

## COMPANY

### PURCHASING CENTRES – ADD PURCHASING CENTRE

The purchasing centre holds configuration and numbering conventions for procurement and stock transactions.

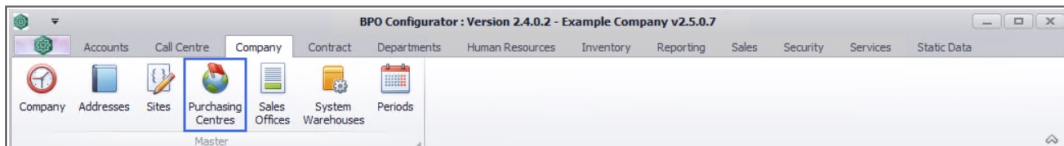
The purchasing centre can be set up in two ways:

- ✓ One global purchasing centre, linked to all branches - document prefix and numbering is globally sequential.
- ✓ One purchasing centre per branch - each site will have its own prefix and numbering.

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**Ribbon Access:** *Company > Purchasing Centres*

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1. The ***Purchasing Centres for Company: [Company Name]*** listing screen will be displayed.
2. Any existing purchasing centres that have been created for the company will display in the data grid.

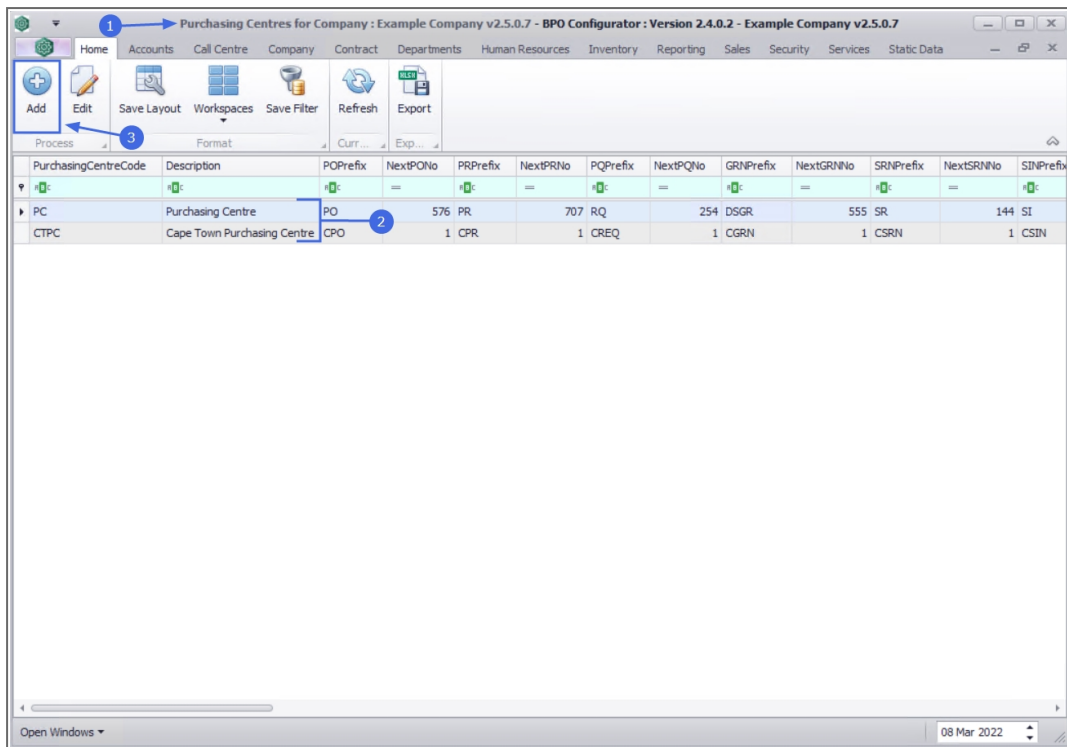
### ADD PURCHASING CENTRE

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3. Click on ***Add***.



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




4. The **Add New Purchasing Centre** screen will be displayed.

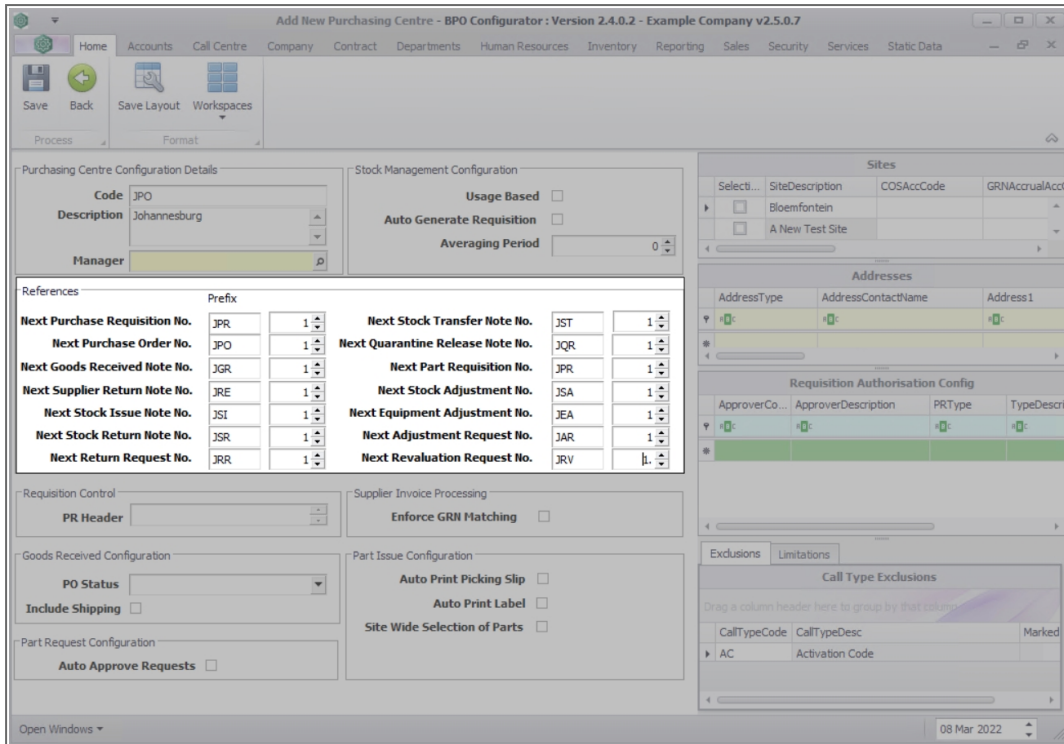
## PURCHASING CENTRE CONFIGURATION DETAILS

