PURCHASING
Work instructions

Date: 03.02.2023
Status: Version 1.0

Contents

1. Purchase plan

1.1. Reviewing actions on existing purchase orders

The actions on existing purchase orders are currently not suitable for use as the action proposals are the same as the ones given for the production order and not relating to the action of the purchase. Please do not rely on these action messages.

If a supply planner amends a production order date they should inform the vendor scheduler so the delivery date of the purchase order can be adjusted if necessary.

1.2. Reviewing planned purchase orders

When viewing planned purchase orders as a vendor scheduler there are two set ups.

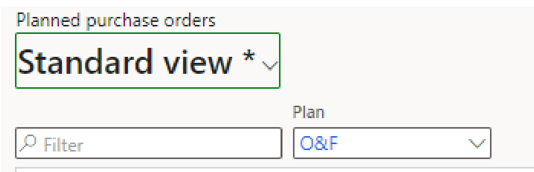
Plan O&F – this shows all the planned purchase orders based on firm and planned demand, this should be used to assist discussions in the global supply review regarding potential bottlenecks for future planned productions.

Plan PURCH – this shows all the planned purchase orders based only on firm production orders, this should be used when firming purchase orders.

The planned orders have different number formats depending on which plan you are viewing which makes it easier to check if you are viewing the right orders.
In the O&F plan orders will start with 'MRP' and in the PURCH plan they start with 'PPO'.

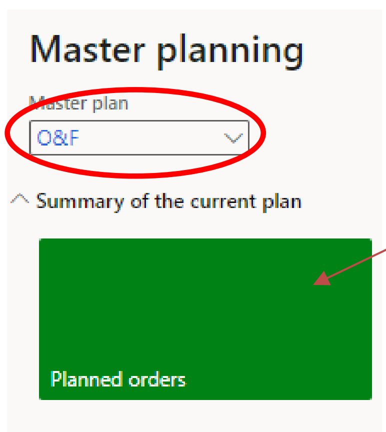
In preparation for the global supply review on WD5, the planned orders in the O&F plan should be reviewed on the morning of WD5.

Planned purchase orders can be accessed by one of the following paths:

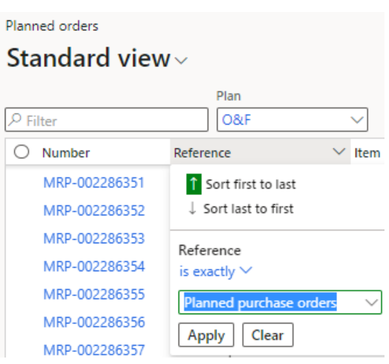


OR via

Select the 'O&F' plan from the master planning and then select 'Planned orders'.



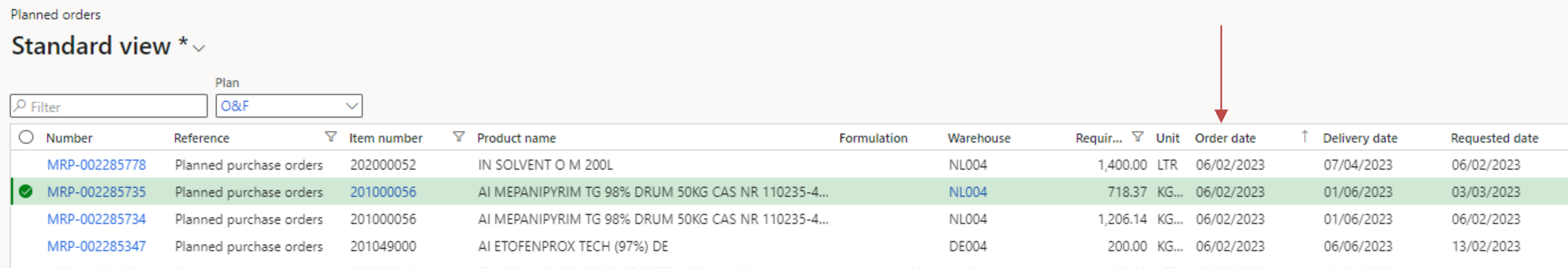
If you use the master planning path you will need to filter the 'reference' field to show only planned purchase orders.



During the global supply review meeting the vendor schedulers should highlight potential bottlenecks to supply. In most cases the supply planner will raise concerns relating to production which can not be delivered on time due to the lead time of components.

The vendor schedulers can focus more on the components which need to be committed to in the immediate short term and if not committed to will cause production delays.

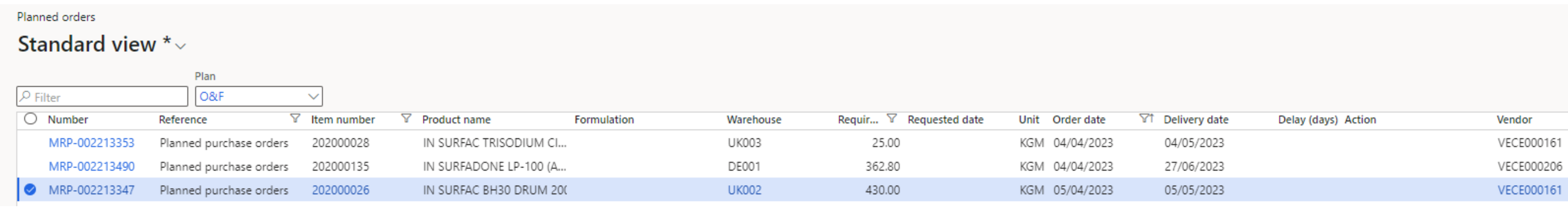
To do this concentrate on the 'Order date' field as this is the latest date by which you need to commit if you are to deliver on time.

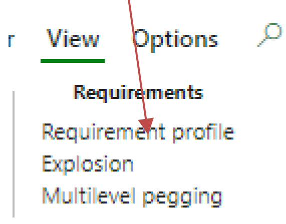


To focus on your purchasing scope, use the filters to reduce the list e.g. filter on items beginning with the correct prefix for your range of items e.g. 4 for labels, 6 for packaging etc and/or filter on the vendor that you are the point of contact for.

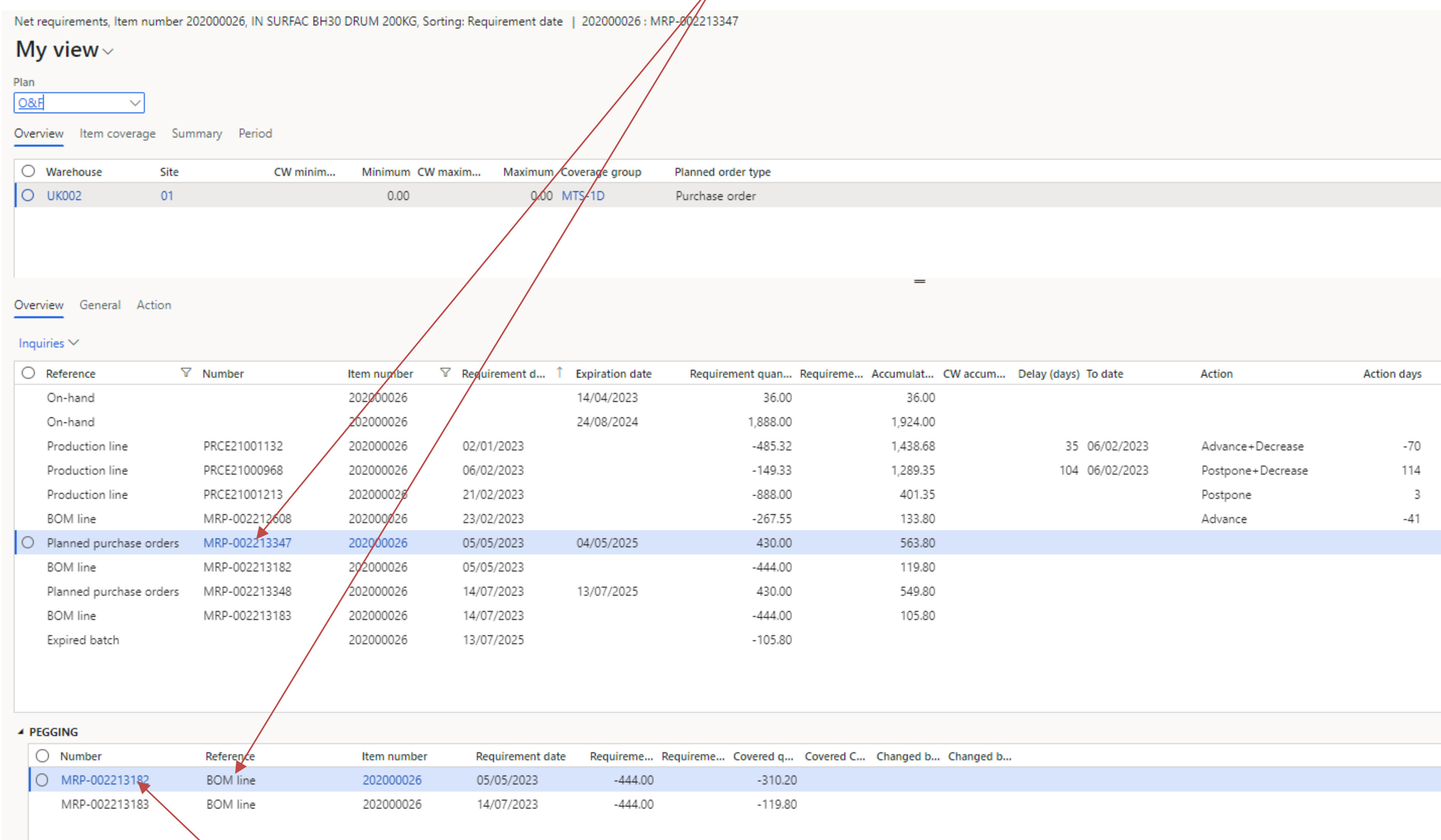
1.2.1. Understanding the net requirements

To understand the requirement behind the planned purchase highlight the planned order and go to the view tab and select 'Requirement profile'.





