

COMPANY

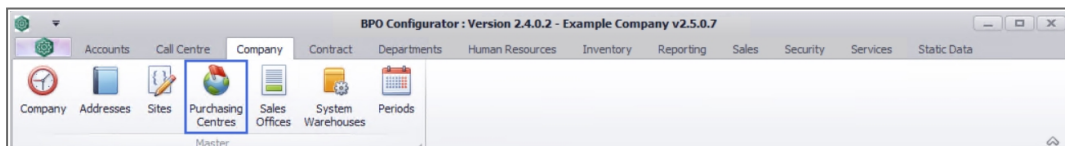
PURCHASING CENTRES – ADD PURCHASING CENTRE

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.

Ribbon Access: *Company > Purchasing Centres*



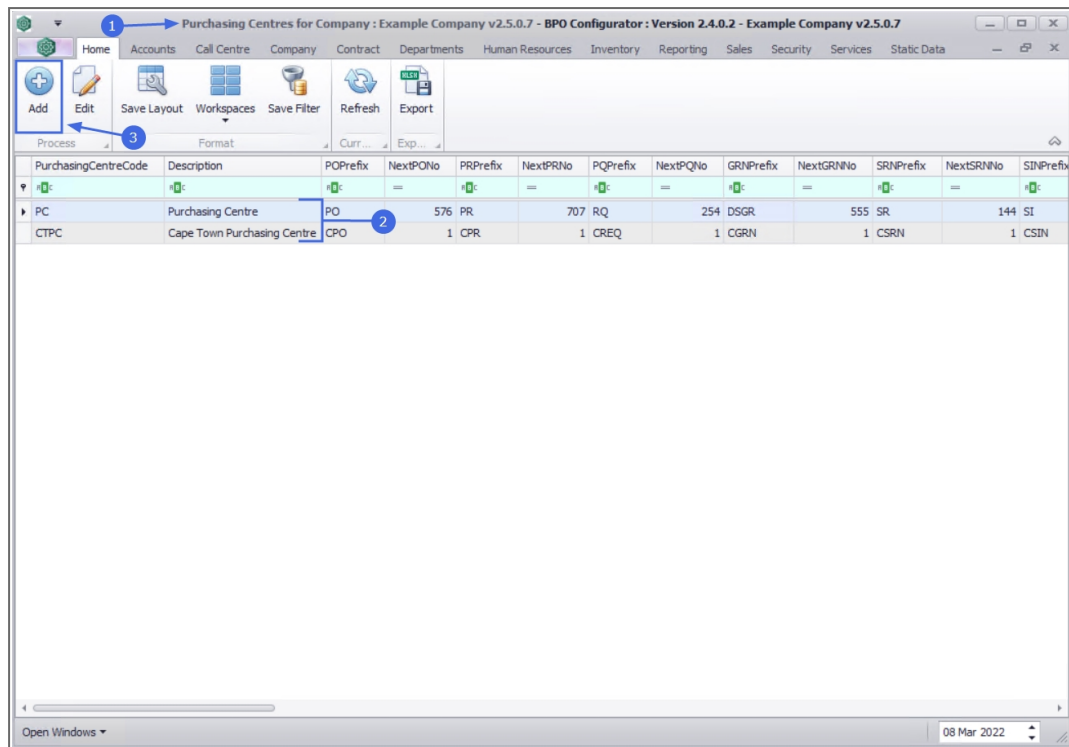
1. The ***Purchasing Centres for Company: [Company Name]*** listing screen will be displayed.
2. Any existing purchasing centres that have been created for the company will display in the data grid.

