

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

## COMPANY

### PURCHASING CENTRES – ADD PURCHASING CENTRE

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

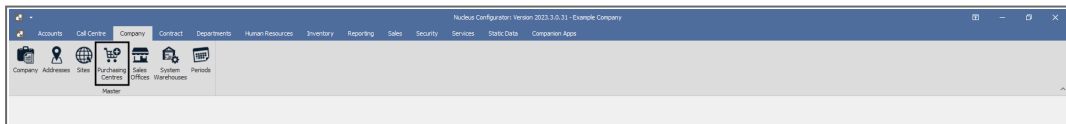
The purchasing centre can be set up in two ways:

- ✔ 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.

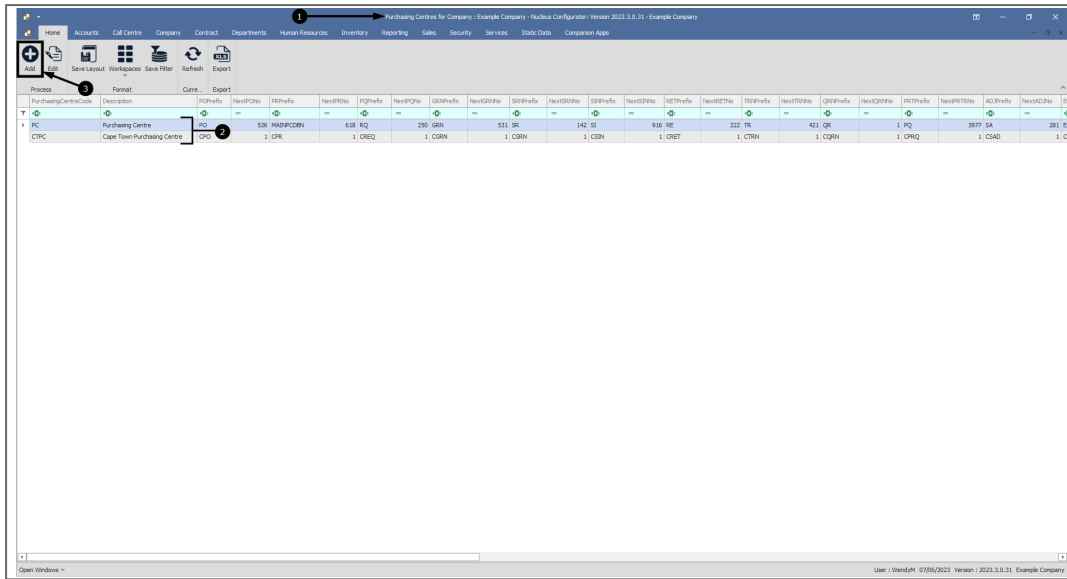
### ADD PURCHASING CENTRE

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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.

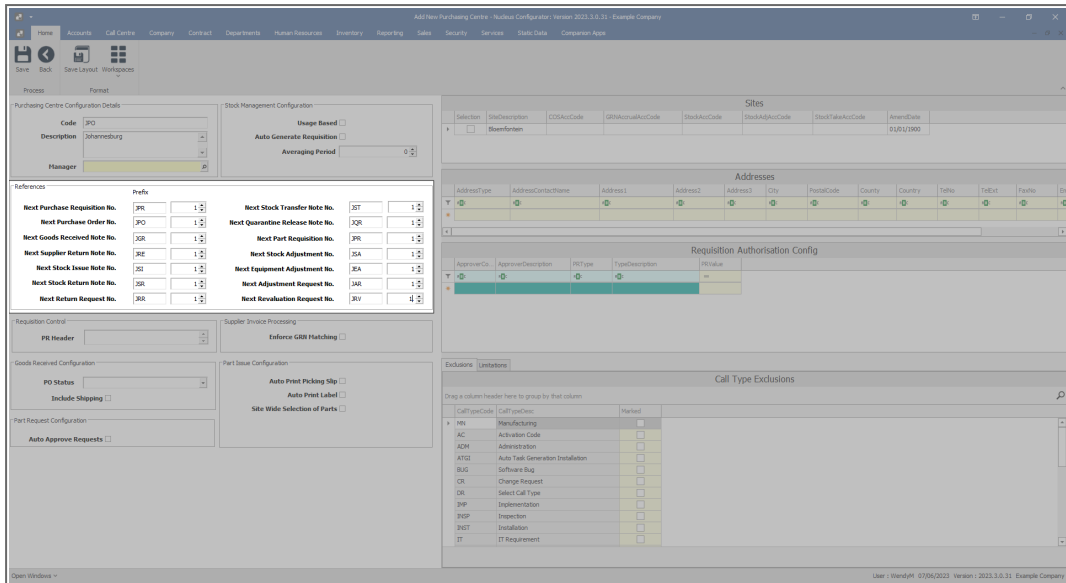
## PURCHASING CENTRE CONFIGURATION DETAILS

