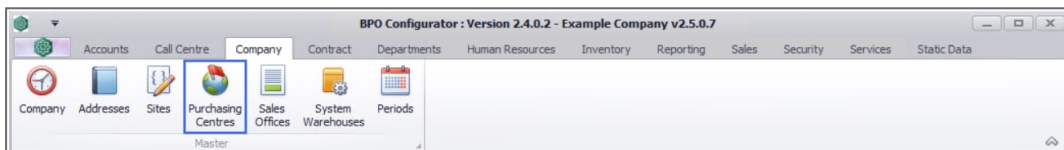


# COMPANY

## PURCHASING CENTRES – EDIT PURCHASING CENTRE

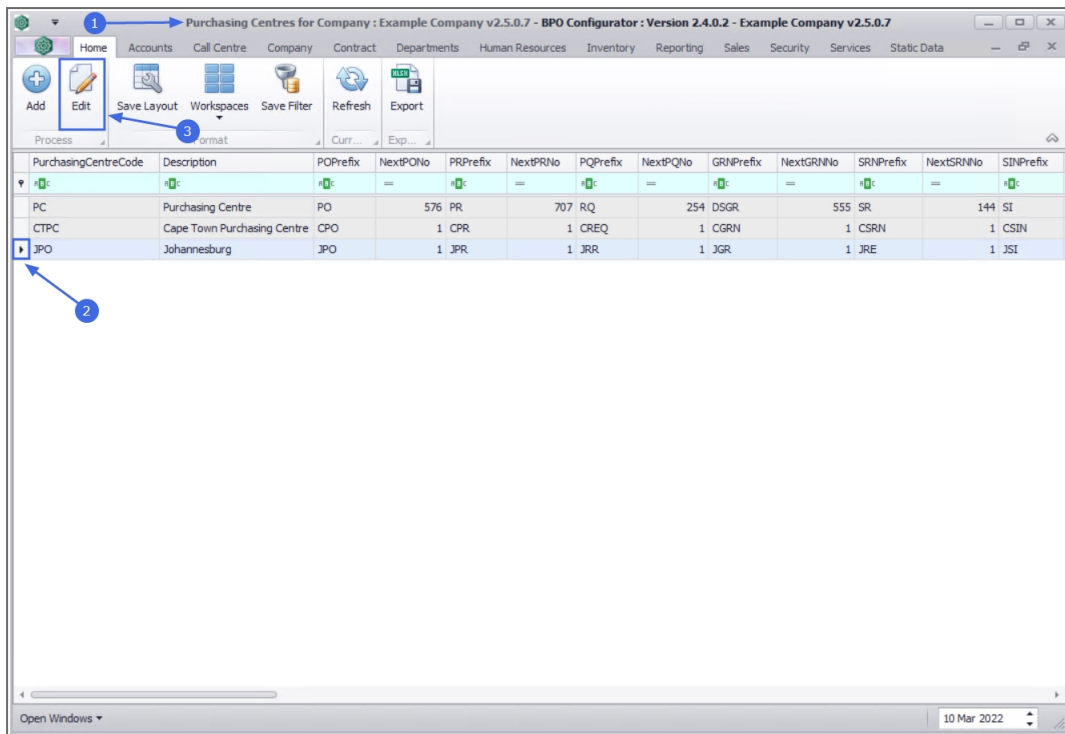
*Ribbon Access: Company > Purchasing Centres*



1. The ***Purchasing Centres for Company: [company name]*** screen will be displayed.
2. Click on the ***row*** of the purchasing centre you wish to make changes to.
3. Click on ***Edit***.




