Chapter 7
Purchase Orders

This chapter—

- Familiarizes the user with how to—
    - Generate a Purchase Order (PO)
    - Edit a PO
    - Complete a PO

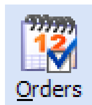
7-2

Working with Purchase Order Data

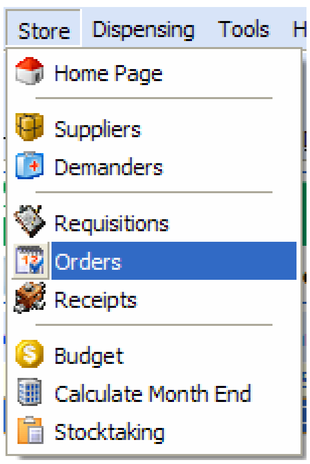
What Is a Purchase Order?

A PO is a financial transaction by means of which a facility, such as a hospital pharmacy or health center, buys products from a supplier.

How Do I Get to the Purchase Orders Screen?

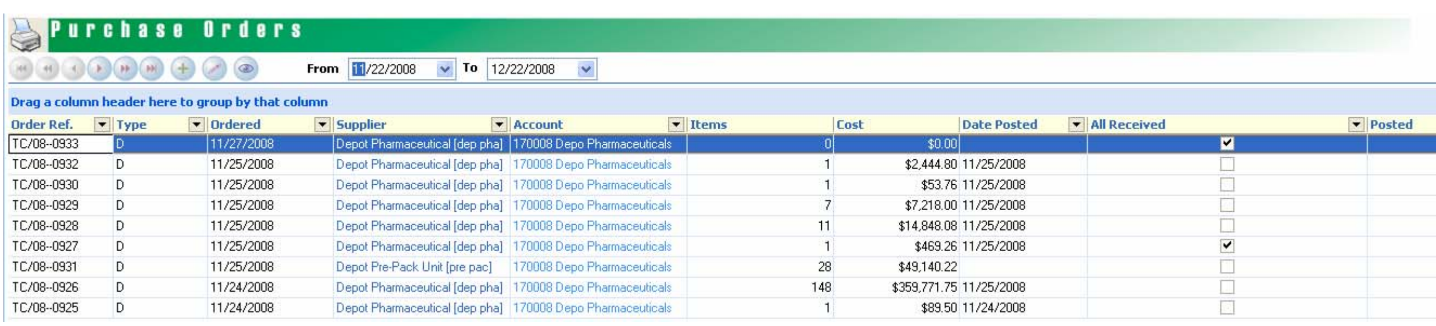
1. Click on the **Orders** icon 

on the toolbar.
2. Alternatively, click on **Store** on the menu bar.
3. Choose **Orders** from the drop-down list.

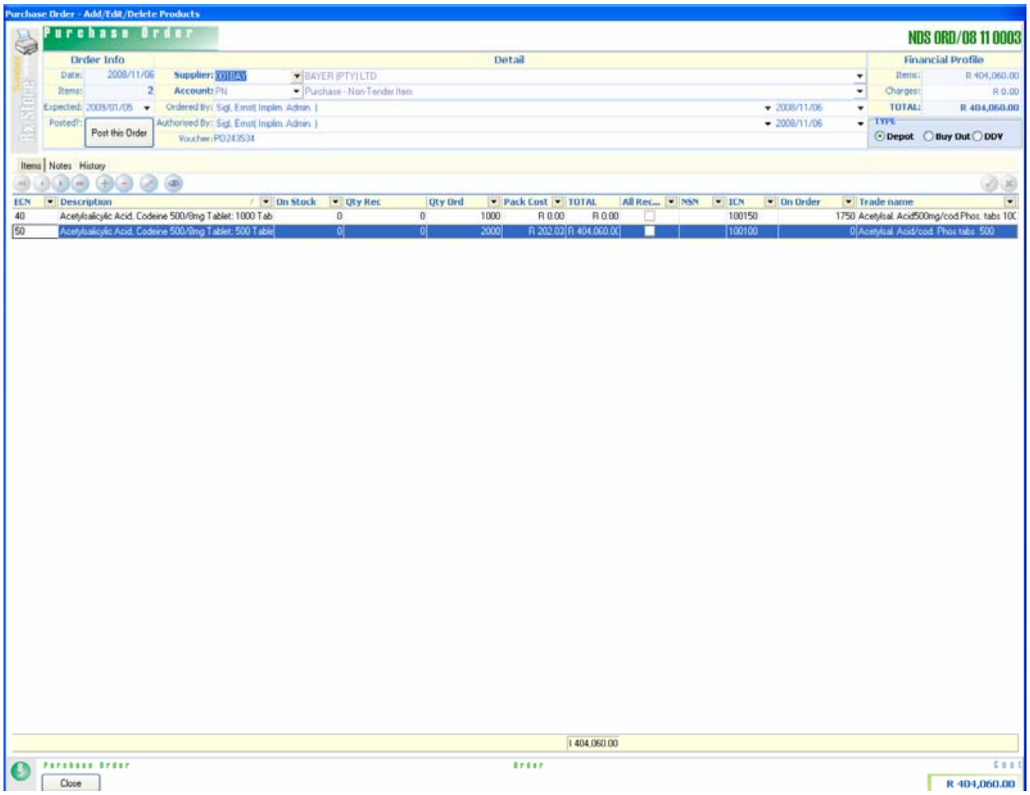


What Does the Purchase Orders Screen Look Like?

The following screen is the main **Purchase Orders** screen. This example shows how the screen looks when RxSolution contains POs; the screen shows one row for each PO in the system.



If you double click on an entry in this screen, RxSolution will open a more detailed view of that PO. Descriptions of the various parts of the Purchase Order screen are provided below.



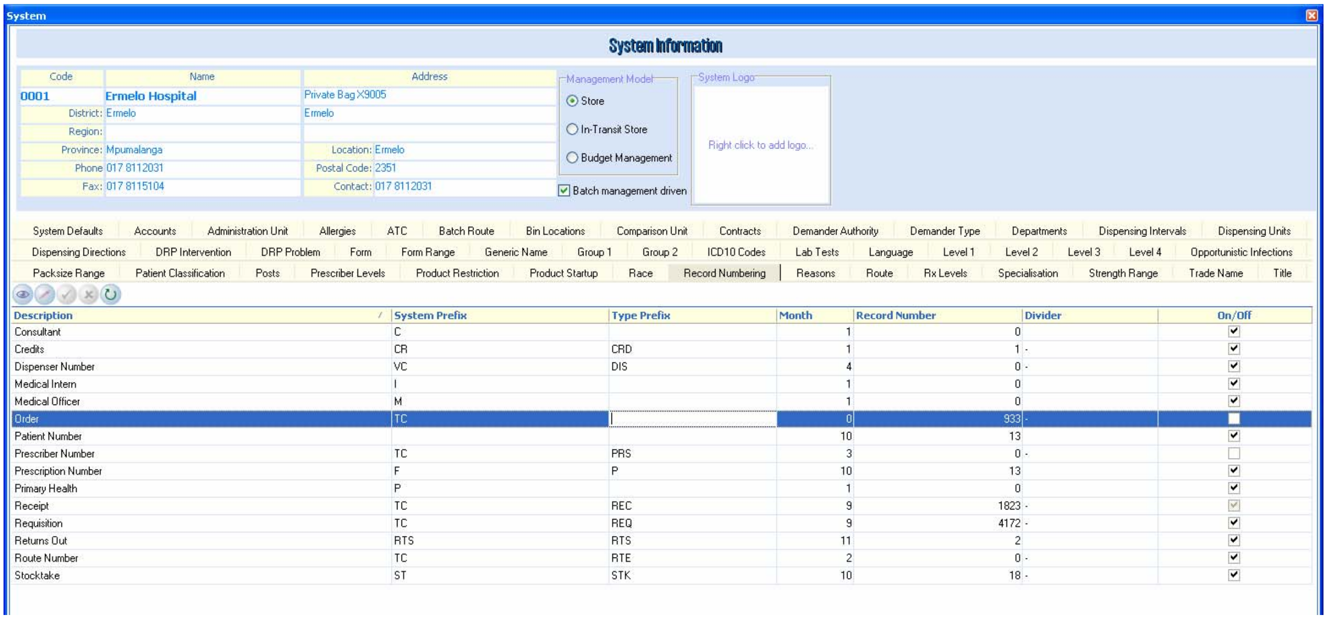
Purchase Order Number

This number is computer generated and unique for each purchase order. Table 6-1 describes the components of this number.