In the net requirements you will see the planned purchase order highlighted and in the lower screen which demand it is linked to.
In this example the order is driven by demand coming from a BOM line in a production order.

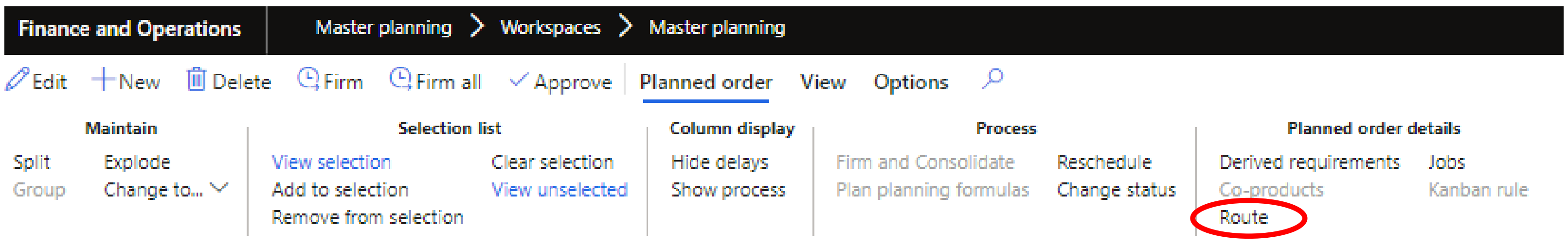


Sometimes the planned order is driven by other demand such as expired stock and linked inventory journals which create a double demand and put the stock in theory into a negative position which is not allowed therefore an order is proposed when in fact it is not needed.

The delivery date of a planned purchase order is in most cases the absolutely latest date the item needs to be delivered, it does not currently include any buffer time.

You can understand this by clicking further into the pegging.

In this examples you can click through to the BOM of the planned production order where the item is needed. Once in the planned production order choose the ‘Planned order’ tab and select ‘Route’.



Based on the scheduling on the planned production order you see the date on which the tolling activity will start and this is the date given as the required delivery date of the item on the planned purchase order.

Oper. No.	Priority	Operation	Start date	End date	Next
15	Primary	Formulate	05/05/2023	26/05/2023	20
20	Primary	Toll fee	26/05/2023	26/05/2023	21
21	Primary	Toll fee	26/05/2023	26/05/2023	22
22	Primary	Toll fee	26/05/2023	26/05/2023	0

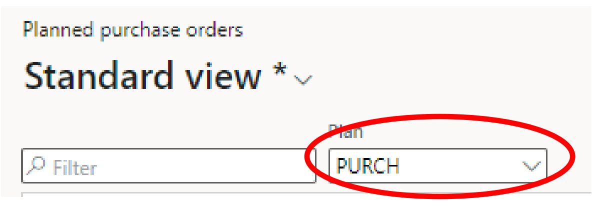
1.3. Reviewing planned purchase orders relating to firm demand

When viewing planned purchase orders that need to be actioned because they are driven by firm production orders the orders need to be viewed in the ‘PURCH’ plan.

The planned orders have different number formats depending on which plan you are viewing which makes it easier to check if you are viewing the right orders.
In the O&F plan orders will start with ‘MRP’ and in the PURCH plan they start with ‘PPO’.

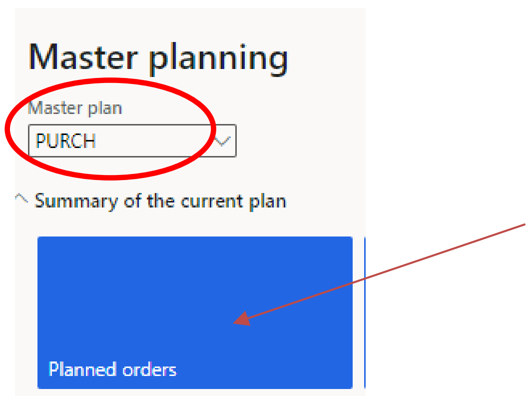
Planned purchase orders can be accessed by one of the following paths and choosing the ‘PURCH’ plan.

Procurement and sourcing > Purchase orders > Planned purchase orders > Planned purchase orders



OR via

Master planning > Workspaces > Master planning

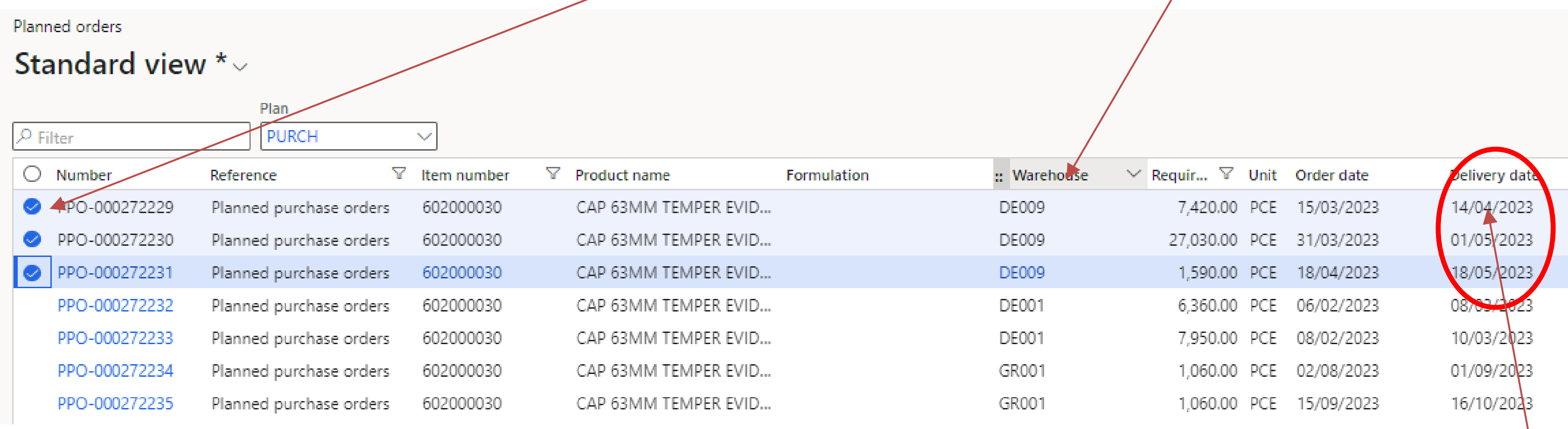


If using the master planning path, select the ‘Planned orders’ and then you will need to filter on the ‘reference’ field in the list to show ‘Planned purchase orders’ only.

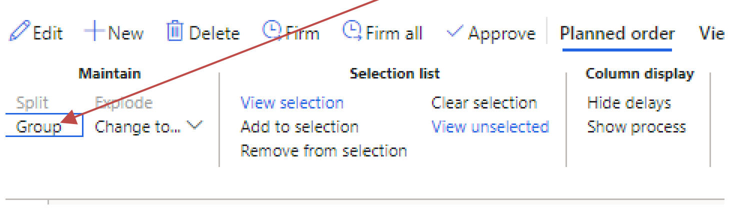
1.3.1. Grouping planned purchase orders

Planned purchase orders for the same item can be grouped together into one order, make sure the delivery warehouse is the same.

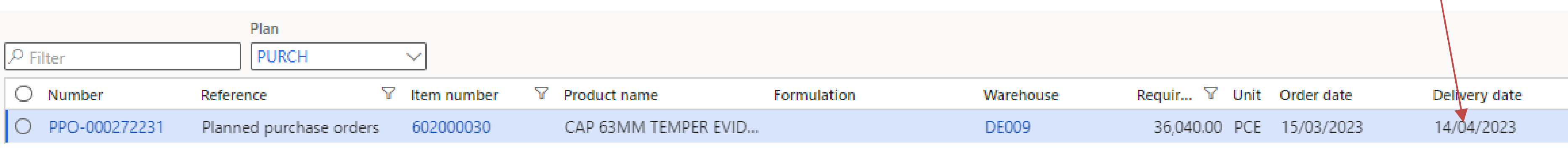
Highlight the orders you want to combine by ticking the far left hand column.



In the planned order tab, select 'Group'. In the pop up screen select 'Ok'.



The planned orders will now be combined in one order with the delivery date taken from the earliest delivery date of the original orders.

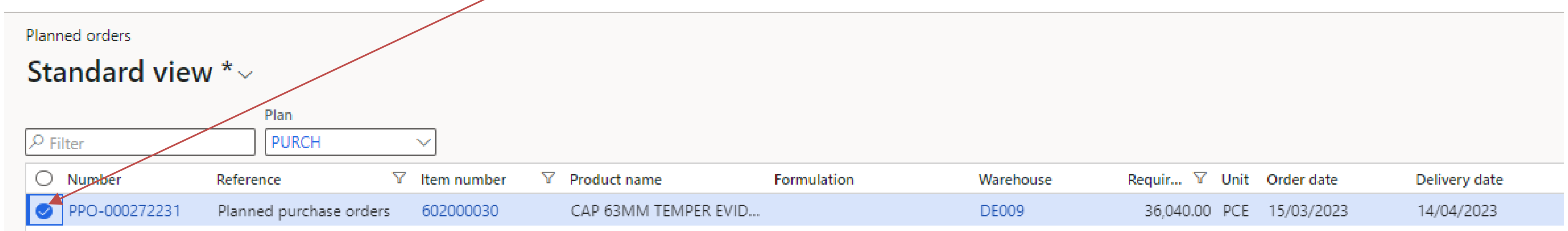


If you group an order and are not yet ready to firm it you will need to change the status to 'approved' otherwise master planning will recalculate next time it runs and the orders will no longer be combined. See the section on how to change the status of a planned order.