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

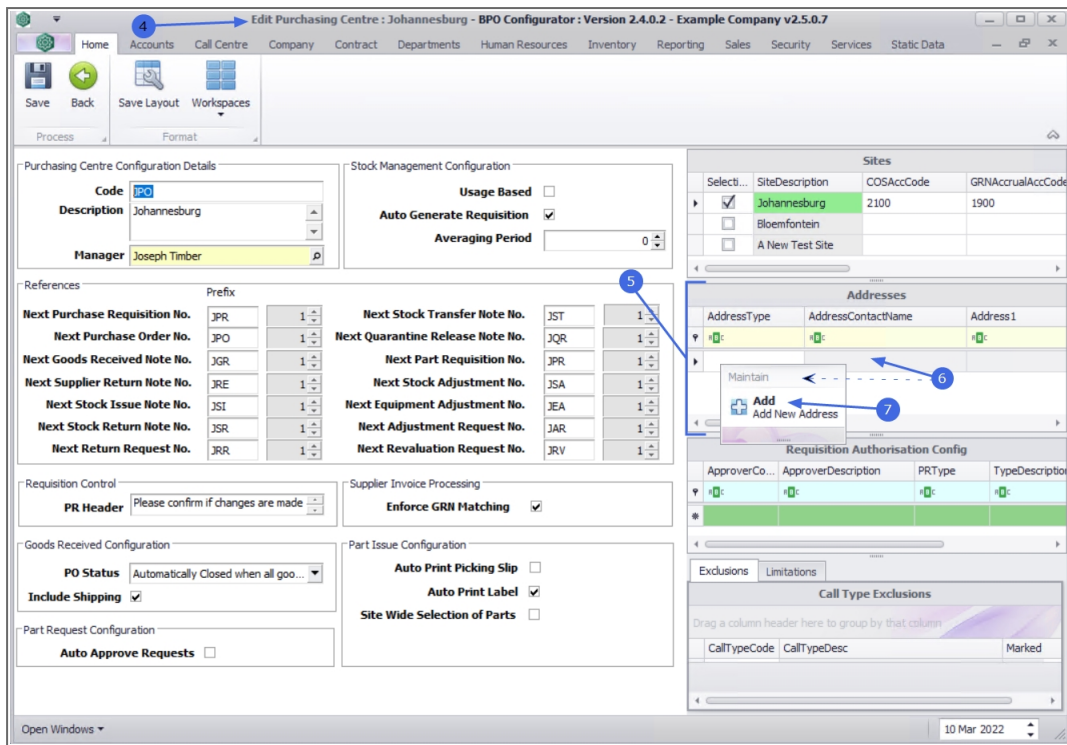


- The **Edit Purchasing Centre** : [purchasing centre name] screen will display.

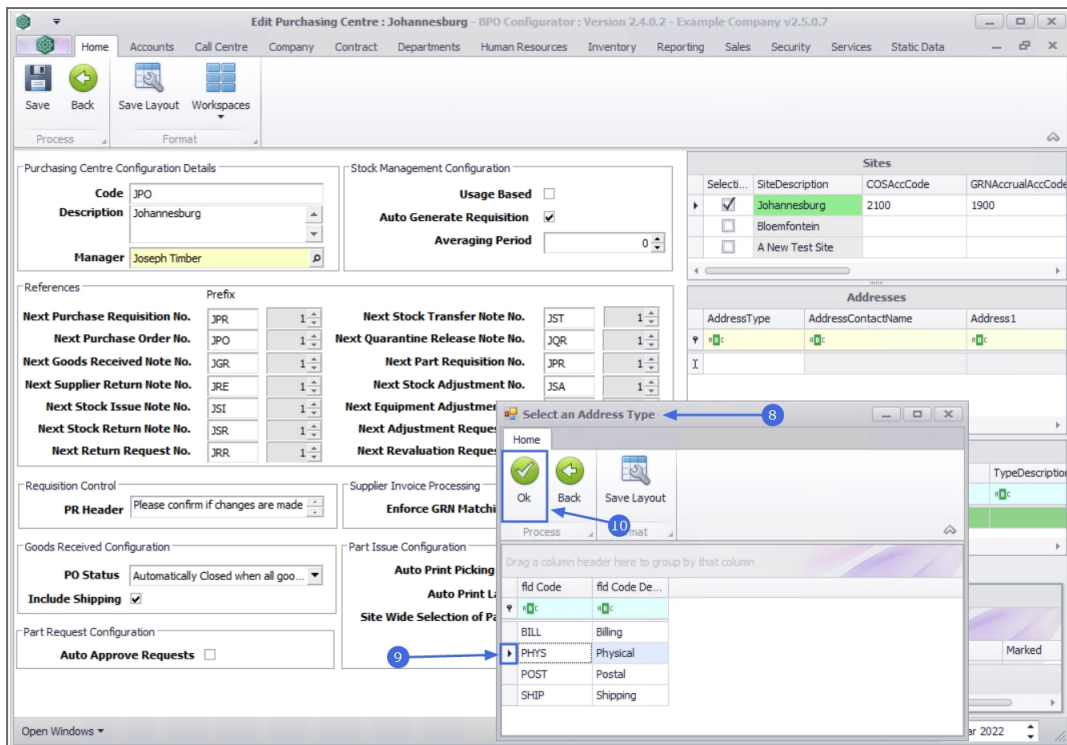
## PURCHASING CENTRE ADDRESS

A physical address type must be set up for the address to pull through on the purchase order.

