

SALES

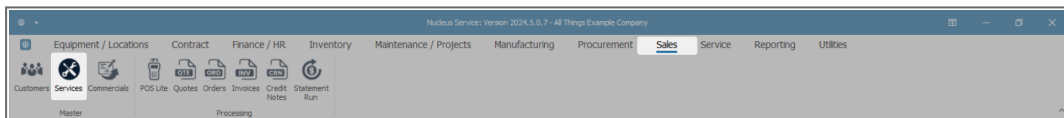
SERVICES – PURCHASE ORDERS

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, Addresses and Delivery Instructions can be added for a Purchase Order.

Ribbon Select **Sales > Services**



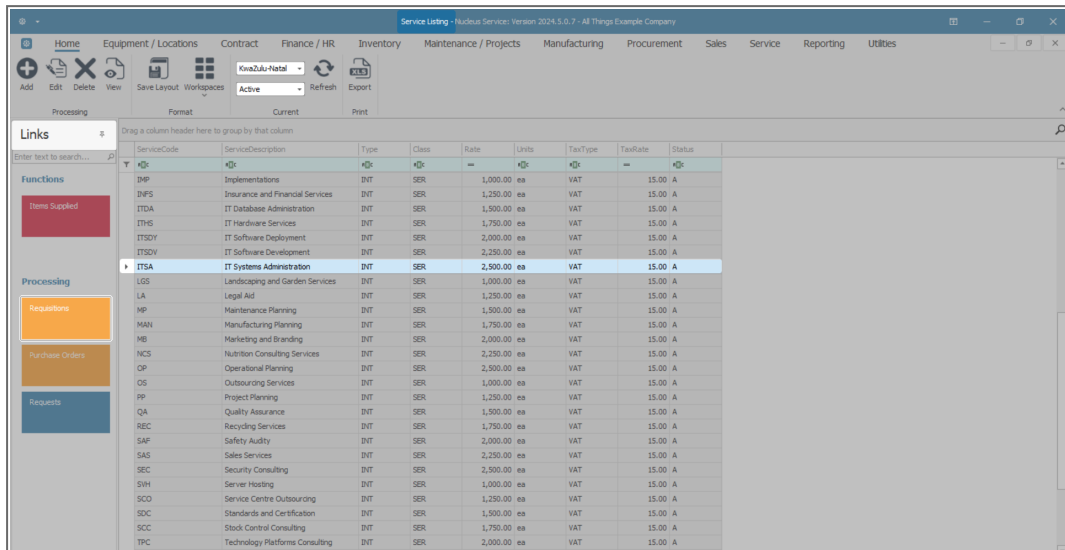
- The **Service** listing screen will be displayed.
- The **Site** filter will be set according to your company configuration. If required, select the **Site** as required.
 - The example has **KwaZulu-Natal** selected.

Note: Refer to [Site Selection](#) for more information.

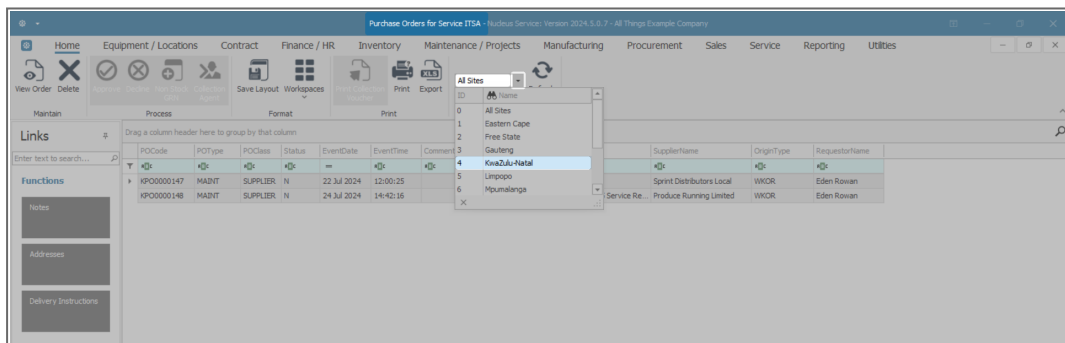
- The State filter will default to '**Active**' upon opening, and you will most likely be working with Services in this status.
 - Click on the **drop-down arrow** to change the status to **Inactive** if required.

Note: Refer to [State/Type Selections](#) for more information.

- Select the **row** of the Service you wish to work with.
- Click on the **Purchase Orders** tile in the **Links** panel.