ADD PURCHASING CENTRE

3. Click on **Add**.



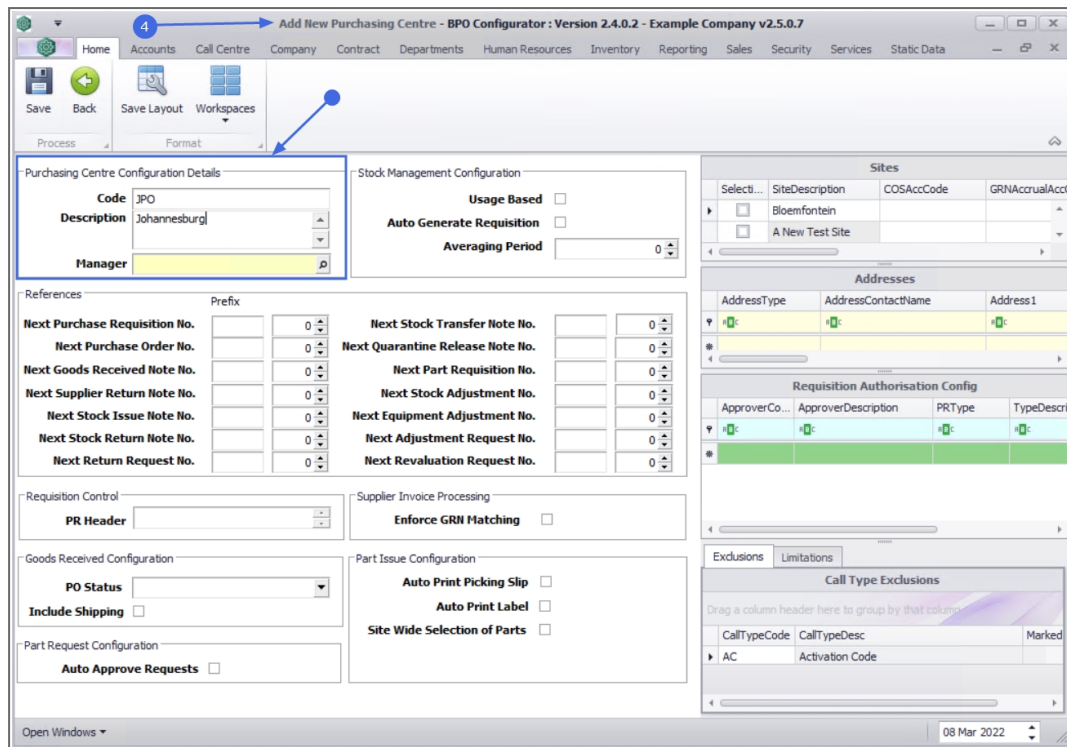
Short cut key: **Right click** to display the **Process** menu list. Click on **Add**.



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.

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

Stock Management Configuration

Usage Based ☐
Auto Generate Requisition ☐
Averaging Period 0

References

Next Purchase Requisition No.	Prefix	Next Stock Transfer Note No.	Prefix
JPR	1	JST	1
Next Purchase Order No.	JPO	Next Quarantine Release Note No.	JQR
JPO	1	JQR	1
Next Goods Received Note No.	JGR	Next Part Requisition No.	JPR
JGR	1	JPR	1
Next Supplier Return Note No.	JRE	Next Stock Adjustment No.	JSA
JRE	1	JSA	1
Next Stock Issue Note No.	JSI	Next Equipment Adjustment No.	JEA
JSI	1	JEA	1
Next Stock Return Note No.	JSR	Next Adjustment Request No.	JAR
JSR	1	JAR	1
Next Return Request No.	JRR	Next Revaluation Request No.	JRV
JRR	1	JRV	1

Requisition Control

PR Header

Supplier Invoice Processing

Enforce GRN Matching ☐

Goods Received Configuration

PO Status
Include Shipping ☐

Part Request Configuration

Auto Approve Requests ☐

Part Issue Configuration

Auto Print Picking Slip ☐
Auto Print Label ☐
Site Wide Selection of Parts ☐

Sites

Select...	SiteDescription	COSAccCode	GRNAccrualAcco
☐	Bloemfontein		
☐	A New Test Site		

Addresses

AddressType	AddressContactName	Address1

Requisition Authorisation Config

ApproverCo...	ApproverDescription	PRTType	TypeDescri

Exclusions Limitations

Call Type Exclusions

CallTypeCode	CallTypeDesc	Marked
AC	Activation Code	

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08 Mar 2022

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.

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

Stock Management Configuration

Usage Based ☐
Auto Generate Requisition ☐
Averaging Period 0

References

Prefix

Next Purchase Requisition No.	JPR	1	Next Stock Transfer Note No.	JST	1
Next Purchase Order No.	JPO	1	Next Quarantine Release Note No.	JQR	1
Next Goods Received Note No.	JGR	1	Next Part Requisition No.	JPR	1
Next Supplier Return Note No.	JRE	1	Next Stock Adjustment No.	JSA	1
Next Stock Issue Note No.	JSI	1	Next Equipment Adjustment No.	JEA	1
Next Stock Return Note No.	JSR	1	Next Adjustment Request No.	JAR	1
Next Return Request No.	JRR	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
Include Shipping ☐

Part Request Configuration

Auto Approve Requests ☐

Part Issue Configuration

Auto Print Picking Slip ☐
Auto Print Label ☐
Site Wide Selection of Parts ☐

Sites

Select...	SiteDescription	COSAccCode	GRNAccrualAccCode
☐	Bloemfontein		
☐	A New Test Site		