- **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.

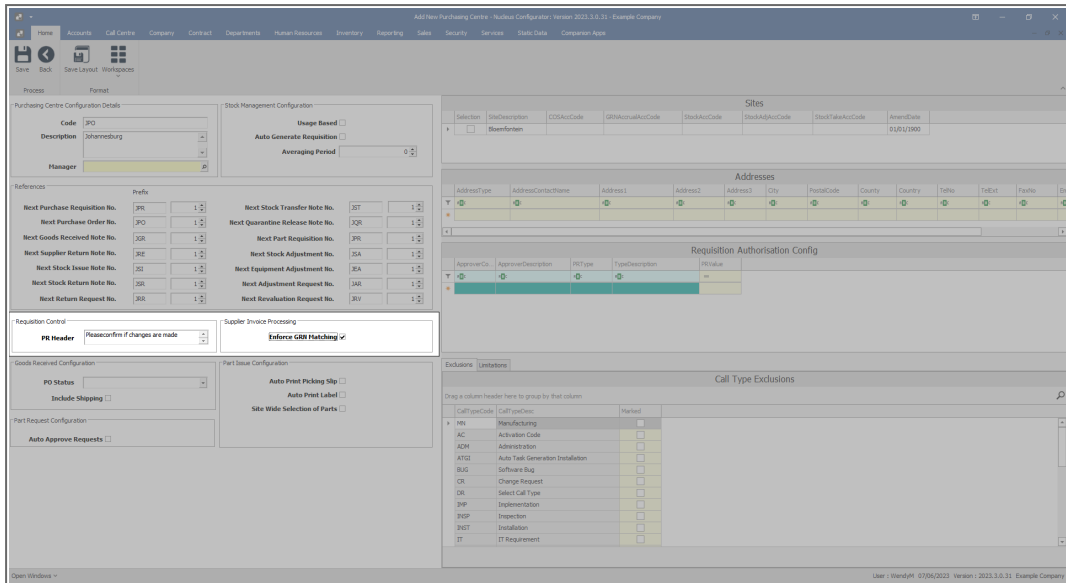


## PROCUREMENT

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

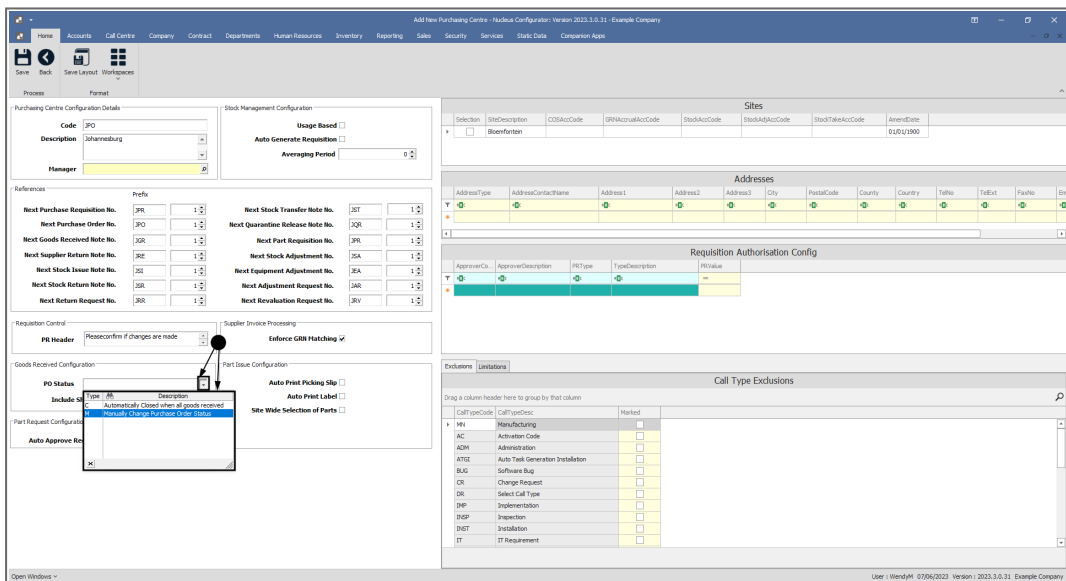
## SUPPLIER INVOICE PROCESSING

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