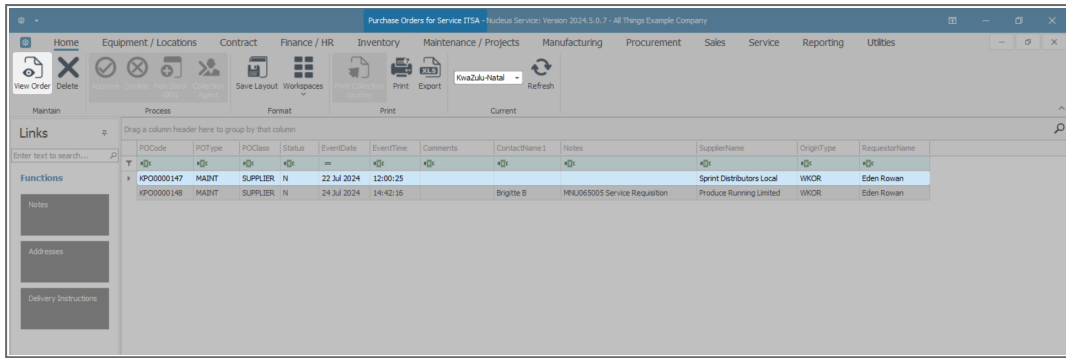


- The **Purchase Order for Service []** screen will be displayed.
- All the services that have been created will display on the screen.
- Click on the drop-down arrow to select the correct **Site**.
 - In this image, **KwaZulu-Natal** has been selected.



VIEW PURCHASE ORDER

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



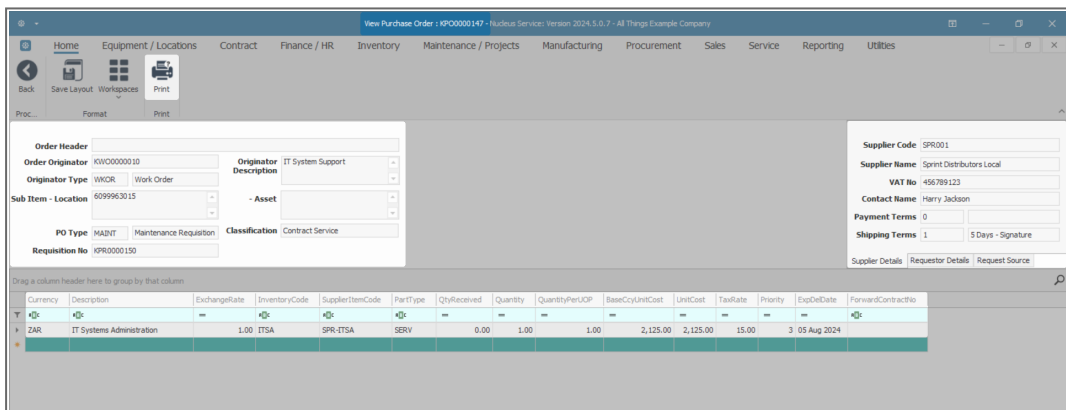
- The **View Purchase Order : PO []** screen will display.



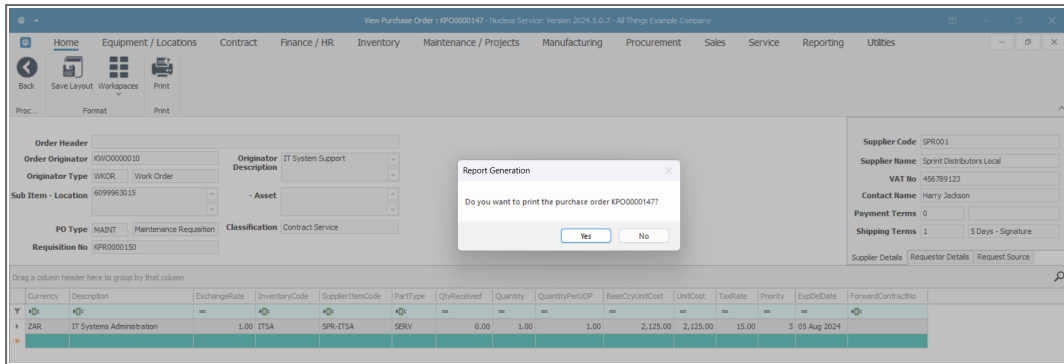
Note that this is a view only screen, you will not be able to make any changes to the purchase order from this screen.

