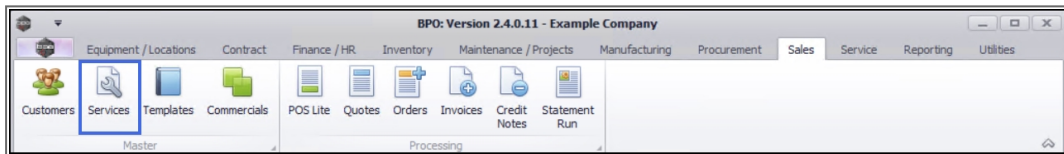


# SALES

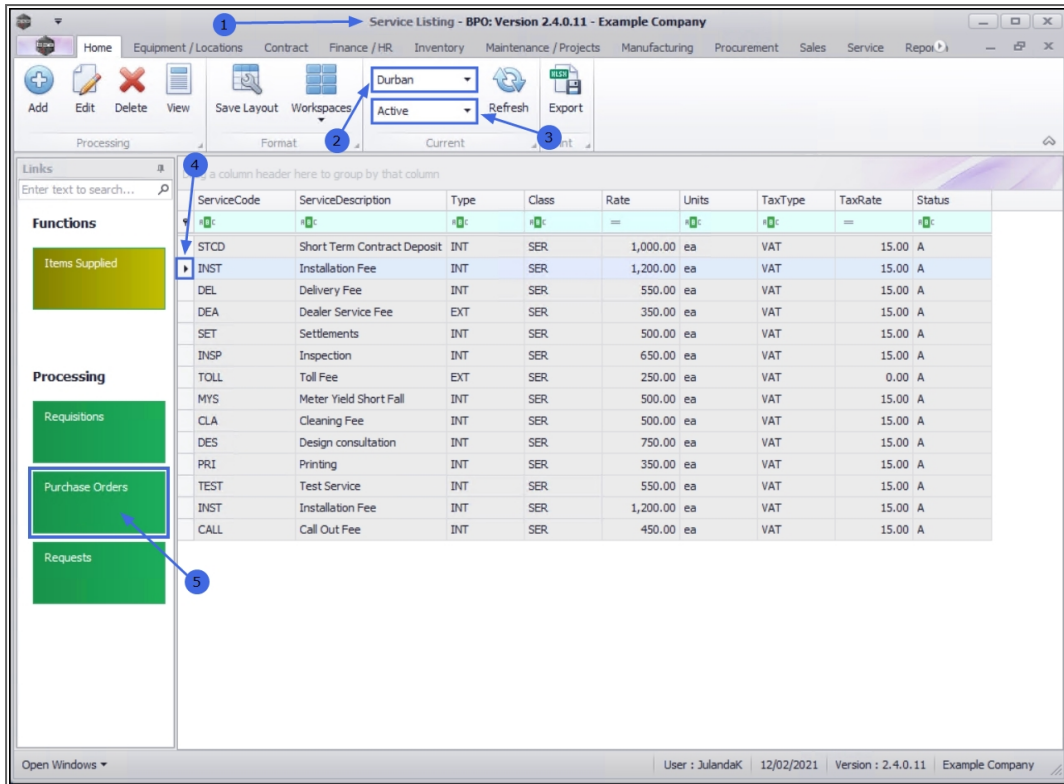
## SERVICES – PURCHASE ORDERS

The purchase orders tile from the Service Listing screen will display a list of all the Purchase Orders linked to the Service. You will be able to View and Delete a purchase order or issue Non Stock GRN's for a purchase order. Notes and Delivery Instructions can be added for a Purchase Order.

**Ribbon Access:** *Sales > Services*



1. The **Service Listing** screen will display.
2. Select the **Site** you wish to work in.
  - The example has **Durban** selected.
3. The Service Listing screen will open in the **Active** status by default, as you will most likely be working with Services in this status.
  - Click on the **down** arrow to change the status to **Inactive** if required.
4. Click on the **row** of the service you wish to work with.
5. Click on the **Purchase Orders** tile.



6. The **Purchase Order for Service** [service code] screen will display.

## VIEW PURCHASE ORDER

7. Click on the **row** of the purchase order you wish to view.
8. Click on **View Order**.

POCode	POType	POClass	Status	EmployeeNumber	EventDate	EventTime	Comments	Notes
PO000046	MAINT	SUPPLIER	C	SHA001	12/05/2014	09:10:22		
PO000047	MAINT	SUPPLIER	C	SHA001	12/05/2014	09:19:22		
PO0000181	MAINT	SUPPLIER	C	DUT001	19/02/2015	08:51:19		
PO0000191	MAINT	SUPPLIER	C	DUT001	26/02/2015	11:15:25		
PO0000194	MAINT	SUPPLIER	C	DUT001	26/02/2015	11:56:03		
PO0000211	MAINT	SUPPLIER	C	DUT001	27/10/2015	11:17:00		
PO0000218	MAINT	SUPPLIER	P	DUT001	05/11/2015	13:07:07		
PO0000220	MAINT	SUPPLIER	C	DUT001	05/11/2015	13:25:20		
PO0000242	MAINT	SUPPLIER	C	DUT001	16/11/2015	15:08:13		
PO0000245	MAINT	SUPPLIER	P	DUT001	16/11/2015	15:59:38		
PO0000257	MAINT	SUPPLIER	C	DUT001	18/11/2015	15:05:28		
PO0000260	MAINT	SUPPLIER	C	DUT001	18/11/2015	15:48:44		
PO0000304	MAINT	SUPPLIER	C	DUT001	31/10/2016	14:15:13		
PO0000365	MAINT	SUPPLIER	C	DUT001	06/06/2017	14:48:38		
PO0000367	MAINT	SUPPLIER	C	DUT001	08/06/2017	14:52:41		
PO0000371	MAINT	SUPPLIER	C	DUT001	15/06/2017	12:31:09		
PO0000407	MAINT	SUPPLIER	C	DUT001	07/11/2017	16:09:33		Generated from sales or
PO0000426	MAINT	SUPPLIER	C	DUT001	13/02/2018	16:33:37		Generated from sales or
PO0000477	MAINT	SUPPLIER	C	DUT001	29/05/2018	14:49:25		Generated from sales or
PO0000478	MAINT	SUPPLIER	C	DUT001	29/05/2018	15:00:49		Generated from sales or
PO0000482	MAINT	SUPPLIER	C	DUT001	11/06/2018	11:41:40		
PO0000505	MAINT	SUPPLIER	P	DUT001	28/06/2019	15:56:49		Generated from sales or