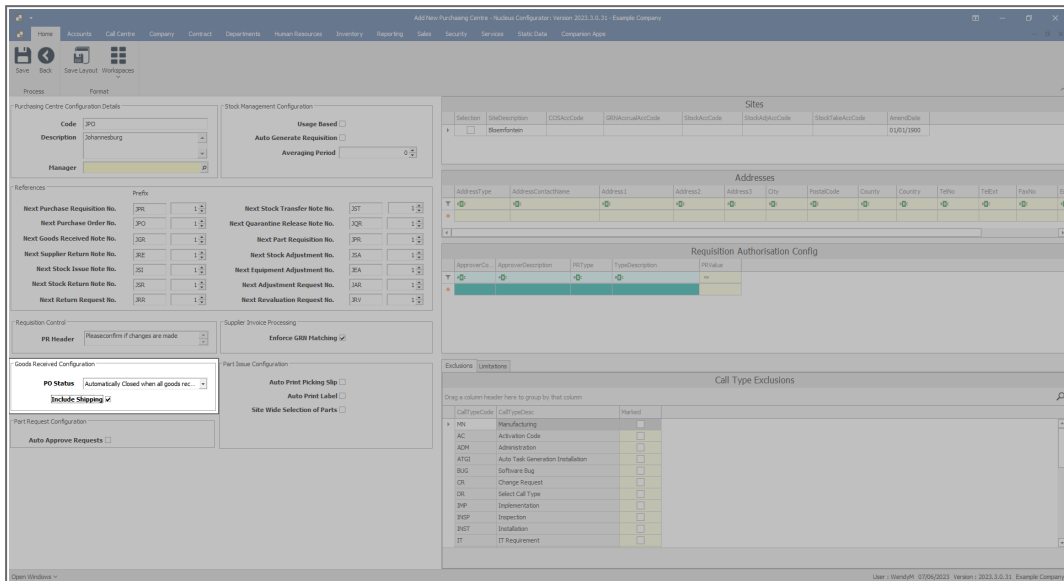
## GOODS RECEIVED CONFIGURATION

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



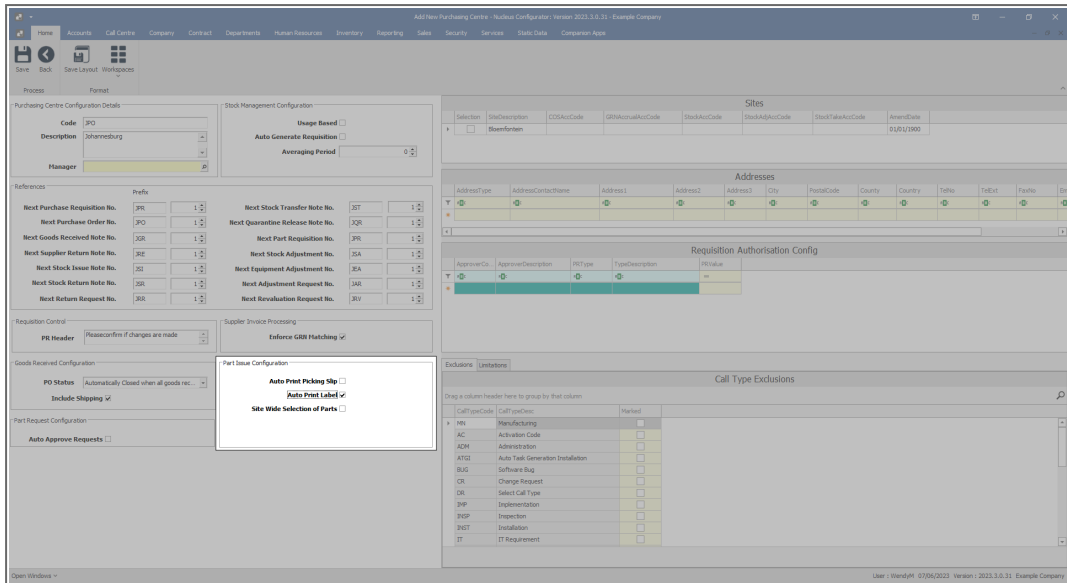
- **Include Shipping:** Click to select the check box if you wish shipping costs to be added separately to the cost of the parts or items