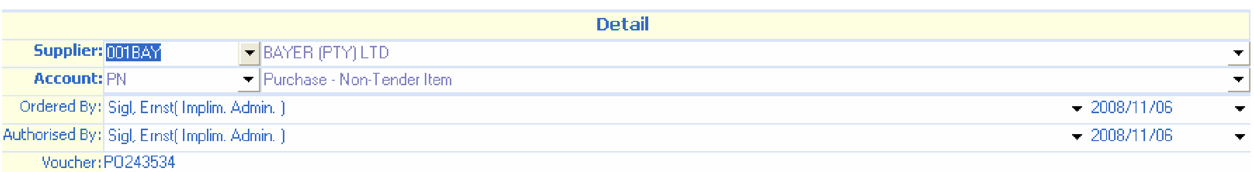
Table 6-1. Components of the Purchase Order Number

Component	Definition
NDS	The **System Prefix** entered by a user (see "Record Numbering Tab" in chapter 2). Here, "NDS" is short for National Drug Supply.
ORD	The **Type Prefix** in the system. "ORD" means order (see "Record Numbering Tab" in chapter 2).
08	The year of the order (here, 2008).
11	The month of the order (here, November).
0003	Sequential number of POs in this month (here, the third).

Note: Clients may not want to include the month in purchase order numbers, preferring instead to have the numbers show year-to-date annual increments. This preference is set up in the **System Information** tab for **Record Numbering**. See below, where this client does not want the order numbers to accrue for months, so the **Month** column for **Order** is set to 0 and the **On/Off** box is not checked.



Detail Section



The **Detail** section lists information about the **Supplier**, the **Account** number you are using for this PO (see "Accounts Tab" in chapter 2), the people or organizations who ordered and authorized the PO, and the relevant dates. If desired, use the **Voucher** field to record the financial voucher number for this PO. If the Voucher Number is not ordinarily used, use it to record the order number section of the system order number e.g. 11-02-0019 where one captures 11020019. This can be done so that one can easily locate the order on receipts. The **Voucher** field can also be used if an institution uses another electronic method of transmitting an order to a supplier or if a pre-numbered order book is used for a supplier. The electronic order number generated by the supplier's software or from the order book can be entered in the **Voucher** field to allow the two numbers to be cross-referenced when the stock is received.

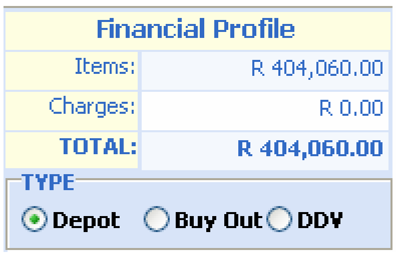
Order Information

Information relating to the order is summarized in the top left-hand corner. The date of entry of the PO and the number of items are displayed. Enter the expected date of delivery if known. This field is useful for reporting the orders that have passed the expected delivery date. Posting is done by clicking on the **Post this Order** button. Once an order has been posted, no further changes can be made to it.

> *Note:* All information on the PO *must* be correct before the **Post this Order** button is pressed. Posting finalizes a transaction, and editing the order is not possible after this is done.

Clicking on the **Post this Order** button ensures that the quantity on order is registered and displayed in the product list. A PO must be posted for your facility to be able receive the order.

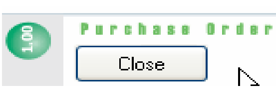
Financial Information



The **Financial Profile** is summarized in the top right-hand corner. This profile provides the detail of the costs involved in purchasing the selected items. Select the type of PO to indicate whether the PO should go to the—

- **Depot** (i.e., a governmental or central warehouse)
- **Buy Out** (i.e., a purchase from a manufacturer or supplier for items not kept at the governmental or central warehouse)
- **DDV** (direct delivery, i.e., a purchase made by the governmental or central warehouse directly to the supplier, with the supplier delivering directly to the institution)

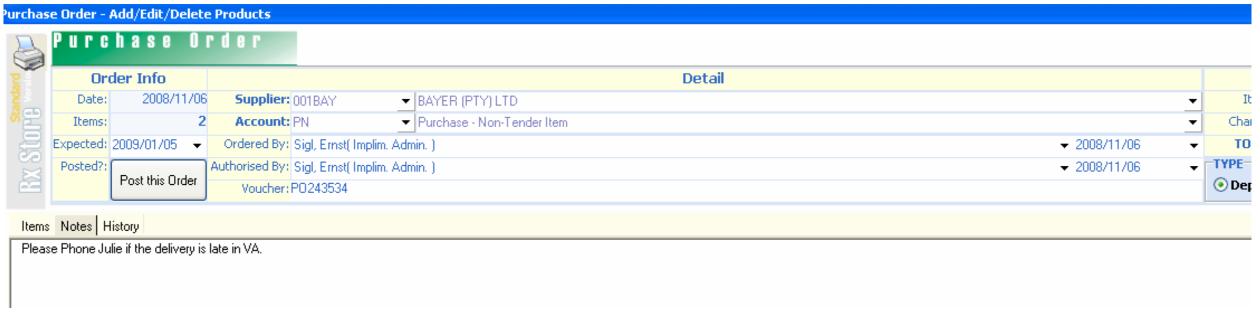
Close Button



Even if the PO is not yet finalized and needs further work, the screen can be closed by clicking on the **Close** button located on the bottom left-hand side of the screen.

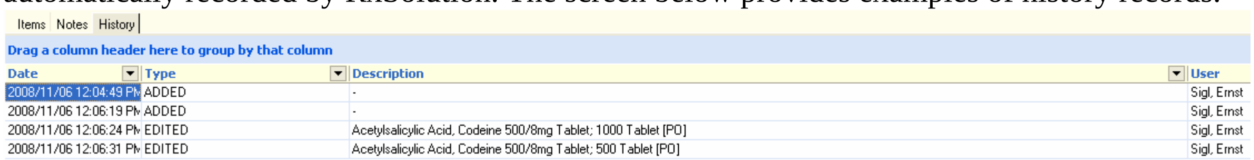
Notes Tab

Additional notes regarding the PO can be entered here. The screen below provides an example of a notes entry.



History Tab

This section is where all the changes made (e.g., additions, deletions, editing) to the PO are automatically recorded by RxSolution. The screen below provides examples of history records.