PRINT PURCHASE ORDER

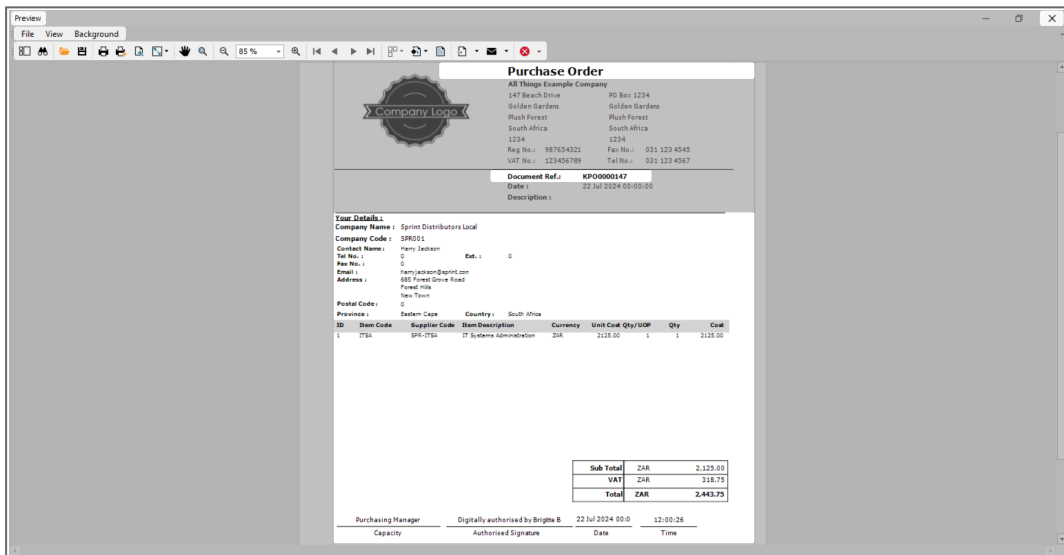
- Click on **Print** to print a copy of the purchase order.



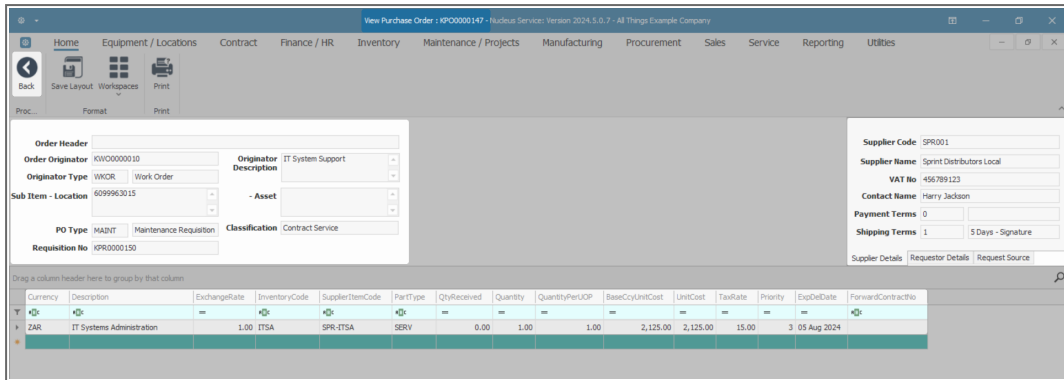
- When you receive the **Report Generation** message to confirm -
 - Do you want to print the purchase order PO []?
- Click on **Yes**.



- The **Purchase Order** will display in the **Preview** screen.
- 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.
- **Close** the screen to return to the **View Purchase Order** screen.

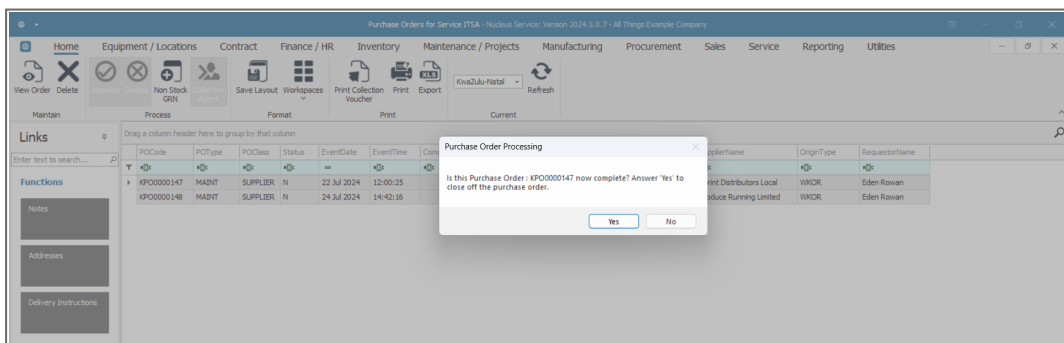


- Click on **Back** or close the screen to return to the **Purchase Order for Service listing** screen.