- **Code:** Type in the **code** that you wish to use for this purchasing centre.
- **Description:** Type in the **description** for the purchasing centre.
- **Manager:** The **site** needs to be selected before you can search for the **purchasing centre manager**. This will be attended to at the end of the process.

## REFERENCES

The reference section is used to set the *documentation prefixes* and *next number* to be generated by the system at Go-Live.

-  Note the **Next Purchase Requisition No.** has a **J** (Johannesburg) prefix followed by a **PR** (Purchase Requisition) prefix and will start with No.**1**, i.e. **JPR1**.
- Continue setting the references as required.

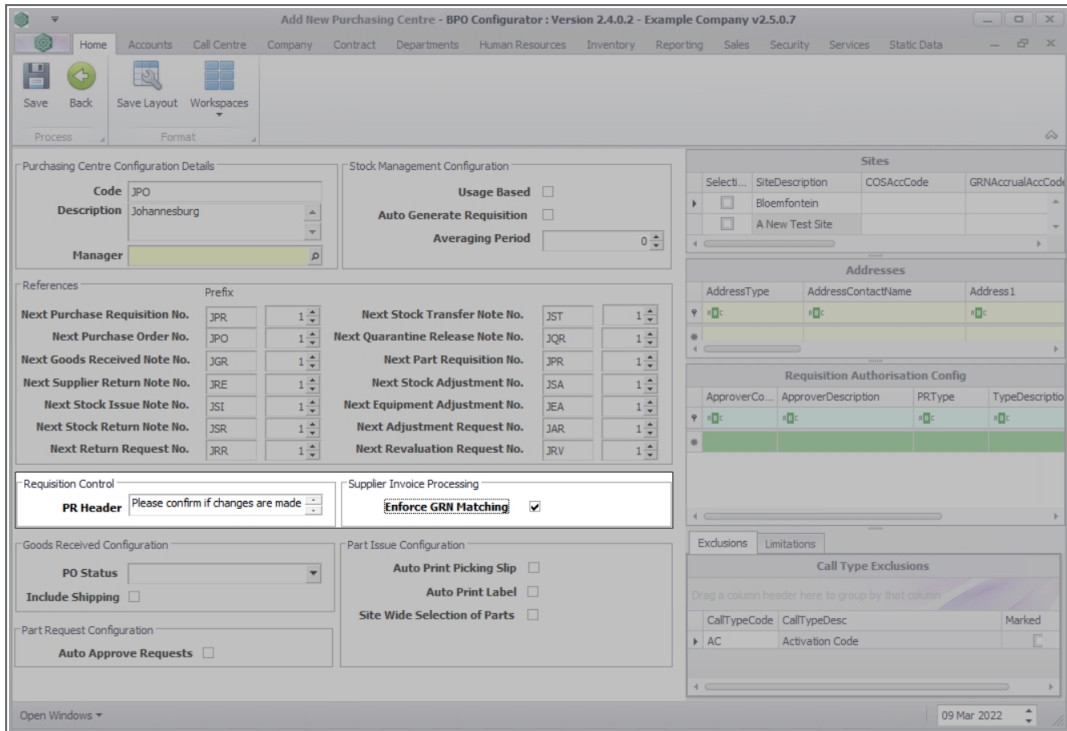


## PROCUREMENT

- **PR Header:** Type in the default heading to be included on all purchase requisitions.