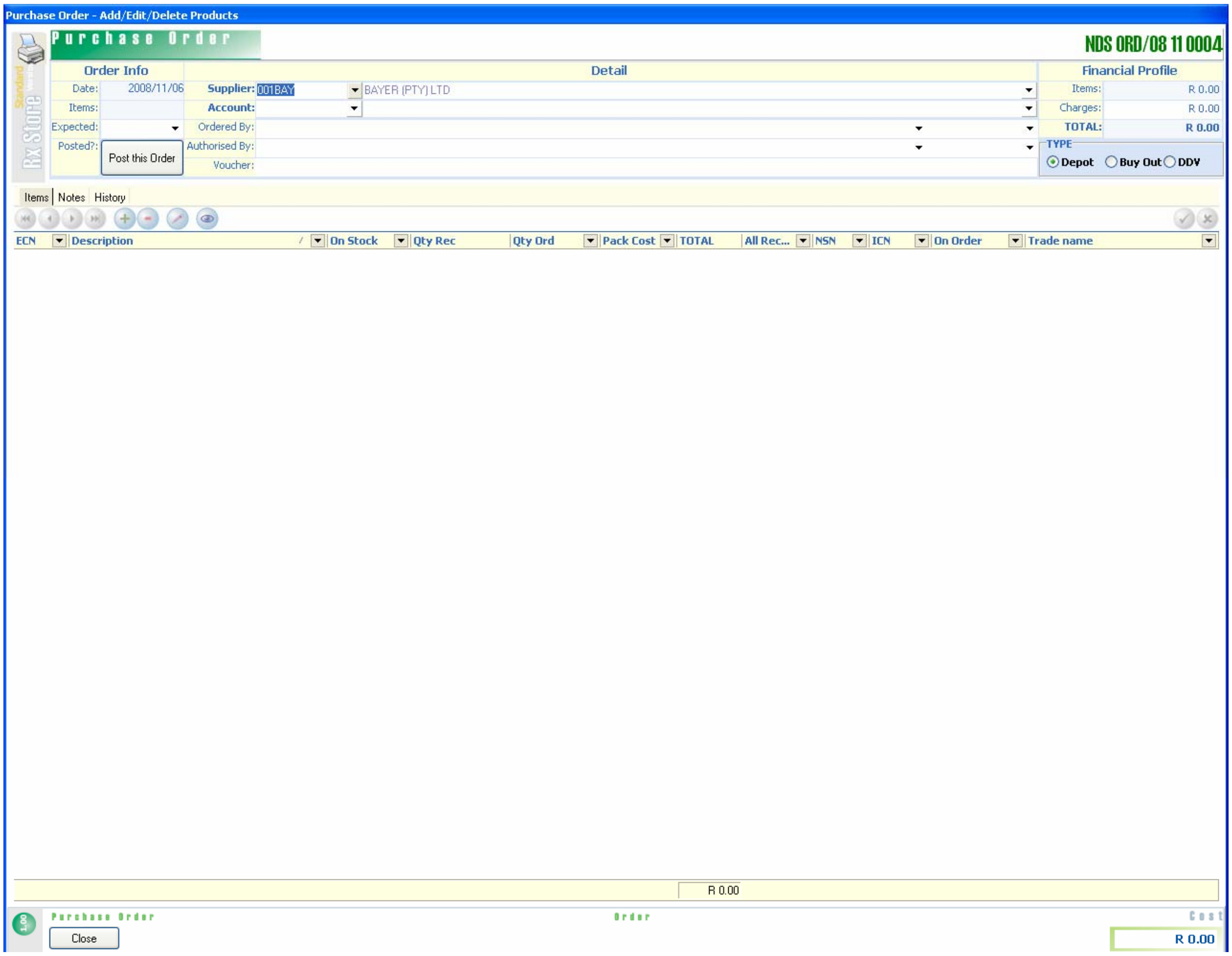


Using RxSolution to Manage and Track Purchase Orders

How Do I Create a Purchase Order?

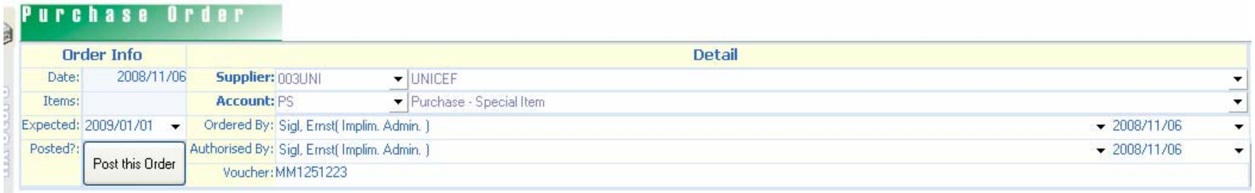
1. Click on the add new record icon  on the main **Purchase Orders** screen shown previously (page 6-3).

2. The following screen appears—



3. Fill in the information requested in the screen by clicking on the gray down-facing arrow and choosing from the drop-down list that appears for each entry. To select a user in the **Ordered By** and **Authorised By** fields, that user must have access to **[Store] Orders** (see "How Do I Add a User and Allow the User Access Rights to the System" in chapter 2). Enter the order and authorization dates to the right of these fields.

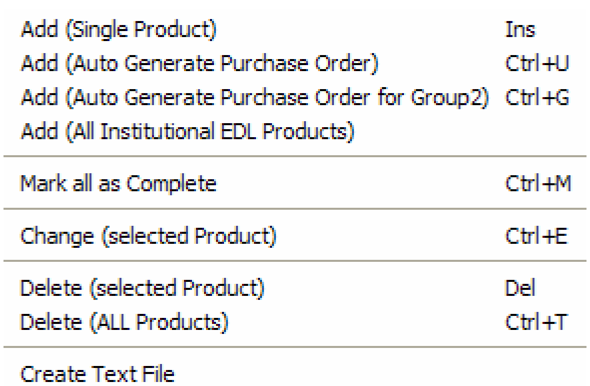
   The **Voucher** reference is an authorization reference obtained from a purchasing office, where applicable. The draft PO is printed and submitted to the purchasing office for approval. Once the PO has been approved, the purchasing office issues an authorization reference. This authorization reference is then recorded in the **Voucher** field. The field may be left empty if this system is not used. The **Voucher** field can also be used if an institution uses an electronic method of transmitting an order to a supplier or if a prenumbered order book is used for a supplier. The electronic order number generated by the supplier's software or from the order book can be captured in the **Voucher** field to allow field to allow the two numbers to be cross-referenced when the stock is received. If the Voucher Number is not ordinarily used, use it to record the order number section of the system order number e.g. **11-02-0019** where one captures 11-02-0019. This can be done so that one can easily locate the order on receipts.



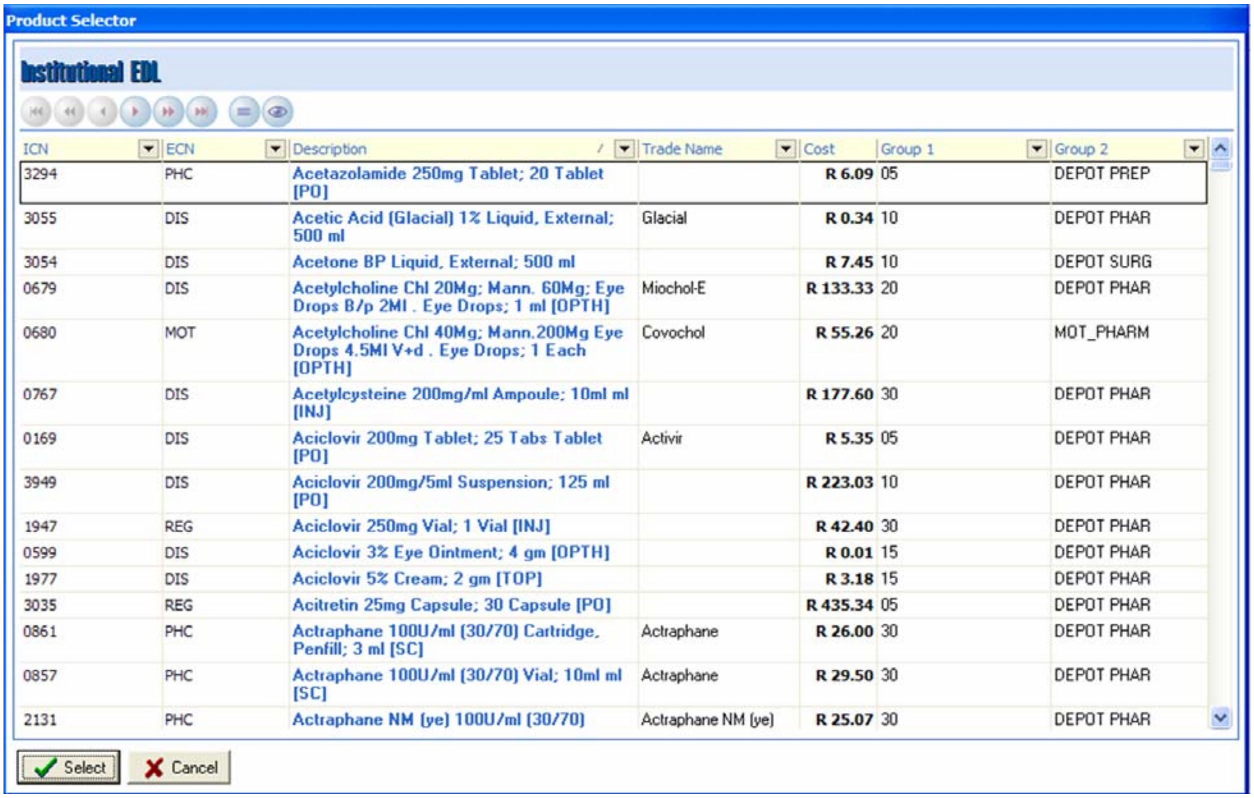
4. Click on the add new record icon to add products to the order.

