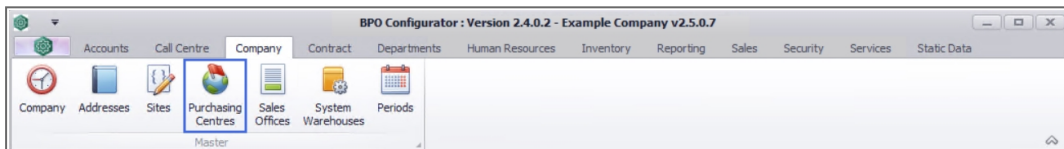We are currently updating our site; thank you for your patience.

COMPANY

PURCHASING CENTRES – EDIT PURCHASING CENTRE
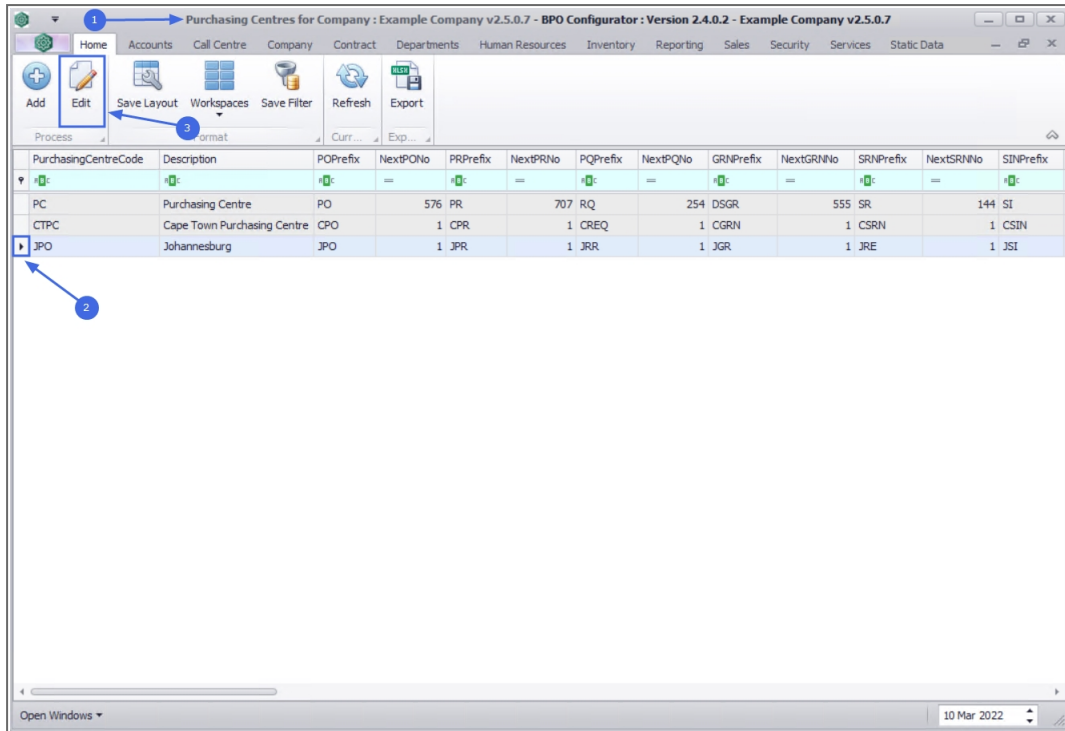
Ribbon Access: Company > Purchasing Centres