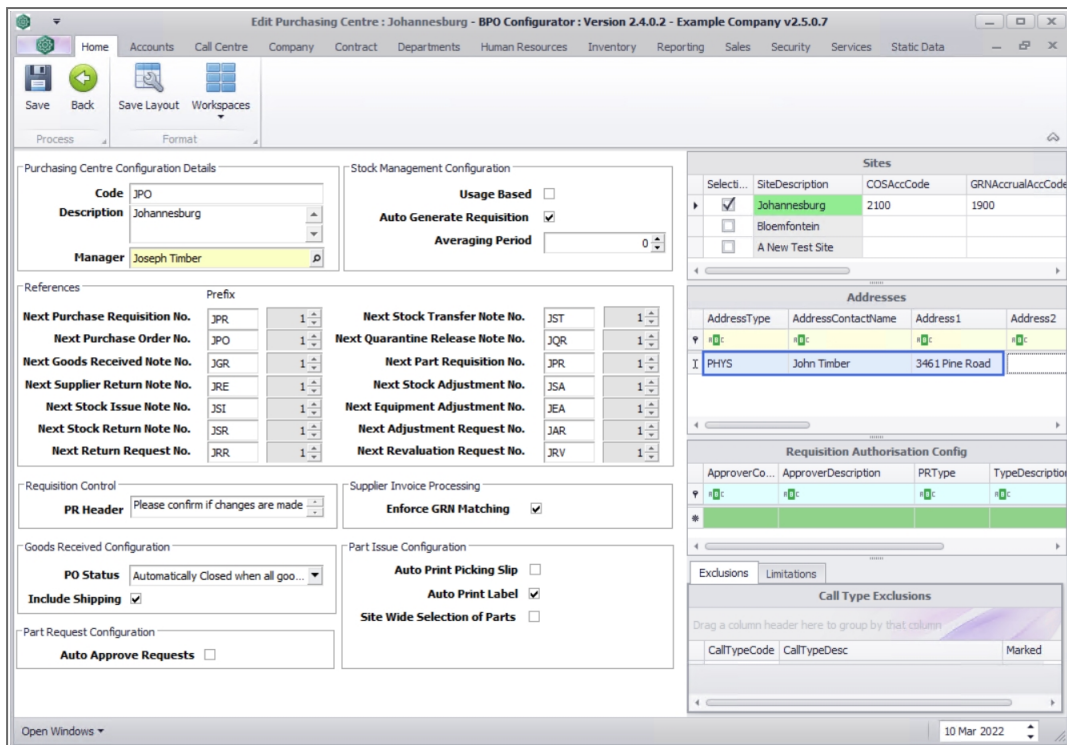
- In the **Addresses** frame,
-  **right click** on a **row** in the data grid to display the **Maintain** menu.
- Click on **Add** - Add New Address.



8. The **Select an Address Type** pop up screen will appear.
9. Click on the **row** of the **address type** you wish to add to the purchasing centre.
10. Click on **OK**.