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.



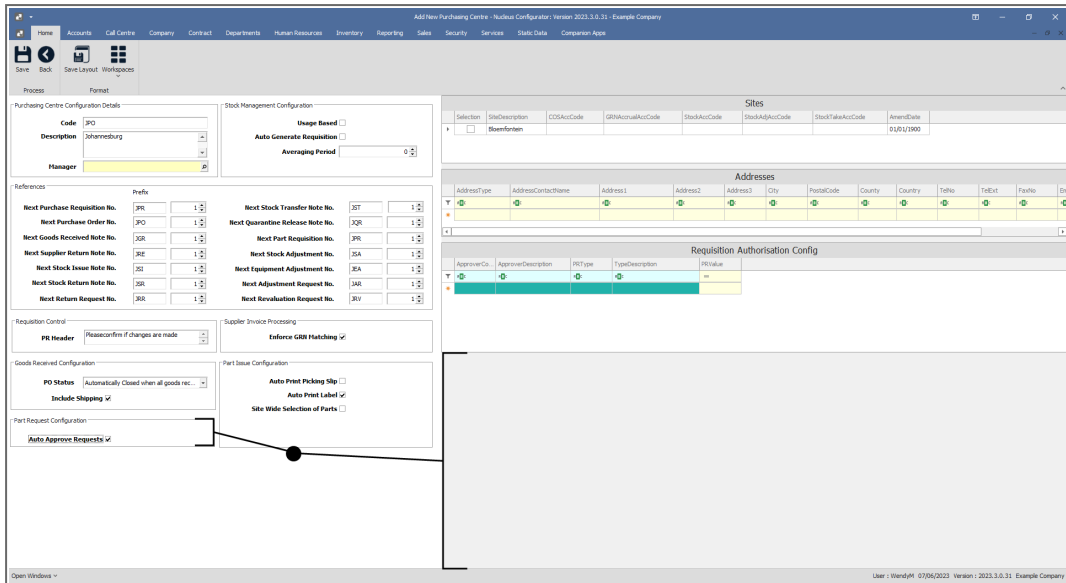
## PART REQUEST CONFIGURATION

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.



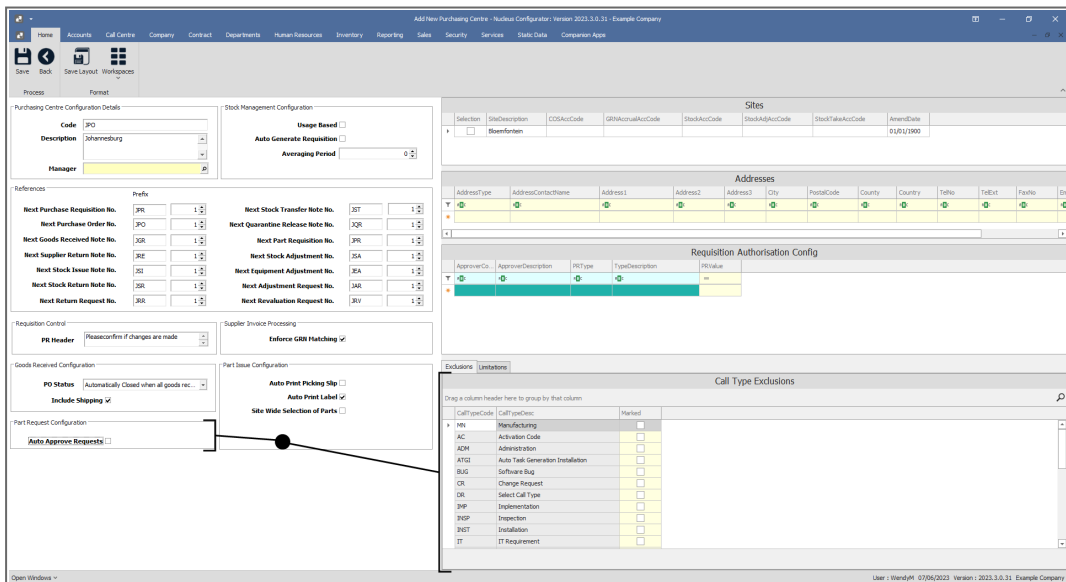
Note that the Exclusions and Limitations panel is not available for this selection as part requests gets automatically approved.



