

PROCUREMENT

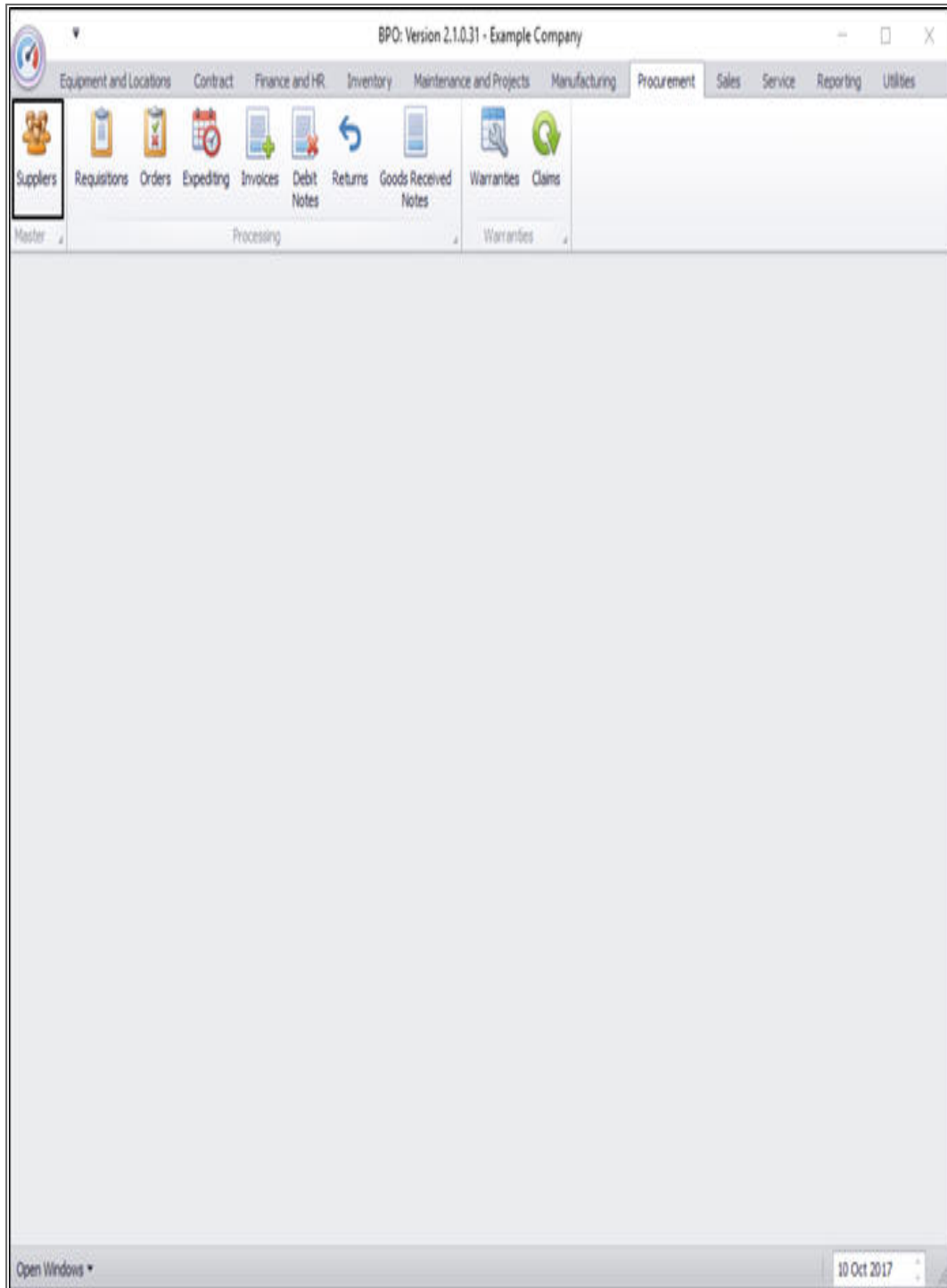
ADD / EDIT SUPPLIER ORDER METHOD

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

- 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 Durban Active Export

Links

Enter text to search...

Drag a column header here to group by that column

SupplierCode	SupplierName	ContactName	SupplierType	Status	VATNo	MinOrderAmt	FreightCarrier	FreightTerms	Payment
SUP001	Buy Back Supplier	Supplier Contact	BUY	A	000000000	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
PR0010	Printer World	Maggie Sage	GEN	A	456123789	0.00	Wheels with Wings	30 days from delivery	4
TW001	Twinkle Office Automation ...	Jason King	GEN	A	9876543210	0.00	Wing It Couriers	30 day	2
BCN001	Bonsai Bonanza	Teddy Miller	GEN	A	987654321	0.00	Wing It Couriers	30 day	2

Functions
 Items Supplied
 Notes
 Addresses

Processing
 Requisitions
 Purchase Orders
 GRNo
 Supplier Invoices

Open Windows 10 Oct 2017

SELECT ORDER METHOD

- 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.

Edit Supplier - Code PR1010 - 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

Save Back

Process

Links

Functions

Items Supplied

Notes

Addresses

Processing

Requisitions

Purchase Orders

GRNs

Supplier Invoices

Type:

Class:

Supplier Code:

Supplier Name:

Primary Contact:

VAT No.:

Tax Rate:

Secondary Rate:

Currency:

Payment Terms:

Shipping Terms:

Ship Via:

Freight Terms:

Freight Carrier:

Sites: Durban
 Pretoria

Order Method:

Order Address:

Physical Address:

Postal Code:

Billing Contact:

Billing Address:

Bill Postal Code:

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.

Edit Supplier - Code PRI010 - 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

Save | Back | Process

Links: Enter text to search...

Functions

- Items Supplied
- Notes
- Addresses

Processing

- Requisitions
- Purchase Orders
- GRNs
- Supplier Invoices

Supplier Information:

- 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: **X**
- Freight Carrier: **Sites**

Physical Address:

- Postal Code:

Billing Information:

- Billing Contact:
- Billing Address: 23 Kings Road
- Manors
- Pretown
- KZN
- RSA
- Bill Postal Code: 3610

Order Method Selection:

Method	Description
CEL	Cellular telephone
EMAIL	Email
FAX	Facsimile
TEL	Telephone
WEB	Web Order

Order Method: Cellular telephone
 Order Address:

Open Windows | 10 Oct 2017

ORDER ADDRESS

- **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.

Edit Supplier - Code PRI010 - 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

Save Back

Process

Links

Functions

Items Supplied

Notes

Addresses

Processing

Requisitions

Purchase Orders

GRNs

Supplier Invoices

Type

Class

Supplier Code

Supplier Name

Primary Contact

VAT No.

Tax Rate

Secondary Rate

Currency

Payment Terms

Shipping Terms

Ship Via

Freight Terms

Freight Carrier

Sites Durban
 Pretoria

Order Method

Order Address

Physical Address

Postal Code

Billing Contact

Billing Address

Bill Postal Code

Open Windows 10 Oct 2017

SAVE ORDER METHOD AND ORDER ADDRESS

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