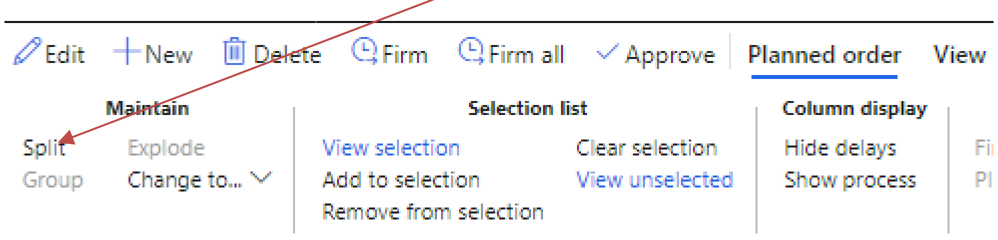
1.3.2. Splitting planned purchase orders

Just as you can group orders you can also split them if required.

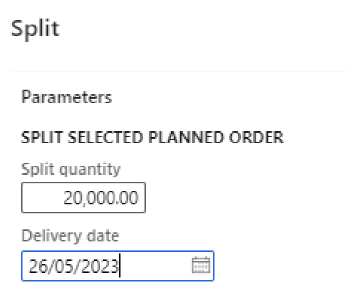
Highlight the order you would like to split by ticking the far left had column.



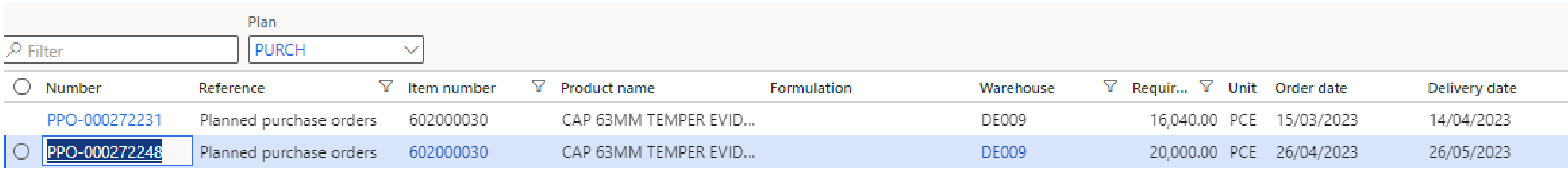
In the planned order tab, select 'Split'.



In the pop up screen enter the quantity that you want to have delivered on a different date and define the new delivery date and then choose 'Ok'.



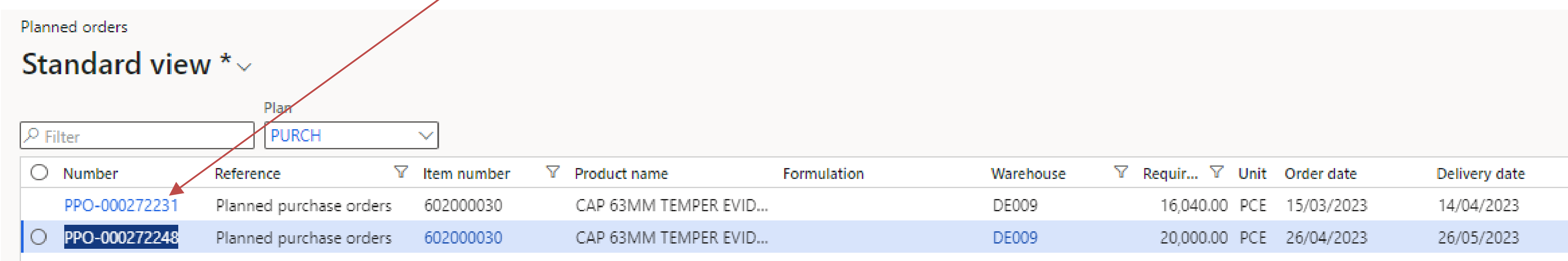
Now you will have two orders with different requirements.



Remember to change the status of the orders to ensure that master planning will not recalculate and overwrite your orders next time it runs. See the section on how to change the status of a planned order.

1.3.3. Changing planned purchase orders

To make a change to a planned order you can open the order by clicking through on the link.

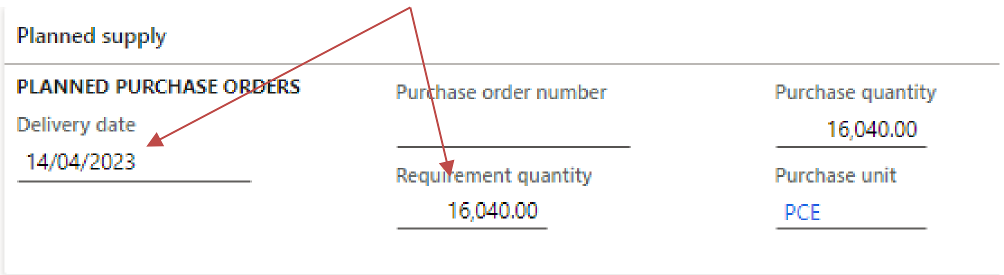


Once in the planned order find the planned supply section where you can change the delivery date or the quantity.

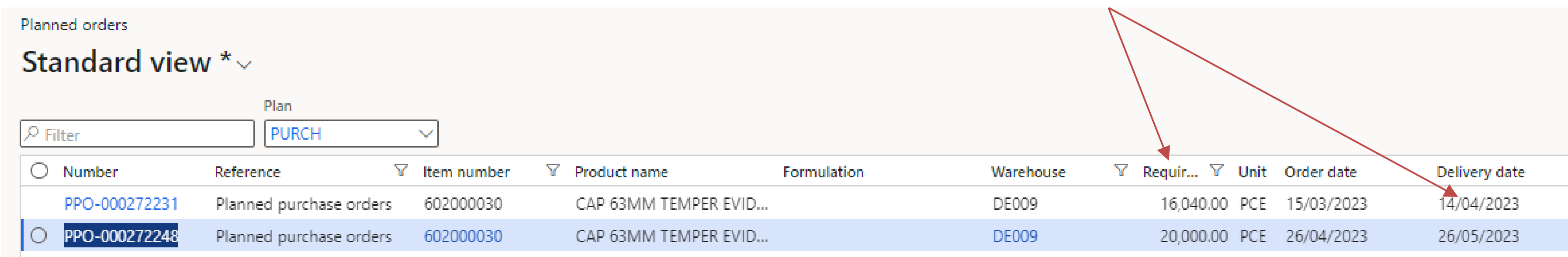
Select 'Edit' at the top left of the screen.

If changing the quantity make sure to enter it in the 'Requirement quantity' and not the 'Purchase quantity' field. This is because if there is a difference between the inventory unit of measure on which the planned order is based and the purchase unit of measure, the system will automatically change the purchase quantity to the correct quantity based on your requirement quantity so you don't need to calculate the change in unit of measure.

Once the data is changed select 'save'



Alternatively you can make the change in the planned order overview list instead by editting the field and then selecting 'save'.

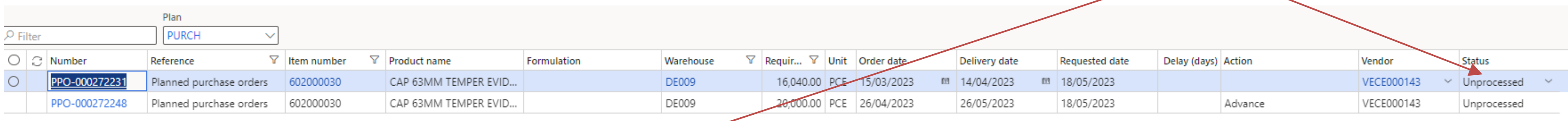


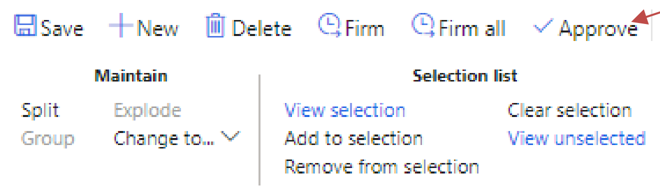
If you make a change to a planned order you will need to change the status of the order to prevent master planning from overwriting it next time it runs. See the next section on how to approve an order.