- 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.



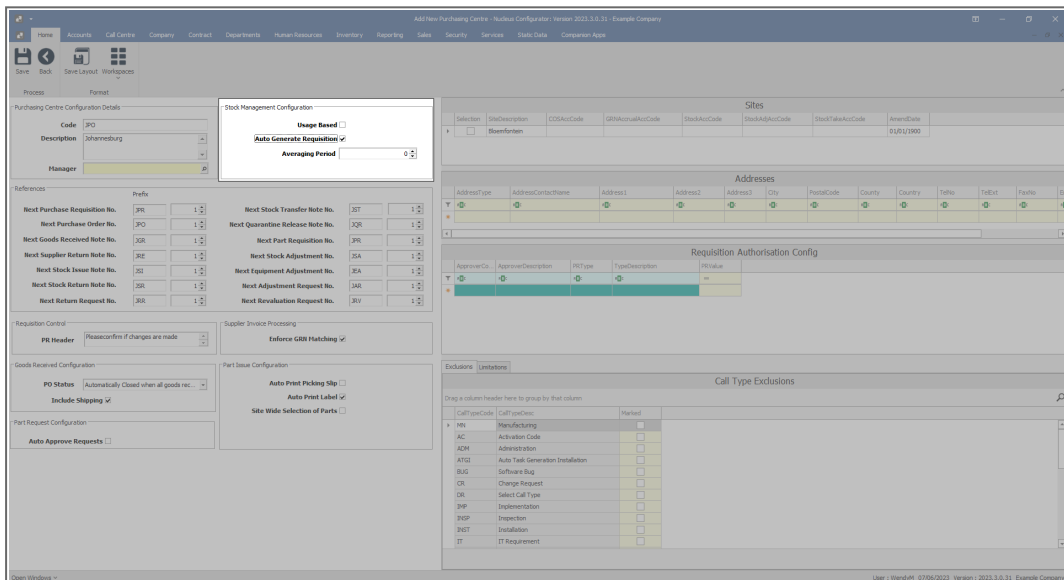
Refer to Edit Purchasing Centre for details on how to complete the Exclusions and Limitations frames.





## STOCK MANAGEMENT CONFIGURATION

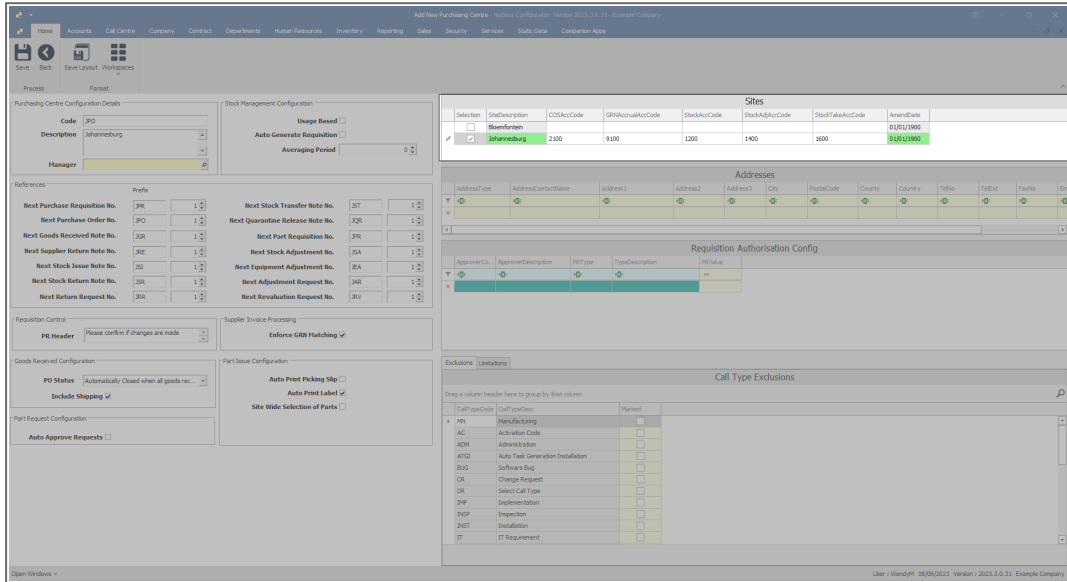
- **Usage Based:** Click to select the check box if you wish the system to calculate stock requirements based on actual usage and supplier lead times.
- **Auto Generate Requisition:** Click to select in this check box if you wish the system to automatically generate the purchase requisition to maintain 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.
- **StockAccCode:** Type in the stock account 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.