5. Alternatively, click on the edit icon .

6. Choose an option from the list that appears. In this example, **Add** (**Single Product**) will be selected from the drop-down list.



7. The following **Product Selector** screen appears—



Product Selector

Institutional EDL

ICN	ECN	Description	Trade Name	Cost	Group 1	Group 2
3294	PHC	Acetazolamide 250mg Tablet; 20 Tablet [PO]		R 6.09	05	DEPOT PREP
3055	DIS	Acetic Acid (Glacial) 1% Liquid, External; 500 ml	Glacial	R 0.34	10	DEPOT PHAR
3054	DIS	Acetone BP Liquid, External; 500 ml		R 7.45	10	DEPOT SURG
0679	DIS	Acetylcholine Chl 20Mg; Mann. 60Mg; Eye Drops B/p 2Ml . Eye Drops; 1 ml [OPTH]	Miochol-E	R 133.33	20	DEPOT PHAR
0680	MOT	Acetylcholine Chl 40Mg; Mann.200Mg Eye Drops 4.5Ml V+d . Eye Drops; 1 Each [OPTH]	Covochol	R 55.26	20	MOT_PHARM
0767	DIS	Acetylcysteine 200mg/ml Ampoule; 10ml ml [INJ]		R 177.60	30	DEPOT PHAR
0169	DIS	Aciclovir 200mg Tablet; 25 Tabs Tablet [PO]	Activir	R 5.35	05	DEPOT PHAR
3949	DIS	Aciclovir 200mg/5ml Suspension; 125 ml [PO]		R 223.03	10	DEPOT PHAR
1947	REG	Aciclovir 250mg Vial; 1 Vial [INJ]		R 42.40	30	DEPOT PHAR
0599	DIS	Aciclovir 3% Eye Ointment; 4 gm [OPTH]		R 0.01	15	DEPOT PHAR
1977	DIS	Aciclovir 5% Cream; 2 gm [TOP]		R 3.18	15	DEPOT PHAR
3035	REG	Acitretin 25mg Capsule; 30 Capsule [PO]		R 435.34	05	DEPOT PHAR
0861	PHC	Actraphane 100U/ml (30/70) Cartridge, Penfill; 3 ml [SC]	Actraphane	R 26.00	30	DEPOT PHAR
0857	PHC	Actraphane 100U/ml (30/70) Vial; 10ml ml [SC]	Actraphane	R 29.50	30	DEPOT PHAR
2131	PHC	Actraphane NM (ye) 100U/ml (30/70)	Actraphane NM (ye)	R 25.07	30	DEPOT PHAR

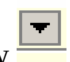
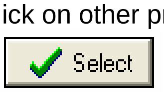
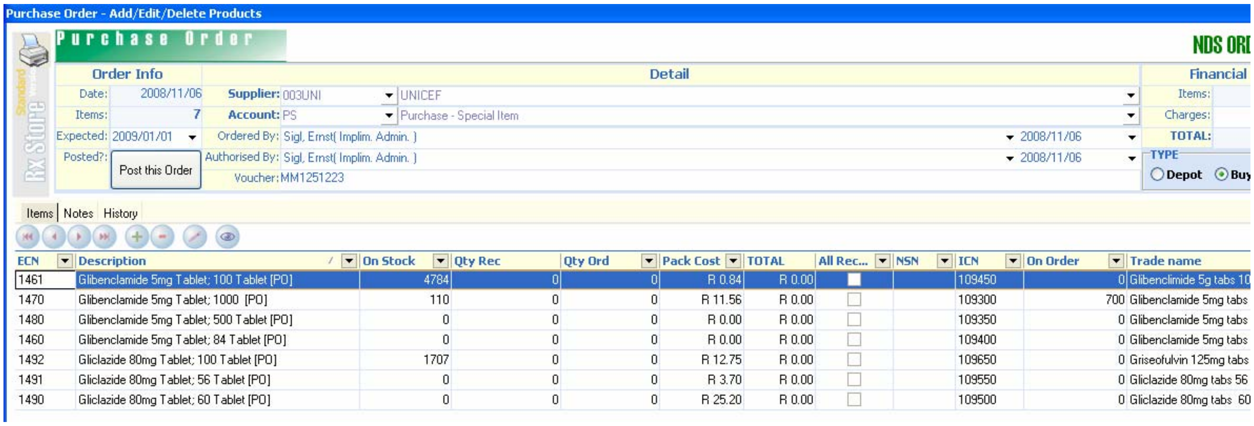
8. Select products to add to your PO using any of the methods in Table 6-2. Remember that you can easily find a product in the list by clicking on the gray down-facing arrow  next to a column heading, then starting to type an entry in that list. The cursor will jump to that entry and you can click on it to select it.

Table 6-2. Methods of Selecting Products for a Purchase Order

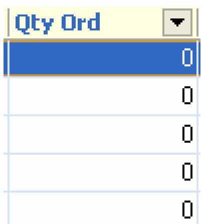
Action	Result
Click on one product, and then click on **Select**  .	One product is added to the list.
Click on the first product you are choosing, hold down **Ctrl** and click on other products required, and then click on **Select**  .	Many other nonconsecutive products can be added to the PO order in this way.
Hold down **Shift**, press the Page Down (**PgDn**) or the down arrow on the keyboard (↓), and click on **Select**  .	Many consecutive products can be added to the list.

The products you selected have been added to the order.