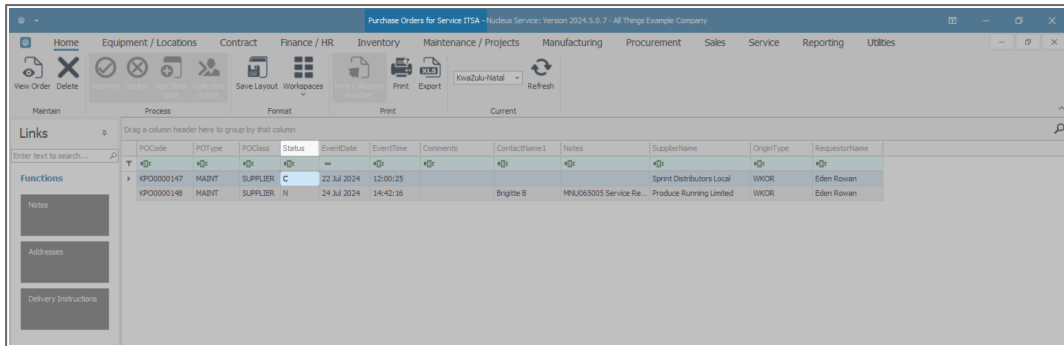


DELETE / CLOSE A PURCHASE ORDER

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



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



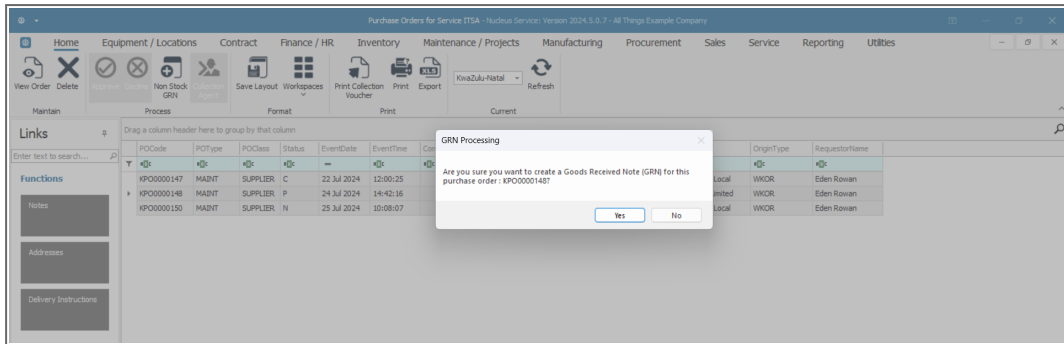
CREATE A NON STOCK GOODS RECEIVED NOTE (GRN)

- From the **Purchase Orders for Service** [] screen -
- Ensure that the correct **Site** has been selected.
 - Click on the **drop-down arrow** to select an alternative site from the drop-down list.
- Click on the **row** of the Purchase Order you want to create a Non Stock GRN for. (The GRN must be in **Printed** status. Refer to [Introduction to Non-Stock GRNs.](#))
- Click on **Non Stock GRN**.



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

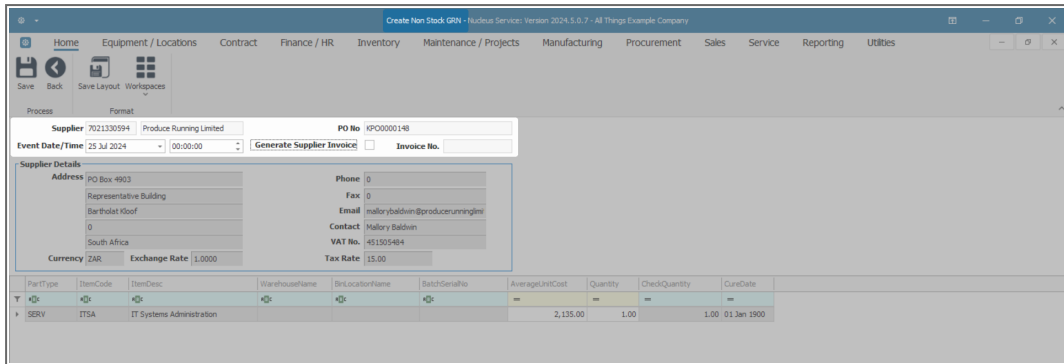
- When you receive the **GRN Processing** message to confirm -
 - **Are you sure you want to create a Goods Received Note (GRN) for this purchase order : PO []?**
- Click on **Yes**.



- 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 Purchase Order Number.
- **Event Date/Time:** The date will display the current date.
 - **Date:** Type in or click on the drop-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.