1.3.4. Approving/Unapproving planned purchase orders

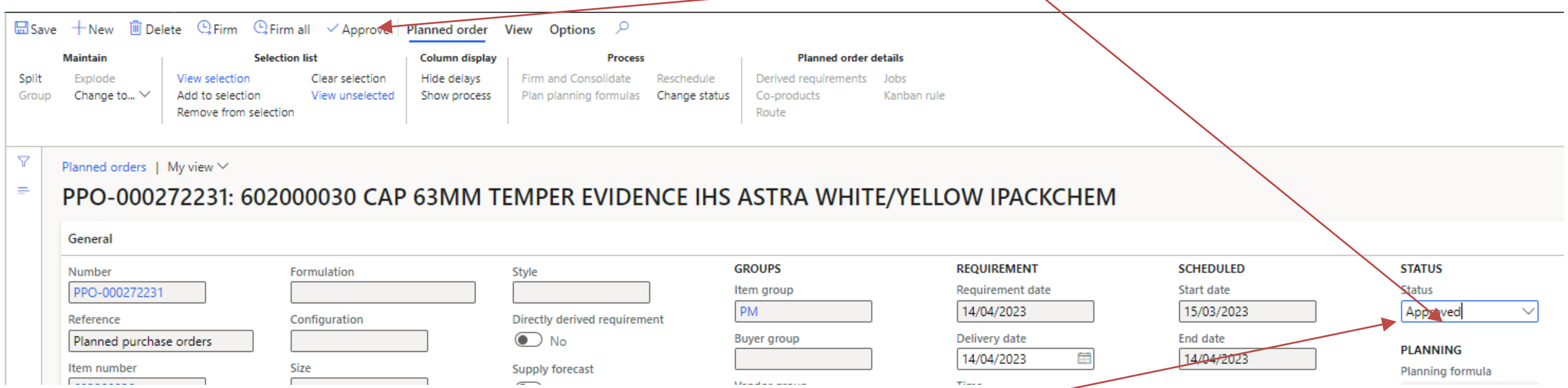
An order can be approved either in the overview list or in the order.

Change the status in the planned order line or by selecting the order you want to change and then choosing ‘Approve’ in the main tab at the top.





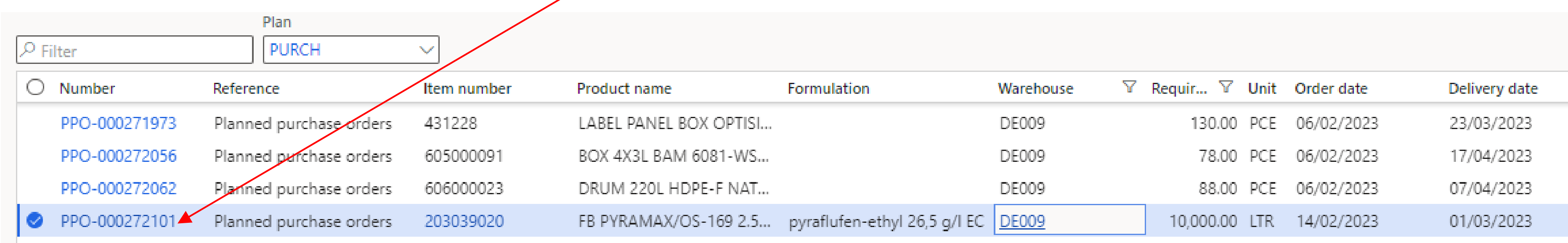
Alternatively you can open the planned purchase order and either change the status field or select ‘Approve’.



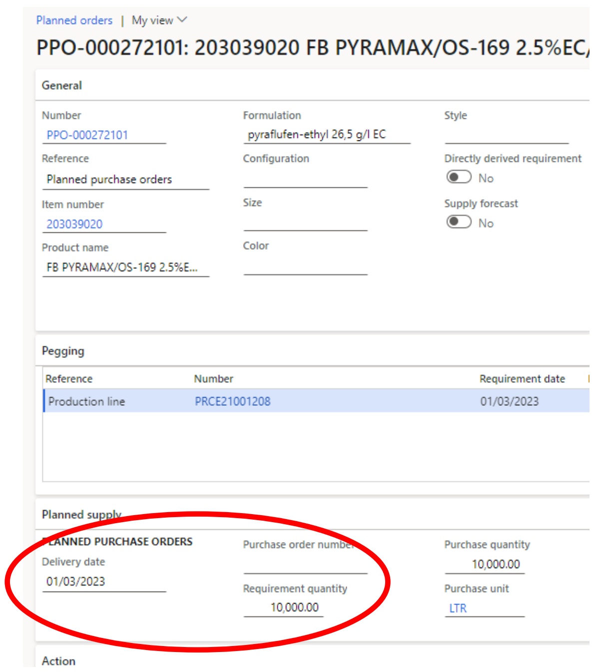
To unapprove an order, you need to change the status field, either in the planned purchase order or in the overview list within the planned order line.

1.4. Firming an order

In the planned order overview select the planned order that needs to be firmed and open it by clicking on the link to the order.



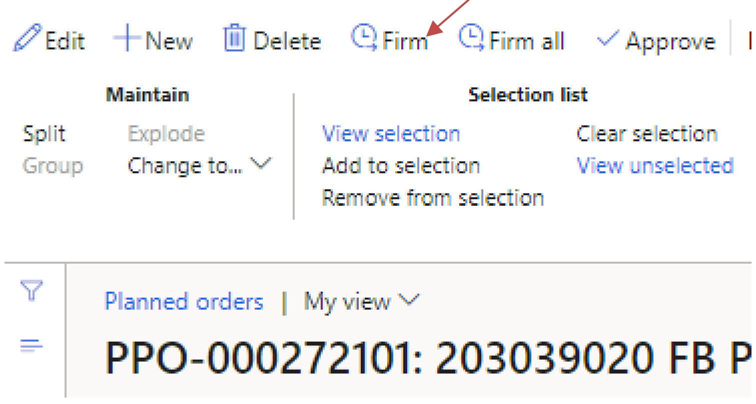
Check the details of the order are correct.



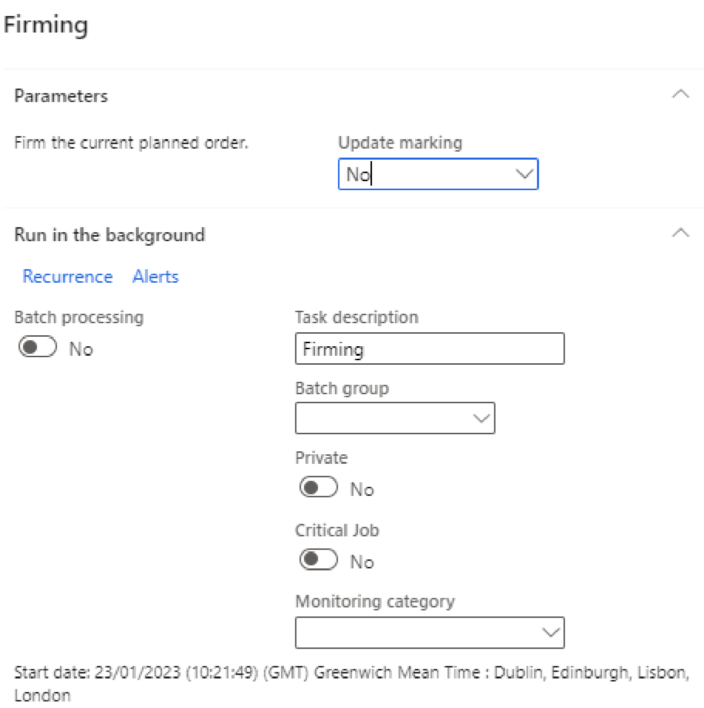
If an item is bought in a different unit of measure to the inventory unit used at certis Belchim, make sure any changes are made in the ‘Requirement quantity’ field and not the ‘Purchase quantity’.

If you try to change the delivery date to one earlier than the lead time of the item allows, it will automatically revert back to the earliest delivery date based on the lead time. It is possible to change this once the purchase order is firmed but it can’t be done in this screen.

When the details are correct select 'Firm', once this is done the order will disappear from the screen and you will see the next planned purchase order in the list. Close this screen.



A pop up screen will appear, check the parameters match the below and then choose 'OK'.



A quicker method to firm an order if you are sure all the details are correct is to directly firm it from the overview screen. Make sure the order is selected by showing the tick mark in the left column and then select 'Firm'. The same pop up screen will appear as above.

BE CAREFUL – it is advisable not to select multiple orders or to use the 'Firm all' option.

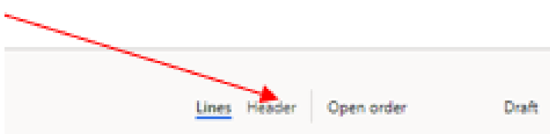
Once the order is firmed you can open it from the following path, it will either appear at the top or bottom of the list depending on your sorting order.

1.4.1. Issuing an order

Before an order can be sent to the supplier some changes are needed to the order and then it has to go through the approval workflow. Currently the status of the order is still 'Draft'.

Open the order by clicking through on the link.