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

Short cut key: Right click to display the **Process** menu list. Click on **Edit**.
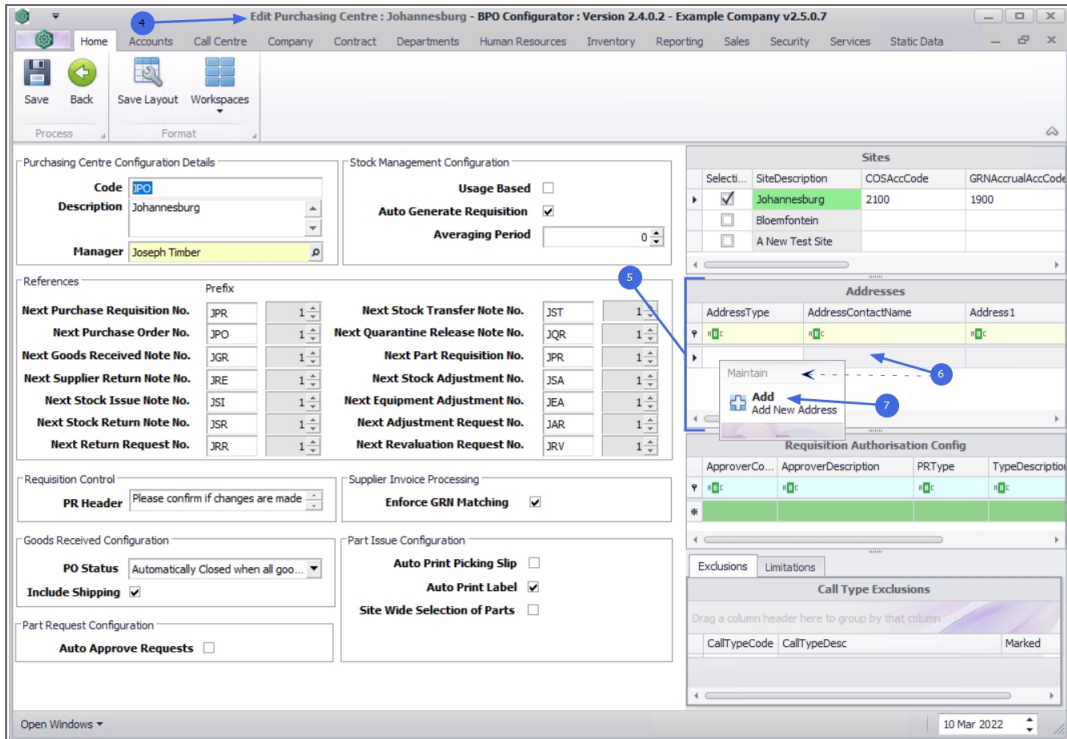
4. The **Edit Purchasing Centre : [**purchasing centre name**]** screen will display.

PURCHASING CENTRE ADDRESS

A **physical** address type <u>must</u> be set up for the address to pull through on the purchase order.
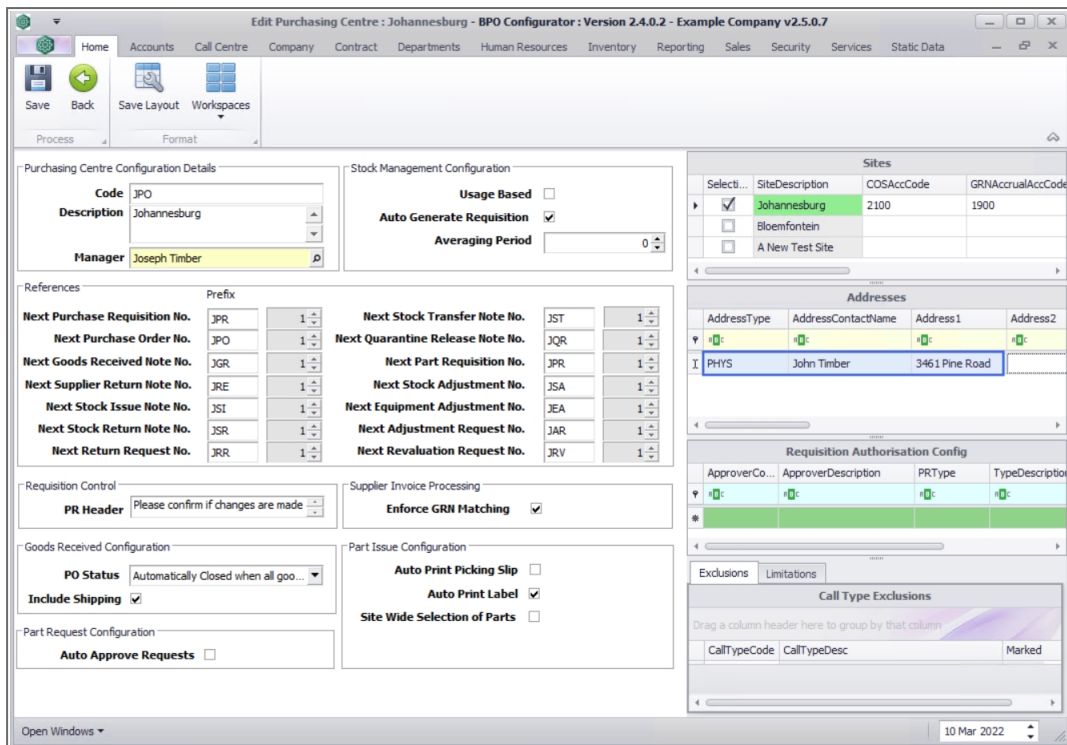
5. In the **Addresses** frame,