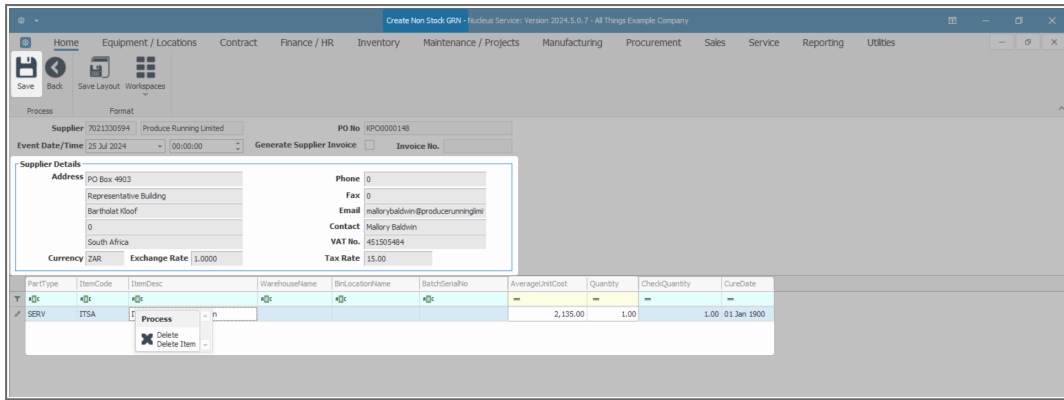
SUPPLIER DETAILS

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

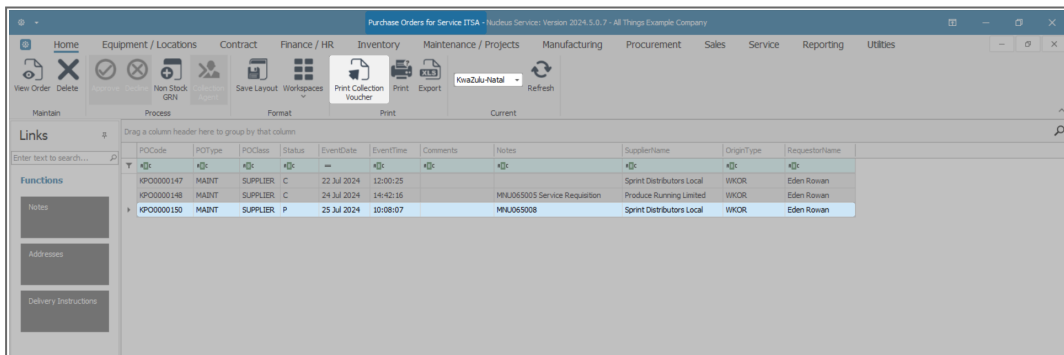
- Remove any Non Stock Items that you wish to exclude, for example an Inspection, a Call Out or a Cleaning Fee.
-  **Short cut key: Right click** on the selected **row** in the data grid to display the **Process** menu list. Click on **Delete**.
- When you receive the **Delete Row** message to confirm -
 - **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.
- Click in the **Average Unit Cost** text box to type in or use the directional arrows to adjust the unit cost.
- Click in the **Quantity** text box to type in or use the directional arrows to adjust the quantity.
- Click on **Save**.