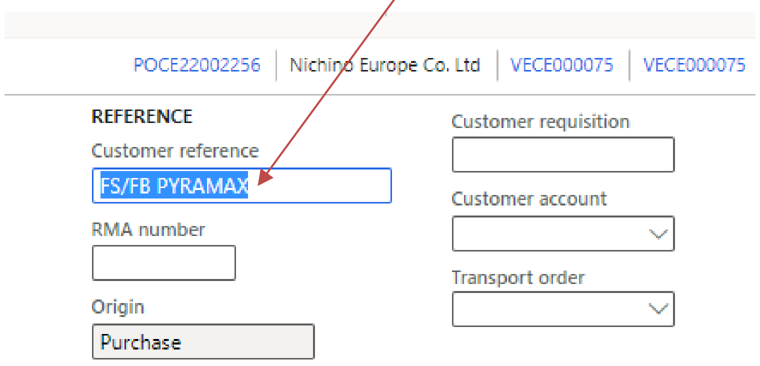
Once in the order open the header page by selecting 'Header'



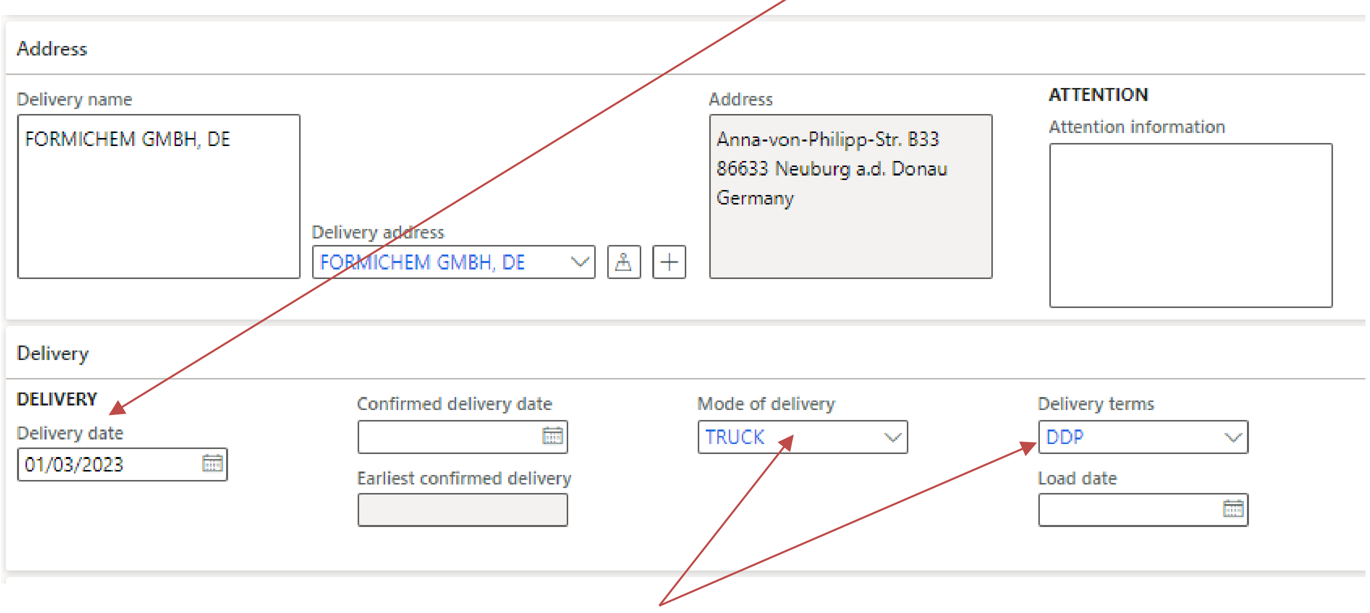
In the ‘Customer reference’ field enter a description of the order, this can be used in the list of purchase orders to identify which product is on the order.

The format should be as follows:

- Your initials followed by /
- The description of the item SKU



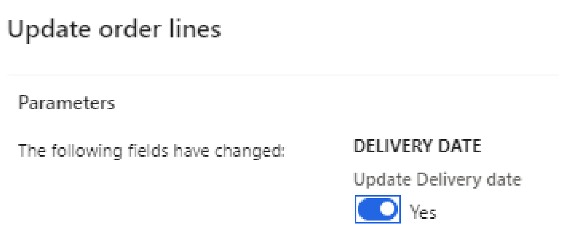
Check the delivery address is correct.
Check the requested delivery date, if you want to request delivery for a date earlier than the lead time in the system allows, change it here.



Remember that the delivery date proposed by the system is the last possible date for the goods to arrive so it is advisable to enter an earlier date to ensure they arrive ahead of time.

Check the delivery terms are correct and add the mode of delivery if known.
Select ‘Save’ at the top left of the screen.

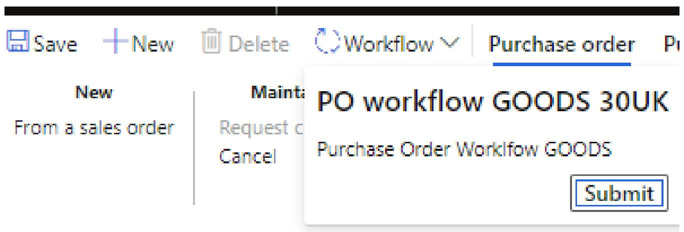
If you change the delivery date you will get a pop up screen asking if you want to update order lines, choose ‘yes’ and then ‘Ok’.



Now go back to the lines page.

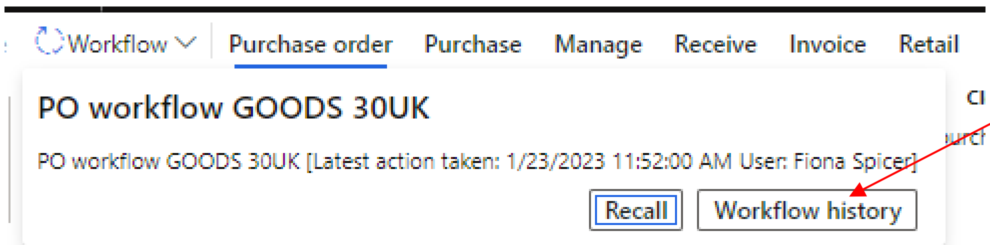
Make sure the date has been updated, if it doesn’t update on line level change it here. This is important because it is the date on the line details that will be printed on the order confirmation.

Check the line details are correct for the item, delivery warehouse, quantity, purchase price and currency.
When all the details are correct the pruchase order is ready to be submitted into the purchase approval workflow.
Go to the 'Workflow' and choose 'Submit'.



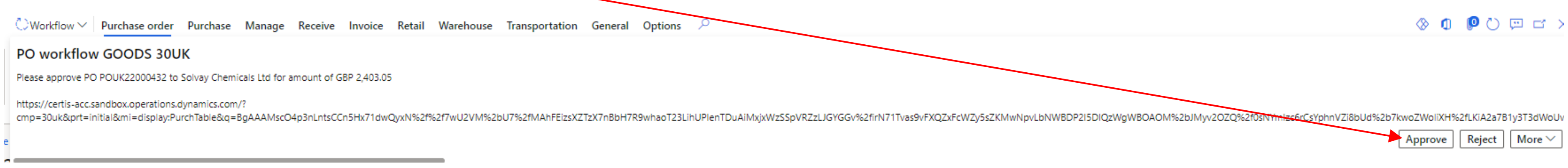
A pop up screen will appear where you can add a comment if needed, select 'submit' again and the order will go into the approval process.

Once submitted, you can monitor the status of the workflow by selecting 'Workflow' and 'workflow history'. Keep referesing the screen to get the latest updates.



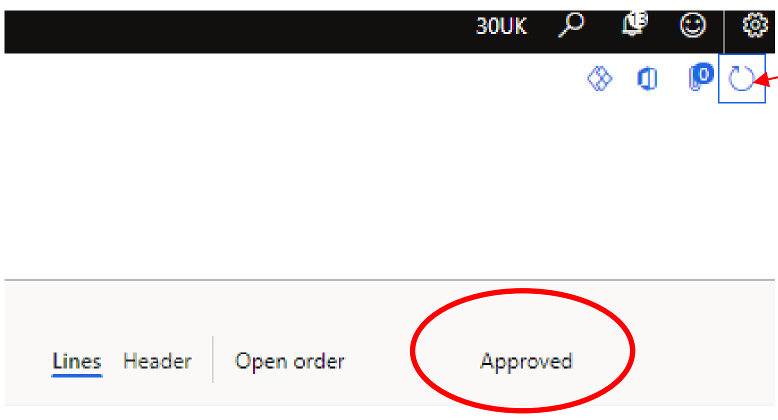
If an error has been made in the purchase order and something needs to be adjusted use the same path and select 'Recall', this will put the purchase order status back into draft so you can make amendments and then resubmit it again.

If the purchase order is within your LOA, once it has gone through the stages of assessment the workflow will give you an option to approve the purchase order. A pop up screen will appear asking you to confirm that you want to approve the order, choose 'Ok'.



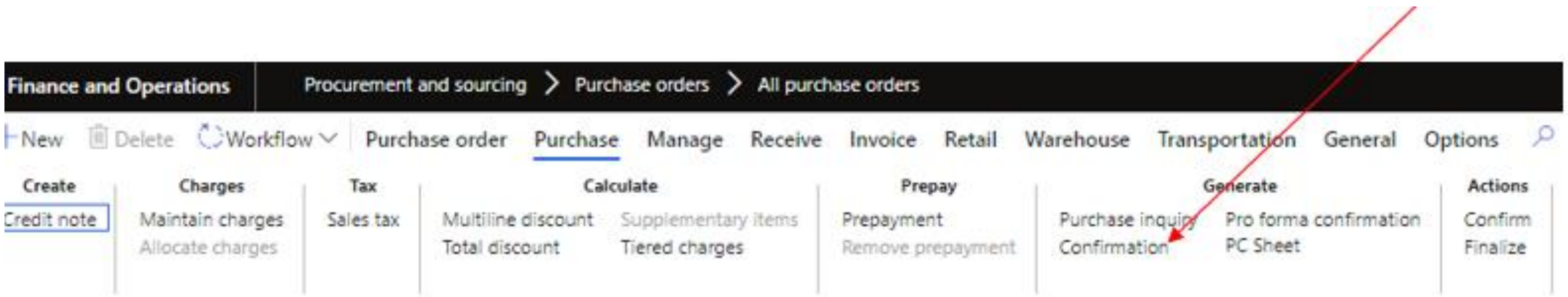
You can also reject it at this stage if you still need to make a change.