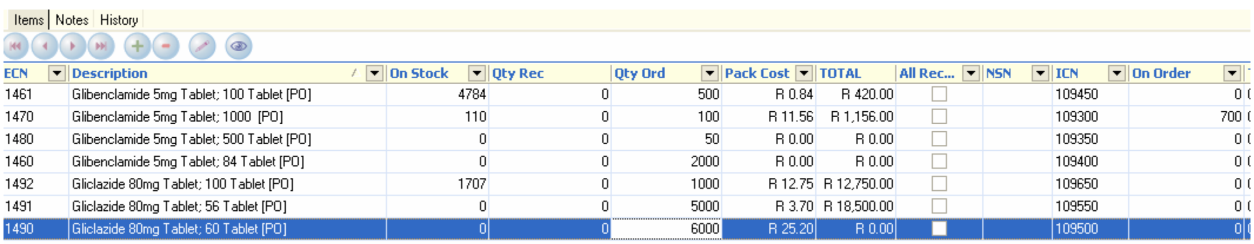
ECN	Description	On Stock	Qty Rec	Qty Ord	Pack Cost	TOTAL	All Rec...	NSN	ICN	On Order	Trade name
1461	Glibenclamide 5mg Tablet; 100 Tablet [PO]	4784	0	0	R 0.84	R 0.00			109450	0	Glibenclimide 5g tabs 10
1470	Glibenclamide 5mg Tablet; 1000 [PO]	110	0	0	R 11.56	R 0.00			109300	700	Glibenclamide 5mg tabs
1480	Glibenclamide 5mg Tablet; 500 Tablet [PO]	0	0	0	R 0.00	R 0.00			109350	0	Glibenclamide 5mg tabs
1460	Glibenclamide 5mg Tablet; 84 Tablet [PO]	0	0	0	R 0.00	R 0.00			109400	0	Glibenclamide 5mg tabs
1492	Gliclazide 80mg Tablet; 100 Tablet [PO]	1707	0	0	R 12.75	R 0.00			109650	0	Griseofulvin 125mg tabs
1491	Gliclazide 80mg Tablet; 56 Tablet [PO]	0	0	0	R 3.70	R 0.00			109550	0	Gliclazide 80mg tabs 56
1490	Gliclazide 80mg Tablet; 60 Tablet [PO]	0	0	0	R 25.20	R 0.00			109500	0	Gliclazide 80mg tabs 60

9. Type the quantities that you are ordering in the **Qty Ord** (quantity ordered) column.

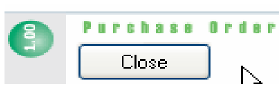


Qty Ord
0
0
0
0
0

10. Your order now looks like this—



ECN	Description	On Stock	Qty Rec	Qty Ord	Pack Cost	TOTAL	All Rec...	NSN	ICN	On Order
1461	Glibenclamide 5mg Tablet; 100 Tablet [PO]	4784	0	500	R 0.84	R 420.00			109450	0
1470	Glibenclamide 5mg Tablet; 1000 [PO]	110	0	100	R 11.56	R 1,156.00			109300	700
1480	Glibenclamide 5mg Tablet; 500 Tablet [PO]	0	0	50	R 0.00	R 0.00			109350	0
1460	Glibenclamide 5mg Tablet; 84 Tablet [PO]	0	0	2000	R 0.00	R 0.00			109400	0
1492	Gliclazide 80mg Tablet; 100 Tablet [PO]	1707	0	1000	R 12.75	R 12,750.00			109650	0
1491	Gliclazide 80mg Tablet; 56 Tablet [PO]	0	0	5000	R 3.70	R 18,500.00			109550	0
1490	Gliclazide 80mg Tablet; 60 Tablet [PO]	0	0	6000	R 25.20	R 0.00			109500	0

11. Click on **Close** 

and your PO is completed.

> *Note:* Remember, you need to post the order to be able to receive it and to show the stock as "on order" in RxSolution.

How Do I Post a Purchase Order?

Each receipt is for a particular PO that you have placed with your supplier. To receive it, the order must be listed as being "ready" to be received. The PO must therefore be posted.

Posting the order also means that the quantities on the order are shown as "Ordered" on both the product summary screen and the supplier outstanding transactions screen.

1. After typing the quantities to be ordered, click on **Post this Order.**

2. A warning screen will be displayed.

3. Click on **Yes** if you are sure, or click on **No** to cancel.

4. The PO is posted and marked as such.

How Do I Use the Editing Options on the Purchase Order Screen?

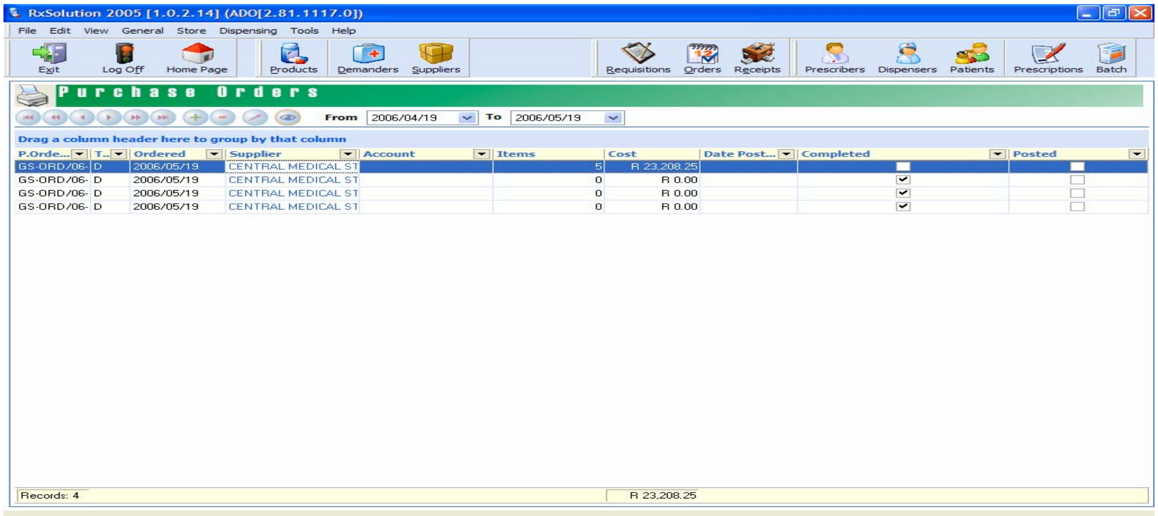
The available options and shortcuts are described in Table 6-3.

Table 6-3. Editing Options in the Purchase Order Screen

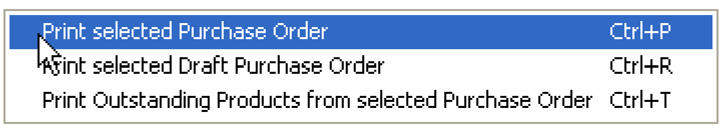
Options	Description
Add (Single Product) Ins	Choose one or a few products as explained in Table 6-2.
Add (Auto Generate Purchase Order) Ctrl+U	RxSolution is able to "suggest" what to order only after you have used RxSolution for three months or longer. The suggested quantities *must* still be reviewed before purchasing. See Annex 5 for details on auto-generating POs.
Add (Auto Generate Purchase Order for Group2) Ctrl+G	This option allows you to select products to order by Group 2 (defined in System Settings) as set up in the product details. For example, a supplier may be Group 2 and then a PO for that supplier's products can be easily generated. To do this, set up the default supplier as Group 2 in Products setup. Then when you want to place an order for that supplier's products, select the supplier from the drop-down list of suppliers. The Group 2 supplier is selected and all the products related to the selected supplier are placed on the order. See Annex 5 for details on auto-generating POs.
Add (All Institutional EDL Products)	RxSolution is able to add all items classified as EDL products in the products catalog.
Mark all as Complete Ctrl+M	This option is used when you want to "recall" an order. Once marked as completed, the ordered items are regarded as received although the stock level is not adjusted by these quantities. The items are removed from the PO even if they were outstanding. This option is commonly used in the case of an item being out of stock for a long period or if a product has been discontinued.
Change (selected Product) Ctrl+E	This option is a shortcut method of changing a selected product in a PO.
Delete (selected Product) Del	This option is a shortcut for deleting an item in an unposted PO.
Delete (ALL Products) Ctrl+T	This option is a shortcut for deleting all products in an unposted PO.
Create Text File	This option exports a text file of the order that can be imported into an electronic warehouse system.

How Do I Print a Purchase Order?