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



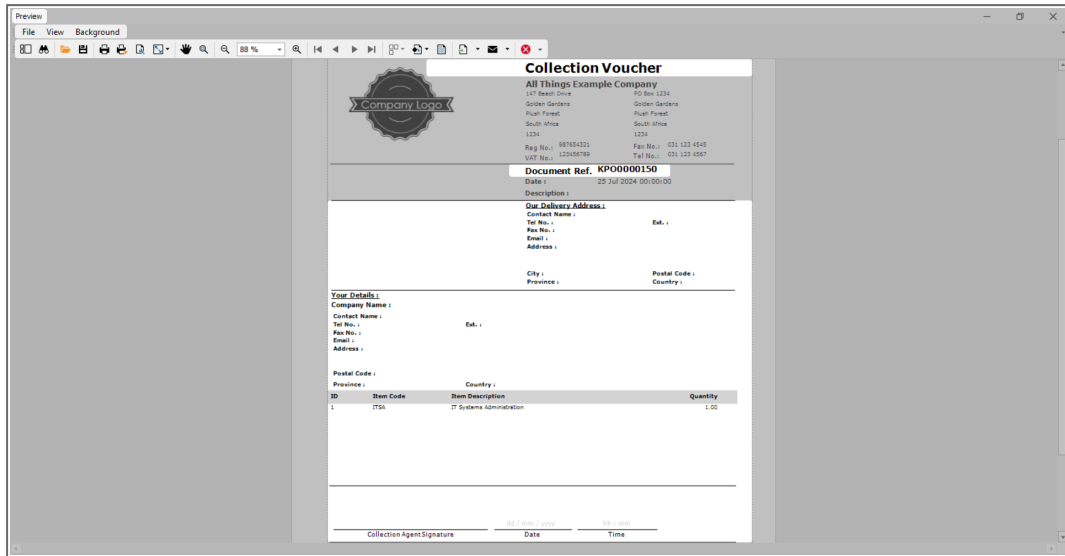
PRINT COLLECTION VOUCHER

- From the **Purchase Orders for Service []** screen,
- Ensure that the correct **Site** has been selected.
 - Click on the **drop-down arrow** to select an alternative site from the drop-down list.
- Click on the **row** of the Purchase Order you wish to print a Collection Voucher for. (The Purchase Order must be in **Printed** status. Refer to [Print a Purchase Order.](#))
- Click on **Print Collection Voucher**.



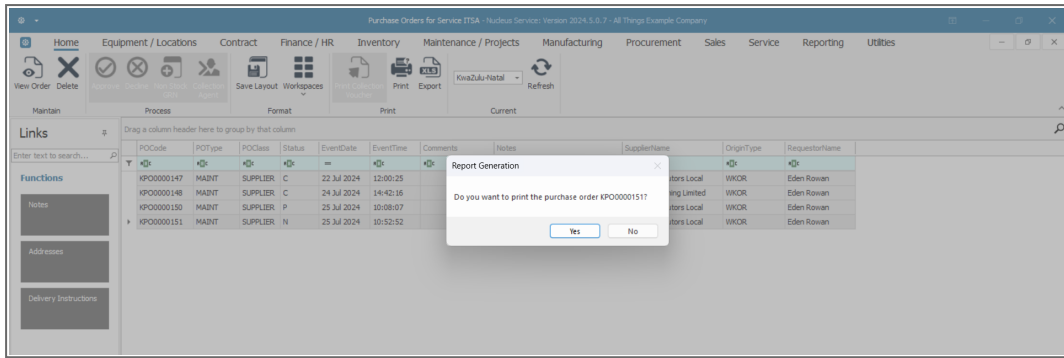
- The Collection Voucher will display in the **Preview** screen.
- From this screen you can make cosmetic changes to the document as well as **Save, Print, Add a Watermark, Export, or Email** the Collection Voucher.

- Click on **Close** to return to the **Purchase Orders for Service** screen.