Addresses

AddressType	AddressContactName	Address1

Requisition Authorisation Config

ApproverCo...	ApproverDescription	PRTType	TypeDescription

Exclusions Limitations

Call Type Exclusions

Drag a column header here to group by that column

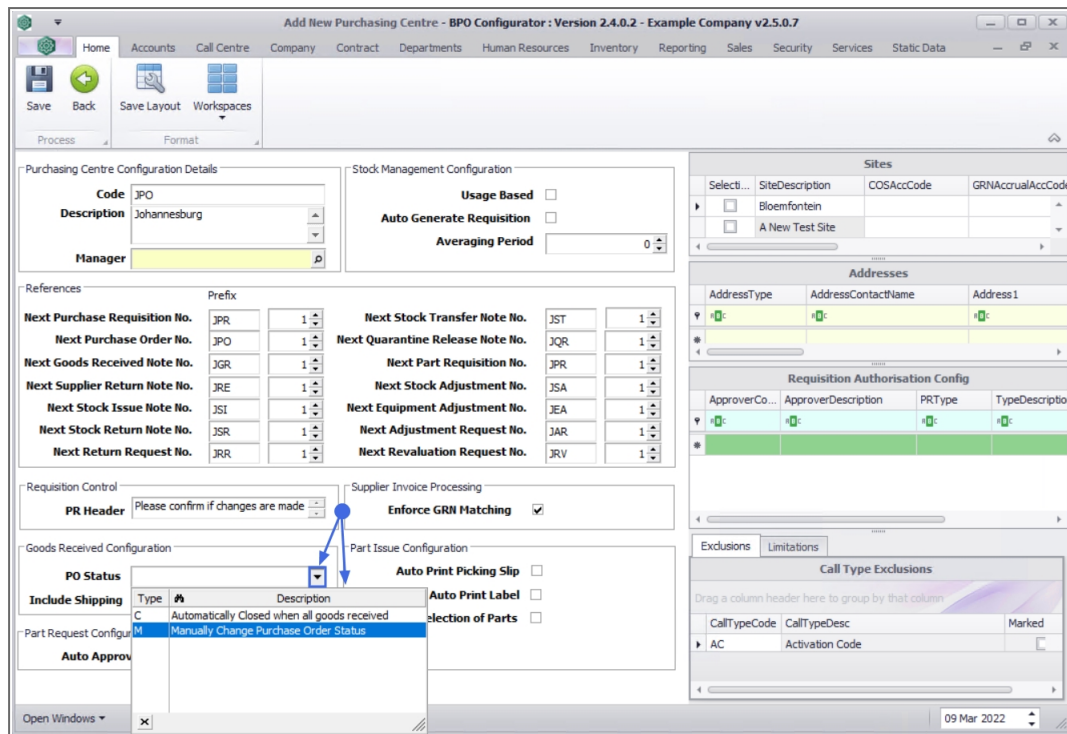
CallTypeCode	CallTypeDesc	Marked
AC	Activation Code	☐

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09 Mar 2022

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.

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: [User Icon]

Stock Management Configuration

Usage Based: ☐
Auto Generate Requisition: ☐
Averaging Period: 0

References

Next Purchase Requisition No.	Prefix	Next Stock Transfer Note No.	Prefix
JPR	1	JST	1
JPO	1	JQR	1
JGR	1	JPR	1
JRE	1	JSA	1
JSI	1	JEA	1
JSR	1	JAR	1
JRR	1	JRV	1

Requisition Control

PR Header: Please confirm if changes are made

Goods Received Configuration

PO Status: Automatically Closed when all goods received
Include Shipping: ☒

Part Request Configuration

Auto Approve Requests: ☐

Supplier Invoice Processing

Enforce GRN Matching: ☒

Part Issue Configuration

Auto Print Picking Slip: ☐
Auto Print Label: ☐
Site Wide Selection of Parts: ☐

Sites

Select...	SiteDescription	COSAccCode	GRNAccrualAccCode
☐	Bloemfontein		
☐	A New Test Site		