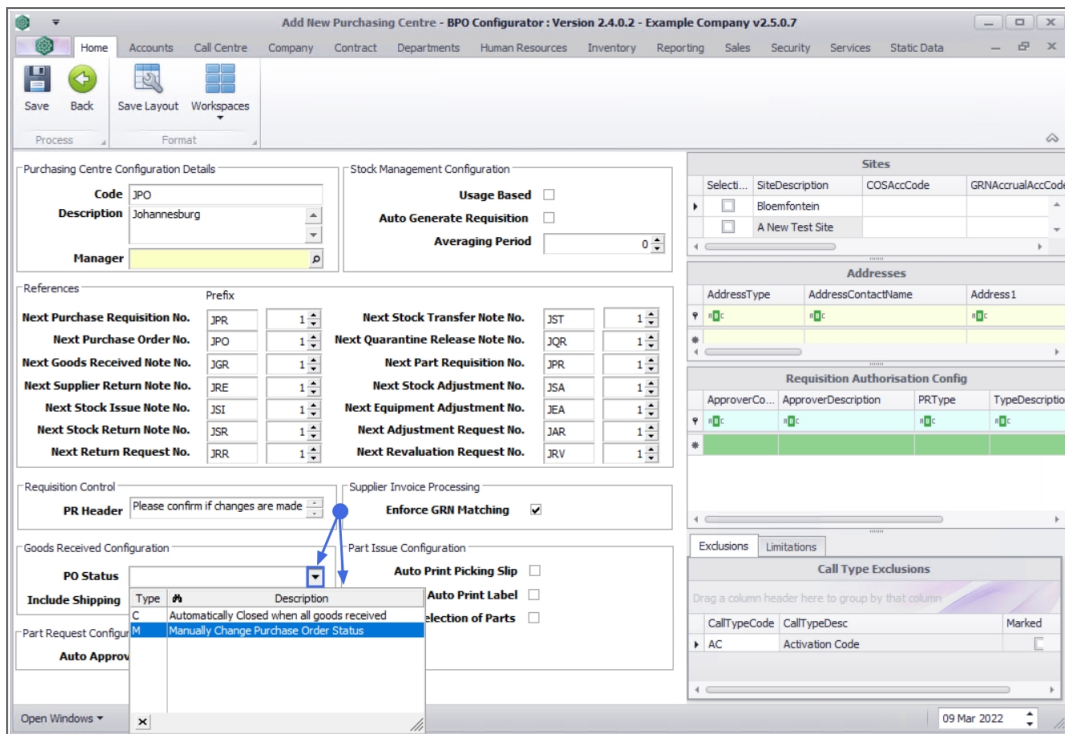
## SUPPLIER INVOICE PROCESSING

- **Enforce GRN Matching:** Click on the check box if GRNs must be linked to a supplier invoice when processing.

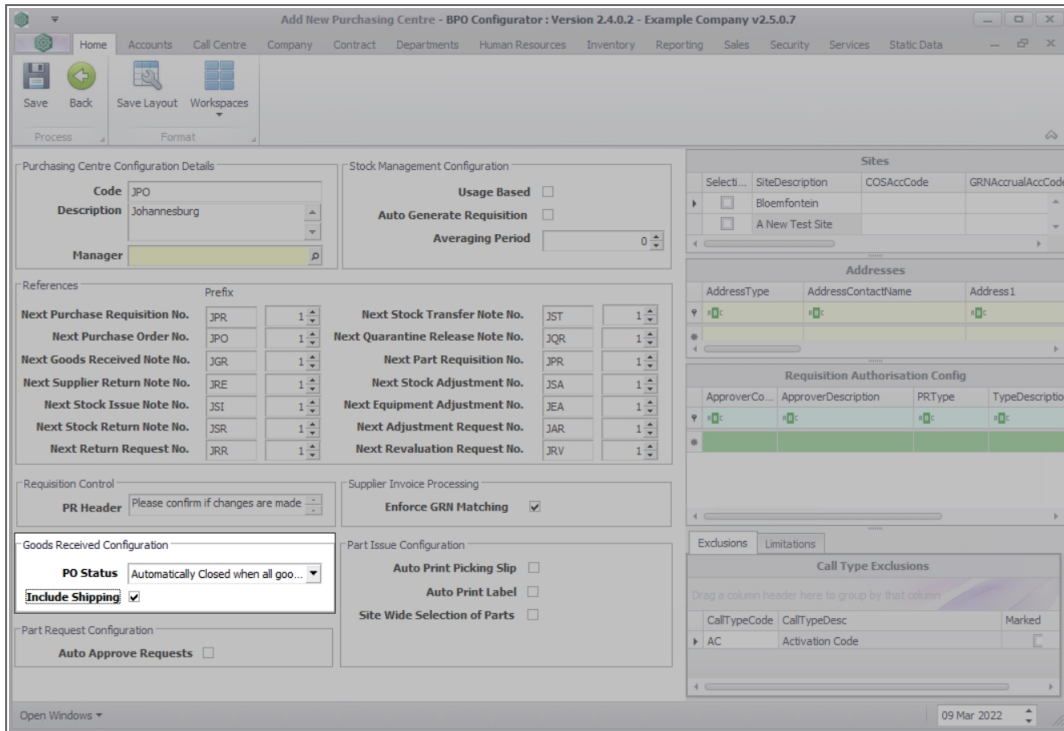


## GOODS RECEIVED CONFIGURATION

- **PO Status:** Click on the down *arrow* to select one of 2 options:
  - Automatically closed when all goods received
  - Manually change Purchase Order Status