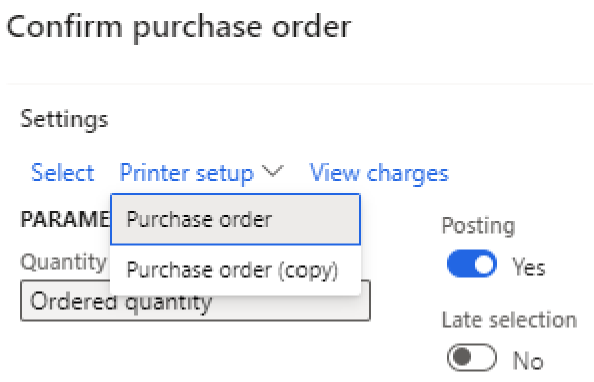
Once approved the status of the order will change from 'In review' to 'Approved'. You may need to refresh the page to see this update.



If the purchase order is not within your LOA, it will be sent to users with a higher limit of approval. You can check the status to see when it has been approved.

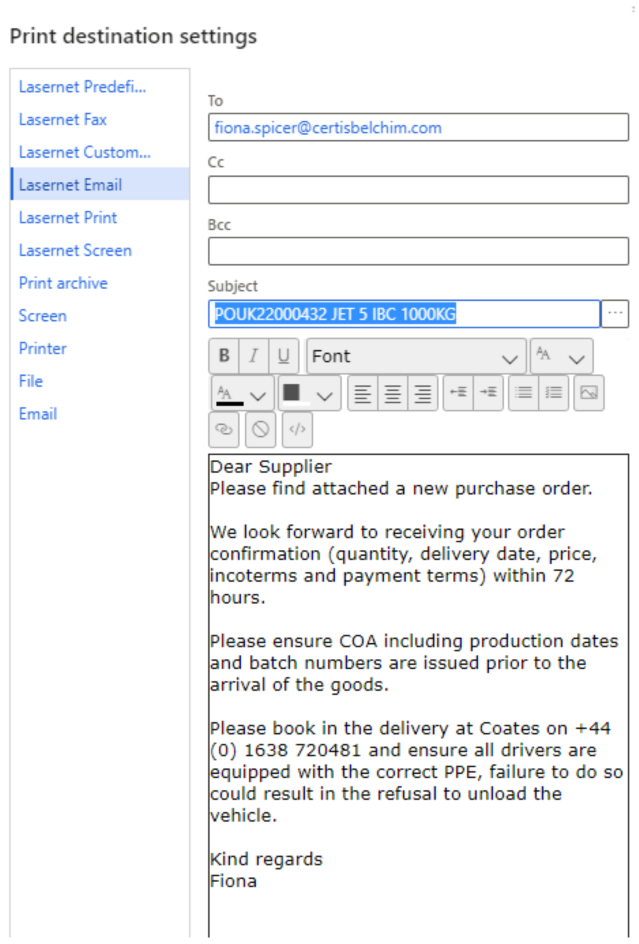
Once approved it is ready to confirm and send to the supplier. Within the purchase menu choose 'Confirmation'.





In the next screen go to ‘printer setup’ and select ‘Purchase order’.

It can be helpful to copy the purchase order number from this screen to use it in the next step as a description for the purchase order.



In the pop up screen choose ‘lasernet email’ in the print destination.

Make sure the ‘To’ field contains your email address – once it has been entered it should be there as default next time you see this screen. DO NOT enter the email address of the supplier – all emails should be checked before issuing them, sending them to yourself allows you to check the details and add any additional information needed. It also allows you to save a copy of the email that you sent as proof

Give the ‘Subject’ field a description so you and the supplier can identify the order. A suggested format would be:

- The purchase order reference copied from the previous screen
- A description of the item on the purchase order

In the text box you can choose to enter text which will be seen in the body of the email. It can be useful to enter a standard text which can be used for all your future purchase orders. It can still be changed within the email if you need to make adjustments to it for specific orders.

Select ‘Ok’ when you are happy with the content and then ‘Ok’ again on the next screen.

The email together with the purchase order attachment and our purchase terms and conditions will be sent to your inbox.

Forward the email to your supplier, making any necessary changes to the body of the email text and adding additonal information such as label artwork pdf’s.

Save the sent email on sharepoint.

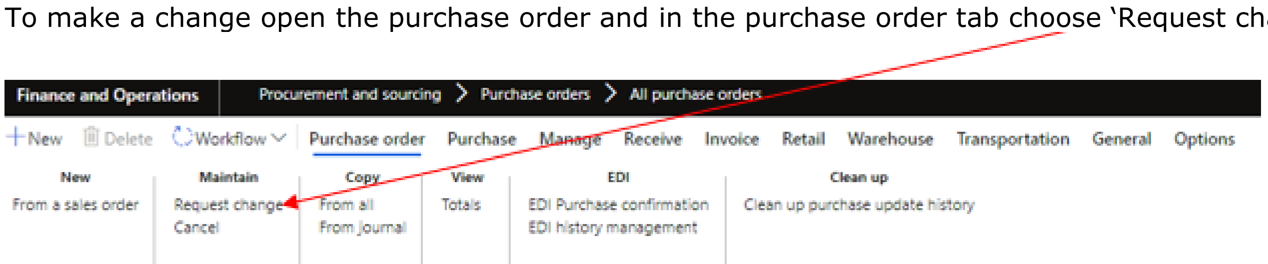
[BEX Purchase Orders - Home (sharepoint.com)]

Choose the 01CE folder on sharepoint, find the correct supplier for your order and create a new folder for the purchase order. This folder should be used to save all correspondence relating to the purchase order.

1.5. Updating / changing a firm purchase order

Once a supplier confirms a purchase order it can be necessary to make a change to the order, it is also good practice to update the confirmed delivery date to indicate what has been agreed.

To make a change open the purchase order and in the purchase order tab choose ‘Request change’.



This puts the status of the order back into draft status allowing you to make changes to the order.

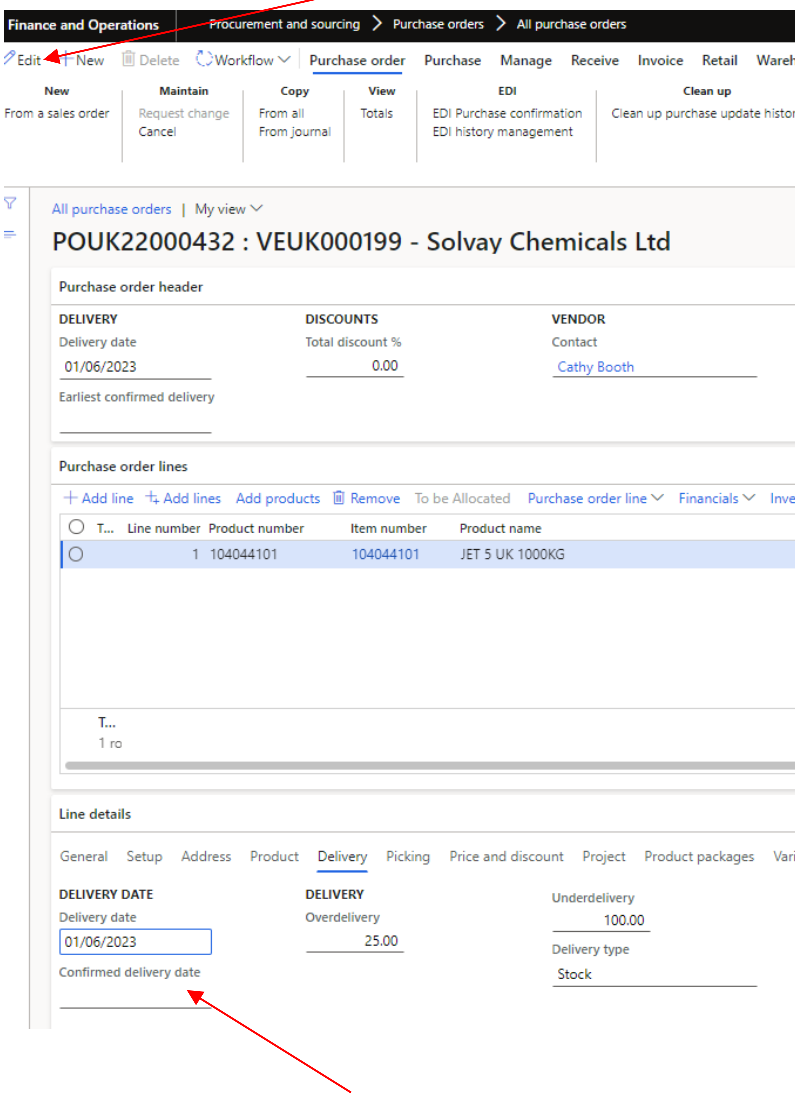
Once a change has been made the workflow needs to be resubmitted. If the change is deemed to be significant it will need to go through the approval process again e.g. increase in volume, increase in price. For changes that decrease the value of the order, approval will be automatic.

Once approved generate the confirmation again to create a new email order to send to the supplier.