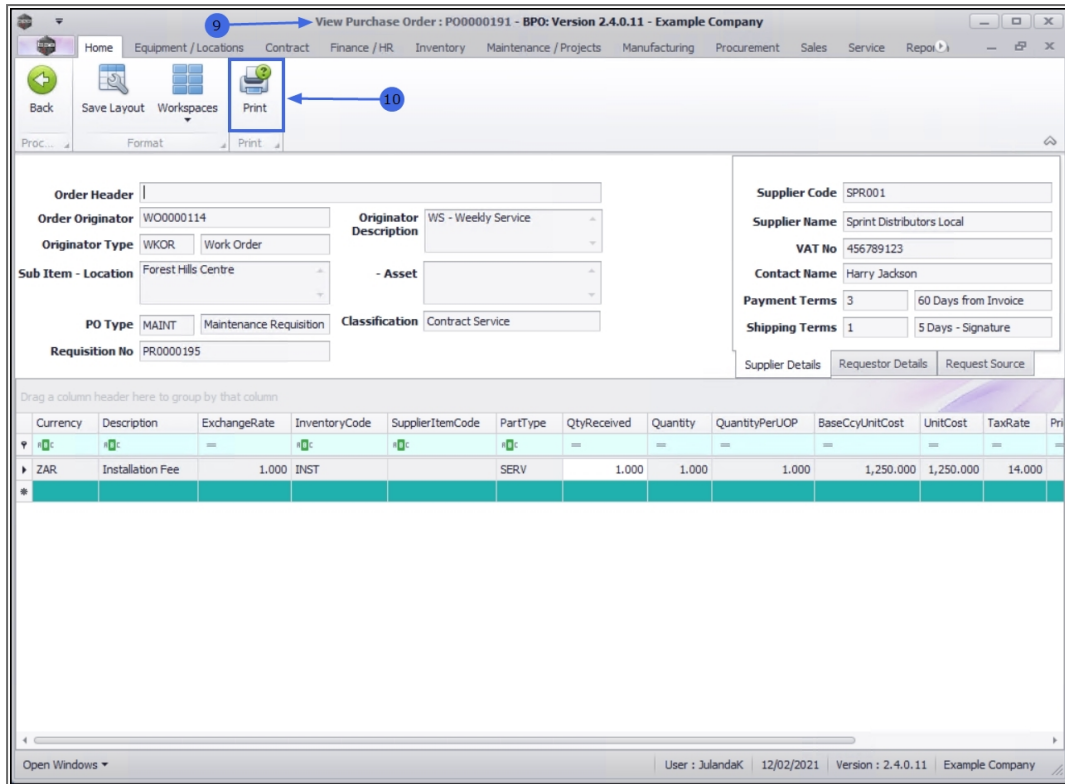
9. The **View Purchase Order : PO**[purchase order number] screen will display.



Note that you will not be able to make any changes to the purchase order from this screen.

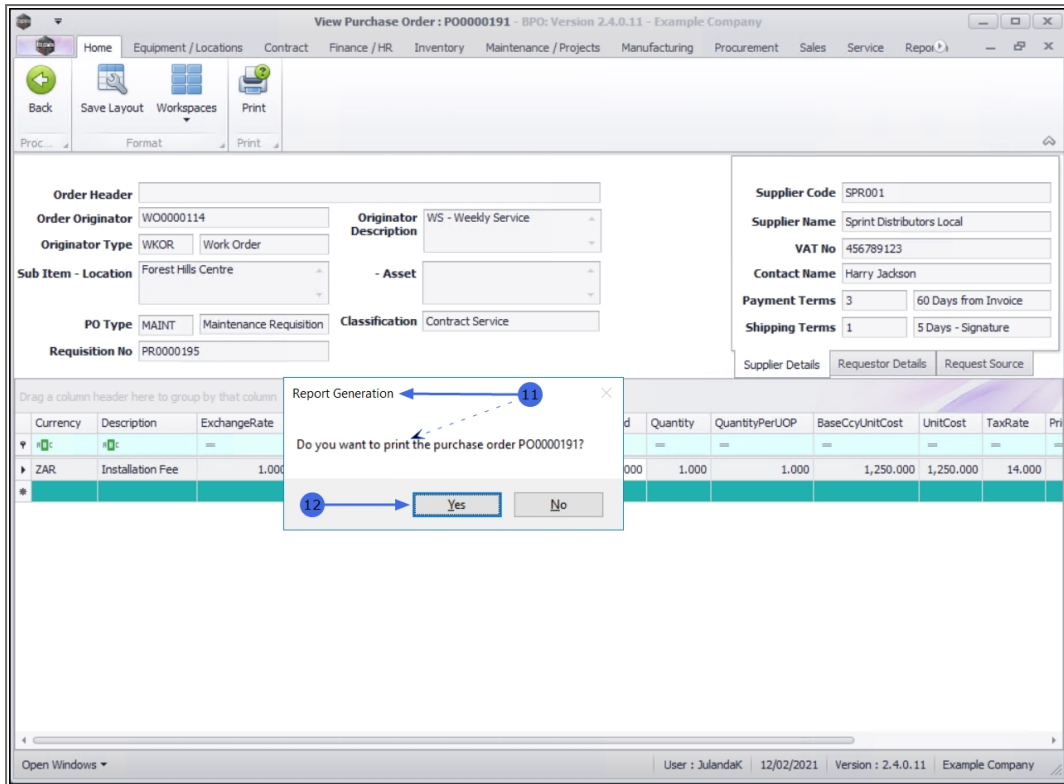
## PRINT PURCHASE ORDER

10. Click on **Print** to print a copy of the purchase order.

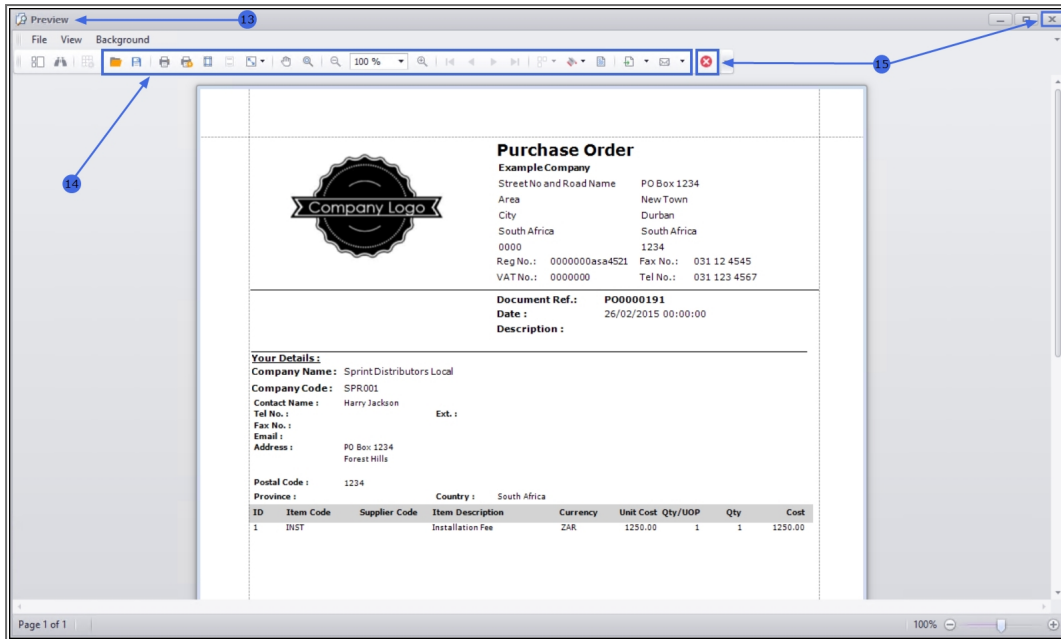


11. When you receive the **Report Generation** message to confirm;
  - **Do you want to print the purchase order PO[purchase order number]?**
12. Click on **Yes**.