6. ⟳ **right click** on a **row** in the data grid to display the **Maintain** menu.

7. 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**.
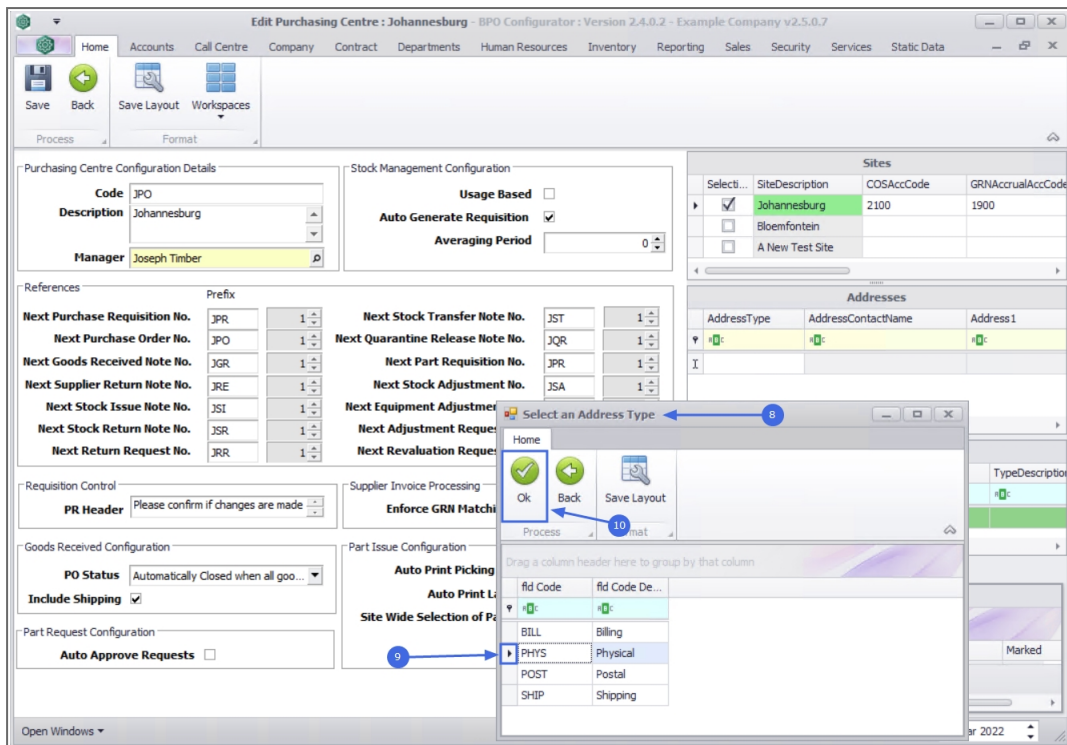
- **Address Type:** This field will be populated with the address type selected.
- **Address Contact Name:** Type in the contact name for this address.
- **Address 1:** Type in the first line of the address.
- **Address 2:** Type in the second line of the address.