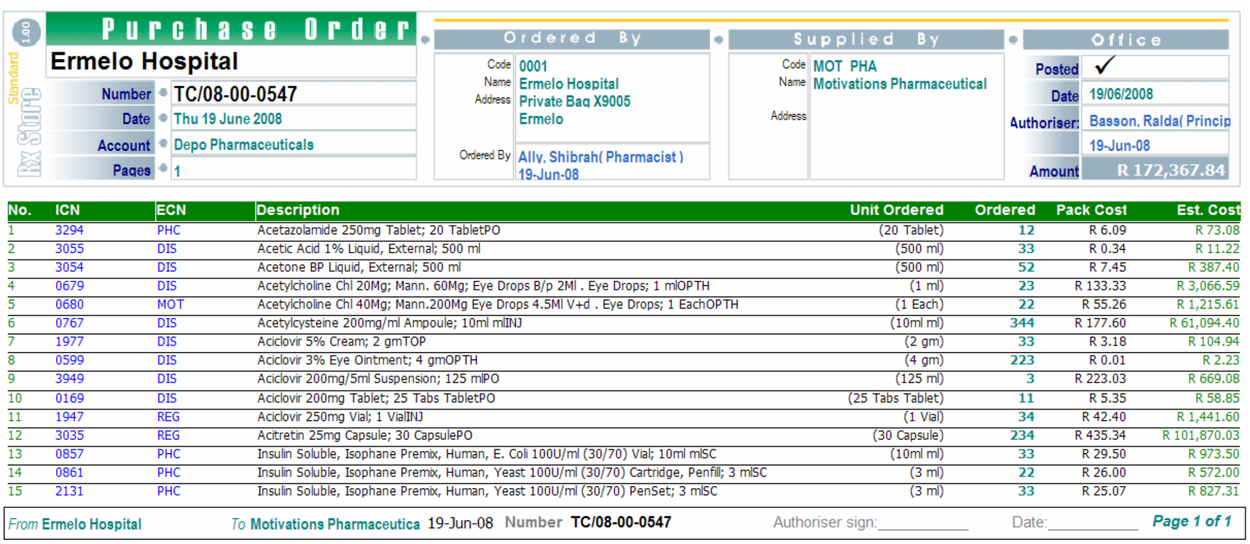
1. Click on the PO to be printed. It is highlighted in blue.



2. Right click on the printer icon  and three printing options are displayed.



A standard printed PO looks like this—



Purchase Order

1.00 Standard Rx Store

Ermelo Hospital

Number: TC/08-00-0547
Date: Thu 19 June 2008
Account: Depo Pharmaceuticals
Pages: 1

Ordered By
Code: 0001
Name: Ermelo Hospital
Address: Private Bag X9005
Ermelo
Ordered By: Ally, Shibrah(Pharmacist)
19-Jun-08

Supplied By
Code: MOT PHA
Name: Motivations Pharmaceutical
Address:

Office
Posted: ✓
Date: 19/06/2008
Authoriser: Basson, Ralda(Princip
19-Jun-08
Amount: R 172,367.84

No.	ICN	ECN	Description	Unit Ordered	Ordered	Pack Cost	Est. Cost
1	3294	PHC	Acetazolamide 250mg Tablet; 20 TabletPO	(20 Tablet)	12	R 6.09	R 73.08
2	3055	DIS	Acetic Acid 1% Liquid, External; 500 ml	(500 ml)	33	R 0.34	R 11.22
3	3054	DIS	Acetone BP Liquid, External; 500 ml	(500 ml)	52	R 7.45	R 387.40
4	0679	DIS	Acetylcholine Chl 20Mg; Mann. 60Mg; Eye Drops B/p 2Ml . Eye Drops; 1 mlOPTH	(1 ml)	23	R 133.33	R 3,066.59
5	0680	MOT	Acetylcholine Chl 40Mg; Mann.200Mg Eye Drops 4.5Ml V+d . Eye Drops; 1 EachOPTH	(1 Each)	22	R 55.26	R 1,215.61
6	0767	DIS	Acetylcysteine 200mg/ml Ampoule; 10ml mlINJ	(10ml ml)	344	R 177.60	R 61,094.40
7	1977	DIS	Aciclovir 5% Cream; 2 gmTOP	(2 gm)	33	R 3.18	R 104.94
8	0599	DIS	Aciclovir 3% Eye Ointment; 4 gmOPTH	(4 gm)	223	R 0.01	R 2.23
9	3949	DIS	Aciclovir 200mg/5ml Suspension; 125 mlPO	(125 ml)	3	R 223.03	R 669.08
10	0169	DIS	Aciclovir 200mg Tablet; 25 Tabs TabletPO	(25 Tabs Tablet)	11	R 5.35	R 58.85
11	1947	REG	Aciclovir 250mg Vial; 1 VialINJ	(1 Vial)	34	R 42.40	R 1,441.60
12	3035	REG	Acitretin 25mg Capsule; 30 CapsulePO	(30 Capsule)	234	R 435.34	R 101,870.03
13	0857	PHC	Insulin Soluble, Isophane Premix, Human, E. Coli 100U/ml (30/70) Vial; 10ml mlSC	(10ml ml)	33	R 29.50	R 973.50
14	0861	PHC	Insulin Soluble, Isophane Premix, Human, Yeast 100U/ml (30/70) Cartridge, Penfill; 3 mlSC	(3 ml)	22	R 26.00	R 572.00
15	2131	PHC	Insulin Soluble, Isophane Premix, Human, Yeast 100U/ml (30/70) PenSet; 3 mlSC	(3 ml)	33	R 25.07	R 827.31

From Ermelo Hospital *To* Motivations Pharmaceutica 19-Jun-08 **Number** **TC/08-00-0547** Authoriser sign:__________ Date:__________ ***Page 1 of 1***

The format of the printed purchase orders can be customized for special needs. This is set up on installation of RxSolution.

Print selected Draft Purchase Order Ctrl+R

A printed draft PO looks like this—

Purchase Order

1.00 Standard Rx Store

Ermelo Hospital

Number	TC/08-00-0547
Date	Thu 19 June 2008
Account	Depo Pharmaceuticals
Pages	1

Ordered By

Code	0001
Name	Ermelo Hospital
Address	Private Bag X9005 Ermelo
Prepared By	Ally, Shibrah(Pharmacist) 19-Jun-08

Supplied By

Code	MOT PHA
Name	Motivations Pharmaceutical
Address	

Office

Posted	✓
Date	19/06/2008
Authoriser:	Basson, Ralda(Princip 19-Jun-08
Amount	R 172,367.84

No.	ICN	ECN	Description	Dues Out	On Hand	Ordered	Pack Cost	Est. Cost
1	3294	PHC	Acetazolamide 250mg Tablet; 20 TabletPO	12	50	12	R 6.09	R 73.08
2	3055	DIS	Acetic Acid 1% Liquid, External; 500 ml	33	0	33	R 0.34	R 11.22
3	3054	DIS	Acetone BP Liquid, External; 500 ml	52	0	52	R 7.45	R 387.40
4	0679	DIS	Acetylcholine Chl 20Mg; Mann. 60Mg; Eye Drops B/p 2Ml . Eye Drops; 1 mlOPTH	23	0	23	R 133.33	R 3,066.59
5	0680	MOT	Acetylcholine Chl 40Mg; Mann.200Mg Eye Drops 4.5Ml V+d . Eye Drops; 1 EachOPTH	22	0	22	R 55.26	R 1,215.61
6	0767	DIS	Acetylcysteine 200mg/ml Ampoule; 10ml mlINJ	344	50	344	R 177.60	R 61,094.40
7	1977	DIS	Aciclovir 5% Cream; 2 gmTOP	33	9	33	R 3.18	R 104.94
8	0599	DIS	Aciclovir 3% Eye Ointment; 4 gmOPTH	223	36	223	R 0.01	R 2.23
9	3949	DIS	Aciclovir 200mg/5ml Suspension; 125 mlPO	3	0	3	R 223.03	R 669.08
10	0169	DIS	Aciclovir 200mg Tablet; 25 Tabs TabletPO	11	62	11	R 5.35	R 58.85
11	1947	REG	Aciclovir 250mg Vial; 1 VialINJ	34	8	34	R 42.40	R 1,441.60
12	3035	REG	Acitretin 25mg Capsule; 30 CapsulePO	234	0	234	R 435.34	R 101,870.03
13	0857	PHC	Insulin Soluble, Isophane Premix, Human, E. Coli 100U/ml (30/70) Vial; 10ml mlSC	33	467	33	R 29.50	R 973.50
14	0861	PHC	Insulin Soluble, Isophane Premix, Human, Yeast 100U/ml (30/70) Cartridge, Penfill; 3 mlSC	22	0	22	R 26.00	R 572.00
15	2131	PHC	Insulin Soluble, Isophane Premix, Human, Yeast 100U/ml (30/70) PenSet; 3 mlSC	33	100	33	R 25.07	R 827.31