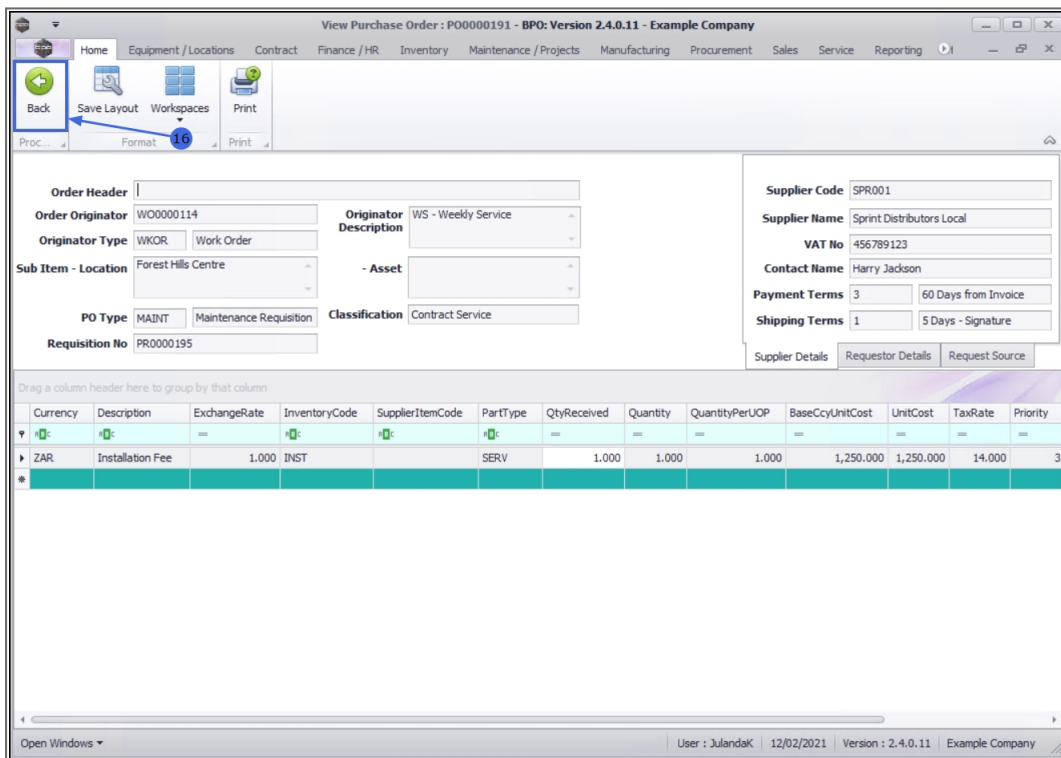




13. The **Purchase Order** will display in the **Preview** screen.
14. From this screen you can make cosmetic changes to the document as well as **Save, Print, Add a Watermark, Export** or **Email** the purchase order.
15. Click on **Close** to return to the **View Purchase Order** screen.

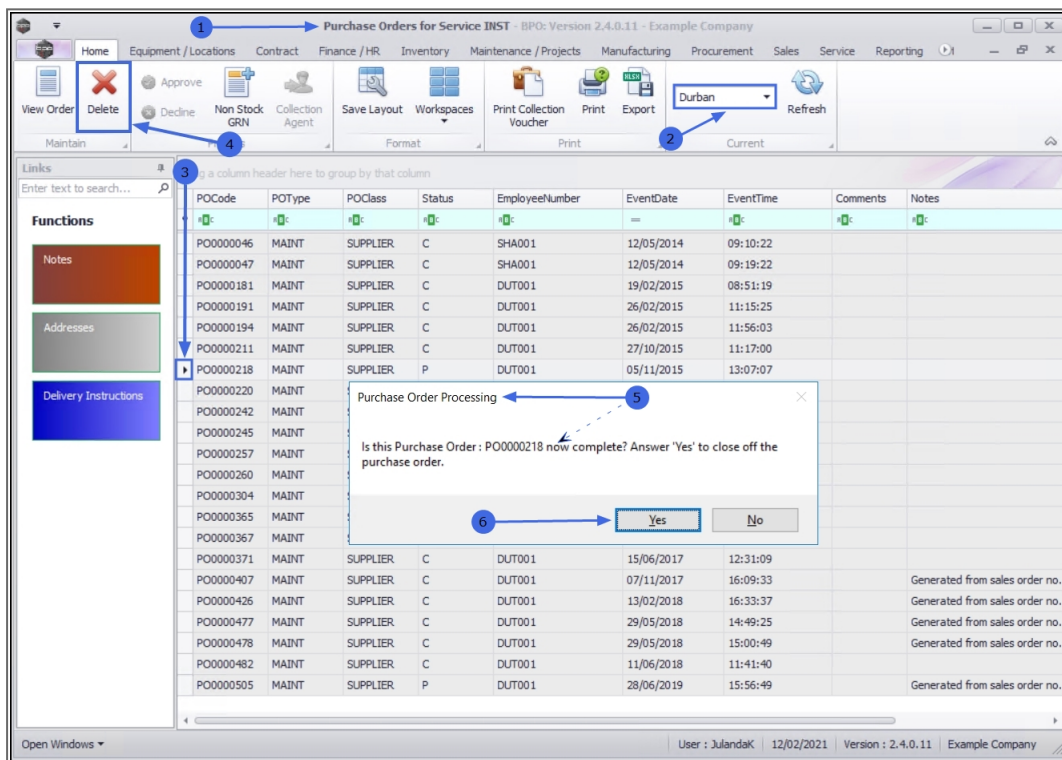


16. Click on **Back** to return to the **Purchase Order for Service** listing screen.

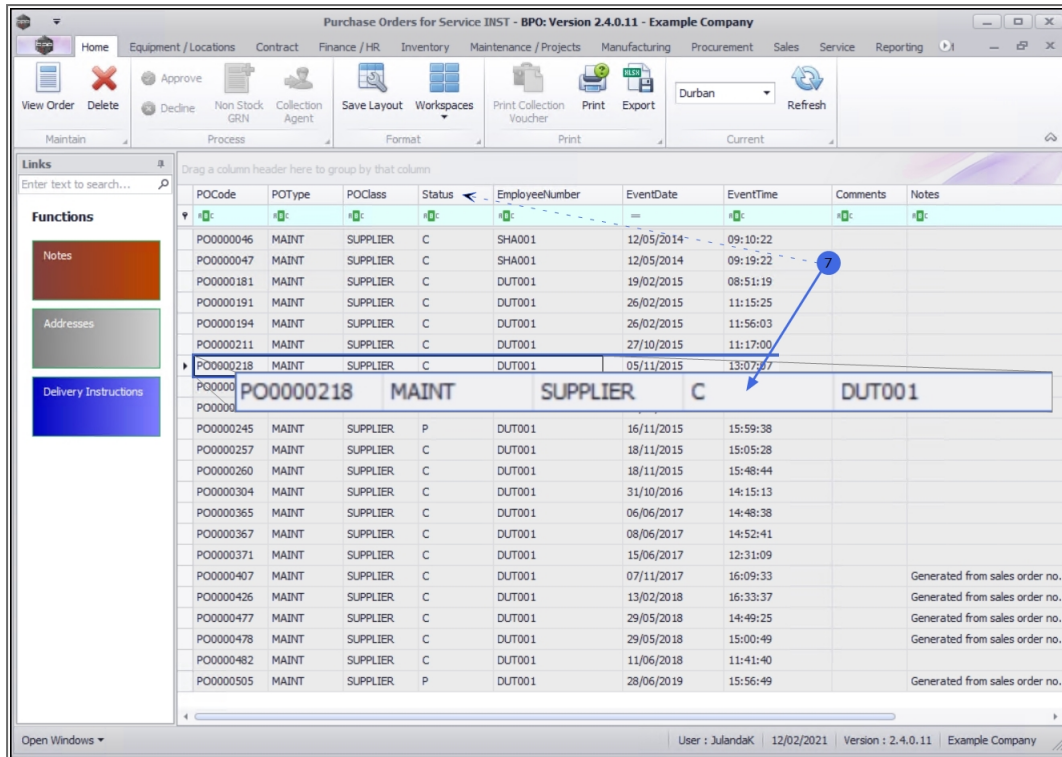


## DELETE / CLOSE A PURCHASE ORDER

1. From the **Purchase Orders for Service** [*service code*] listing screen,
2. Ensure that the correct **Site** has been selected.
  - Click on the down **arrow** to select an alternative site from the drop-down list.
3. Click on the **row** of the purchase order you wish to delete.
4. Click on **Delete**.
5. When you receive the **Purchase Order Processing** message to confirm;
  - **Is this Purchase Order : PO**[*purchase order number*] **now complete? Answer 'Yes' to close off the purchase order.**
6. Click on **Yes** if you are certain about your selection.