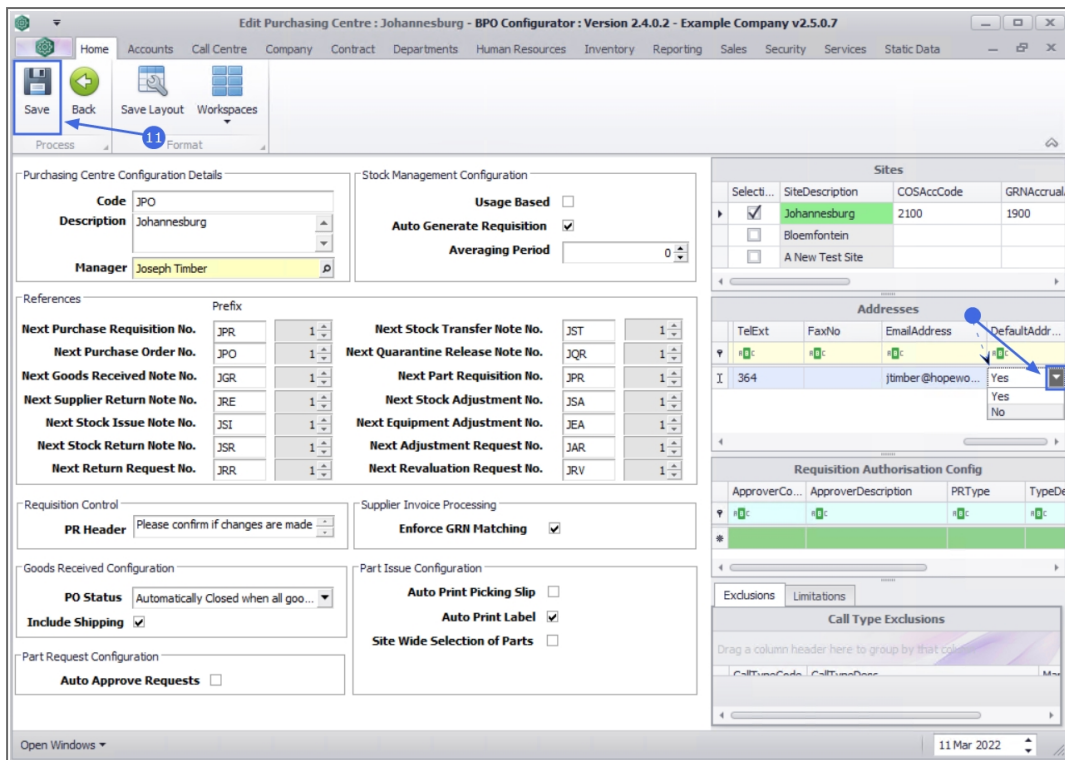


- **Address Type:** This field will be populated with the address type selected.
- **Address Contact Name:** Type in the contact name for this address.
- **Address 1:** Type in the first line of the address.
- **Address 2:** Type in the second line of the address.



Use the **scroll bar** at the bottom of the frame to scroll to the hidden columns, to continue adding the address details.

- **Address 3:** Type in the third line of the address.
- **City:** Type in the city for this address.
- **Postcode:** Type in the postal code for this address.
- **County:** Type in the county for this address, if applicable.
- **Country:** Type in the country for this address.
- **TelNo:** Type in the telephone number for this address.
- **TelExt:** Type in the extension number for the address contact.
- **FaxNo:** Type in the fax number for this address, if applicable.
- **EmailAddress:** Type in the contact email address.
- **Default Address:** Click on the down **arrow** to select;
  - **Yes** if this **is** to be the default address for this purchasing centre.
  - **No** if this is **not** to be the default address for this purchasing centre.



## REQUISITION AUTHORISATION CONFIGURATION

Stores can raise a purchase requisition for stock requirements, whether to replenish stock levels, or to buy for client demand. This requisition must then be approved by the purchasing or general manager.

Two authorisation levels can be set up:

- First authorisation by the *Purchasing Manager* for a set requisition total value.
- Second authorisation by the *General Manager* when the requisition total *exceeds* the first authorisation level.

The result of this authorisation set up can be viewed in the [Introduction to Purchase Requisitions](#) manual under [Approval Matrix](#).

1. In the **Requisition Authorisation Config** frame,
2. Click in the **text box** of the empty row below **Approver Code** to display the **ellipsis** button.
3. Click on the ellipsis button to display the **Select an Approver Code** screen.
4. Click on the **row** of the **Approver code / description** you wish to **link** to the requisition authorisation configuration.
5. Click on **OK**.