Purchase Order Summary **Provisional**

Motivations Pharmaceutical — Was Requested to Supply — 15 Products — 1112 Items @ TOTAL R 172,367.84

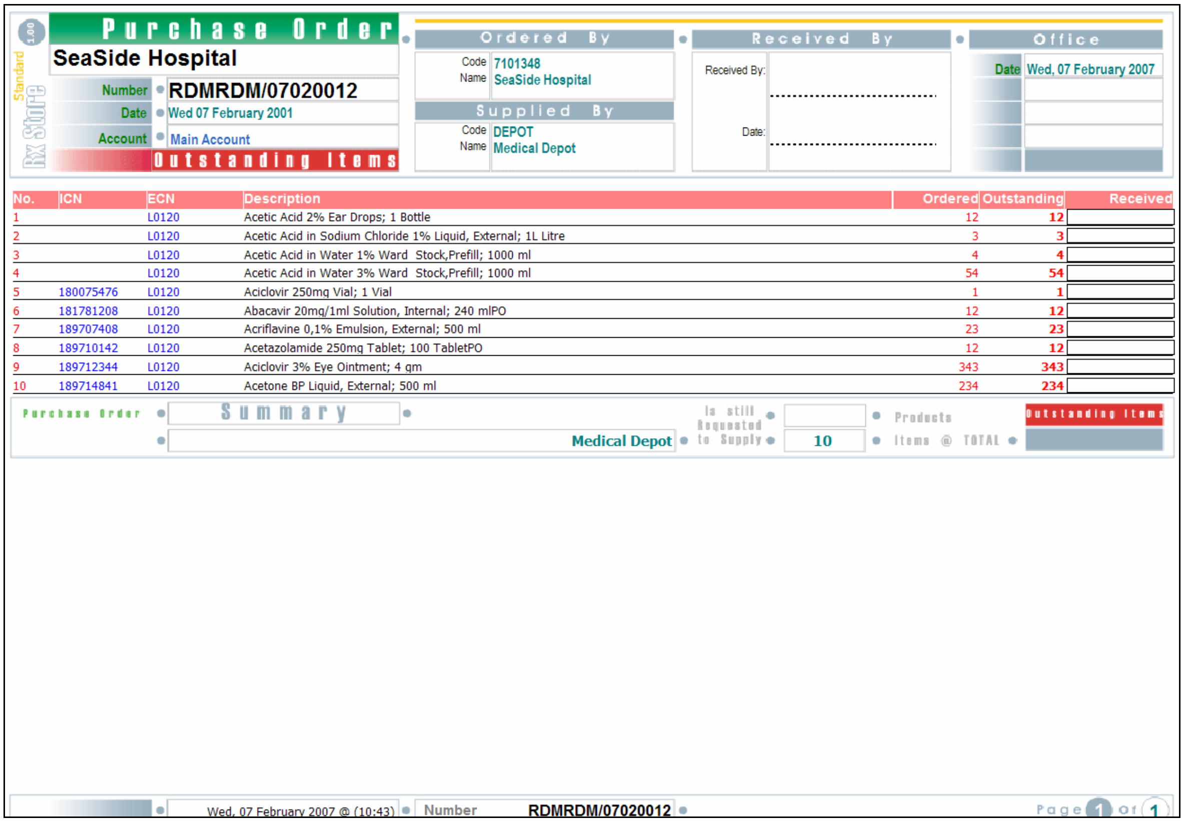
Draft Thu, 19 June 2008 @ (16:58) Number TC/08-00-0547 Authoriser sign:__________ Date:______Time:______ Page 1 of 1

The draft PO shows the **Dues Out** (back orders) and **On Hand** stock quantities, so that a purchasing officer can decide before posting if he or she should adjust the order quantity. The draft PO can also be used for obtaining authorization from your finance office.

The final PO does not show the dues out and stock-on-hand fields because you do not want to show the supplier what your stock on hand is and what is still outstanding, especially if the stock is outstanding from another supplier.

Print Outstanding Products from selected Purchase Order Ctrl+T

A screen showing outstanding products from a PO looks like this—



Purchase Order

SeaSide Hospital

Number RDMRDM/07020012
Date Wed 07 February 2001
Account Main Account

Outstanding Items

Ordered By — Code 7101348, Name SeaSide Hospital
Supplied By — Code DEPOT, Name Medical Depot
Received By — Received By: Date:
Office — Date Wed, 07 February 2007

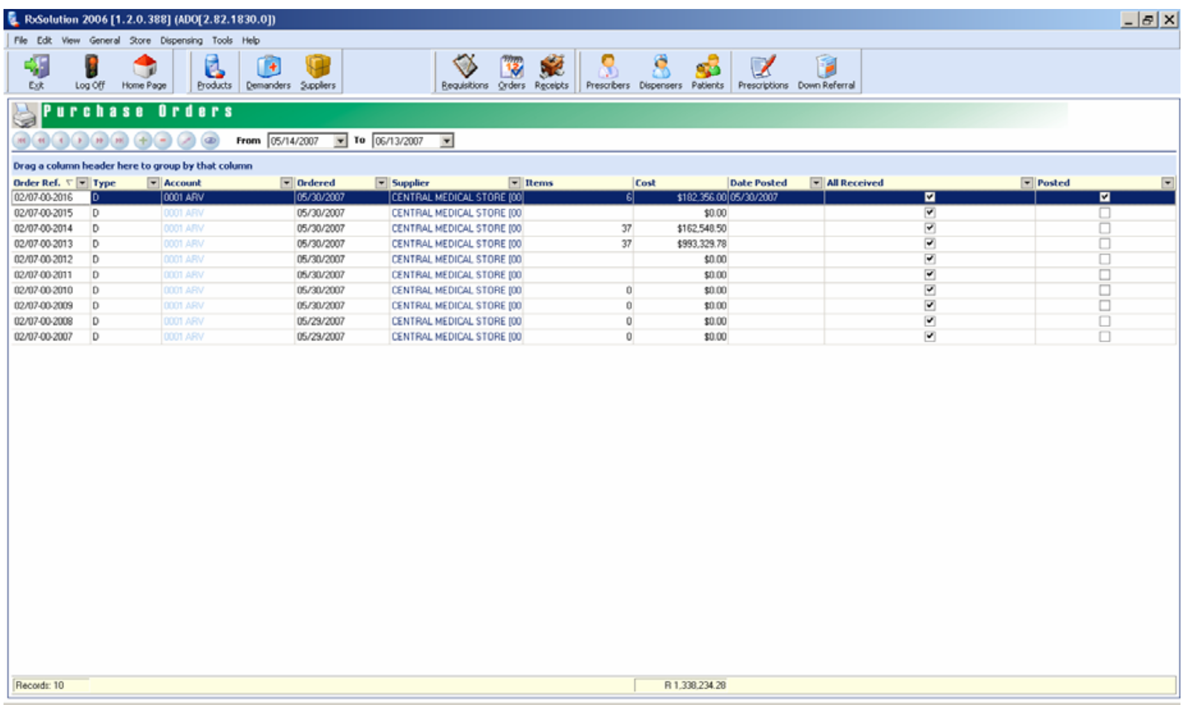
No.	ICN	ECN	Description	Ordered	Outstanding	Received
1		L0120	Acetic Acid 2% Ear Drops; 1 Bottle	12	12	
2		L0120	Acetic Acid in Sodium Chloride 1% Liquid, External; 1L Litre	3	3	
3		L0120	Acetic Acid in Water 1% Ward Stock,Prefill; 1000 ml	4	4	
4		L0120	Acetic Acid in Water 3% Ward Stock,Prefill; 1000 ml	54	54	
5	180075476	L0120	Aciclovir 250mg Vial; 1 Vial	1	1	
6	181781208	L0120	Abacavir 20mg/1ml Solution, Internal; 240 mlPO	12	12	
7	189707408	L0120	Acriflavine 0,1% Emulsion, External; 500 ml	23	23	
8	189710142	L0120	Acetazolamide 250mg Tablet; 100 TabletPO	12	12	
9	189712344	L0120	Aciclovir 3% Eye Ointment; 4 gm	343	343	
10	189714841	L0120	Acetone BP Liquid, External; 500 ml	234	234	