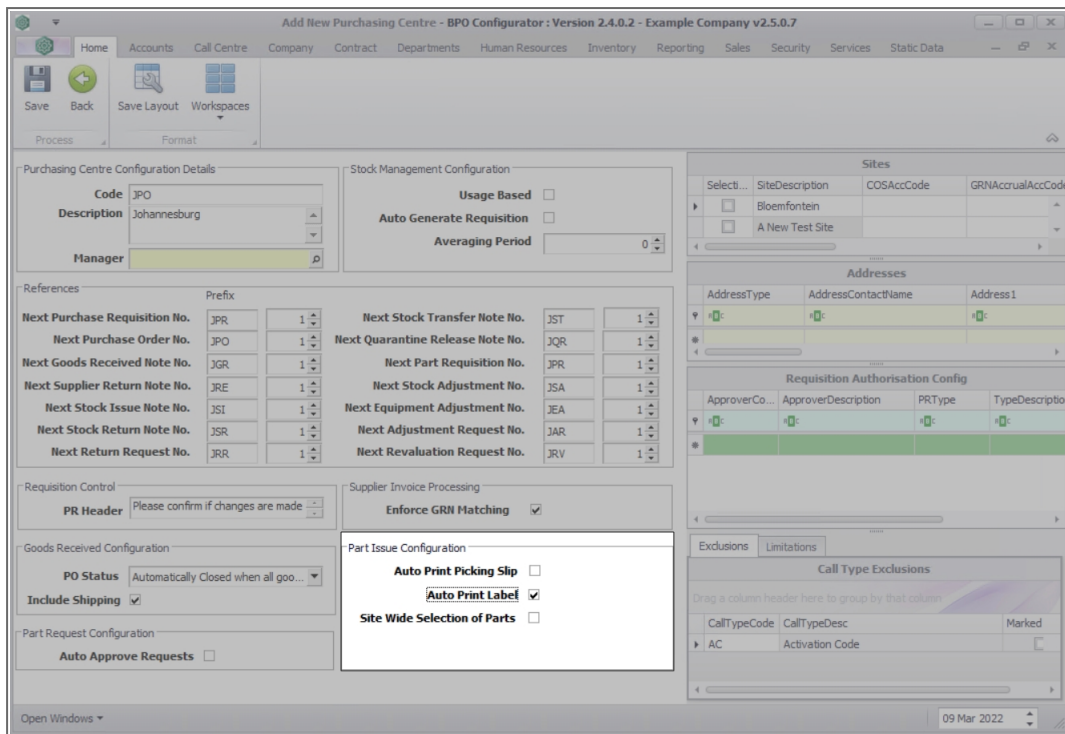


- Include Shipping:** Click to select the check box if you wish shipping costs to be added separately to the cost of the parts or items purchased when you receive goods from a supplier. This is used in conjunction with the Shipping Costs Included Flag functionality on the Supplier.



## PART ISSUE CONFIGURATION

- **Auto Print Picking Slip:** Click to select the check box if you wish a picking slip to be generated with a part issue.
- **Auto Print Label:** Click to select the check box if you wish a label to be printed with a part issue.
- **Site Wide Selection of Parts:** Click to select the check box if you wish a site wide selection of parts to be available for a part issue.



## PART REQUEST CONFIGURATION

The auto approve selection you make will affect the availability of the Exclusions and Limitations panel on the right hand side of the screen.

- **Auto Approve:** Click to select the auto approve check box if part requests (from calls and/or work orders) to store, should automatically be approved.



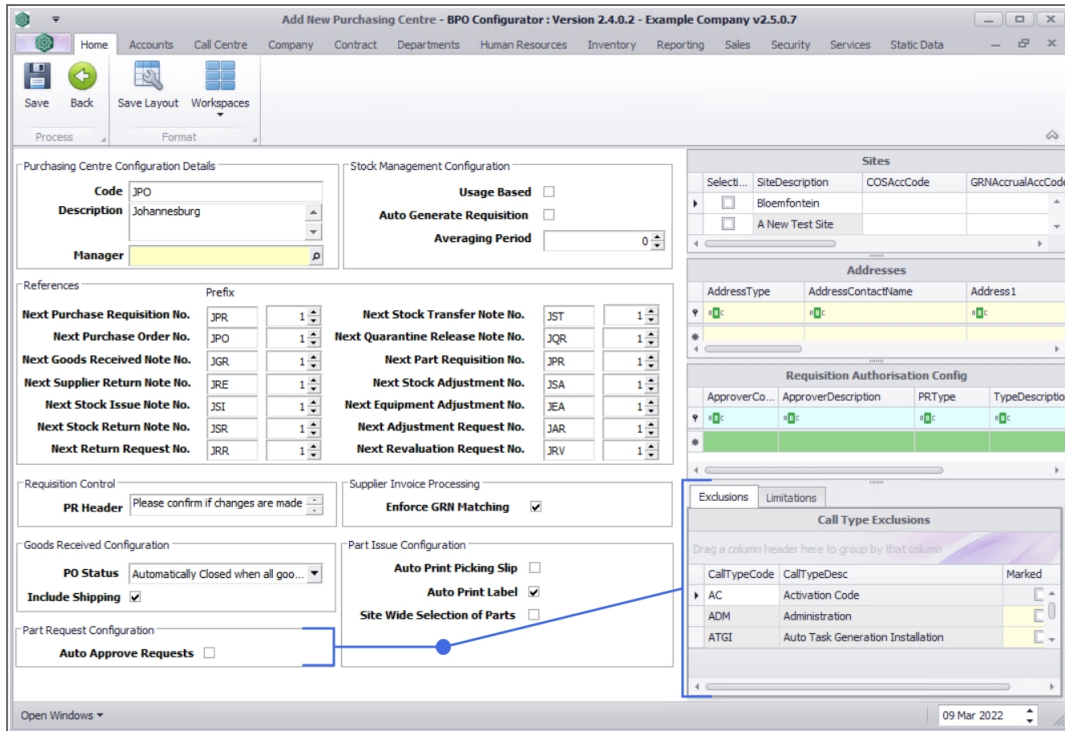
Note that the *Exclusions* and *Limitations* panel is not available for this selection as part requests gets automatically approved.



- Leave the **auto approved** check box *unselected*, if part requests needs to be **authorised** first before the request is sent to store for stock issue.
  - Ensure that the **Exclusions** and **Limitations** for the part request approval has been set.