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.
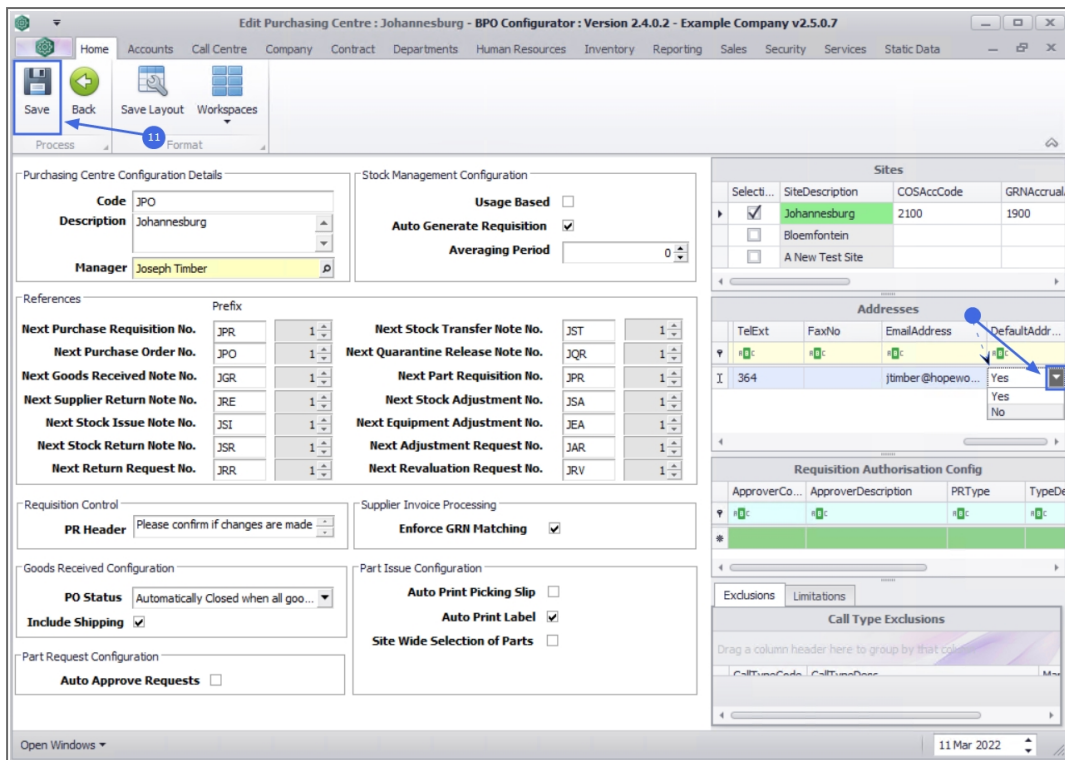
REQUISITION AUTHORISATION CONFIGURATION

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.