Addresses

AddressType	AddressContactName	Address1
JPR	JPR	JPR

Requisition Authorisation Config

ApproverCo...	ApproverDescription	PRTType	TypeDescription
JPR	JPR	JPR	JPR

Exclusions

Limitations

Call Type Exclusions

Drag a column header here to group by that column

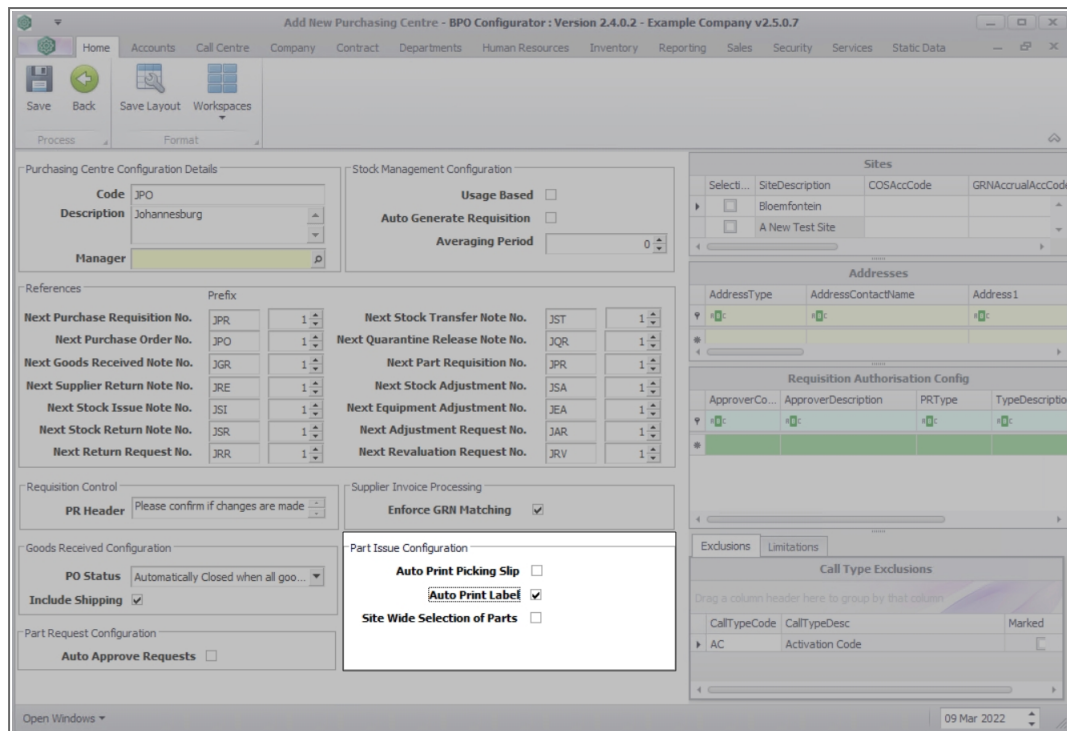
CallTypeCode	CallTypeDesc	Marked
AC	Activation Code	☐

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09 Mar 2022

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.



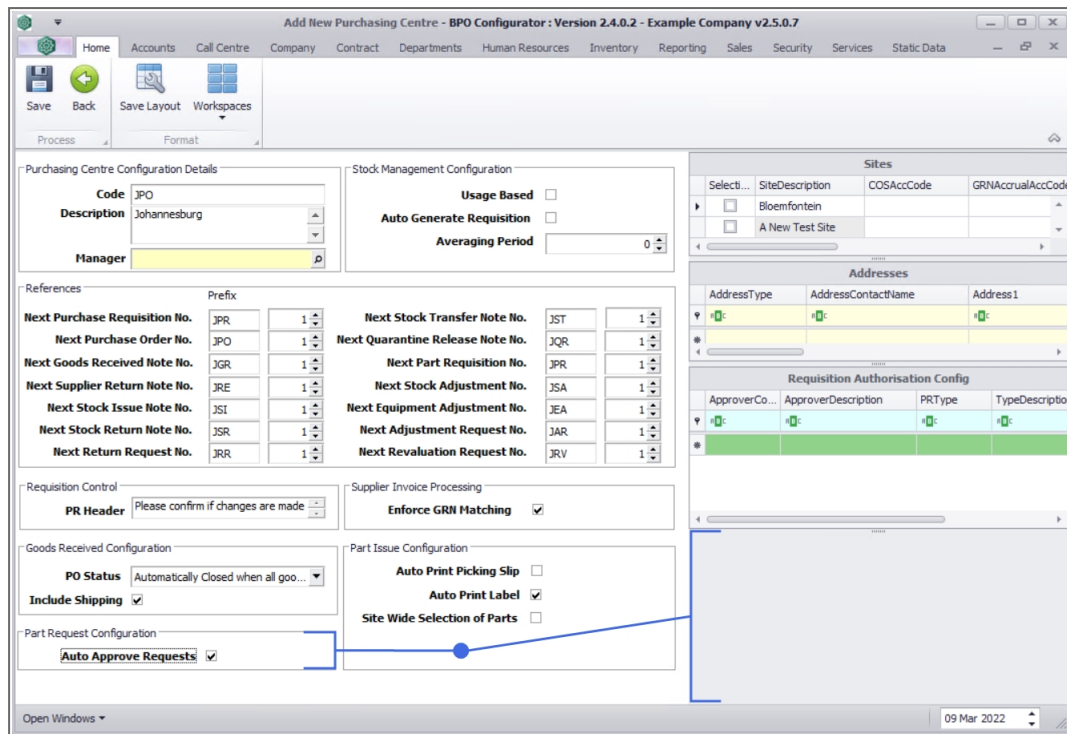
PART REQUEST CONFIGURATION

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.