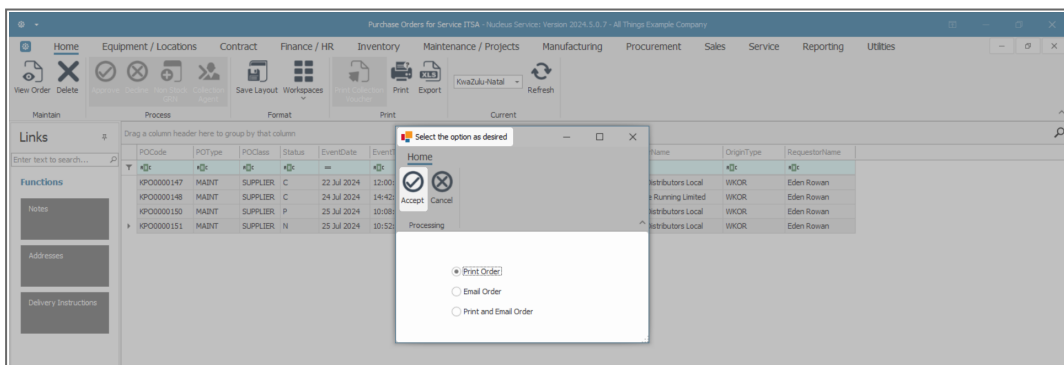


PRINT PURCHASE ORDER

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

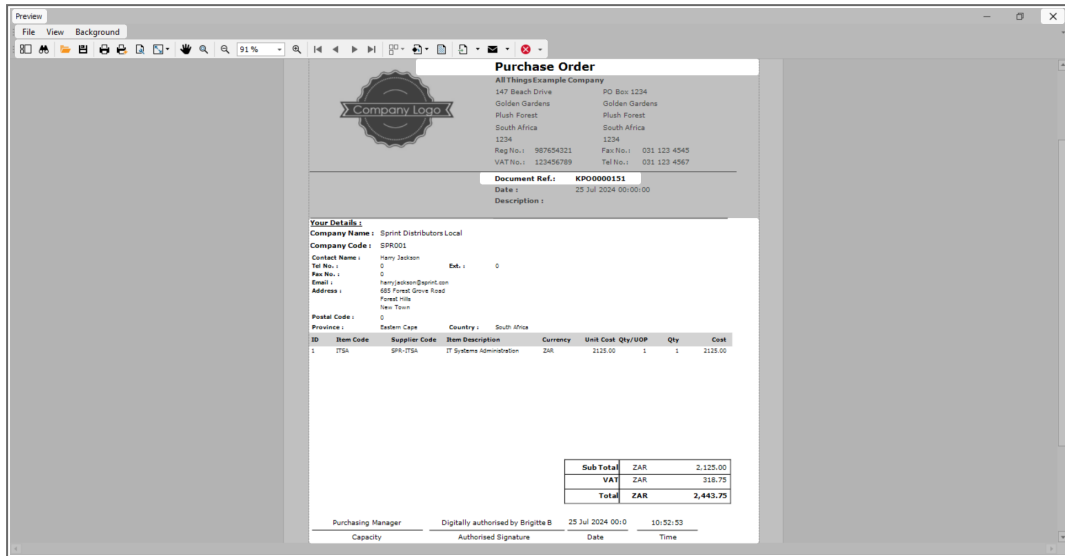


- The **Select the option as desired** screen will display.
 - **Print Order** will open the purchase order in the Report Preview to view, print, export or email.
 - **Email Order** will attach documents, add recipients, the system will create a .PDF and email the Invoice.
 - **Print and Email Order** will display both the Report Preview and Email screens.
- For the purpose of this manual **Print Order** has been selected.
- Click on **Accept**.



- The Purchase Order will display in the **Preview** screen.
- 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.

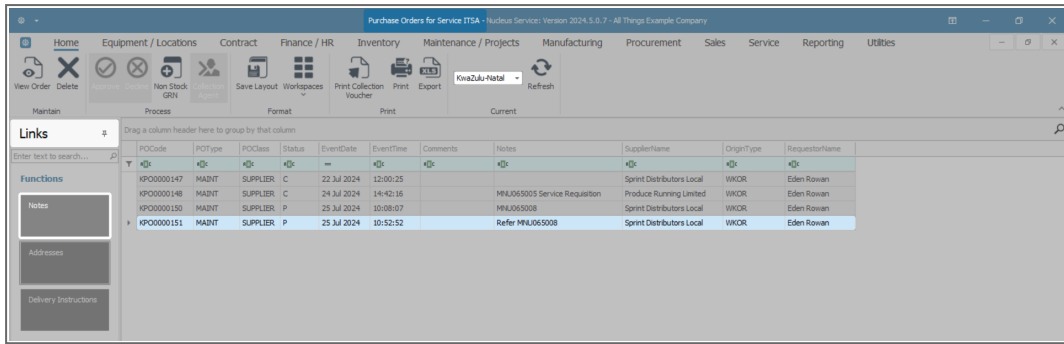
- Click on **Close** to return to the **Purchase Orders for Service** screen.



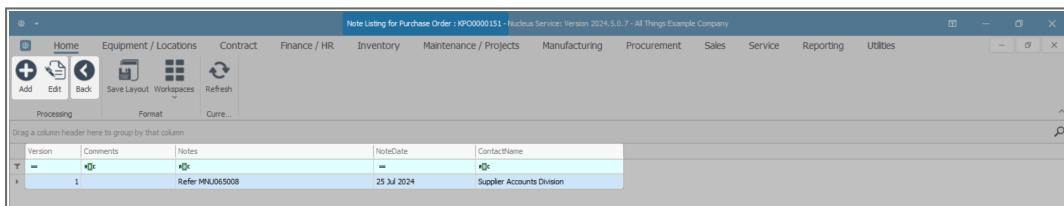
FUNCTIONS TILES

NOTES

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

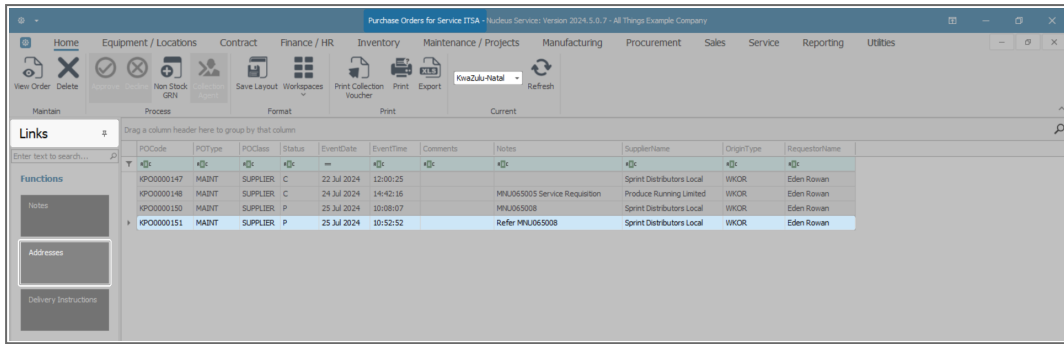


- The **Note Listing for Purchase Order : PO []** screen will display.
- Any notes linked to the Purchase Order will display on the listing screen.
- Click on **Add** to create a note or, click on **Edit** if you need to make changes to an existing note. For a detailed handling of the topic refer to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