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**.
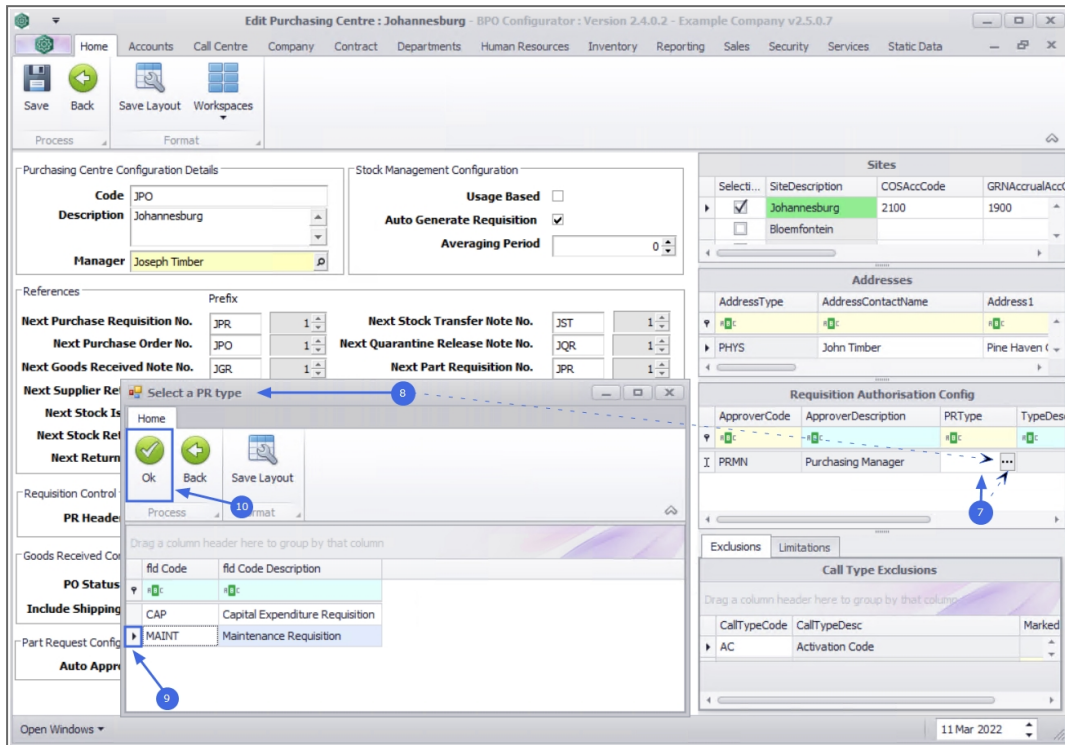
11. The **PR Type** and **Type Description**with be populated with the selected PR type.
12. Click in the **PR Value** text box to type in, or use the reveal arrow indicators to select the **PR authorisation limit**.
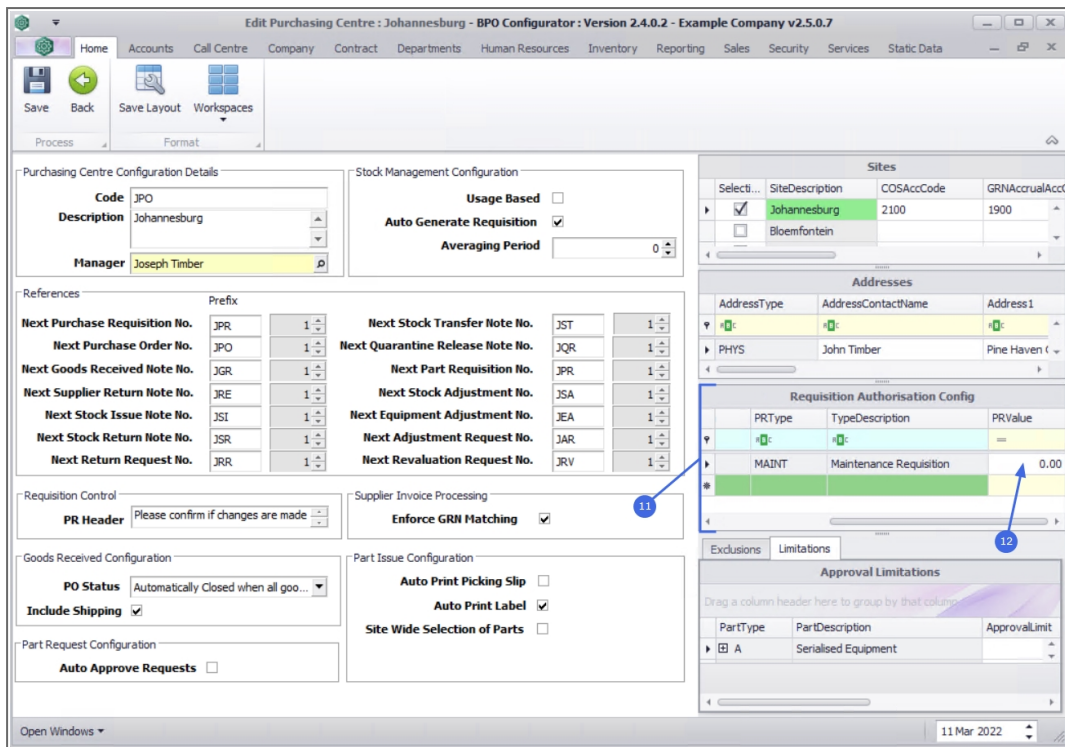
13. Continue to add the **second** authorisation for the **General Manager** following the process above. The General Manager will be created to authorise any purchase requisition <u>above</u> the PR Value specified for the Purchasing Manager.
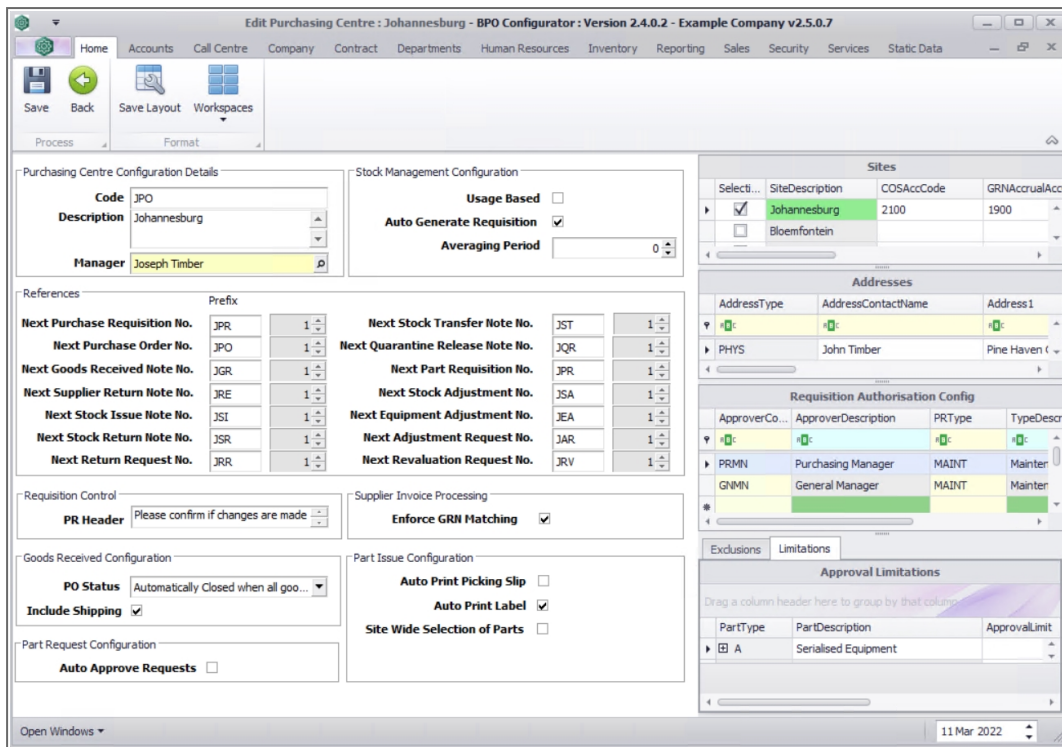
APPROVAL EXCLUSIONS