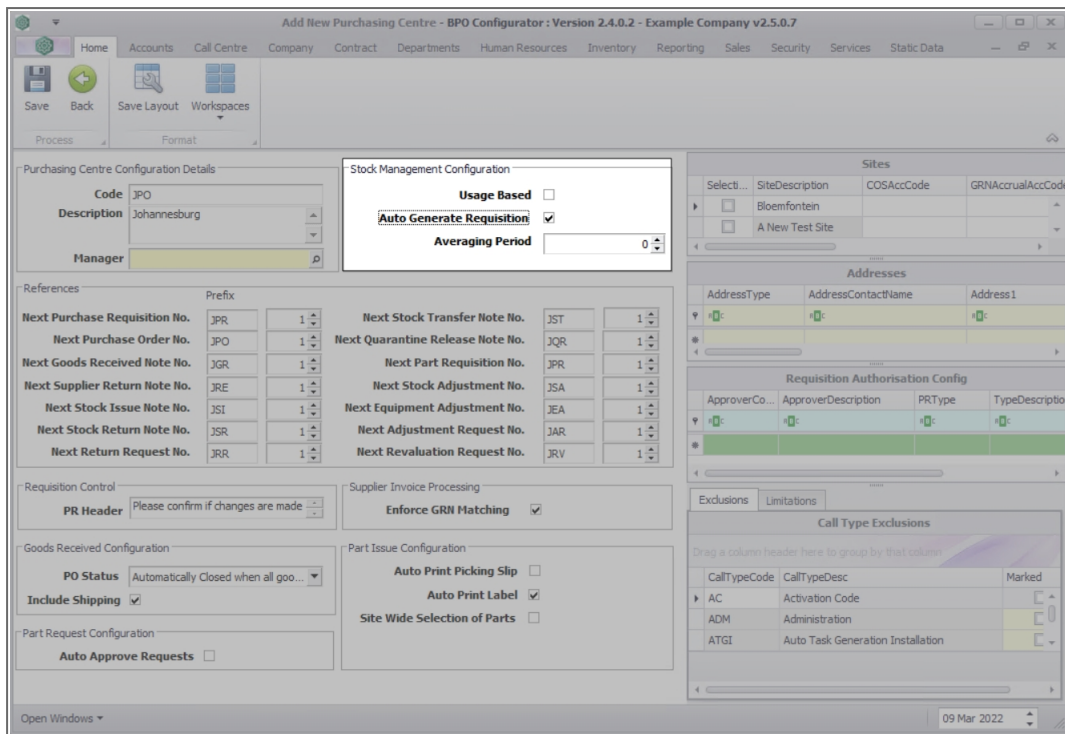


Refer to Edit Purchasing Centre for details on how to complete the Exclusions and Limitations frames.



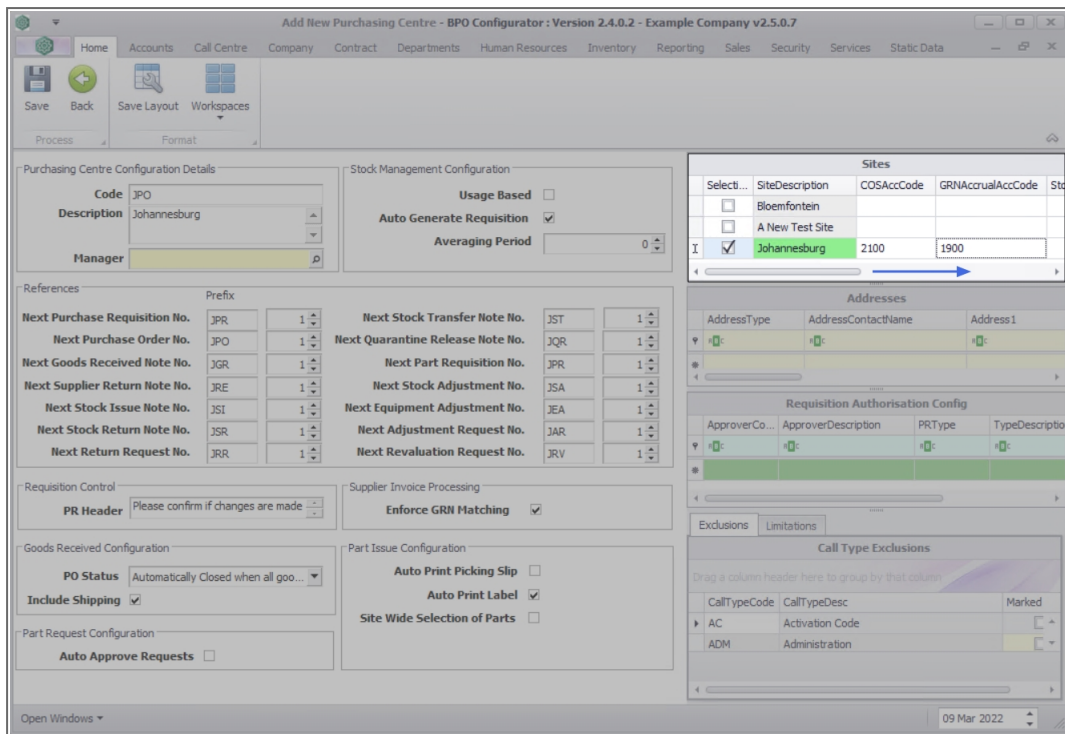
## STOCK MANAGEMENT CONFIGURATION

- **Usage Based:** Click to select the check box if you wish the system to calculate stock requirements based on actual usage and supplier lead times.
- **Auto Generate Requisition:** Click to select in this check box if you wish the system to automatically generate the purchase requisition to maintain stock levels.
- **Averaging Period:** Type in or use the arrow indicators to set the averaging period. The system will calculate the period in months over which usage is averaged, based on stock levels.