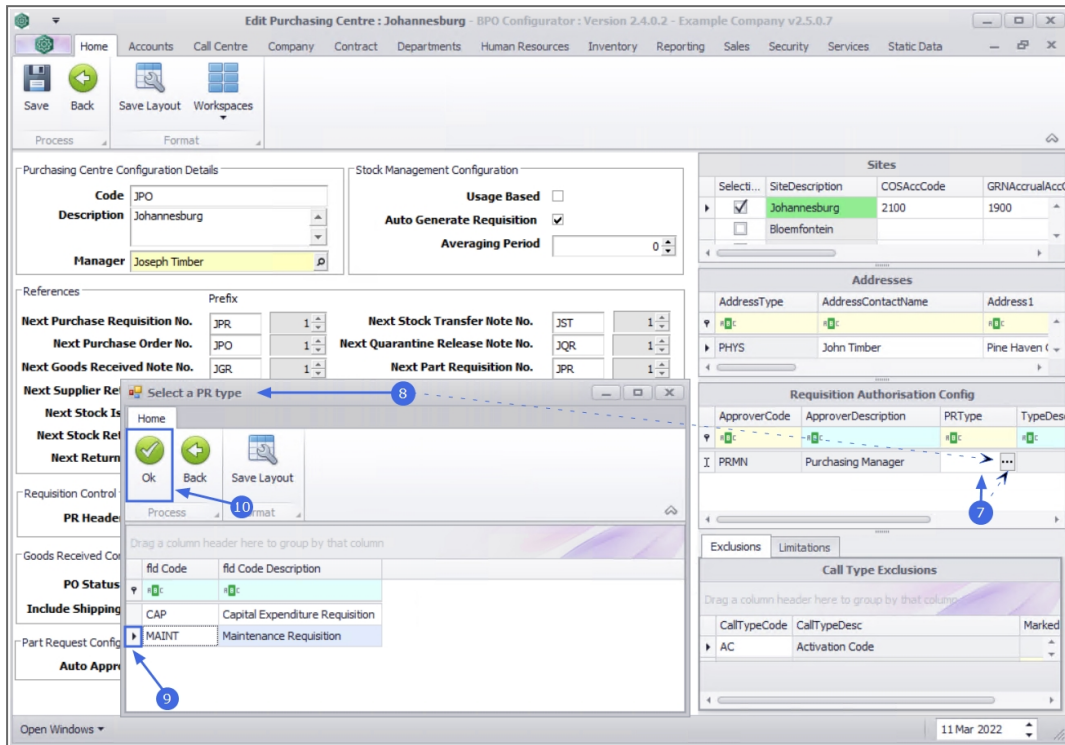


Note that as this is the first authorisation level, the **Purchasing Manager** has been selected.

The screenshot shows the 'Edit Purchasing Centre' application window. The 'Requisition Authorisation Config' table is visible, with an empty row selected. A 'Select an Approver Code' dialog is open, showing a list of approvers. The 'PRMNM' (Purchasing Manager) is selected. The 'OK' button in the dialog is highlighted. Numbered callouts 1-5 point to the ellipsis button, the dialog, the selected row, the 'PRMNM' row, and the 'OK' button respectively.

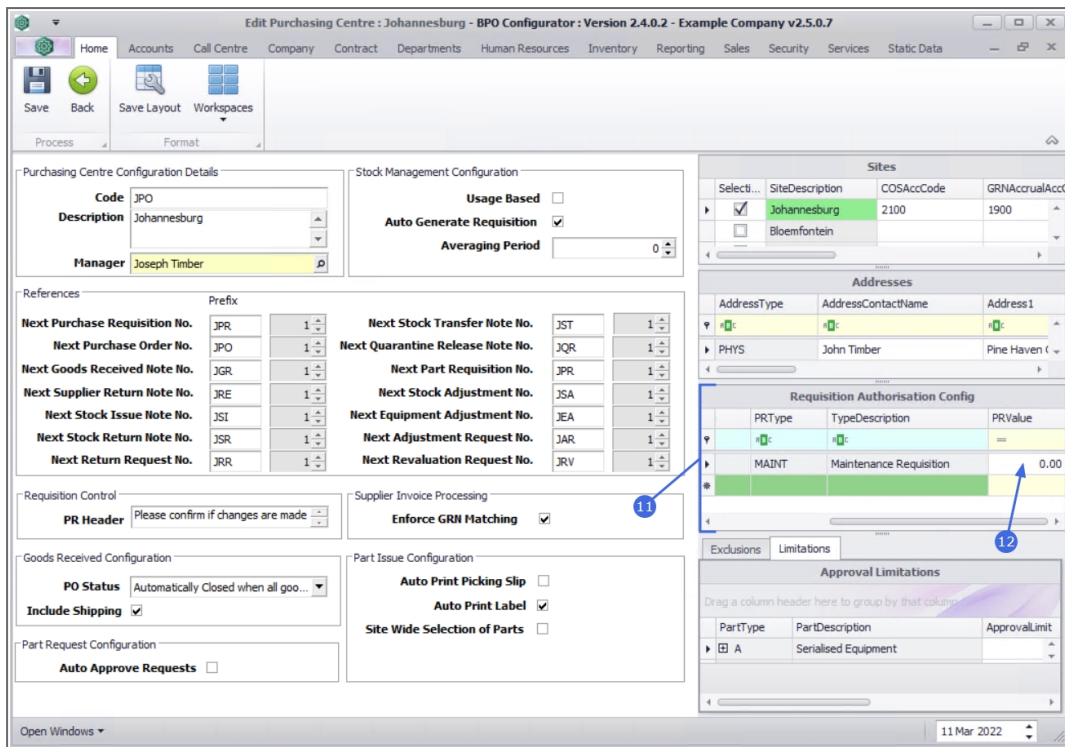
6. The **Approver Code** and **Approver Description** will be populated with the selected approver.
7. Click in the **PR Type** text box to display the **ellipsis** button
8. Click on this button to display the **Select a PR type** screen.