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 <u>exclude</u> from approval, if any.
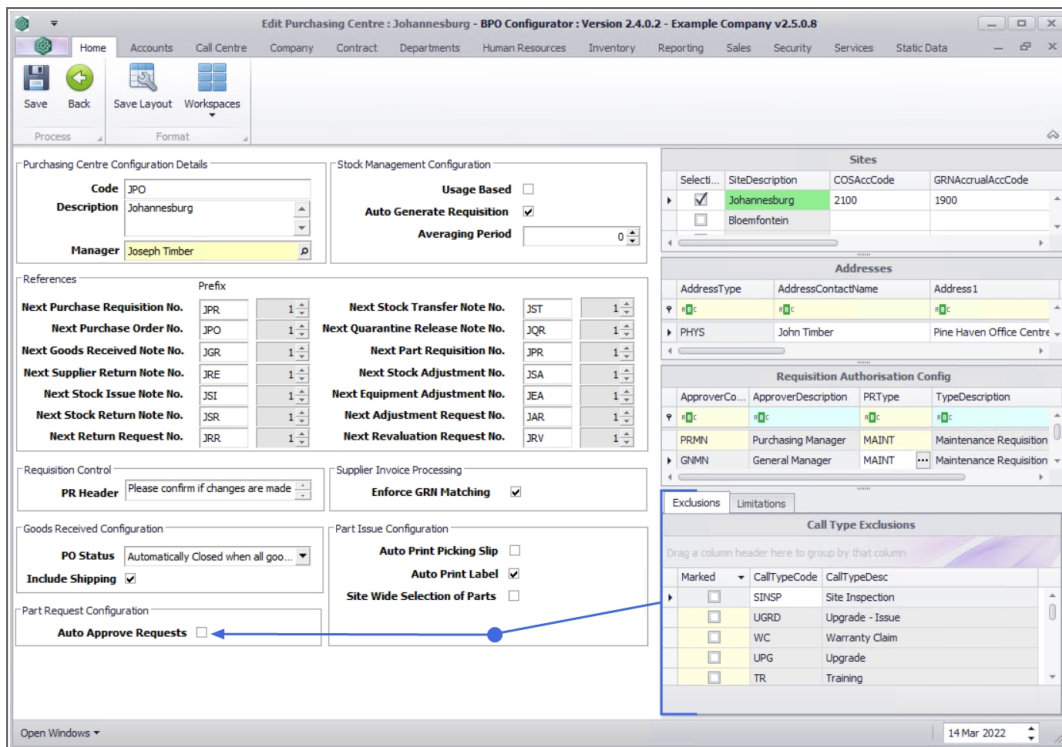
APPROVAL LIMITATIONS