7. Note that the **Status** for the Purchase Order have been updated to **C - Closed**.



## CREATE A NON STOCK GOODS RECEIVED NOTE (GRN)

1. From the **Purchase Orders for Service** [service code] screen,
2. Ensure that the correct **Site** has been selected.
  - Click on the down **arrow** to select an alternative site from the drop-down list.
3. Click on the **row** of the Purchase Order you want to create a Non Stock GRN for.
4. Click on **Non Stock GRN**.

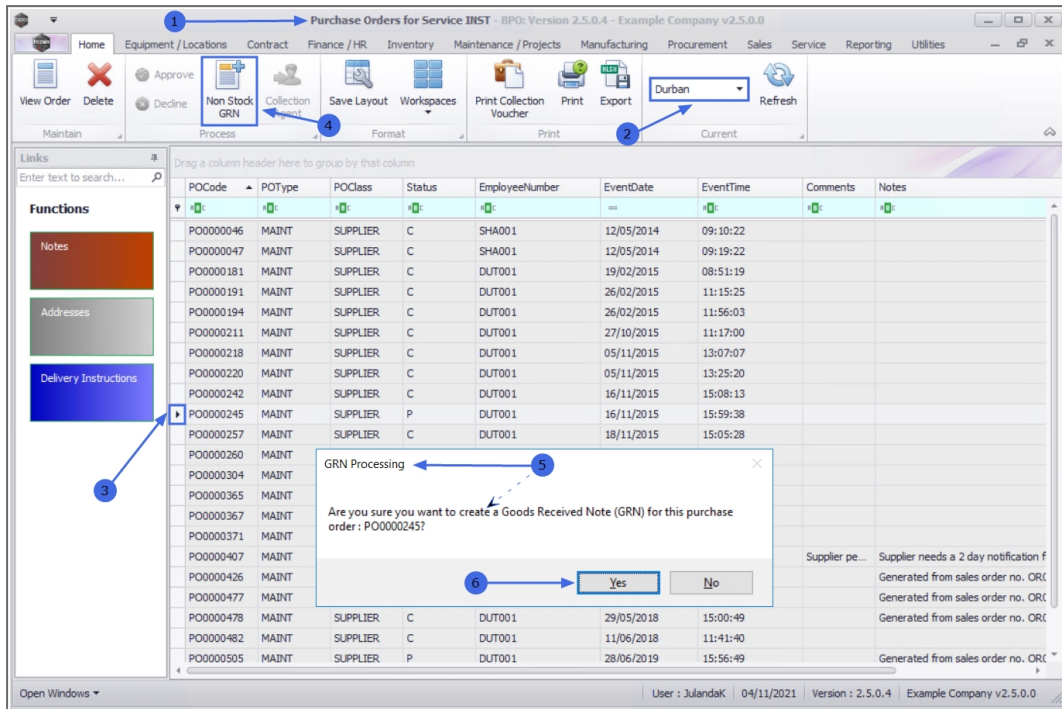


Short cut key: **Right click** to display the **Process** menu list. Click on **GRN**.

5. When you receive the **GRN Processing** message to confirm;
  - **Are you sure you want to create a Goods Received Note (GRN) for this purchase order : PO**[purchase order

number]?

6. Click on **Yes**.

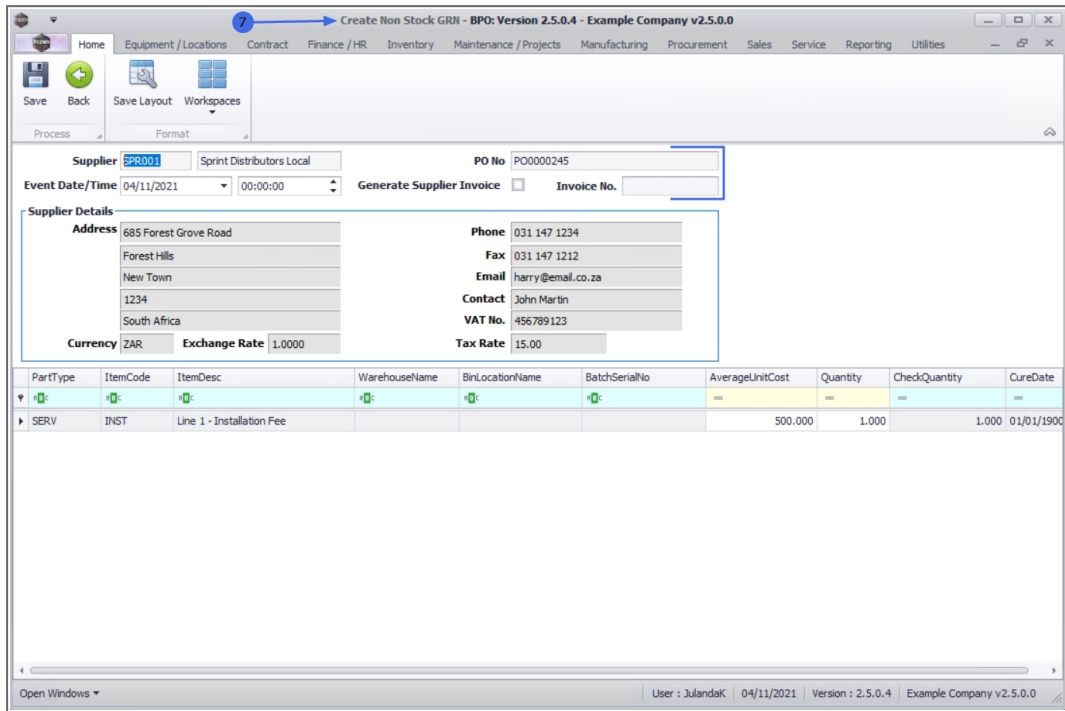


7. The **Create Non Stock GRN** screen will display.

## NON STOCK GRN HEADING

- **Supplier:** This field will auto populate with the Supplier linked to the purchase order.
- **PO No:** This field will auto populate with the and Purchase Order Number.
- **Event Date/Time:** The date will display the current date.
  - **Date:** Type in or click on the down arrow to change the date, using the calendar function, if required.
  - **Time:** Type in or use the arrow indicators to select an alternative time.
- **Generate Supplier Invoice:** Click to **select** the check box if you would like to **generate** a supplier invoice for the Non Stock GRN.

- Leave this check box **un-selected** if you want to generate a GRN **without** a Supplier invoice.
- **Invoice No.:** Type in the Invoice number, if required.



## SUPPLIER DETAILS

The information for the supplier details is linked to the **Supplier** code and will auto populate the fields. No changes can be made to the Supplier details from this screen.

