

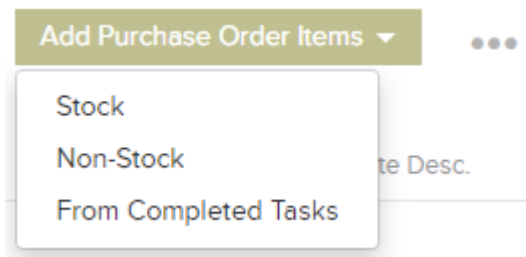
Purchase Orders / Material Requests

Purchase orders can be created against a Job or stand alone.

You can create a PO from the 'Purchase Order' tab on the Job Details page or in the Finance Area.

| | |
|------------------------|---|
| Supplier | Darren John Choose |
| Ref. | <input type="text" value="6605"/> |
| Description | <input type="text" value="Stock needed"/> |
| Budget / Contract | <input type="text" value="(Please Select)"/> |
| Site | <input type="text" value="AbbeyCourt - Ab1"/> |
| Finance Code 1 | <input type="text" value="(Please Select)"/> |
| Finance Code 2 | <input type="text" value="(Please Select)"/> |
| Finance Code 3 | <input type="text" value="(Please Select)"/> |
| ? Help | |

Purchase Orders / Material Requests displays all purchase orders created. You can select each PO Number which brings you to the *PO / Material Request Details* view. In this page, you have a table labelled *Purchase Order Items* where you can add, update and delete purchase order items:



From here you have 3 different options:

Stock – A pop up will appear with a list of all stock items for you to add to the Purchase order.

Non-Stock – A pop up will appear with 3 fields to fill out, Quantity, Cost and Description. Click Save to add this Non-Stock item to the Purchase order.

From Completed Tasks – A pop up will appear with a list of Costs from Completed Job Tasks for that Resource for you to add to the Purchase order.

From the Purchase Order Items list the Storage Area can be changed, The Tax rate can be changed and this grid can be exported to Excel.

Purchase Order Items

Add Purchase Order Items

...

| Cost Type | Stock Name | Code | Description | Storage Area | Finance Code 1 | Quantity | Cost | Total | Tax Rate | Tax Rate Desc. | Tax Amount | Gross Total |
|--|------------|------|-------------|--------------|----------------|----------|--------|--------|----------|----------------|------------|-------------|
| <div><div></div><div>Stock</div></div> | Lift Chain | lc01 | | Cupboard 2 | | 1 | 200.00 | 200.00 | 0.0% | | 0.00 | 200.00 |
| | | | | | | 1 | 200.00 | 200.00 | | | 0.00 | 200.00 |

1

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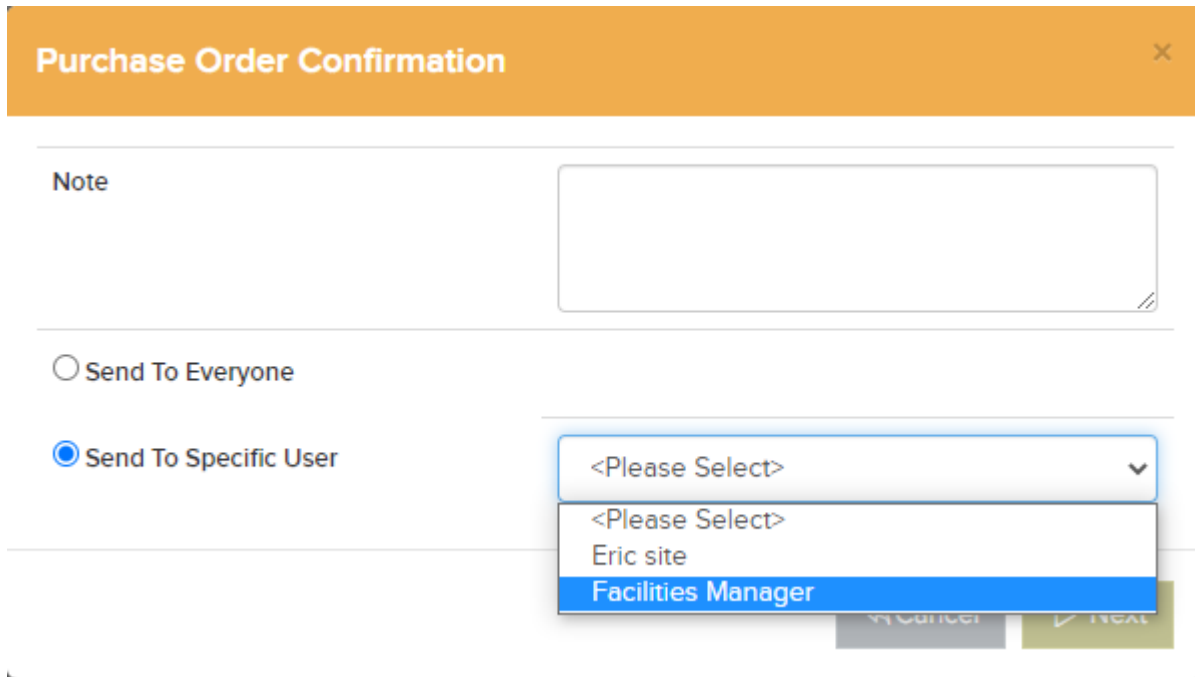
Items per page

1 - 1 of 1 Items

Once PO items are added you can 'Send for Confirmation' . In Settings -> Purchase Order Settings you can set up Confirmation Bands to restrict certain users from confirming PO's.

Clicking 'Send for Confirmation' will reveal a pop-up where you can send an email to everyone or send to a specific person. A link can be attached to this email that will bring the user (once logged in) directly to that P0. At this point a

PDF will be generated.



The image shows a 'Purchase Order Confirmation' dialog box with an orange header bar containing a close button (X). Below the header, there is a 'Note' label followed by a large, empty text area. Underneath the text area, there are two radio button options: 'Send To Everyone' and 'Send To Specific User'. The 'Send To Specific User' option is selected. To the right of these options is a dropdown menu. The dropdown menu is open, showing a list of options: '<Please Select>', '<Please Select>', 'Eric site', and 'Facilities Manager'. The 'Facilities Manager' option is highlighted in blue. At the bottom right of the dialog box, there are two buttons: 'Cancel' and 'OK'.

Once the P0 is Confirmed you can then send that P0 via email to the Resource/Supplier.

Fulfill should be selected when the stock arrives and this will be the status of the P0 in the P0 list. The stock ordered is now brought into a storage area or asset.

You can also 'Flag as Invoiced' . You will get the option to add an invoice number now and this will change the status to 'Invoiced' on the main P0 list.

When creating a P0 from a Job you will get the option to 'Instruct Job and Send P0 to Resource' . This will appear when:

1. The P0 is not at status fulfilled
2. The job is Pending (or not instructed or complete)

3. There is a single resource already selected for the job which matches the resource for the P0.

As soon as the button is clicked it will generate the P0 PDF and attach it to the job (as well as the P0). It will then bring up the instruct wizard as if you were instructing the Job to the Resource. Once the instruct wizard has been completed then it will change the P0 status to "Confirmed" (if it is not confirmed already).