Approval Limitations needs to be specified when the Auto Approve Requests option has <u>not</u> 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.
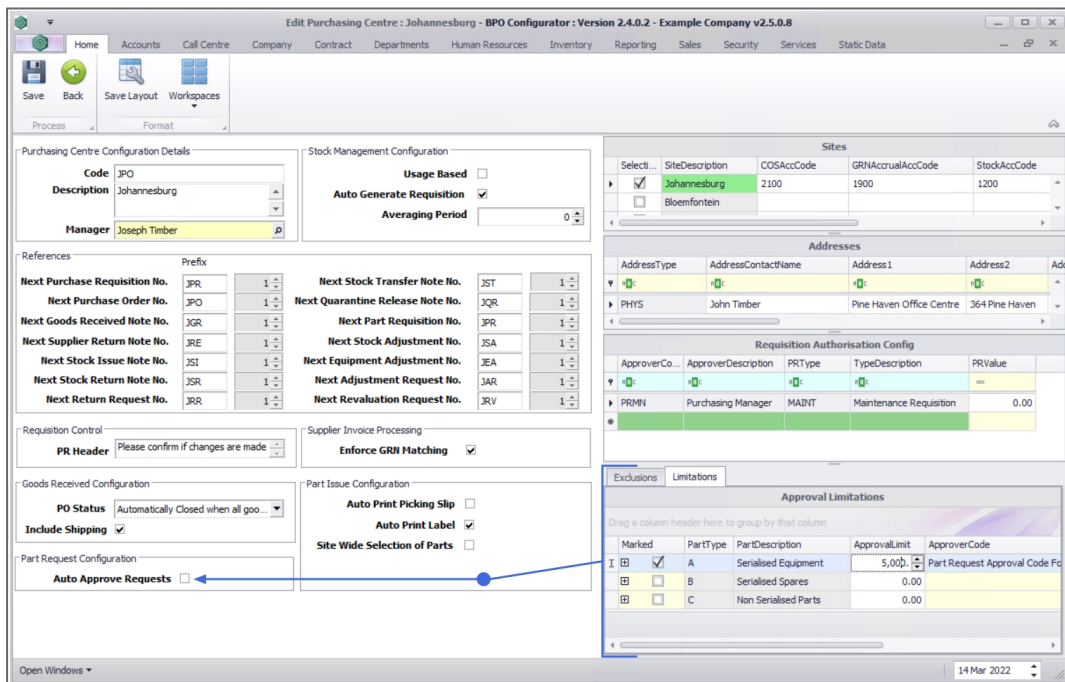
APPROVAL GROUPS