## NON STOCK GRN LINE ITEM

8. Remove any Non Stock Items that you wish to exclude, for example an Inspection, a Call Out or a Cleaning Fee.

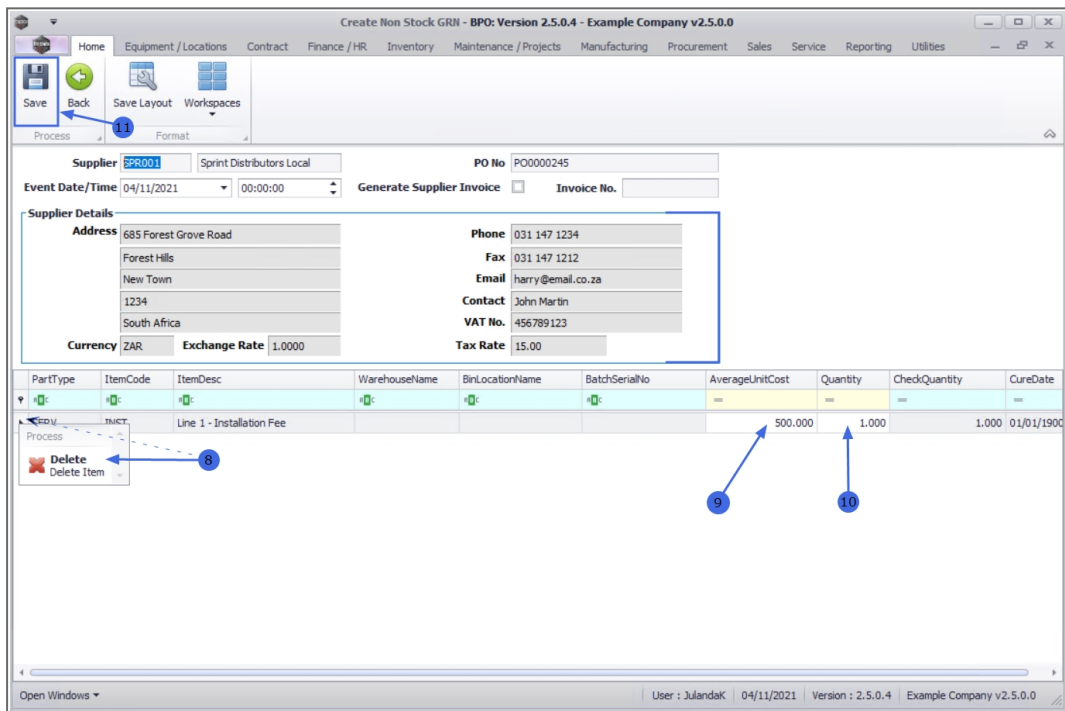


Short cut key: **Right click** on the row to display **Process** menu, click on **Delete**



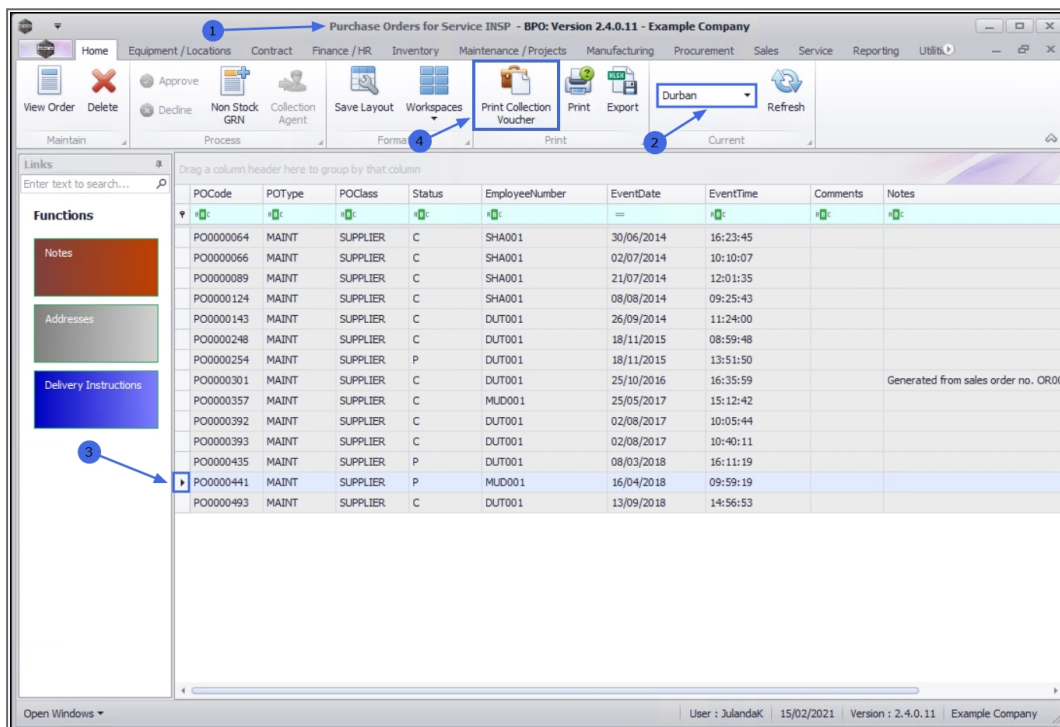
- When you receive the **Delete Row** message to confirm;
    - **Are you sure you want to delete this row for item?**
  - Click on **Yes** if you are certain about removing the item from the Non Stock GRN.
9. Click in the **Average Unit Cost** text box to type in or use the directional arrows to adjust the unit cost.
  10. Click in the **Quantity** text box to type in or use the directional arrows to adjust the quantity.
  11. Click on **Save**.

For a detailed handling of this topic refer to [Non Stock Supplier Returns](#)



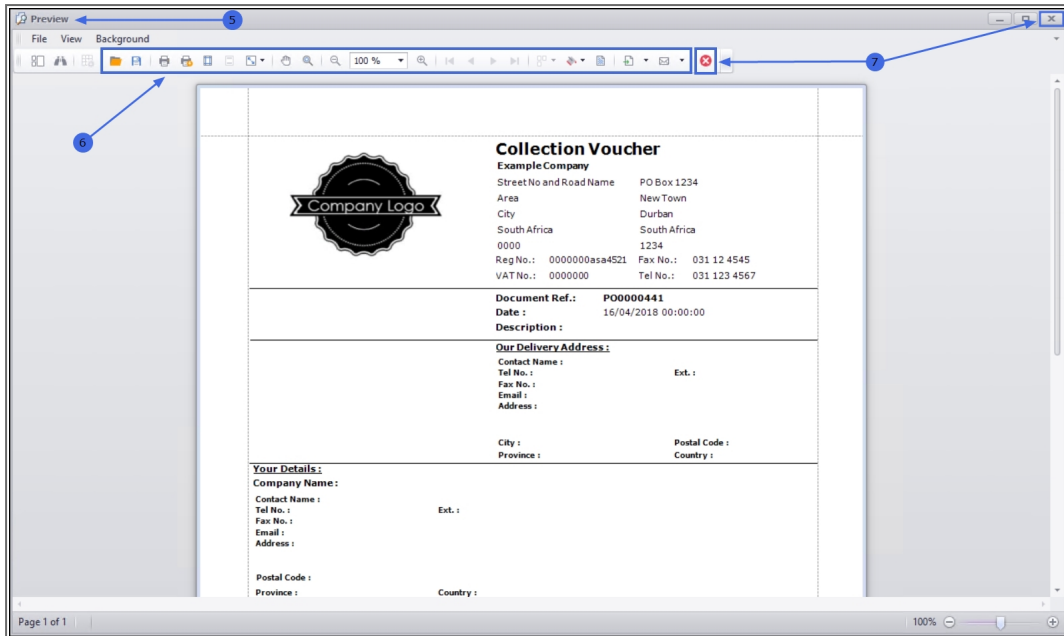
## PRINT COLLECTION VOUCHER

1. From the **Purchase Orders for Service [service code]** screen,
2. Ensure that the correct **Site** has been selected.
  - Click on the down **arrow** to select an alternative site from the drop-down list.
3. Click on the **row** of the Purchase Order you wish to print a collection voucher for.
4. Click on **Print Collection Voucher**.