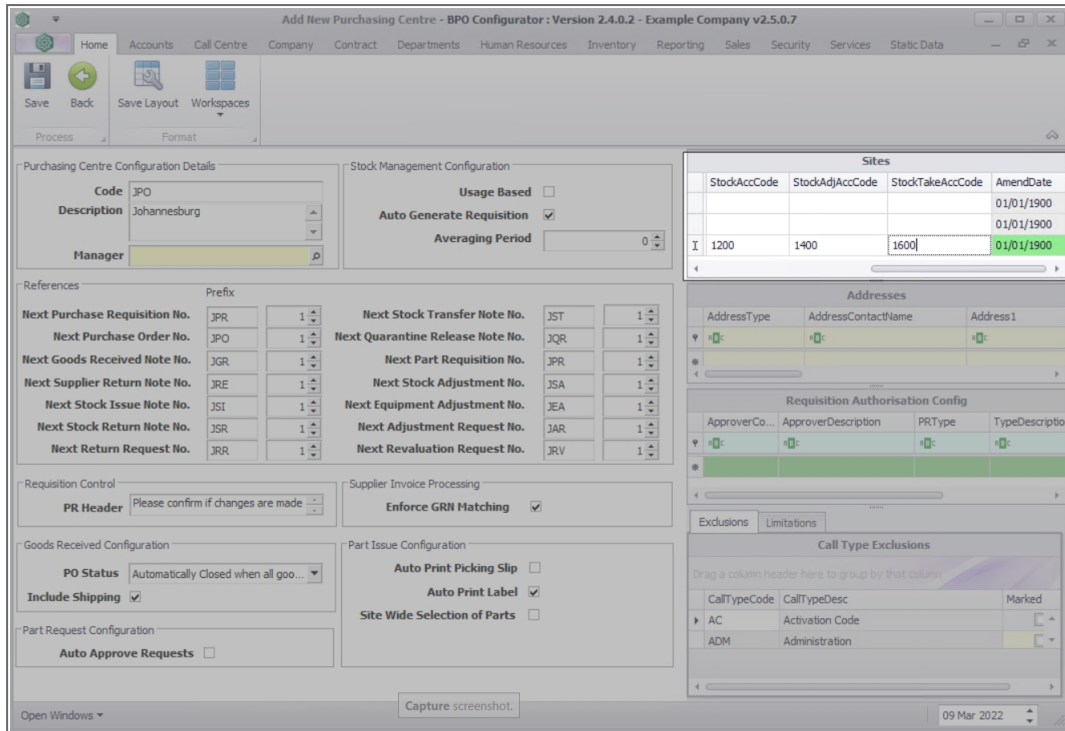


## SITES FRAME

- Click in the check box in front of the **site** you wish to associate with this Purchasing Centre.
  - The example has the **Johannesburg** site selected.
- **COSAccCode:** Type in the cost of sales account code.
- **GRNAccrualAccCode:** Type in the GRN accrual account code.



- Use the scroll bar to scroll to the right of the frame to view the hidden columns.
  - **StockAccCode:** Type in the stock account authorisation code.
  - **StockAdjAccCode:** Type in the stock adjustment account code.
  - **StockTakeAccCode:** Type in the stock take account code.
  - **AmendDate:** This field will be updated with the date the codes were amended. Refer to "**Purchasing Centre Address**" on page 2 to view amended date.



## PURCHASING CENTRE MANAGER

Once the associated site has been selected, the **Purchasing Centre Manager** can be selected in the **Purchase Centre Configuration Details** frame.

- **Manager:** Click on the **search** button to select the **Procurement Manager**.



If no items are available for selection, ensure that the **Crafts** have been set up for the relevant site, and that the **Purchasing Manager** has been linked to the Craft for that Site.

Add New Purchasing Centre - BPO Configurator : Version 2.4.0.2 - Example Company v2.5.0.7

Home Accounts Call Centre Company Contract Departments Human Resources Inventory Reporting Sales Security Services Static Data

Save Back Save Layout Workspaces

Process Format

**Purchasing Centre Configuration Details**

**Code** JPO

**Description** Johannesburg

**Manager** Joseph Timber

**Stock Management Configuration**

**Usage Based**

**Auto Generate Requisition**

**Averaging Period** 0

**Sites**

Selecti...	SiteDescription	COSAccCode	GRNAccrualAccCode	Sto
<input type="checkbox"/>	Bloemfontein			
<input type="checkbox"/>	A New Test Site			
<input checked="" type="checkbox"/>	Johannesburg	2100	1900	12

**References**

**Prefix**

Next Purchase Requisition No.	Prefix	Value
Next Purchase Requisition No.	JPR	1
Next Purchase Order No.	JPO	1
Next Goods Received Note No.	JGR	1
Next Supplier Return Note No.	JRE	1
Next Stock Issue Note No.	JSI	1
Next Stock Return Note No.	JSR	1
Next Return Request No.	JRR	1

**Next Stock Transfer Note No.** JST 1

**Next Quarantine Release Note No.** JQR 1

**Next Part Requisition No.** JPR 1

**Next Stock Adjustment No.** JSA 1

**Next Equipment Adjustment No.** JEA 1

**Next Adjustment Request No.** JAR 1

**Next Revaluation Request No.** JRV 1

**Requisition Control**

**PR Header** Please confirm if changes are made

**Supplier Invoice Processing**

**Enforce GRN Matching**

**Goods Received Configuration**

**PO Status** Automatically Closed when all goo...

**Include Shipping**

**Part Issue Configuration**

**Auto Print Picking Slip**

**Auto Print Label**

**Site Wide Selection of Parts**

**Part Request Configuration**

**Auto Approve Requests**

**Requisition Authorisation Config**

ApproverCo...	ApproverDescription	PRTType	TypeDescripto
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

**Addresses**

AddressType	AddressContactName	Address1
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

**Exclusions**

**Call Type Exclusions**

CallTypeCode	CallTypeDesc	Marked
AC	Activation Code	<input type="checkbox"/>
ADM	Administration	<input checked="" type="checkbox"/>