Purchase Order Summary
Medical Depot — Is still Requested to Supply: 10 — Products / Items @ TOTAL — Outstanding Items

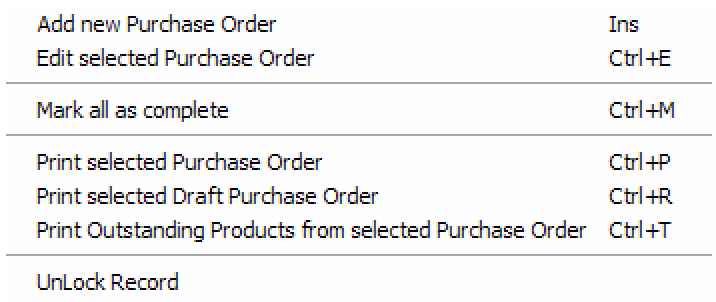
Wed, 07 February 2007 @ (10:43) Number RDMRDM/07020012 Page 1 of 1

How Do I Use the Alternate Method of Printing a Purchase Order?

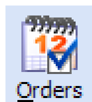
1. Click on the PO to be printed. It is highlighted in blue.



2. Right click on the PO, and the following options are displayed—

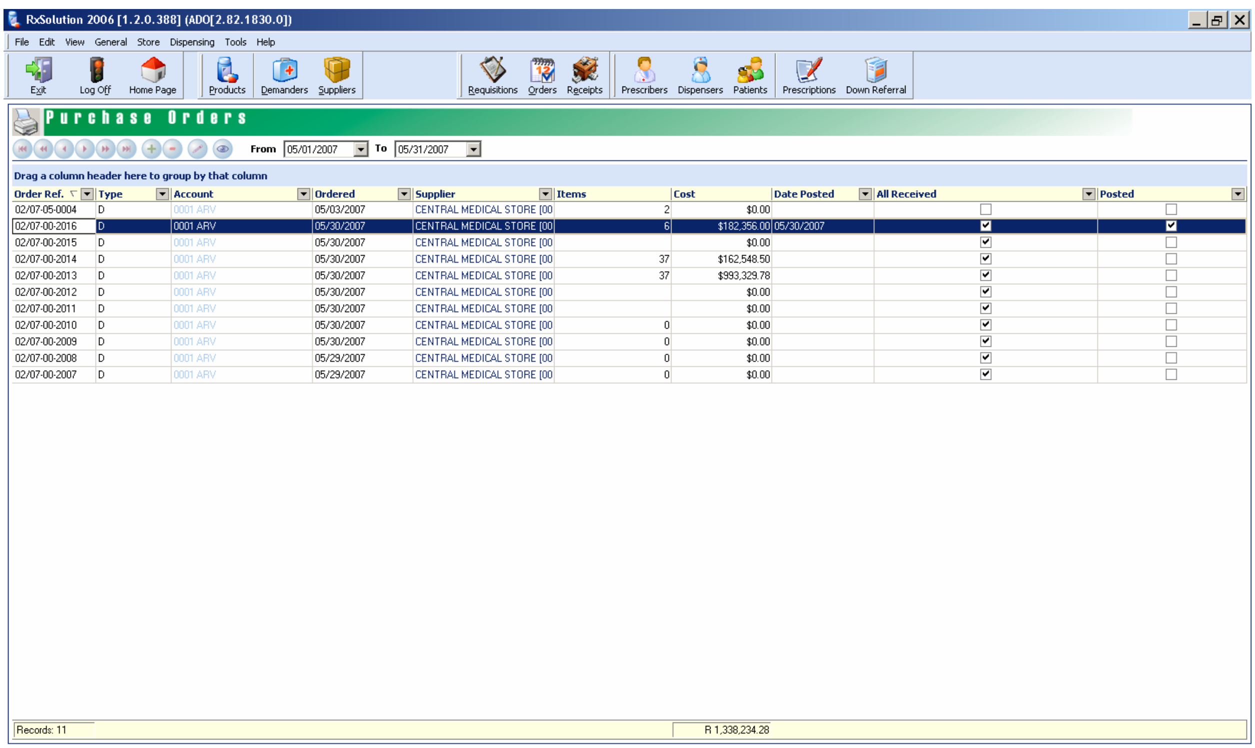


How Do I View a List of My Purchase Orders?

1. Click on the **Orders** icon 

on the toolbar.

2. The following screen appears—



3. Refer to chapter 3, “Understanding the Features and Navigation,” for information on customizing the screen view and searching for records.

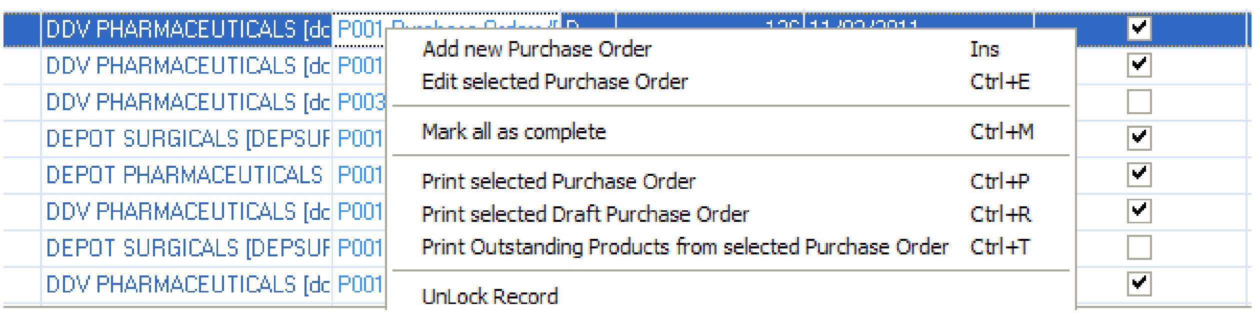
How Do I View a Purchase Order?

Double click on the PO to be viewed to open the detail screen. The following screen appears—

How Do I Unlock a locked Purchase order?

In the event that the power went down and the PO is left in a locked state, **ensure firstly that nobody else is presently accessing the same PO.**

1. Right Click on the relevant PO in the Purchase Order List screen.



2. Click on the UnLock Record.

3. The List will now be unlocked.