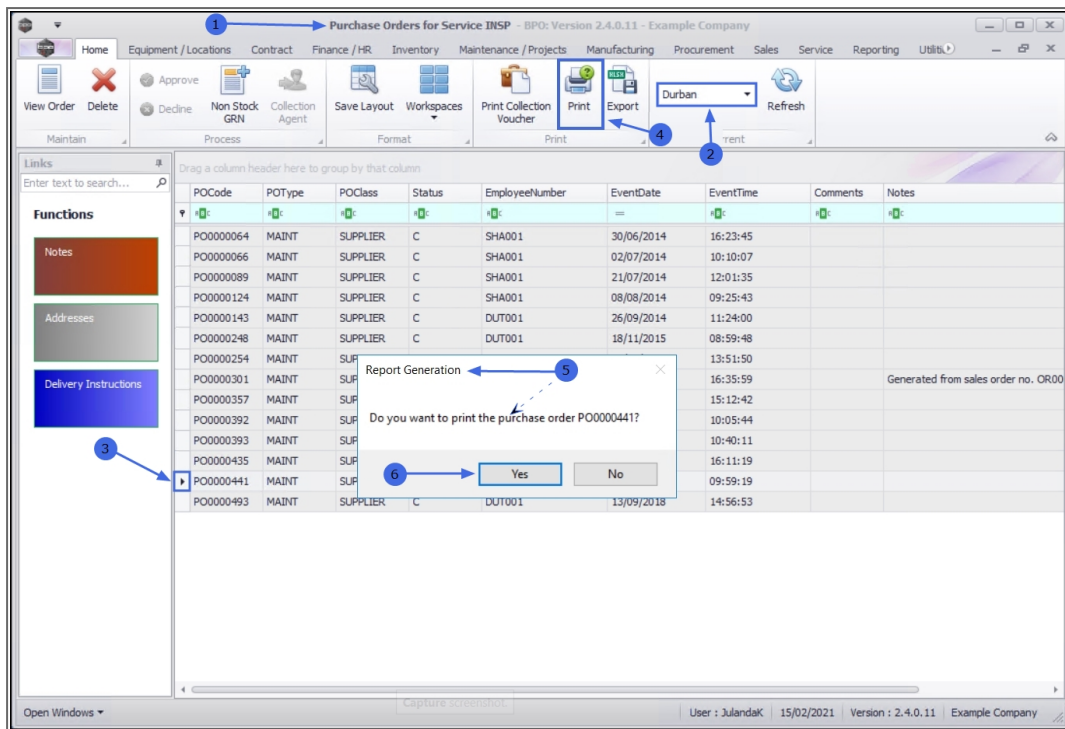
5. The Collection Voucher will display in the **Preview** screen.
6. From this screen you can make cosmetic changes to the document as well as **Save, Print, Add a Watermark, Export** or **Email** the Collection Voucher.
7. Click on **Close** to return to the **Purchase Orders for Service** screen.





## PRINT PURCHASE ORDER

1. From the **Purchase Order for Service** [service code] screen,
2. Ensure that the correct **Site** has been selected.
  - Click on the down **arrow** to select an alternative site from the drop-down list, if required.
3. Click on the **row** of the Purchase order you wish to print.
4. Click on **Print**.
5. When you receive the **Report Generation** message to confirm;
  - **Do you want to print the purchase order PO**[purchase order number]?
6. Click on **Yes**.

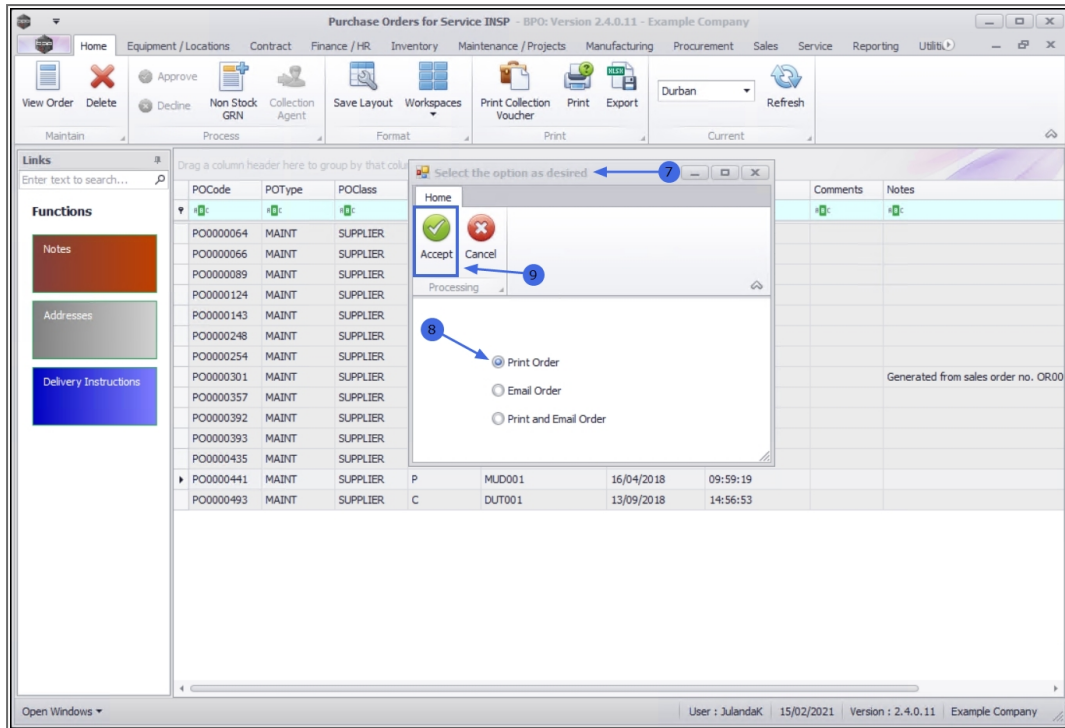


7. The **Select the option as desired** screen will display.

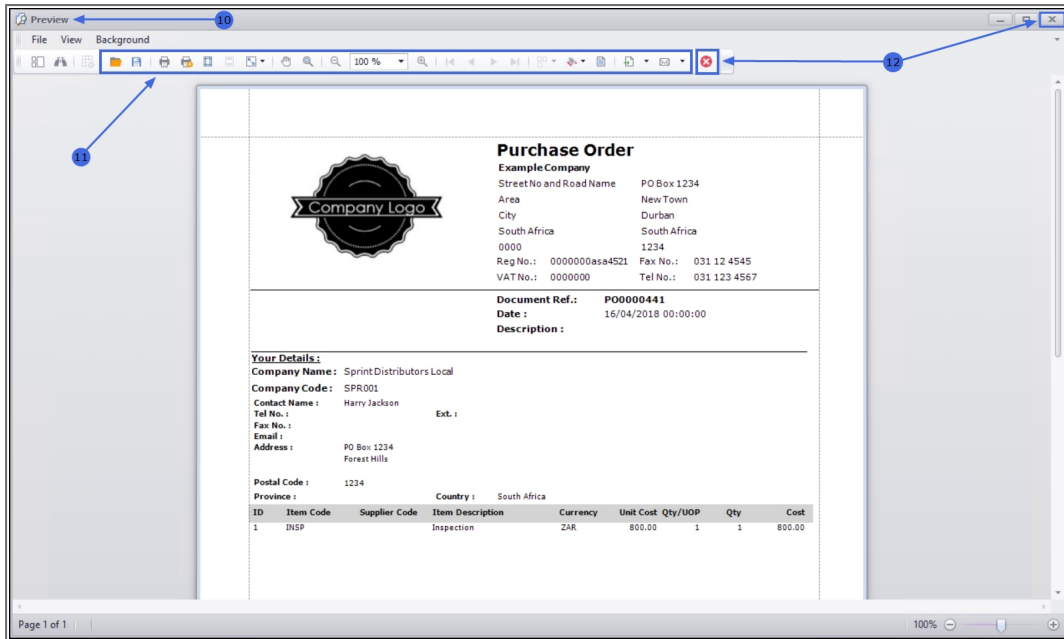
- Print Order** will open the purchase order in the Report Preview to view, print, export or email.
- Email Order** will attach documents, add recipients, the system will create a .PDF and email the Invoice.
- Print and Email Order** will display both the Report Preview and Email screens.