9. Click on the **row** of the **PR type** you wish to **link** to the requisition authorisation configuration.
10. Click on **OK**.

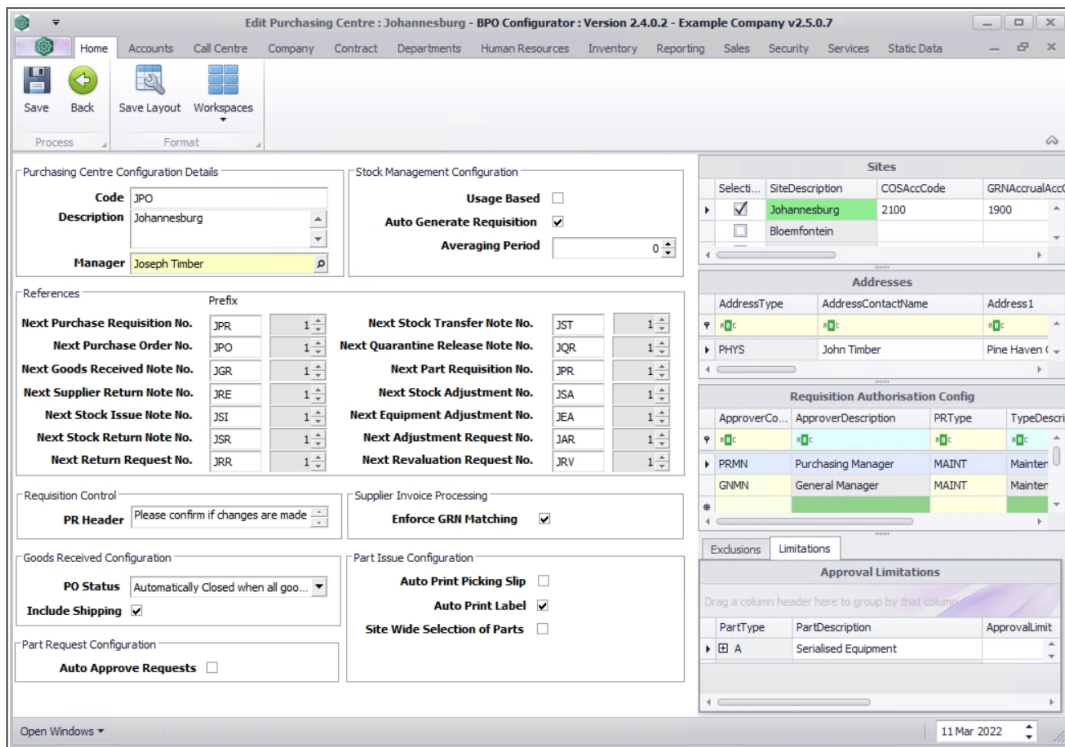


11. The **PR Type** and **Type Description** will be populated with the selected PR type.
12. Click in the **PR Value** text box to type in, or use the reveal arrow indicators to select the **PR authorisation limit**.





