Purchase Indent Entry

Purchase Indent is an internal document used in the purchasing process to authorize the requisition of materials prior to initiating a PO. Purchase indents are similar to purchase requisitions, except they are typically used for material acquisition, particularly for those with a long lead time. As such, they incorporate more functionality (e.g., grouping orders).

The *Purchase Indent Entry* screen lets you accommodate requirements coming directly from the shop floor. A purchase indent can be sent to the appropriate people for approvals. Once approved, a PO can be directly created by transferring the indents to PO using the *Transfer Indent to PO* screen.

Go To: Purchase → Purchase Order → Purchase Indent Entry.

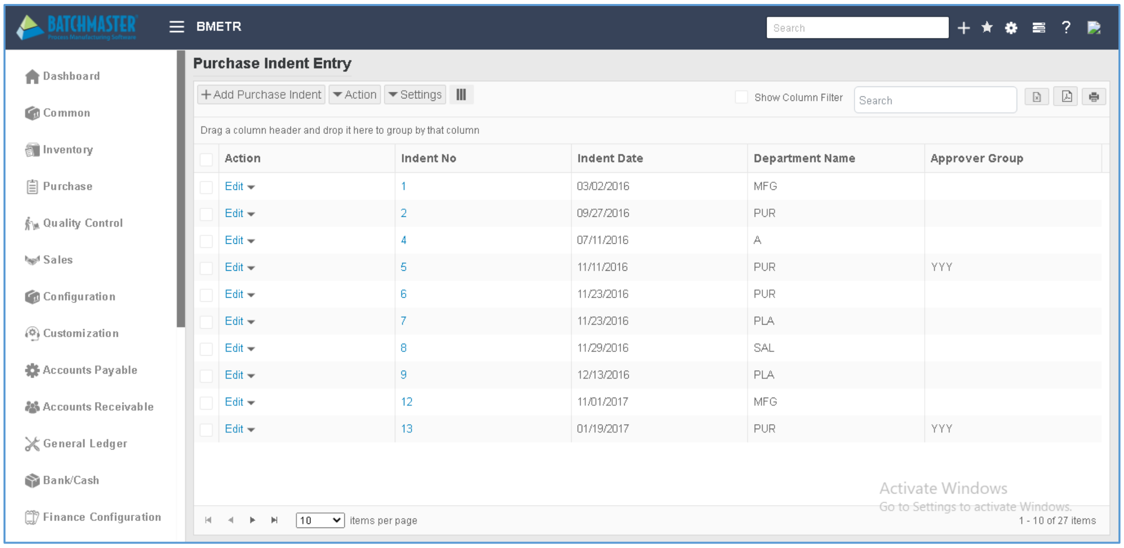
⚠ **Prerequisites:** Data should be maintained at the *Quote Layout Setup* screen to use the *Request For Quote* option available in *Special Functions*. If an approval process is required:

- On the *Purchase Indent* tab of the *BW Setup* screen, *BatchMaster Enterprise* must be selected as the Approver Source.
- Data must be maintained on the following screens:
  - *Purchase Approver Group*.
  - *Department Master*.
  - *Approver Matrix*.

The system will automatically assign approvers for the purchase based on the defined approver matrix and the associated department on *the Purchase Indent* screen.

Purchase Indent Entry – Dashboard

You can manage purchase indent entry from this dashboard. By default, the system displays all the existing purchase indents as maintained for your business/company. You can click on any of the purchase indent record to view its details.