8. For the purpose of this manual **Print Order** has been selected.

9. Click on **Accept**.



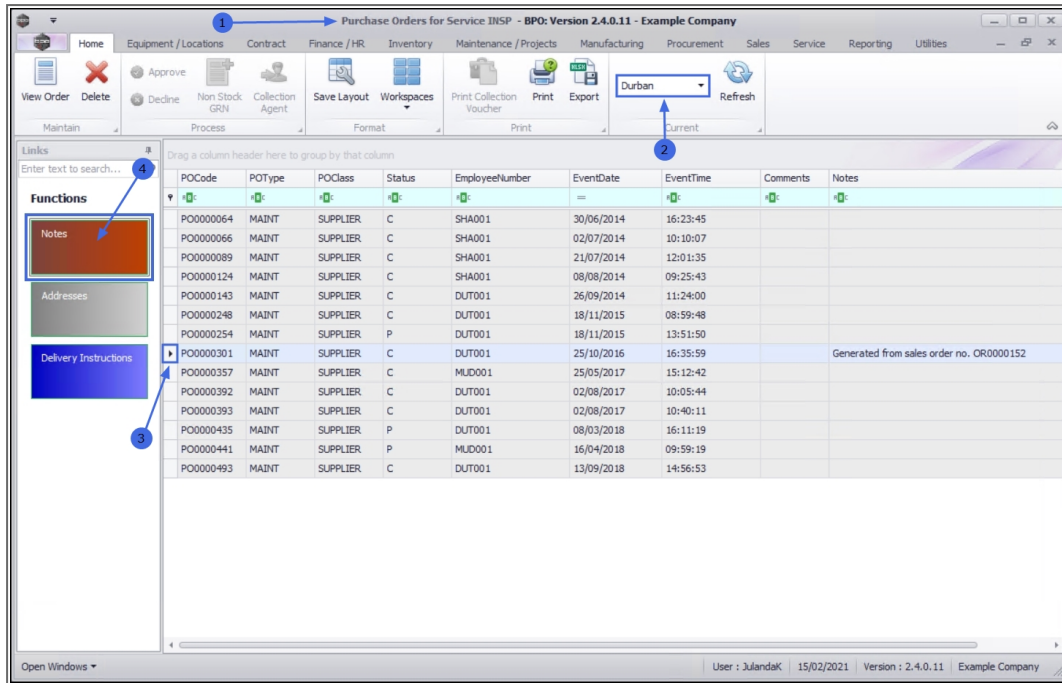
10. The Purchase Order will display in the **Preview** screen.
11. From this screen you can make cosmetic changes to the document, as well as **Save, Print, Add a Watermark, Export** or **Email** the Collection Voucher.
12. Click on **Close** to return to the **Purchase Orders for Service** screen.



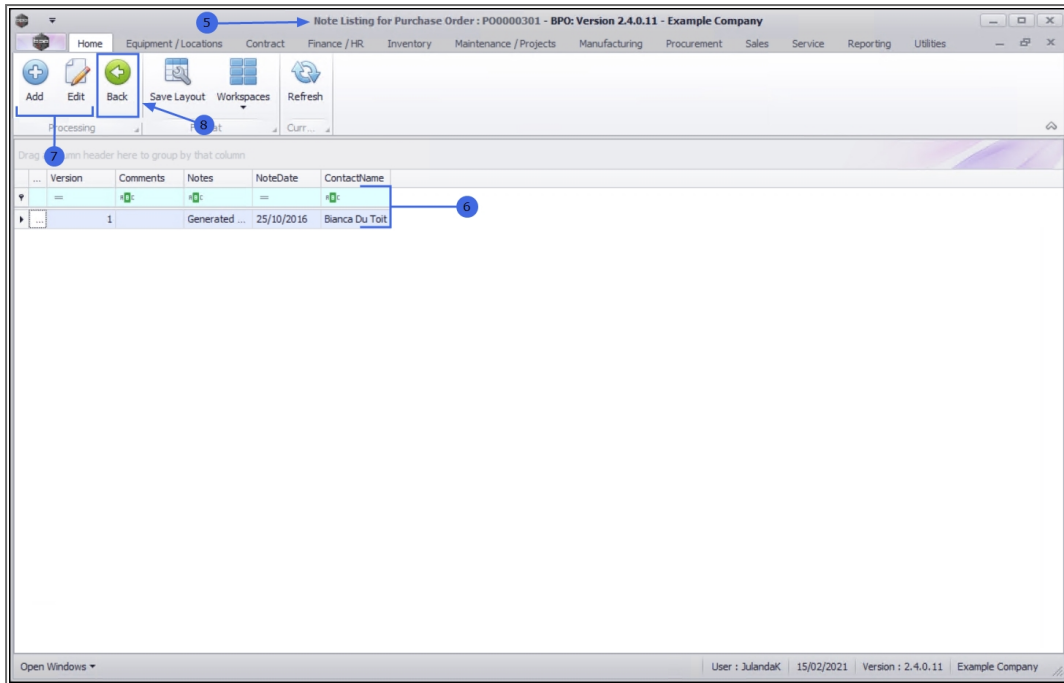
## FUNCTIONS TILES

### NOTES

1. From the **Purchase Order for Service [service code]** screen,
2. Ensure that the correct **Site** has been selected.
  - Click on the down **arrow** to select an alternative site from the drop-down list, if required.
3. Click on the **row** of the Purchase Order you need to create a Note for.
4. Click on the **Notes** tile.