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: [User Icon]

Stock Management Configuration

Usage Based: ☐
Auto Generate Requisition: ☐
Averaging Period: 0

References

Prefix	Next Purchase Requisition No.	Next Purchase Order No.	Next Goods Received Note No.	Next Supplier Return Note No.	Next Stock Issue Note No.	Next Stock Return Note No.	Next Return Request No.
JPR	1	JPO	1	JGR	1	JRE	1
JSI	1	JQR	1	JRI	1	JSR	1
JRR	1	JST	1	JSA	1	JAR	1
		JJE	1	JJA	1	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 goods received

Include Shipping: ☒

Part Request Configuration

Auto Approve Requests: ☐

Part Issue Configuration

Auto Print Picking Slip: ☐
Auto Print Label: ☒
Site Wide Selection of Parts: ☐

Sites

Select...	SiteDescription	COSAccCode	GRNAccrualAccCode
☐	Bloemfontein		
☐	A New Test Site		

Addresses

AddressType	AddressContactName	Address1
JPR	JPR	JPR

Requisition Authorisation Config

ApproverCo...	ApproverDescription	PRTType	TypeDescription
JPR	JPR	JPR	JPR

Exclusions

Limitations

Call Type Exclusions

Drag a column header here to group by that column

CallTypeCode	CallTypeDesc	Marked
AC	Activation Code	☐
ADM	Administration	☐
ATGI	Auto Task Generation Installation	☐

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09 Mar 2022

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.

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

Stock Management Configuration

Usage Based ☐
Auto Generate Requisition ☒
Averaging Period 0

References

Prefix

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 goods received ☐
Include Shipping ☒

Part Request Configuration

Auto Approve Requests ☐

Part Issue Configuration

Auto Print Picking Slip ☐
Auto Print Label ☒
Site Wide Selection of Parts ☐

Sites

Select... SiteDescription COSAccCode GRNAccrualAccCode

☐ Bloemfontein
☐ A New Test Site

Addresses

AddressType AddressContactName Address1

Requisition Authorisation Config

ApproverCo... ApproverDescription PRTYPE TypeDescription

Exclusions Limitations

Call Type Exclusions

Drag a column header here to group by that column

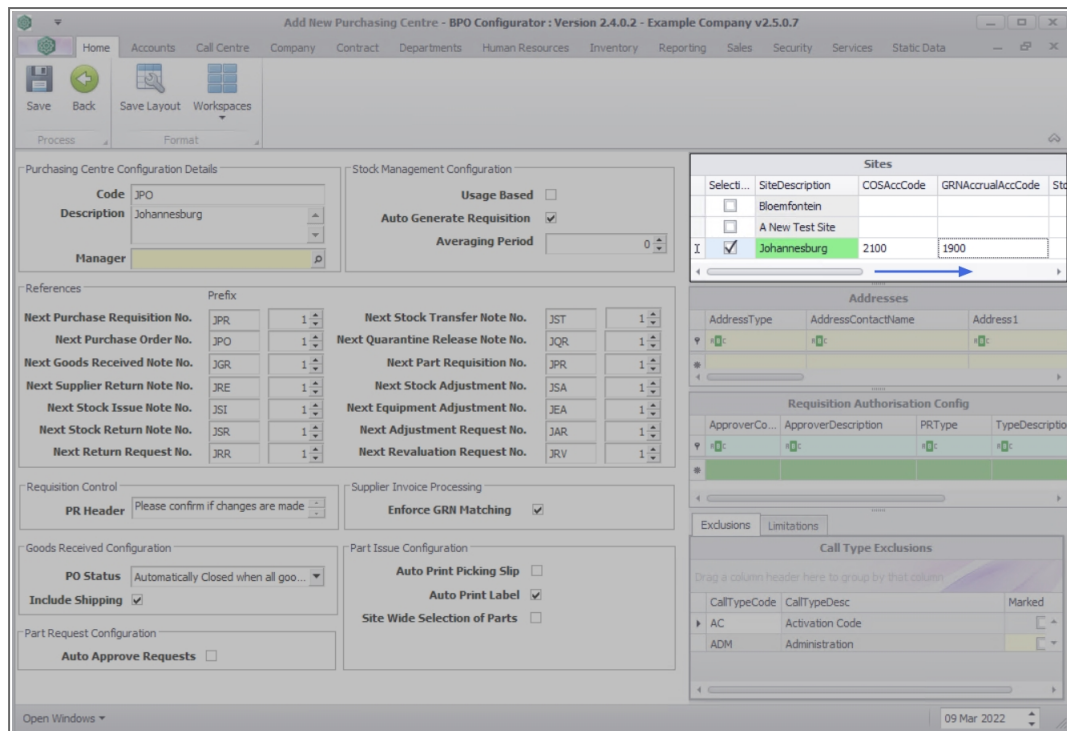
CallTypeCode	CallTypeDesc	Marked
AC	Activation Code	☐
ADM	Administration	☐
ATGI	Auto Task Generation Installation	☐