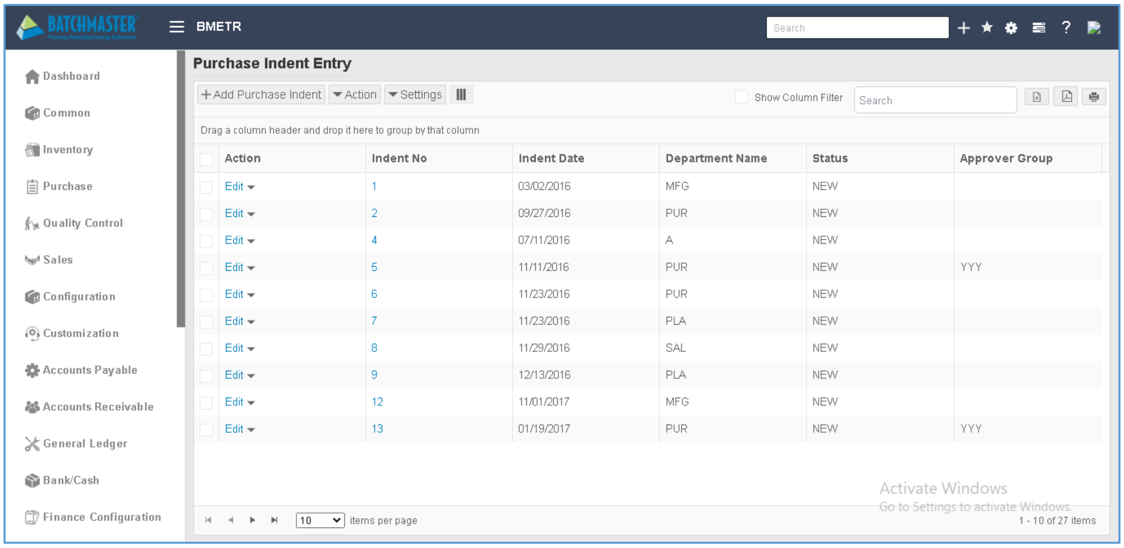


The *Purchase Indent Entry* dashboard contains many elements that occupy 100% of the browser window. Resizing the window would resize the elements to fit. The elements can be rearranged, i.e., docked, resized, grouped, and stacked. The header and the side panel can't be rearranged.
By default this dashboard displays all status indent records.

Using the *Action* button from the dashboard you can:

- Copy selected indent records
- Select multiple indents and transfer them to PO
- Cancel selected indent records
- Delete selected indent records

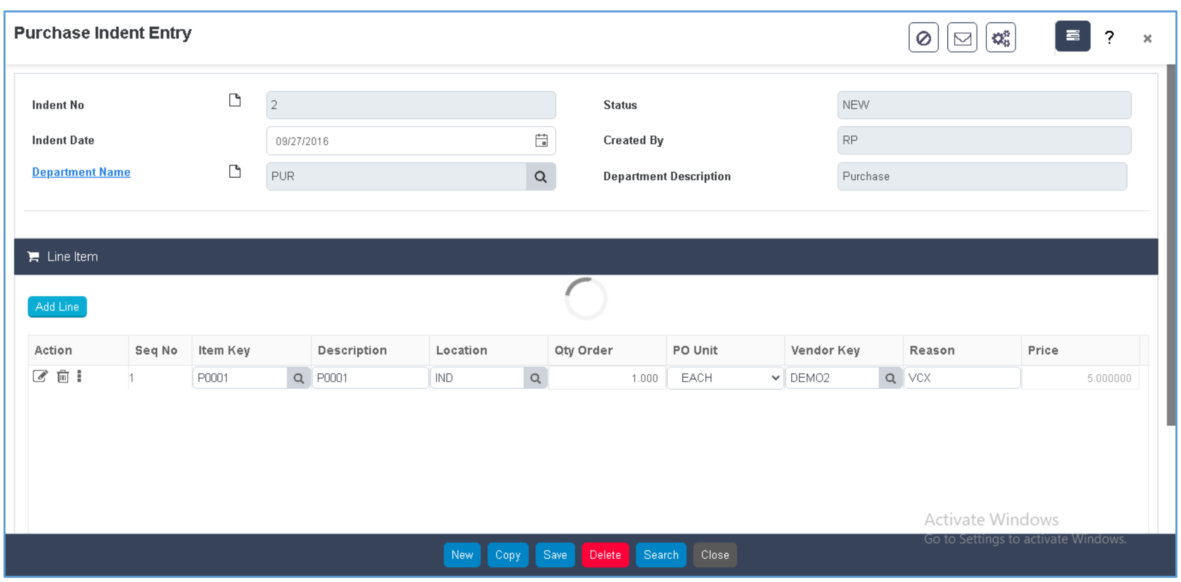
After you select all the columns of the *Purchase Indent Entry* dashboard, the middle grid displays the selected columns.