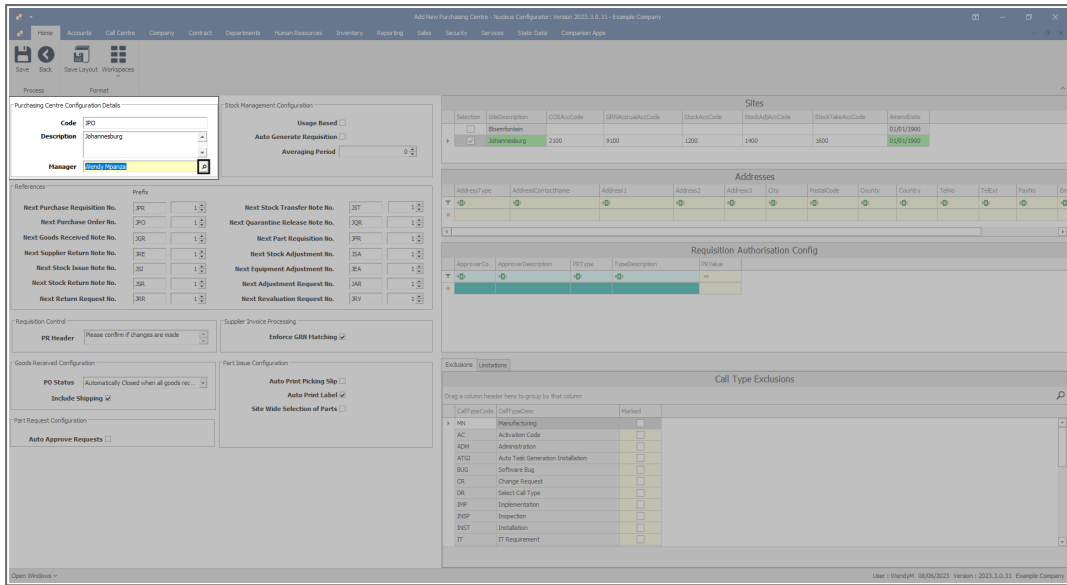
## PURCHASING CENTRE MANAGER

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**.



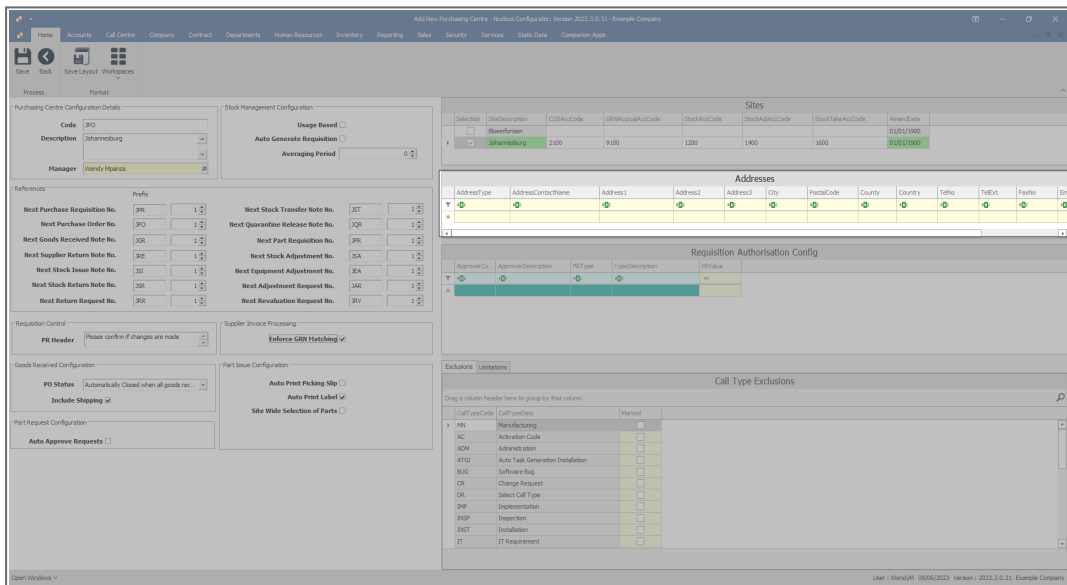
If no items are available for selection, ensure that the **Crafts** have been set up for the relevant site, and that the **Purchasing Manager** has been linked to the Craft for that Site.



