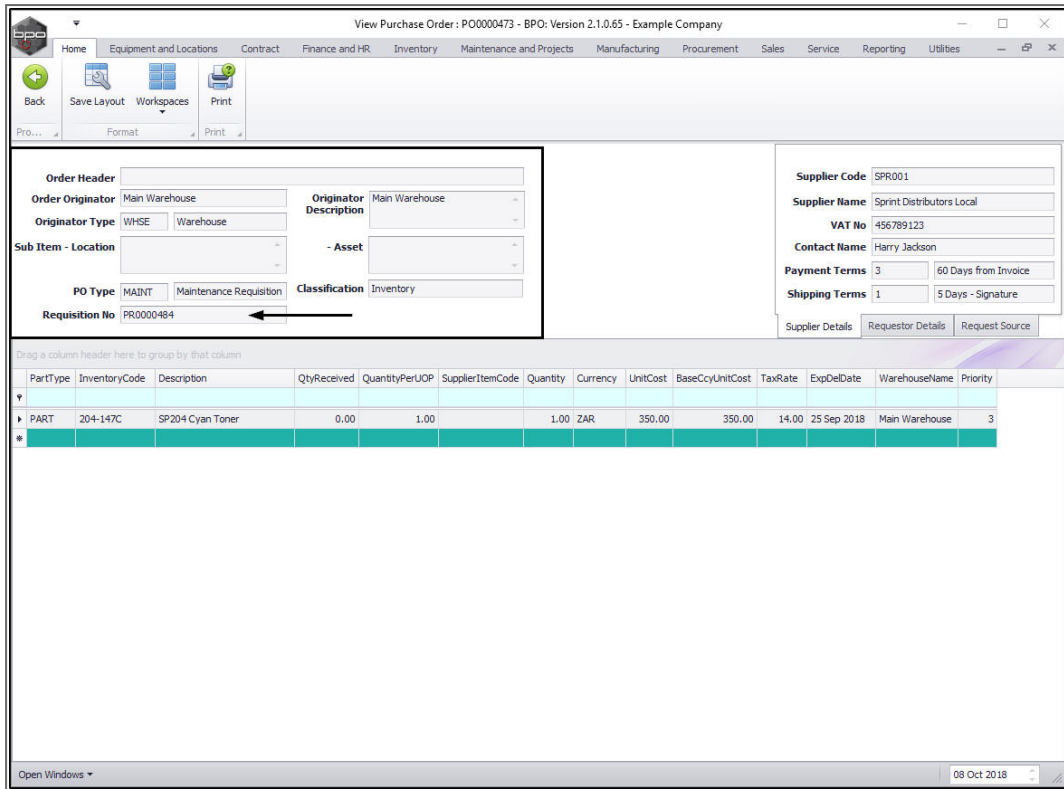
- Click on the row selector in front of the **Purchase Order** you wish to view the details of.
- Click on **View Order**.



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

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 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

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

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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.

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

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

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## 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

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

Requestor Details

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

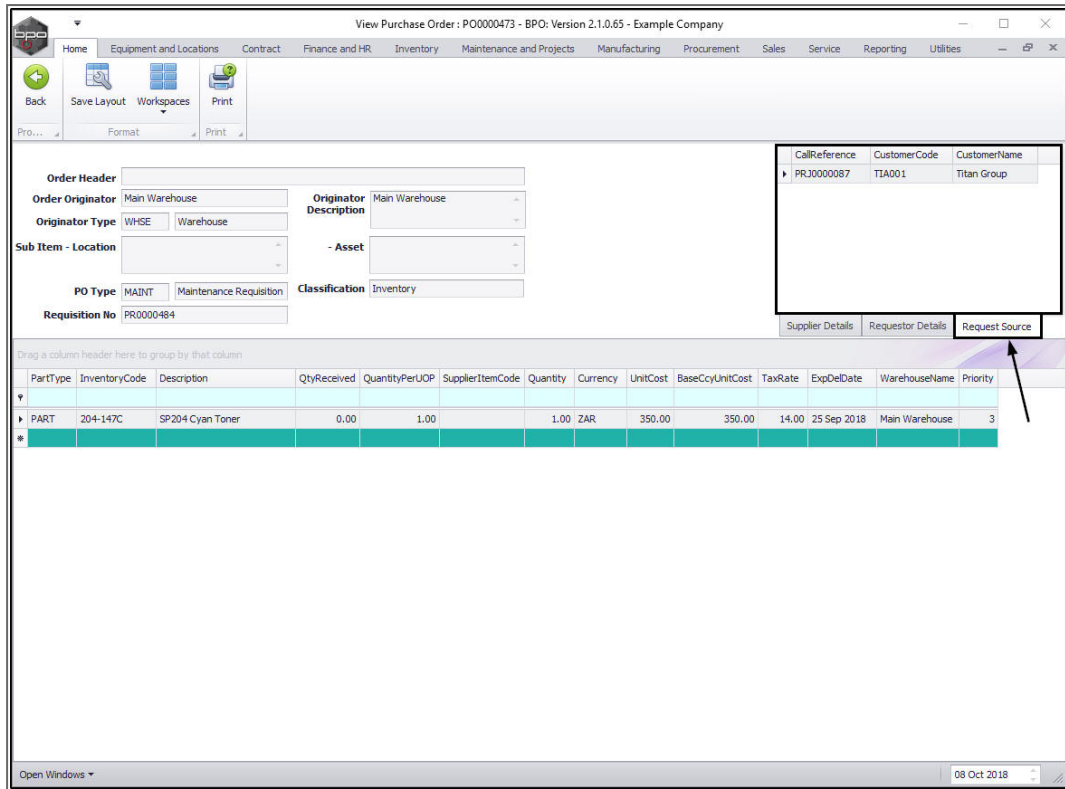
PartType	InventoryCode	Description	QtyReceived	QuantityPerUOP	SupplierItemCode	Quantity	Currency	UnitCost	BaseCcyUnitCost	TaxRate	ExpDelDate	WarehouseName	Priority
PART	204-147C	SP204 Cyan Toner	0.00	1.00		1.00	ZAR	350.00	350.00	14.00	25 Sep 2018	Main Warehouse	3

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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.





## 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	CustomerCode	CustomerName
PRJ0000087	TIA001	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	ExpDeDate	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

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## Related Topics

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

BPO.MNU.054