The *Purchase Indent Entry* dashboard provides a clear vision of the created records in a read-only mode. You can view the records as per the number of pages provided per page.

Purchase Indent Entry – Add Mode

To add a new Purchase Indent Entry to your BatchMaster database, click on the + *Add Purchase Indent* button. The system displays the *Purchase Indent Entry* screen, where you can create new requisition records.



Header Fields:

Indent No: This is auto-assigned indent number, assigned to provide unique identification to each indent created.

Status: This field displays the current status of indent like new, approved or processed. The statuses of an indent help user determine the stage at which the indent process presently is.

Indent Date: This field holds the date on which indent was created. By default, it is the server date and can be changed to any other date below server date.

Created By: Name of the person who created the indent, will be displayed here.

Department Name: This field is used specify the department from which the purchase Indent is created.

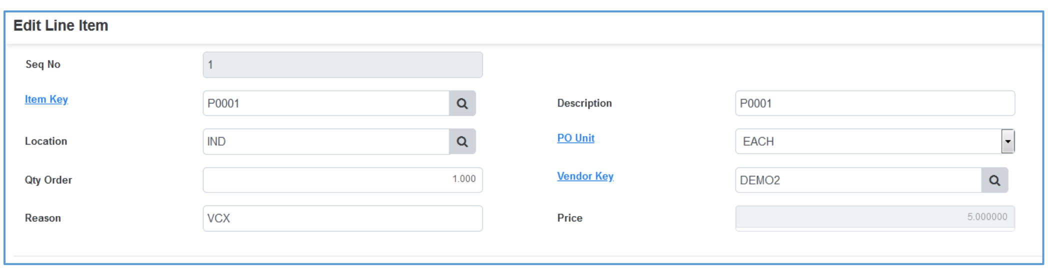
Department Description: This field specifies the description of the department name.

<u>Grid Fields:</u>

Action: Click this button to perform various activities on the purchase indent.

Edit: Clicking this button will open the Edit Line Item screen. The screen will fetch all the related information of the selected line item. With this screen you can edit the line item information as required.

<u>Edit Line Item Screen:</u>



Seq No: This key is used for re-sequencing the Line items. This field is useful in order to change the sequence of line items at a later stage. Once user click the add line button the sequence number gets initiated with 1. Each time when a line is inserted in the grid the sequence number gets incremented by 1. This is an editable field, thus user can enter the sequence number for individual inventory line to specify its position in the sequence.

Item key: This is the item for which request is being put using this indent.

Description: This field is defaulted to the description of the Item selected.

Location: This is the inventory location where the item is required. When the Receipt of the PO created upon transferring this Indent is processed, the onhand of this location gets incremented.

Qty Order: This is the quantity to be ordered of the required item.

PO Unit: Purchase unit of the item gets defaulted to this field. The required quantity of item is expressed in this unit.

Vendor Key: This field holds the vendor key of the vendor from whom the purchase is recommended. This vendor key can be changed after reviewing the prices of alternate vendor.

Reason: Reasons or any comment related to the purchase can be entered in this field.

Price: This field specifies purchase price of the item.

Delete: Click this button to delete the selected line item.

More Actions: The following options are available under the more actions:

- **View Item Location:** Click this option to view the inventory details for all item-locations for the selected item.

Seq No: This key is used for re-sequencing the Line items. This field is useful in order to change the sequence of line items at a later stage. Once user click the add line button the sequence number gets initiated with 1. Each time when a line is inserted in the grid the sequence number gets incremented by 1. This is an editable field, thus user can enter the sequence number for individual inventory line to specify its position in the sequence.

Item Key: This is the item for which request is being put using this indent.

Description: This field is defaulted to the description of the selected Item.

Location: This is the inventory location where the item is required. When the Receipt of the PO created upon transferring this Indent is processed, the onhand of this location gets incremented.

Qty Order: This is the quantity to be ordered of the required item.