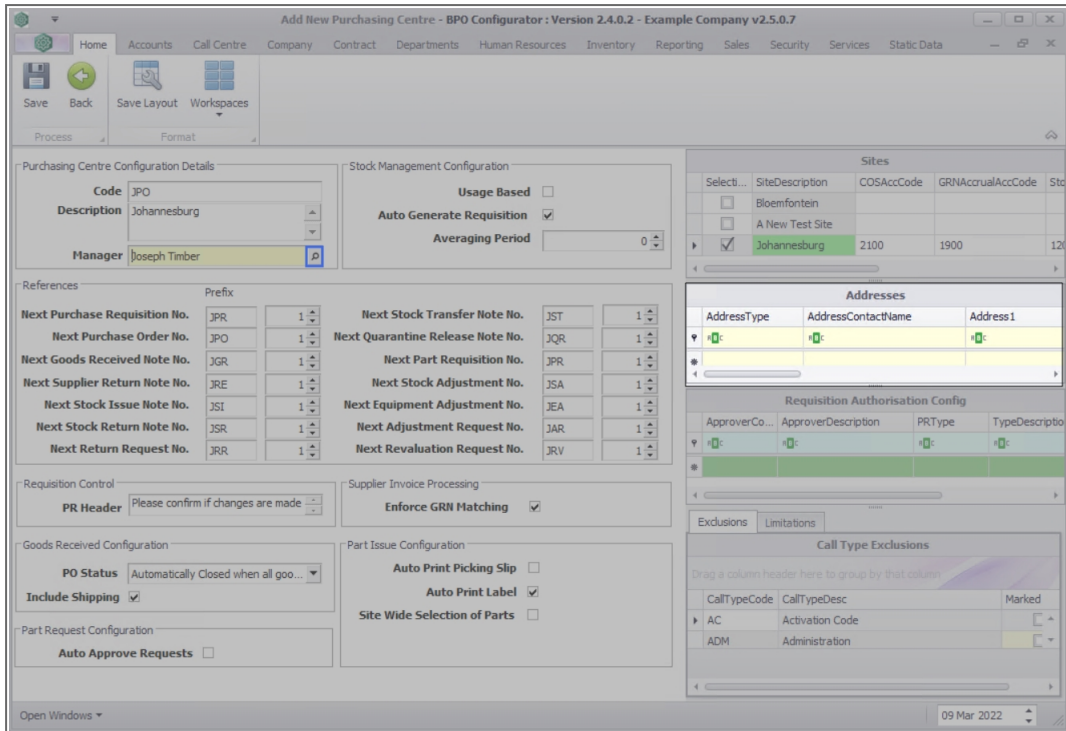
Open Windows

09 Mar 2022

## ADDRESSES FRAME



Refer to [Company Purchasing Centre Addresses](#) to complete the Addresses frame.



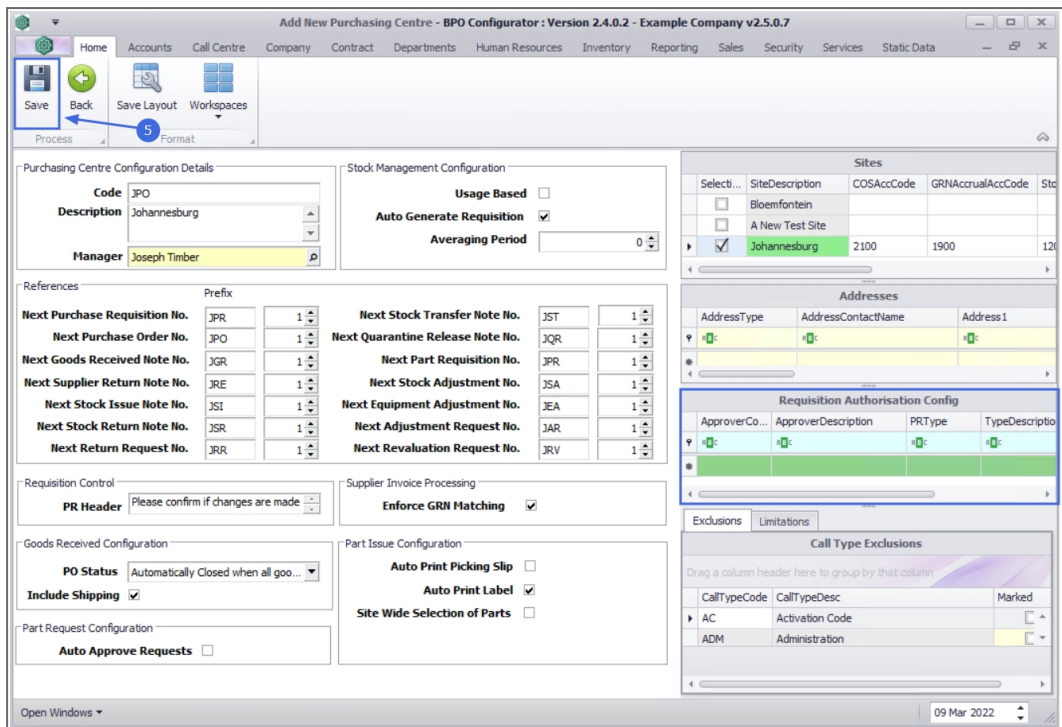
## REQUISITION AUTHORISATION CONFIGURATION FRAME



Refer to the [Company Purchase Centre Requisition Approval](#) manual to complete the Requisition Authorisation Configuration frame.