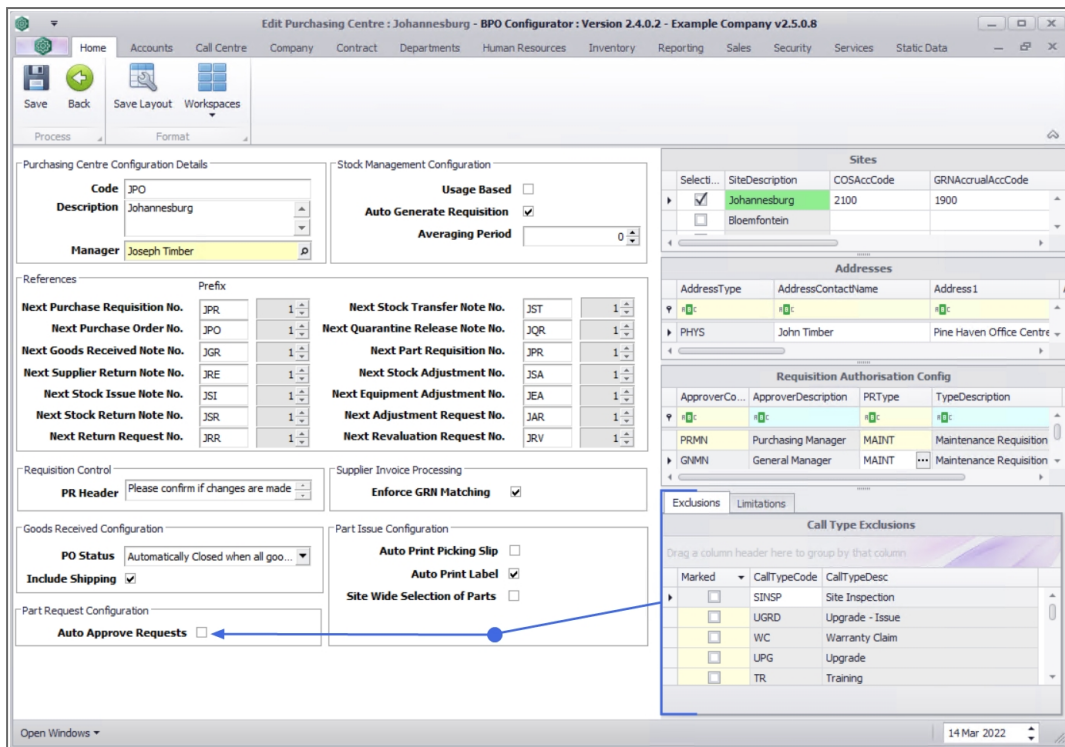
13. Continue to add the **second** authorisation for the **General Manager** following the process above. The General Manager will be created to authorise any purchase requisition above the PR Value specified for the Purchasing Manager.



## APPROVAL EXCLUSIONS

The Exclusions frame work in conjunction with the Part Request Configuration when the Auto Approve Requests have not been selected.

- Click to select the **Call Type** you wish to exclude from approval, if any.



## APPROVAL LIMITATIONS

Approval Limitations needs to be specified when the Auto Approve Requests option has not been selected.

An approval limit needs to be set for;

- A-Class Serialised Equipment,
- B-Class Serialised Spares, and
- C-Class Serialised Parts

When stock items are purchased and the value of the purchase is below the approval limit, then the *Approval Manager* will be *greyed out* on the Part Request screen.

When stock items are purchased and the value of the purchase is above the approval limit specified, then the *Approval Manager* selection is available

on the Part Request screen. You can then choose to select if the Part Request should be approved. In some instances where an item was pre-approved, the approval manager is then not selected.



Refer to [Work Orders - Part Requests](#) to view the availability of the Approval Manager on the Part Requests screen.

- **Marked:** Click to select the part type you wish to set an approval limitation for.
- **Part Type and Part Description:** These fields would have been hard coded for A-Class, B-Class and C-Class part type and descriptions.
- **Approval Limit:** Click in the text box to type in or use the *arrow* indicators to specify the approval limit amount.
- **Approver Code:** Click on the down *arrow* to select the *Approver Code* from the drop-down list.
- **Approver Code Description:** Click to type in the *approver code description* for the part type.

The screenshot shows the 'Edit Purchasing Centre' software interface. The window title is 'Edit Purchasing Centre: Johannesburg - BPO Configurator: Version 2.4.0.2 - Example Company v2.5.0.8'. The interface is divided into several panels. On the right, there are tables for 'Sites', 'Addresses', and 'Requisition Authorisation Config'. At the bottom right, there is an 'Approval Limitations' table. A blue arrow points from the 'Auto Approve Requests' checkbox in the 'Part Request Configuration' panel to the 'Marked' column in the 'Approval Limitations' table.