PO Unit: Purchase unit of the item gets defaulted to this field. The required quantity of item is expressed in this unit.

Vendor Key: This field holds the vendor key of the vendor from whom the purchase is recommended. This vendor key can be changed after reviewing the prices of alternate vendor.

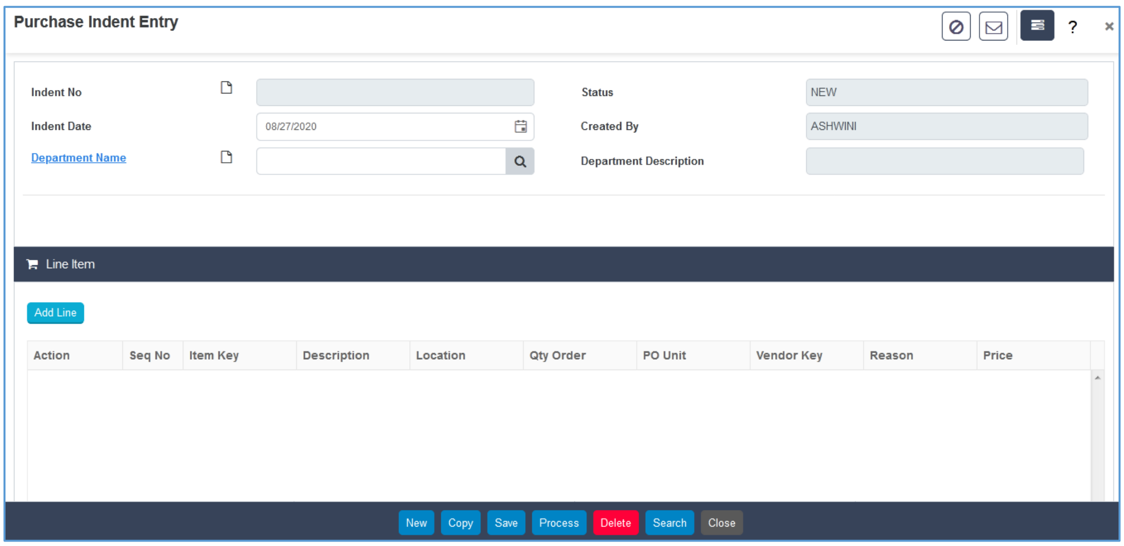
Reason: Reasons or any comment related to the purchase can be entered in this field.

Price: This field specifies purchase price of the item.

Creating an Indent

1. Open the *Purchase Indent Entry* Dashboard.

2. Click on the *+Add Purchase Indent* button to open the *Purchase Indent Entry* screen.



2. The *Status* field is defaulted with the value *NEW*. The indent date is defaulted to the current server date

3. Select the department that is putting up the request for material at the *Department ID* field.

4. Click the *Add Line* button to insert a new line within the grid.

5. Click the *Item Key* field to select an item via the lookup. As soon as you select the item key, the *Description* and the *PO Unit* field values are defaulted from the *Item Master* screen.

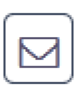
6. Select the location of the item for which the request is being made via the lookup provided next to the *Location* field. When the location is selected, the *Price* field is defaulted with the price maintained at the item-location.

7. The *Vendor Key* is defaulted as soon as you select the location. You can change the vendor from whom the purchase is recommended.