Open Windows

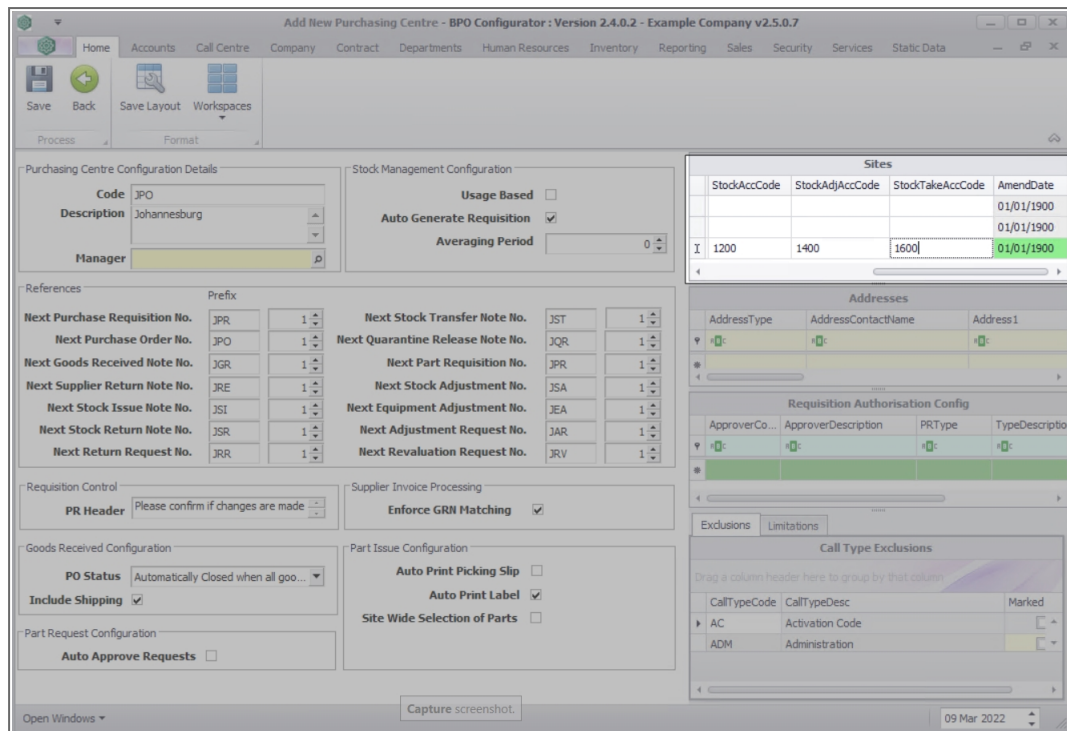
09 Mar 2022

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 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

References

Prefix

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 goods received
Include Shipping: ☒

Part Request Configuration

Auto Approve Requests: ☐

Part Issue Configuration

Auto Print Picking Slip: ☐
Auto Print Label: ☒
Site Wide Selection of Parts: ☐

Sites

Select...	SiteDescription	COSAccCode	GRNACcualAccCode	Sto
☐	Bloemfontein			
☐	A New Test Site			
☒	Johannesburg	2100	1900	12

Addresses

AddressType	AddressContactName	Address1
J:	J:	J:

Requisition Authorisation Config

ApproverCo...	ApproverDescription	PRTType	TypeDescriptio
J:	J:	J:	J:

Exclusions

Call Type Exclusions

Drag a column header here to group by that column

CallTypeCode	CallTypeDesc	Marked
AC	Activation Code	☐
ADM	Administration	☒

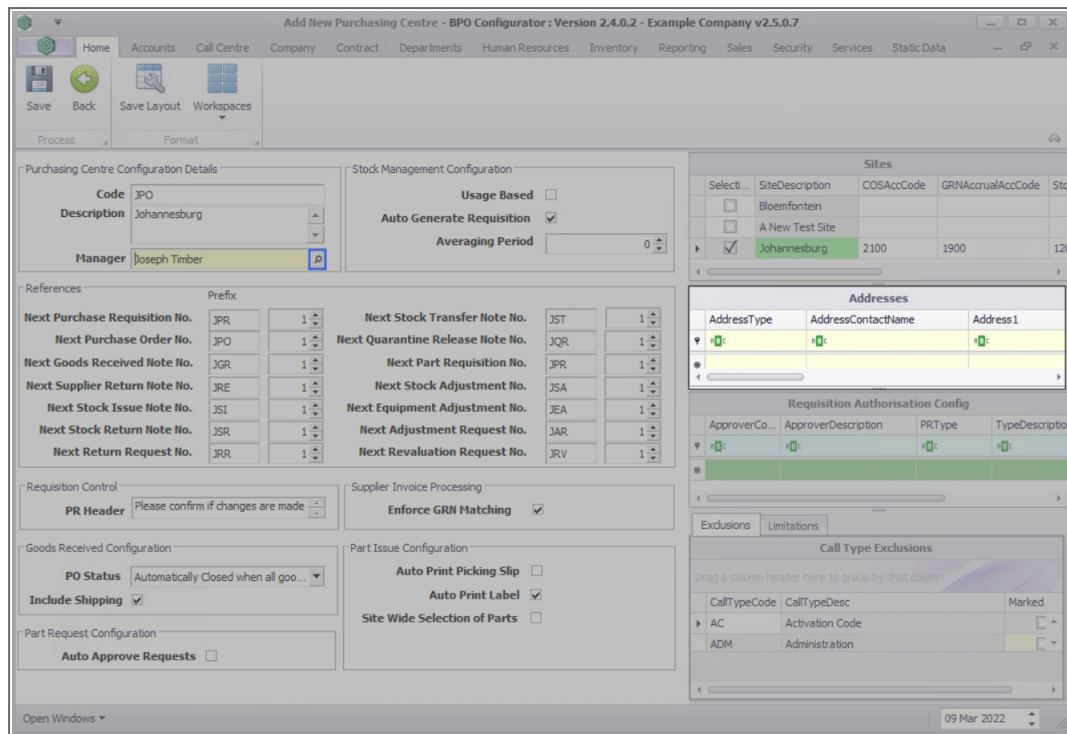
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09 Mar 2022

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**.

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 5 Format

Purchasing Centre Configuration Details

Code: JPO
Description: Johannesburg
Manager: Joseph Timber

Stock Management Configuration

Usage Based: ☐
Auto Generate Requisition: ☒
Averaging Period: 0

References

Prefix	Next Purchase Requisition No.	Next Purchase Order No.	Next Goods Received Note No.	Next Supplier Return Note No.	Next Stock Issue Note No.	Next Stock Return Note No.	Next Return Request No.
JPR	1	JPO	1	JGR	1	JRE	1
JQR	1	JSI	1	JSR	1	JRI	1
JSA	1	JEA	1	JAR	1	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 goods received

Include Shipping: ☒

Part Request Configuration

Auto Approve Requests: ☐

Part Issue Configuration

Auto Print Picking Slip: ☐
Auto Print Label: ☒
Site Wide Selection of Parts: ☐

Sites

Select...	SiteDescription	COSAccCode	GRNAccrualAccCode	Sto
☐	Bloemfontein			
☐	A New Test Site			
☒	Johannesburg	2100	1900	120