1.5.1. Updating the confirmed delivery date

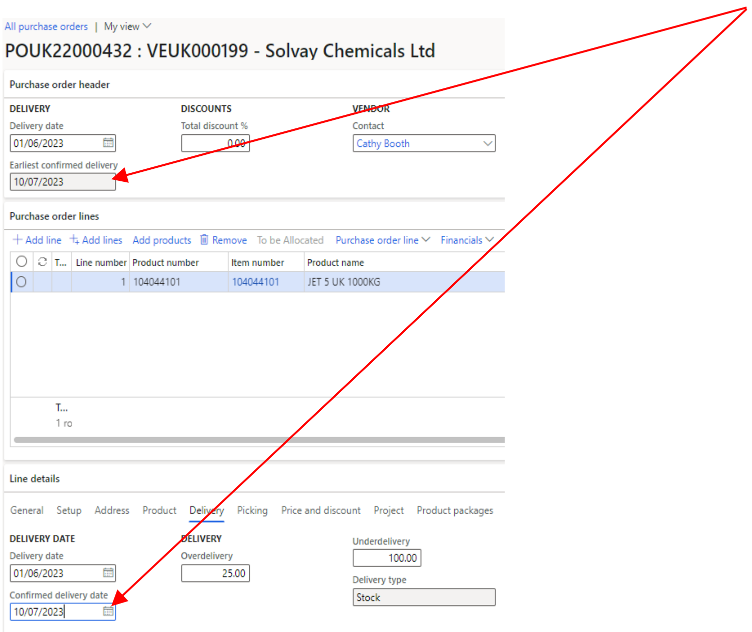
To update the delivery date to the one agreed with the supplier regardless of whether it is the same as the requested one or different you will need to request the purchase order change as in the previous step.

Once back in the draft status, select 'Edit'.

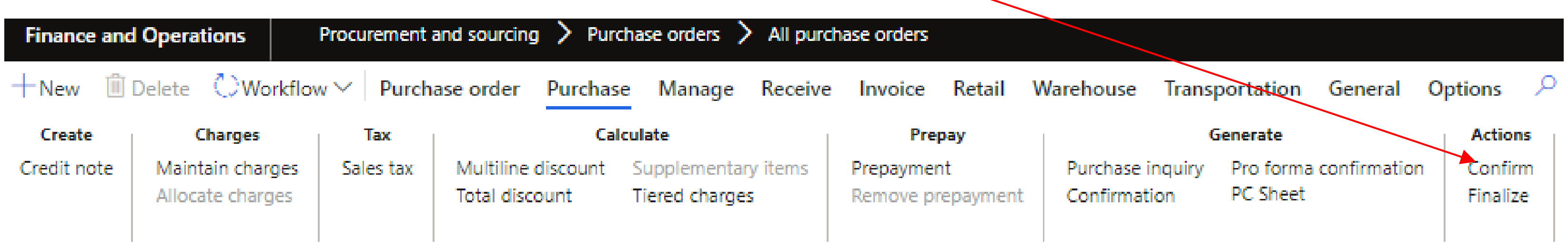


Enter the confirmed delivery date in the line detail, if you have multiple items on the order make sure you select the correct line.

Select 'save' at the top left of the screen. Once saved the updated date will appear in the line detail and the header.



A change in date is a minor change so the workflow will automatically approve the order. To put the status back to confirmed status but without issuing a new email, go to the 'purchase' tab and select 'Confirm'.

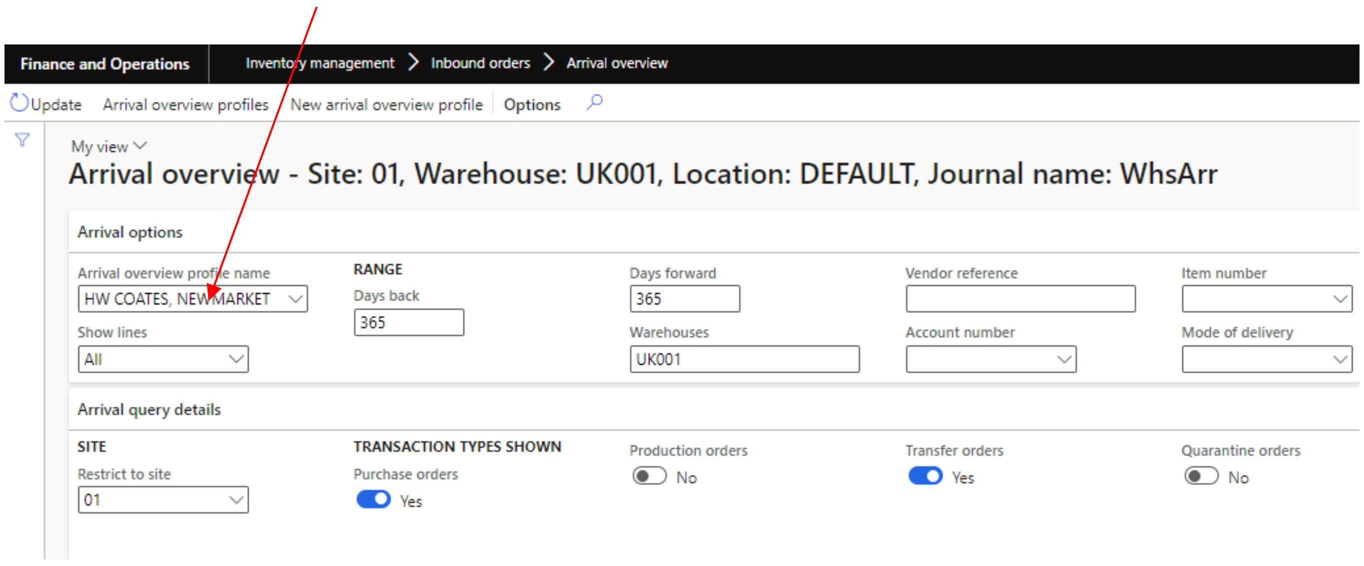


1.6. Receiving a purchase order

To receive a purchase order go to the following path:

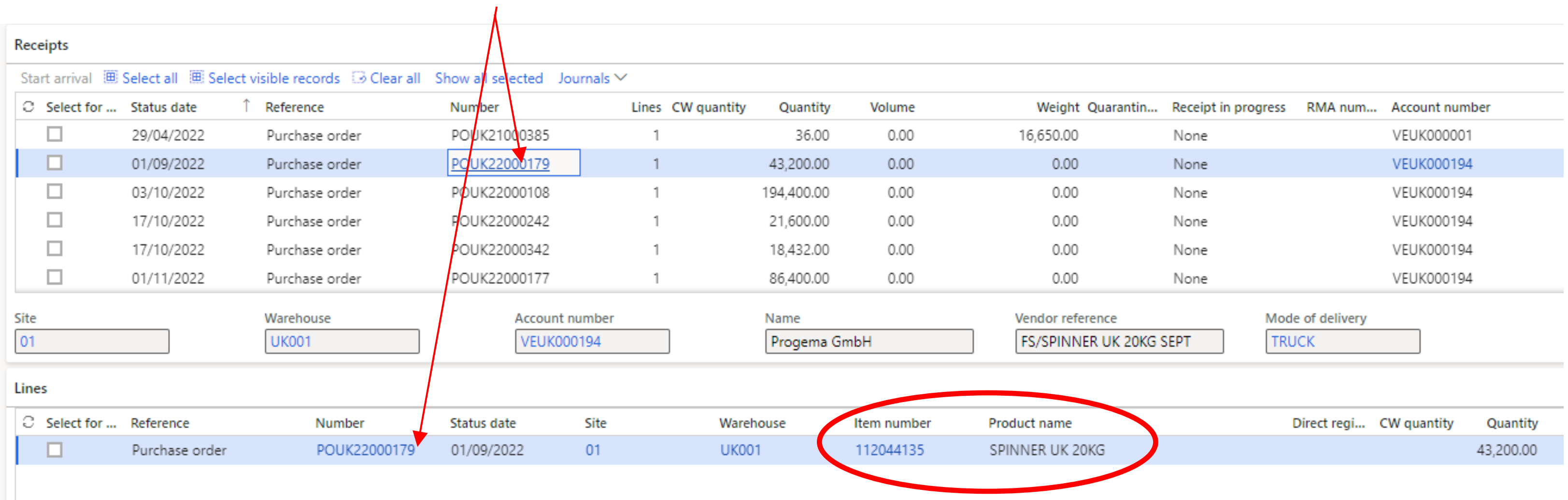
Inventory management > Inbound orders > Arrival overview

Make sure the receiving warehouse is selected in the 'arrival overview profile name'.
This should be the one that was entered as the delivery warehouse on the purchase order, if the order was an import arriving at a port, you should select the warehouse for the port but in most cases this will be the main warehouse for the branch.