Select...	SiteDescription	COSAccCode	GRNAccrualAccCode	StockAccCode
<input checked="" type="checkbox"/>	Johannesburg	2100	1900	1200
<input type="checkbox"/>	Bloemfontein			

AddressType	AddressContactName	Address1	Address2	Ad
PHYS	John Timber	Pine Haven Office Centre	364 Pine Haven	

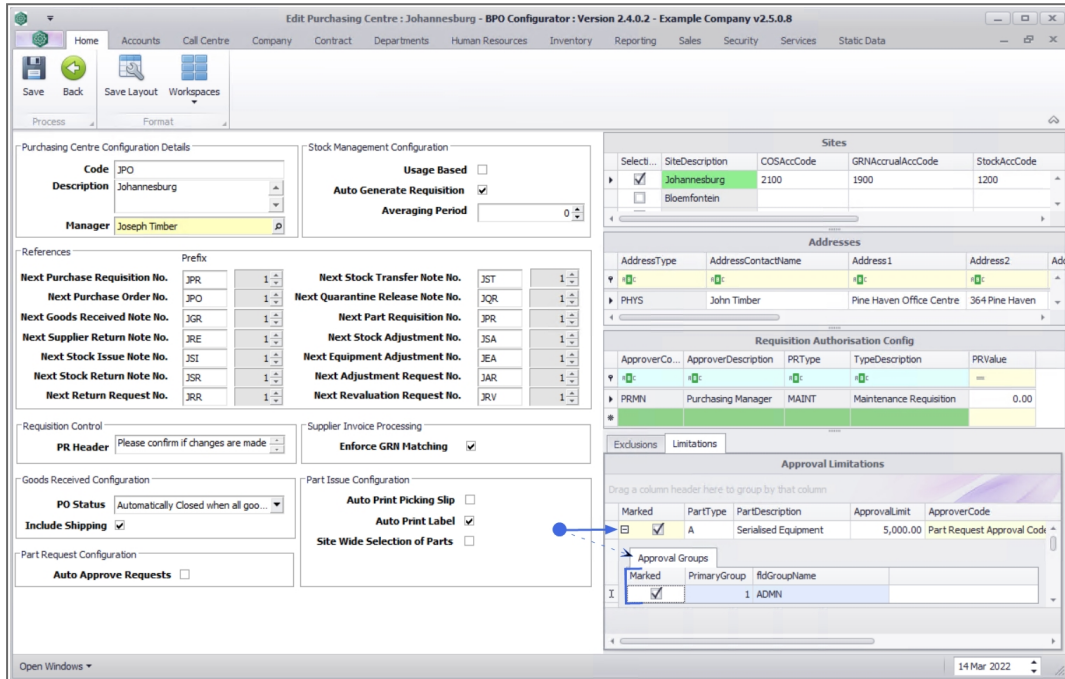
ApproverCo...	ApproverDescription	PRType	TypeDescription	PRValue
PRMN	Purchasing Manager	MAINT	Maintenance Requisition	0.00

Marked	PartType	PartDescription	ApprovalLimit	ApproverCode
<input checked="" type="checkbox"/>	A	Serialised Equipment	5,000	Part Request Approval Code Fc
<input type="checkbox"/>	B	Serialised Spares	0.00	
<input type="checkbox"/>	C	Non Serialised Parts	0.00	

## APPROVAL GROUPS

- Click on the **expand button** for the part type to display the **Approval Groups** frame.
- Click to select the **Group(s)** that will be able to approve the selected part type.



## SAVE PURCHASE CENTRE CONFIGURATION

14. Click on **Save**.
15. When you receive the **Process Validation** message to confirm;
  - **Purchasing centre saved successfully.**
16. Click on **OK**.

17. You will return to the *Purchasing Centres for Company* listing screen.

PurchasingCentreCode	Description	POPrefix	NextPONo	PRPrefix	NextPRNo	PQPrefix	NextPQNo	GRNPrefix	NextGRNNo	SRNPrefix	NextSRNNo	SINP
PC	Purchasing Centre	PO	576	PR	707	RQ	254	DSGR	555	SR	144	SI
CTPC	Cape Town Purchasing Centre	CPO	1	CPR	1	CREQ	1	CGRN	1	CSRN	1	CSIN
JPO	Johannesburg	JPO	1	JPR	1	JRR	1	JGR	1	JRE	1	JSI

**Related Topics**

- [Work Orders - Part Requests](#)

MNU.091.004