Addresses

AddressType	AddressContactName	Address1

Requisition Authorisation Config

ApproverCo...	ApproverDescription	PRType	TypeDescription

Exclusions

Call Type Exclusions

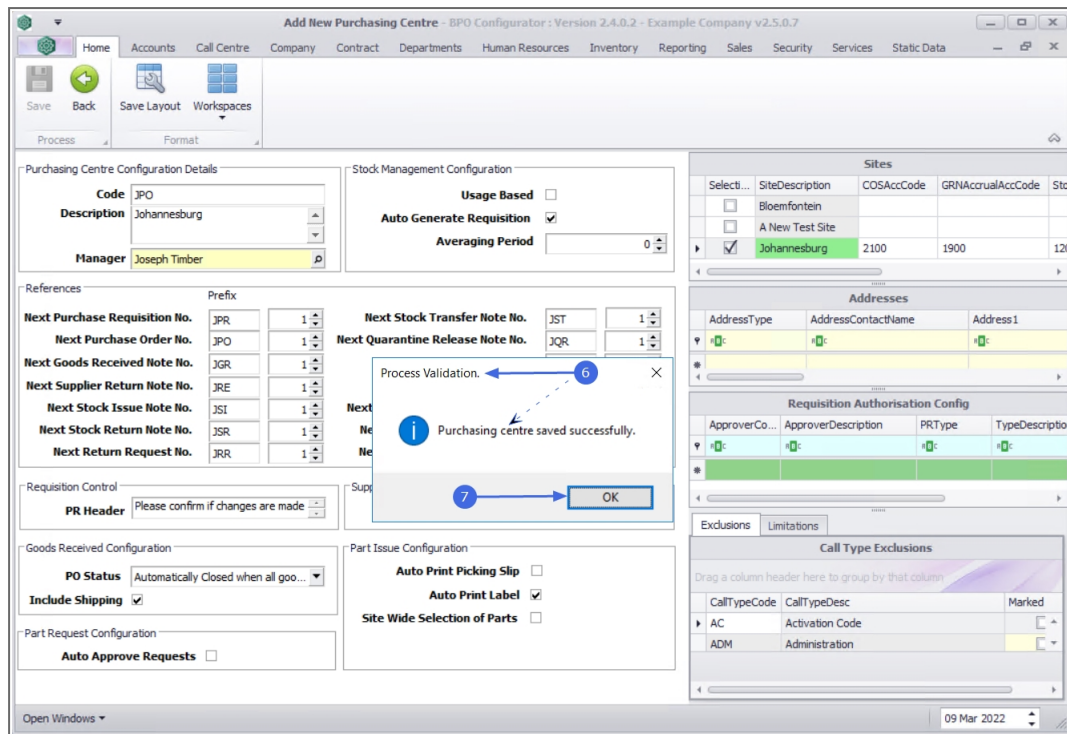
Drag a column header here to group by that column

CallTypeCode	CallTypeDesc	Marked
AC	Activation Code	☐
ADM	Administration	☒

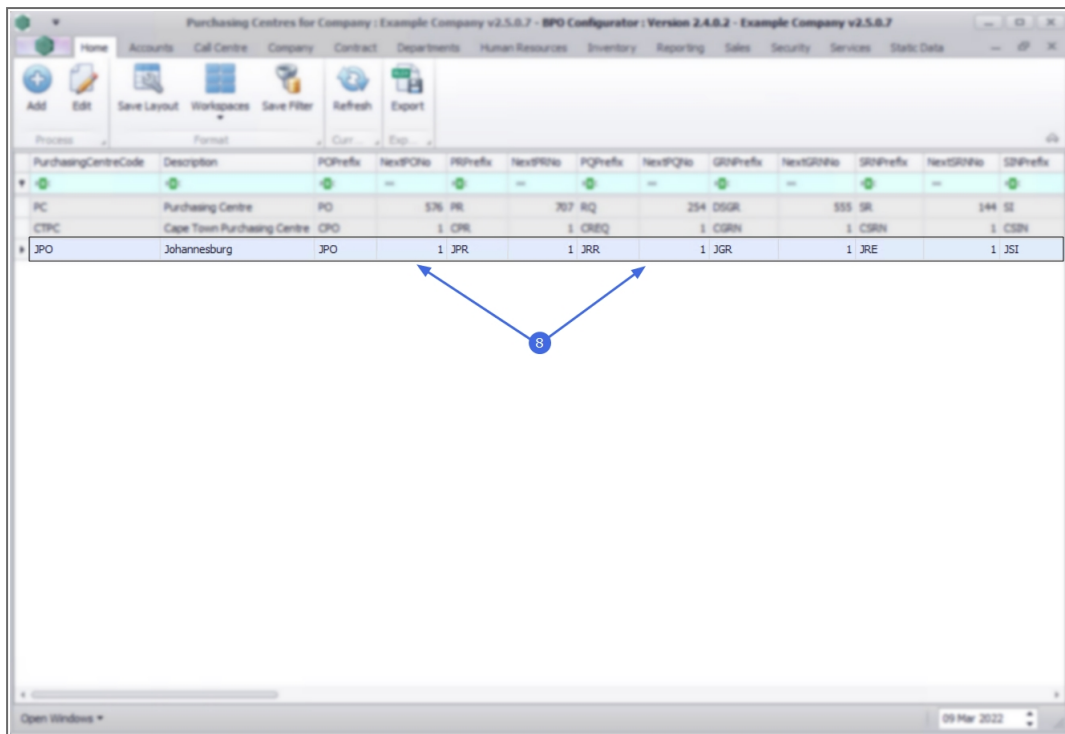
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09 Mar 2022

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

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

Add Edit Save Layout Workspaces Save Filter Refresh Export

Process Format Curr... Exp...

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

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Related Topics

- [Company - Edit Purchasing Centre](#)

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