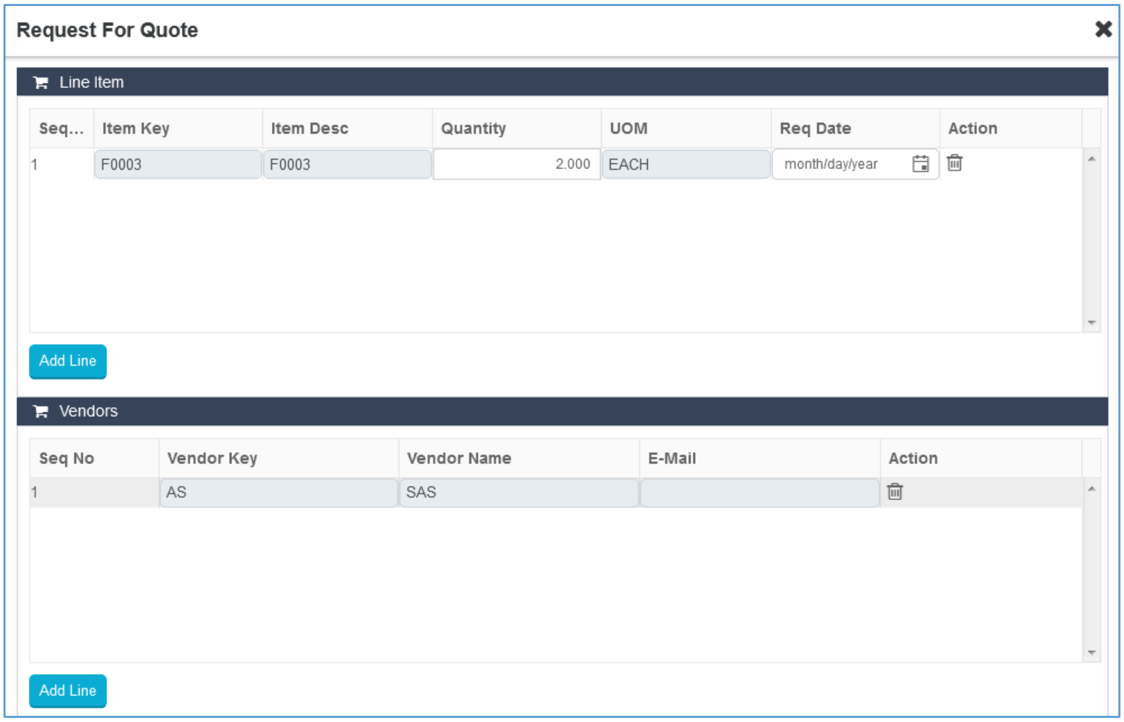
8. Enter the quantity in *Quantity Order* field.
9. At the *Reason* field, enter any reason or comment related to the purchase. You can add more than one item in this grid by clicking on the *Add Line* button.
10. After you have finished adding all the line items, click the *Save* button to save the Indent. The *Indent Number* field on the saved record is defaulted with an auto-generated number.
11. To delete any line from the grid, click the *Delete* button under the *Action* column.
12. If Approver settings are maintained on the *BW Setup* screen and information is maintained at the *Purchase Approvers* screen. This is required if the Indent needs to be formally approved before being transferred to a PO.
13. BatchMaster WEB provides a Purchase Approval process on the basis of the purchase limit of the department. The system automatically assigns the Approvers for the purchase based on the defined approver matrix and the associated department on the *Purchase Indent* screen.
14. To approve the Indent, locate the Indent on the Approval dashboard and approve.
15. The value in the *Status* field changes to *Approver* when at least one Approver has approved the Purchase Indent.
16. When all the approvals are complete, the value in the *Status* field of the Purchase Indent changes to Approved.
17. Save the Indent by clicking the *Save* button.

Special Functions

Cancel Indent: Click this button to cancel Purchase Indents with New, Approved, or Approver status. Note that Purchase Indents with Transferred status cannot be canceled using this button.



Request For Quote: This button provides visibility for vendor selection, with the ability to place a quote request with multiple vendors. Click the *Request For Quote* button to open the *Request For Quote* screen.



The Indent lines are defaulted on this screen. The quantities of identical items (if multiple lines exist for them) are grouped and a single line is entered for them. You can add more line items and vendors here, in which case values for the *Item Key*, *Item Description*, and *UOM* fields are defaulted upon selecting the required item, whereas the quantity to be ordered must be entered manually.

Add multiple vendors in the right grid, using the *Add Line* button.

Click the *Send Mail* button to send item details via mail to the respective vendor(s). Note that the following settings are obligatory when you use this option:

- Data must be maintained on the *Mail Settings* section of the *User Settings* screen in the *Configuration Module*.
- It is necessary to maintain the *Email ID* of the Logged User in the *User Setup* screen in the *Administration Module*.
- The *Email ID* of the vendor must be maintained on the *Vendor Master* screen.