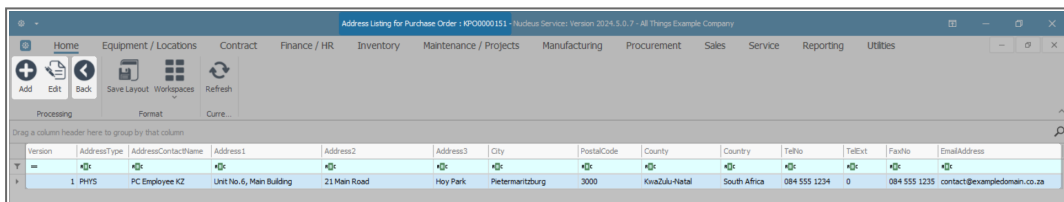


ADDRESSES

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

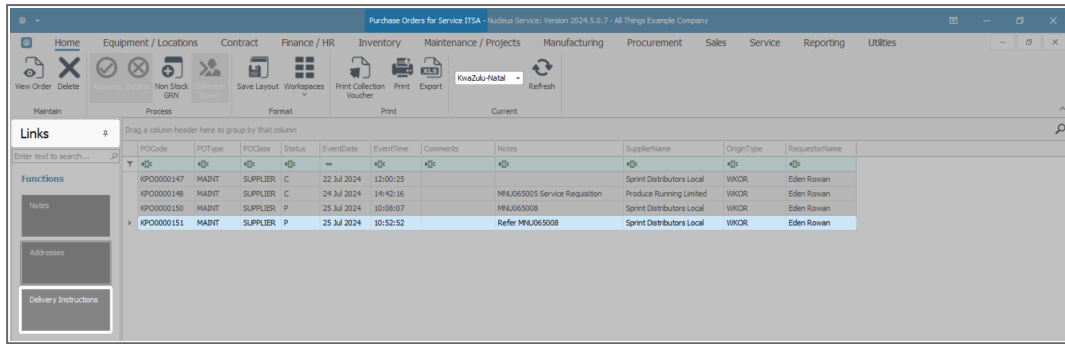


- The **Address Listing for Purchase Order : PO []** screen will display.
- Click on **Add** to add an address, or click on **Edit** if you need to make changes to an existing address. For details on how to Add and Edit Addresses on a Purchase order, refer to [Parts - Purchase Orders - Addresses](#).
- Click **Back** to return to the **Purchase Orders for Service** screen.

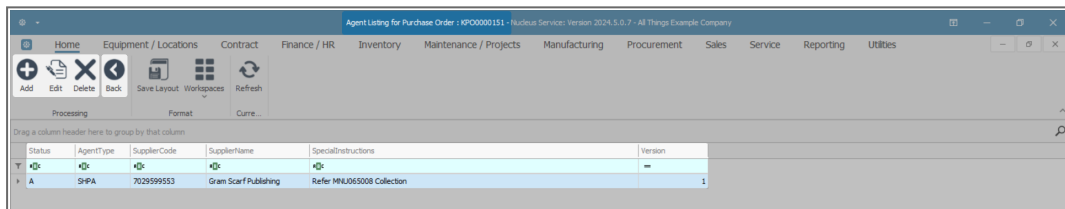


DELIVERY INSTRUCTIONS

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



- The **Agent Listing for Purchase Order : PO []** screen will display.
- 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](#).
- Click **Back** to return to the **Purchase Orders for Service** screen.



Related Topics

[Sales Services - Add a Service](#)

[Sales Services - Edit a Service](#)

[Sales Services - Delete a Service](#)

[Sales Services - View a Service](#)

[Sales Services - Link a Supplier](#)

[Sales Services - Add a Purchase Requisition](#)

[Sales Services - Purchase Orders](#)

[Sales Services - View Service Request List](#)

[Sales Services - Items Supplied Add / Link Supplier](#)



[Sales Services - Items Supplied Edit Supplier](#)

[Sales Services - Items Supplied Delete Supplier](#)

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