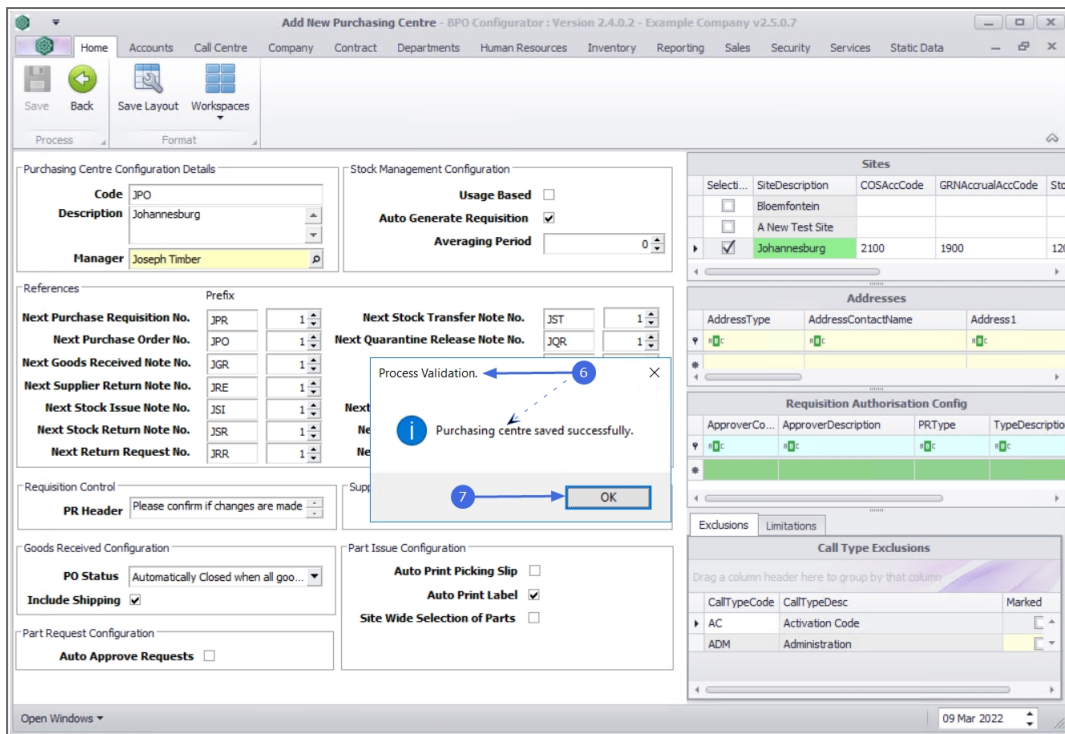
## SAVE PURCHASING CENTRE

- When you have finished adding details for the new purchasing centre, click on **Save**.

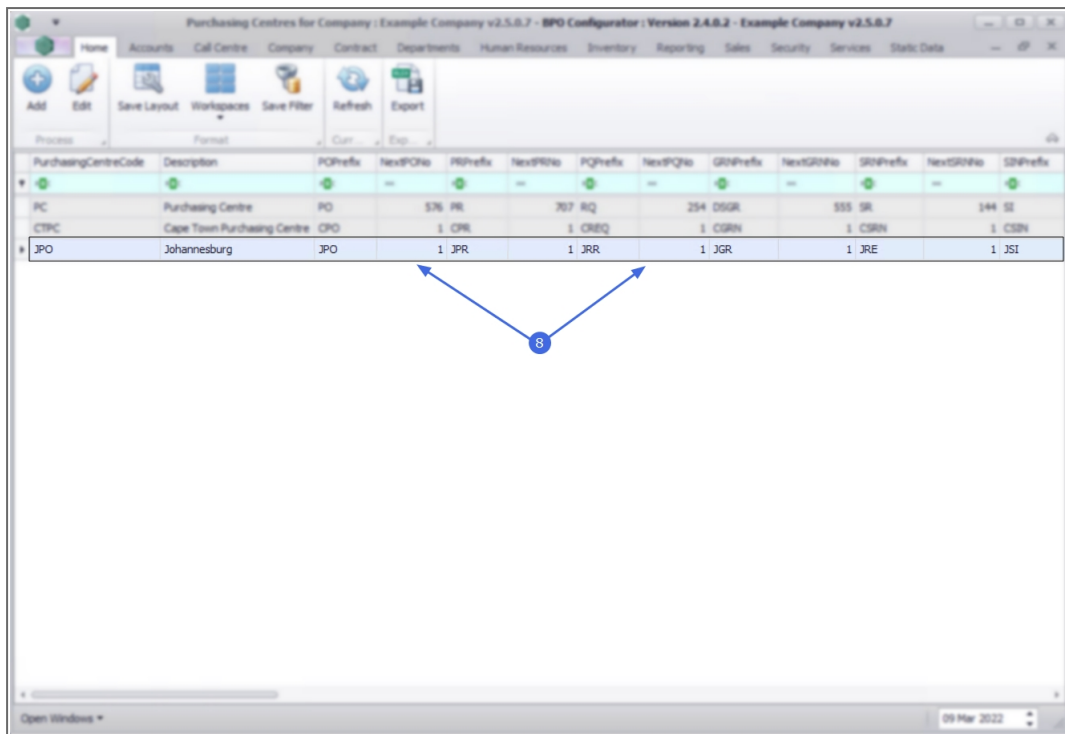


6. When you receive the **Process Validation** message to confirm;
  - **Purchasing centre saved successfully.**
7. Click on **OK**.





8. You will return to the updated ***Purchasing Centres for Company*** listing screen where you can view the new purchasing centre in the data grid.



- Use the **scroll bar** at the bottom of the screen to scroll to the **Amend Date** to display the date amendments were made to the purchasing centre for the site.

Purchasing Centres for Company : Example Company v2.5.0.7 - BPO Configurator : Version 2.4.0.2 - Example Company v2.5.0.7

AutoPrintPickSlip	SSMEnabled	AutoRequisition	UsageAvgPeriod	EnforceGRNMatching	AutoPrintLabel	SiteWideSelection	AmendDate	EmployeeNumber	FullName
No	Yes	No	30	1	Yes	No	10/03/2022	DUT001	Bianca Du Toit
No	No	No	0	1	Yes	No	25/10/2017	DUT001	Bianca Du Toit
No	No	Yes	0	19	Yes	Yes	11/03/2022	TIM	Joseph Timber

## Related Topics

- [Company - Edit Purchasing Centre](#)

MNU.091.003