## ADDRESSES FRAME



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



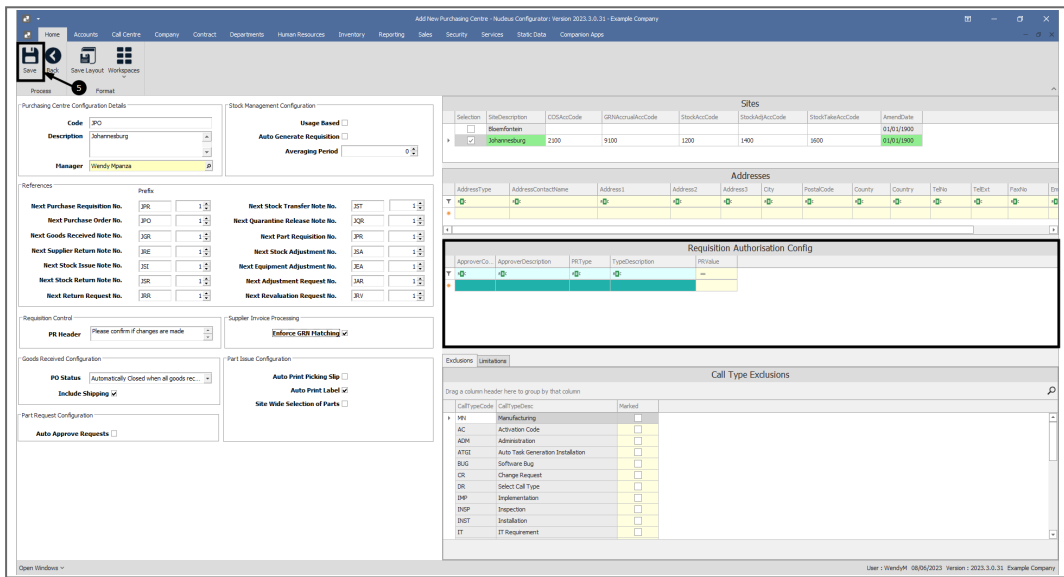
## REQUISITION AUTHORISATION CONFIGURATION FRAME