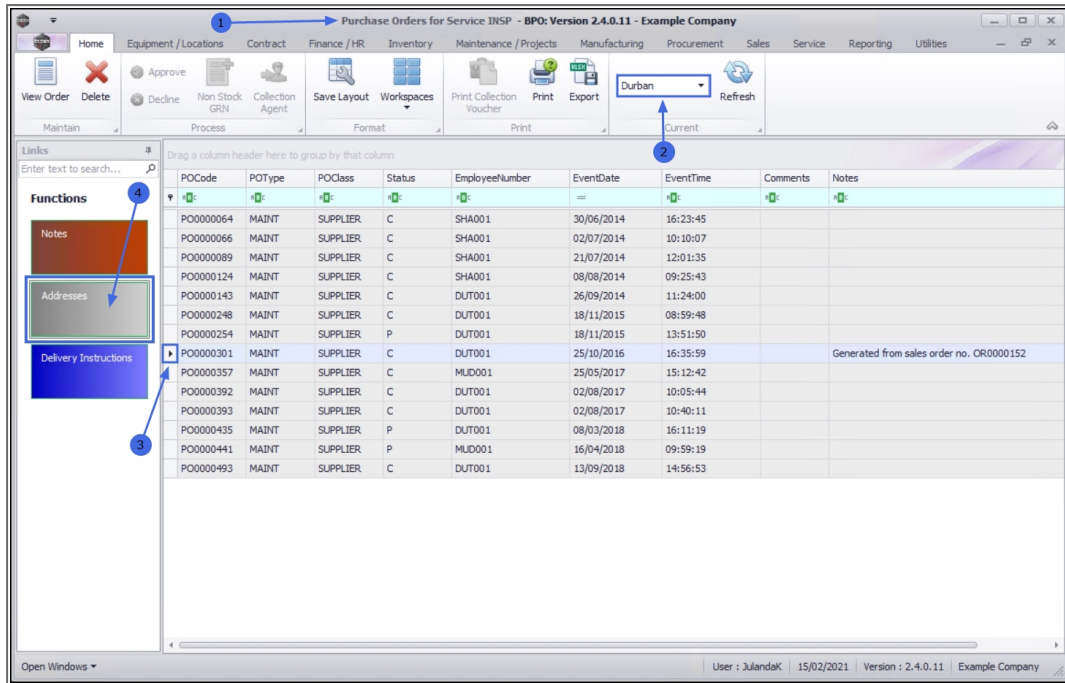


5. The **Note Listing for Purchase Order : PO**[purchase order number] screen will display.
6. Any notes linked to the Purchase Order will display on the listing screen.
7. Click on **Add** to create a note or, click on **Edit** if you need to make changes to an existing note. For a detailed handling of the topic refer to [Parts - Purchase Orders - Notes](#)
8. Click on **Back** to return to the **Purchase Orders for Service** screen.



## ADDRESSES

1. From the **Purchase Order for Service** [*service code*] screen,
2. Ensure that the correct **Site** has been selected.
  - Click on the down **arrow** to select an alternative site from the drop-down list, if required.
3. Click on the **row** of the Purchase Order you need to view the address for.
4. Click on the **Addresses** tile.

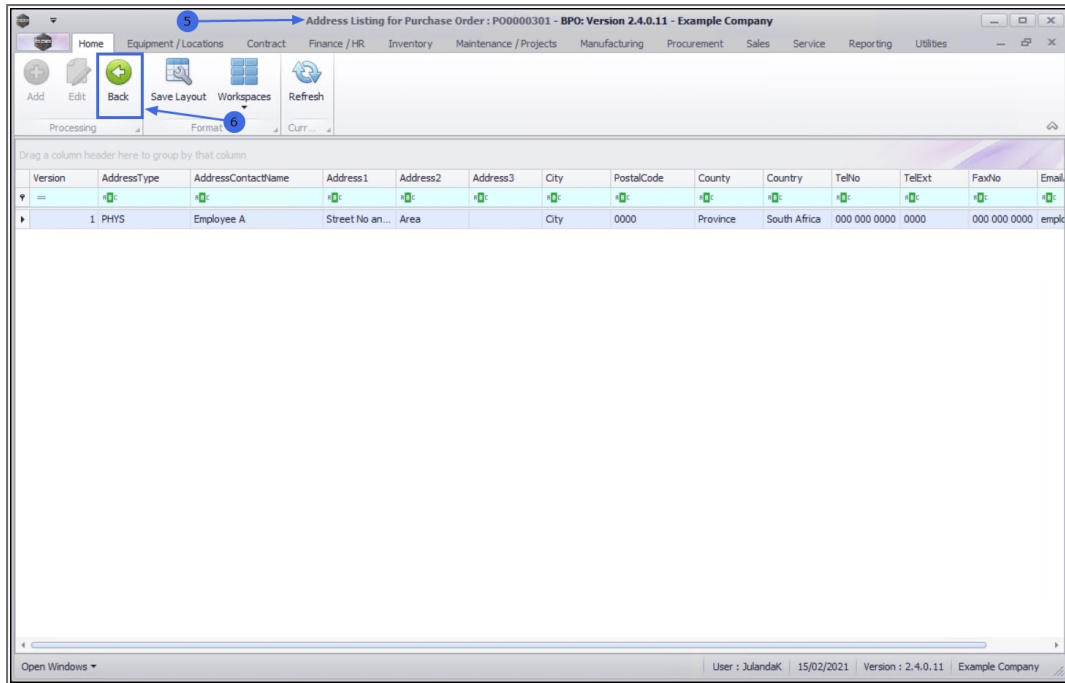


- The **Address Listing for Purchase Order : PO**[purchase order number] screen will display.



Note that this is a view only screen and you will not be able to add or make changes to the information on this screen.

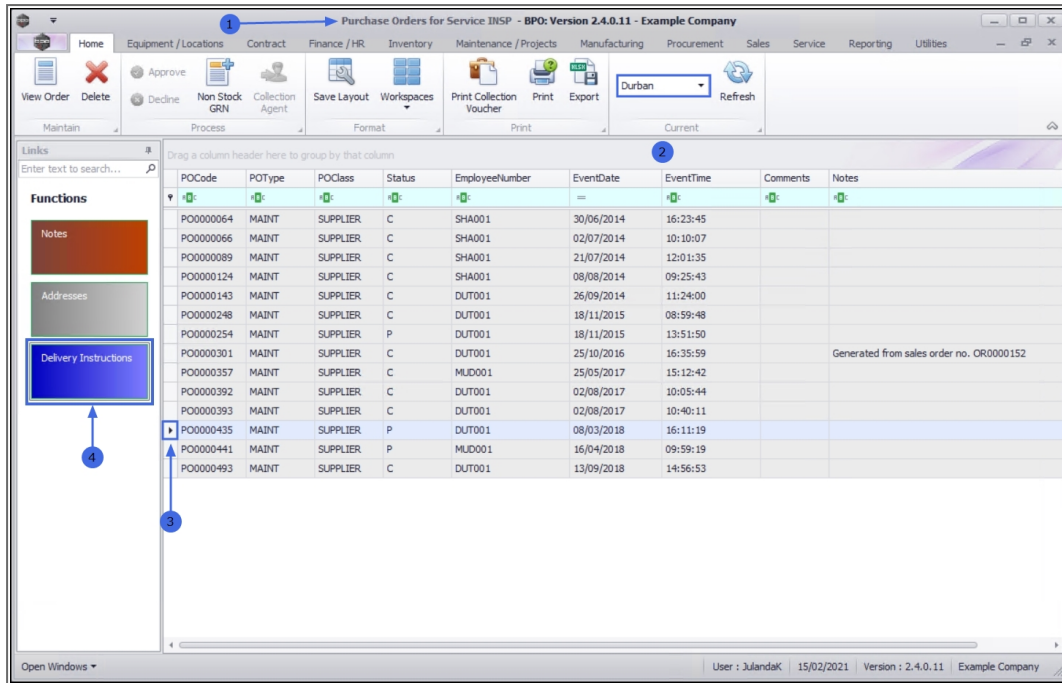
- Click **Back** to return to the **Purchase Orders for Service** screen.
- For details on how to Add and Edit Addresses on a Purchase order, refer to [Parts - Purchase Orders - Addresses](#)



## DELIVERY INSTRUCTIONS

1. From the **Purchase Order for Service** [service code] screen,
2. Ensure that the correct **Site** has been selected.
  - Click on the down **arrow** to select an alternative site from the drop-down list, if required.
3. Click on the **row** of the purchase order, you need to work with.
4. Click on the **Delivery Instructions** tile.





5. The **Agent Listing for Purchase Order : PO**[purchase order number] screen will display.
6. From this screen you can **Add** a supplier, **Edit** to change or **Delete** the supplier from the purchase order. Refer to [Parts - Purchase Orders - Delivery Instructions](#)
7. Click **Back** to return to the **Purchase Orders for Service** screen.

Status	AgentType	SupplierCode	SupplierName	SpecialInstructions
A	SHPA	TON002	Tonys Copy Shop	testing an agent

MNU.065.008