- 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.
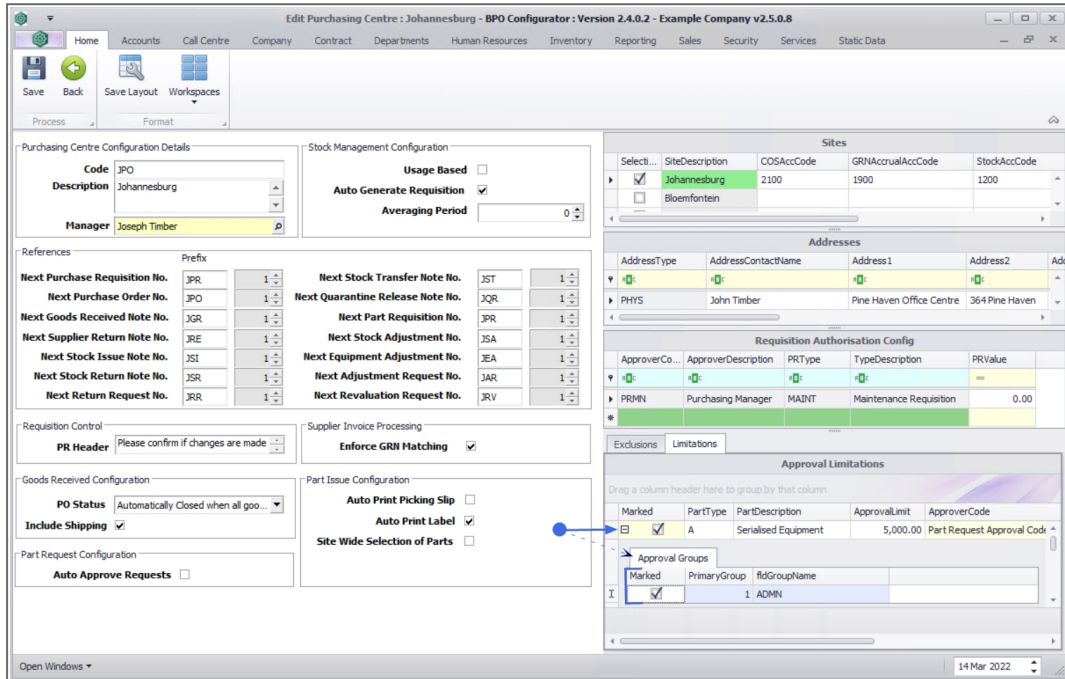
SAVE PURCHASE CENTRE CONFIGURATION

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.

Related Topics

- Work Orders - Part Requests

MNU.091.004