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

## SAVE PURCHASING CENTRE

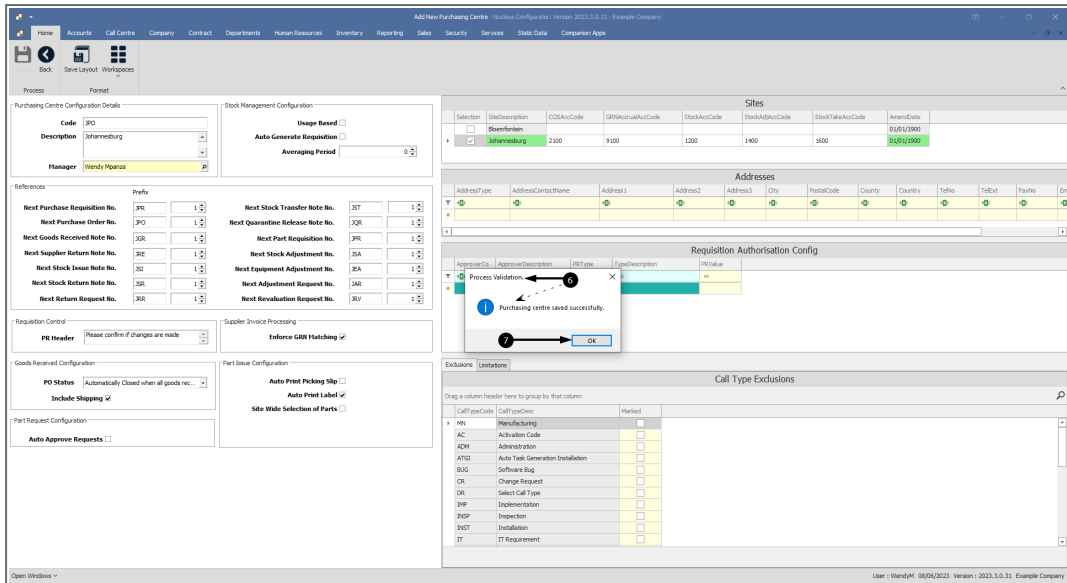
5. When you have finished adding details for the new purchasing centre, click on **Save**.



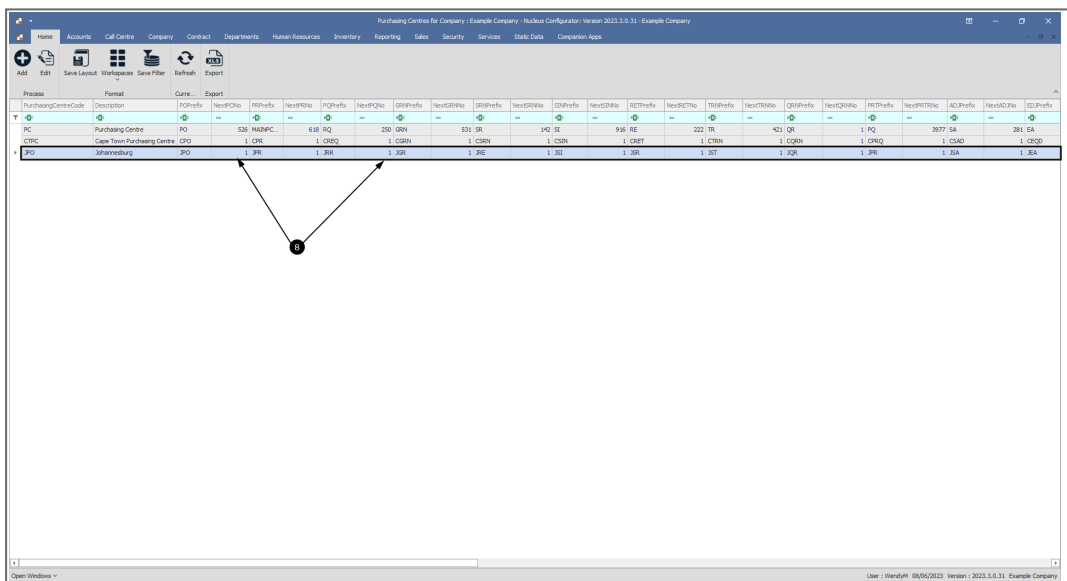
6. When you receive the **Process Validation** message to confirm;

- **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.



9. 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.

Process	AutoPReceivQty	IncludeTax	IncludeShippingCharge	IncludeRecCharge	PurchaseOrderStatus	AutoPrintSO	RGGrouping	NonStockItems	RAutoApproval	AutoPrintPdsSlip	SOEnabled	AutoRequisition	UsageExpPeriod	Enforce200Matching	AutoPrintLabel	SO/WMASelection	AmendDate	EmpowerNumber	FullName	
T	No	No	Yes	No	C	No		No	No	Yes	Yes		30	1	Yes	No	No	06/06/2023	OU001	Banca Du Test
Wing	No	No	No	C	C	No		No	No	No	No		0	1	Yes	No	No	20/03/2013	OU001	Banca Du Test
23...		Yes		C	C	No		No	No	No	No		0	1	Yes	Yes	No	08/06/2023	M001	Wendy Mpa...

## Related Topics

- [Company - Edit Purchasing Centre](#)

MNU.091.003