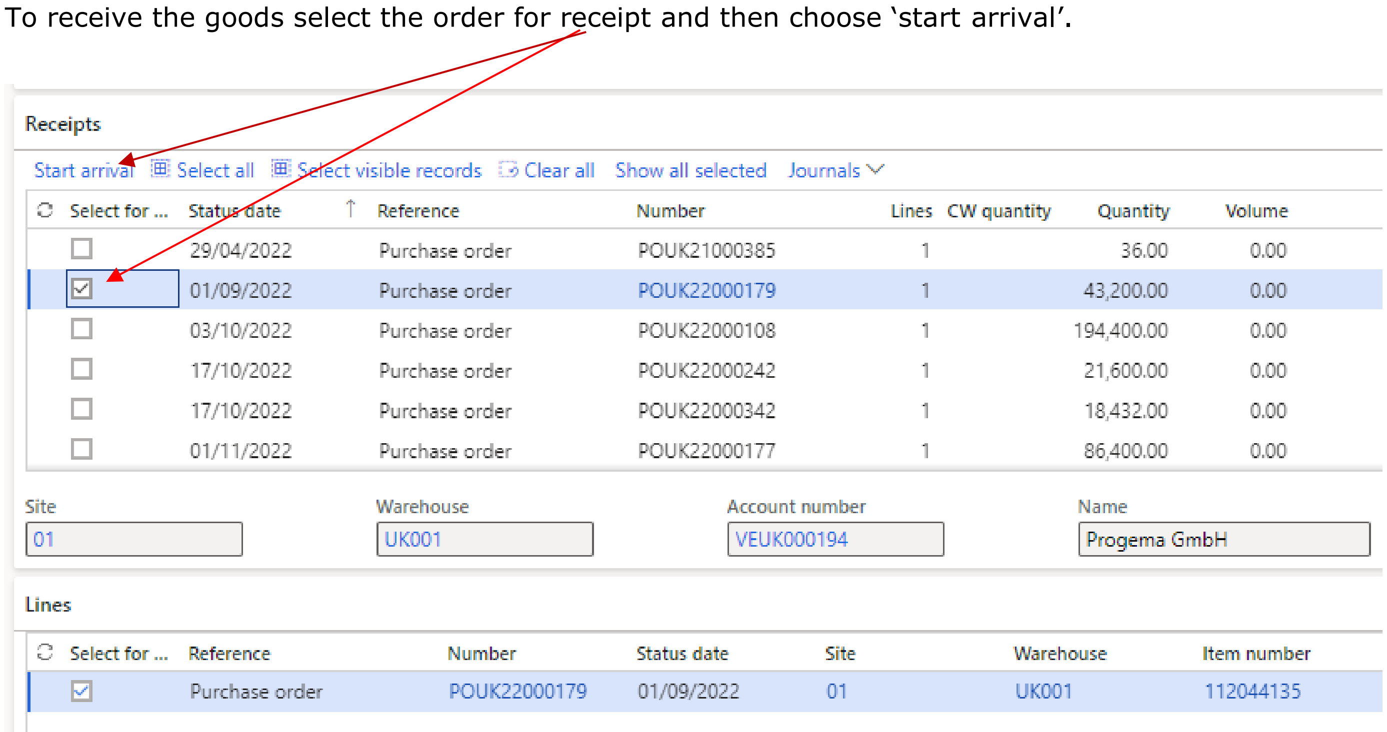


A list of all the open purchase orders for that receiving warehouse will appear in the receipts overview.
Use the column header filters to help locate the one you want to receive.

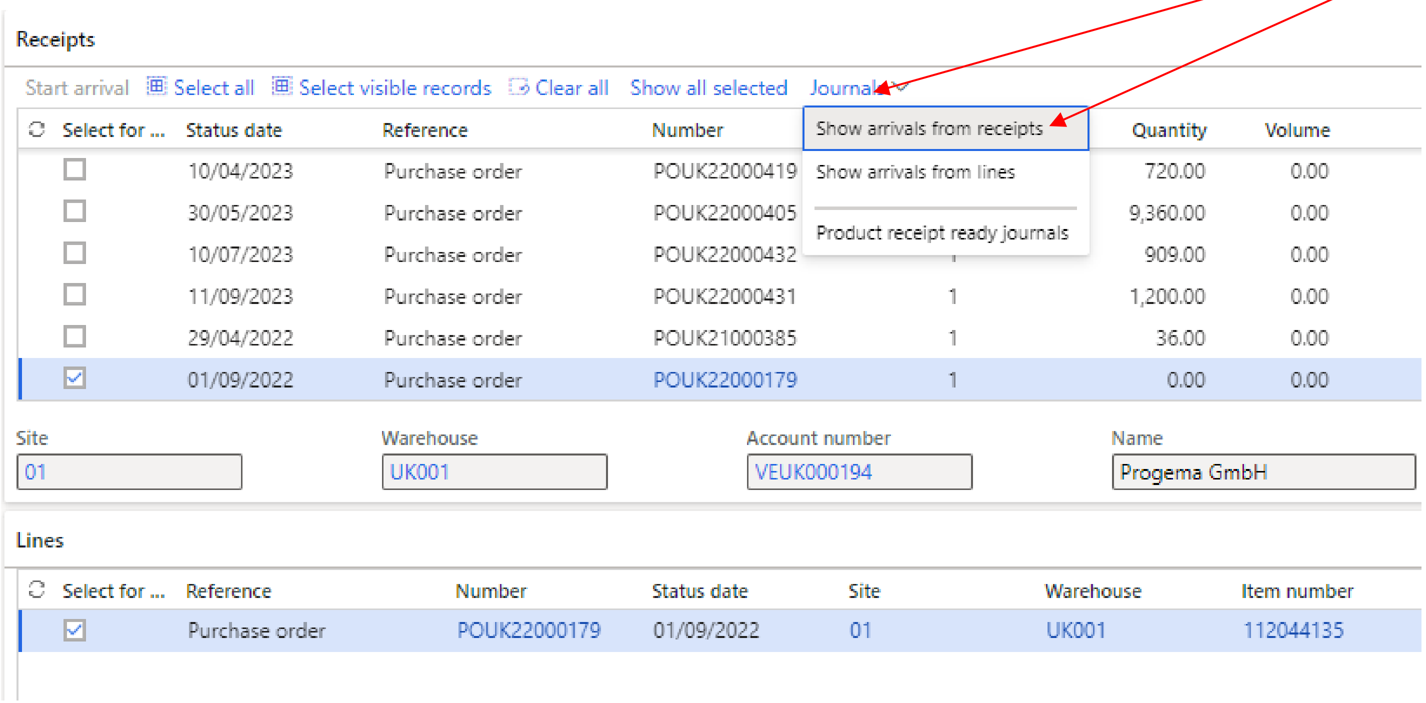
When you select a purchase order you will see the item details behind it in the lower line screen.



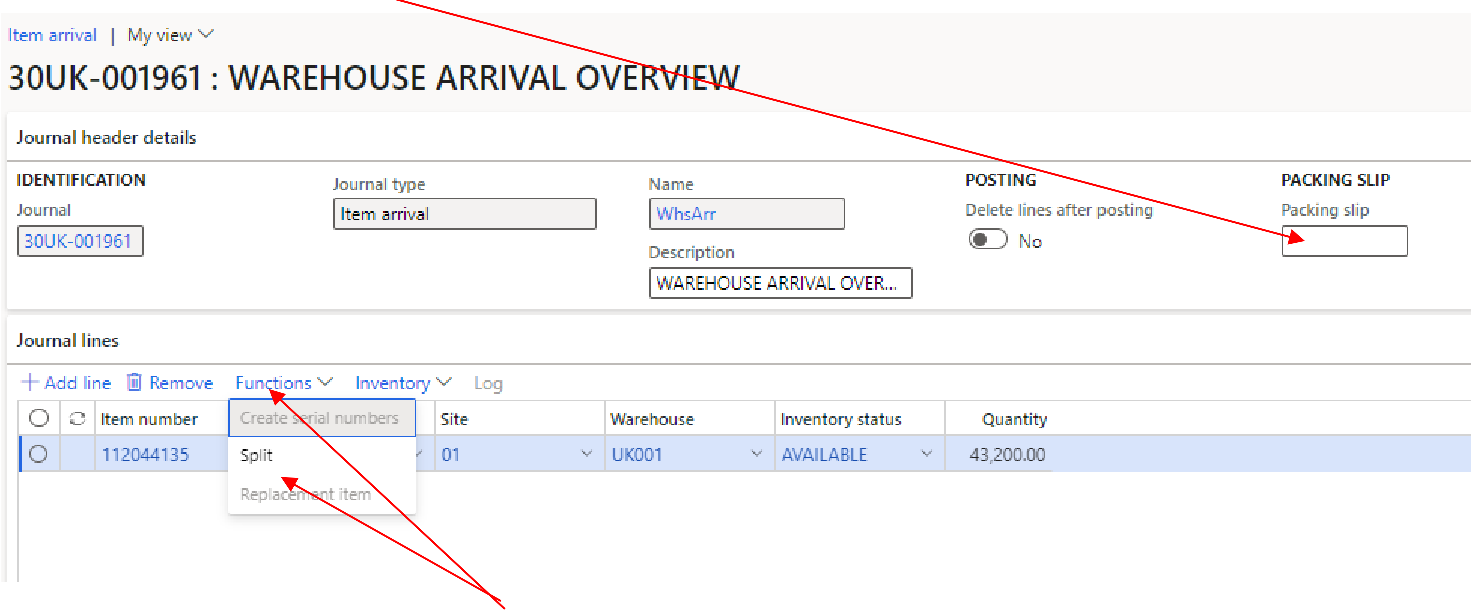
To receive the goods select the order for receipt and then choose 'start arrival'.



Find the order again and select it (it may have moved to the bottom of the list) and then choose 'Show arrivals from receipts' from the 'journals' tab.

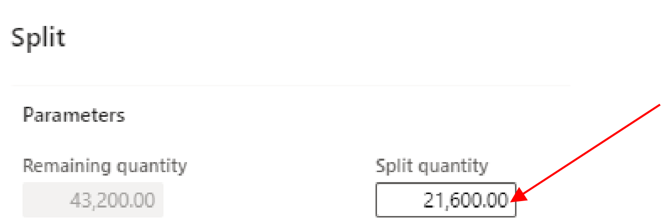


Enter the packing slip reference from the goods in paperwork received from your warehouse.



Each batch received will be entered as a separate line, check if the quantity showing matches the quantity you want to receive for your batch. If not you can amend the quantity or if you have multiple batches to receive you can split the quantity by choosing the 'Function' tab and selecting 'Split'.

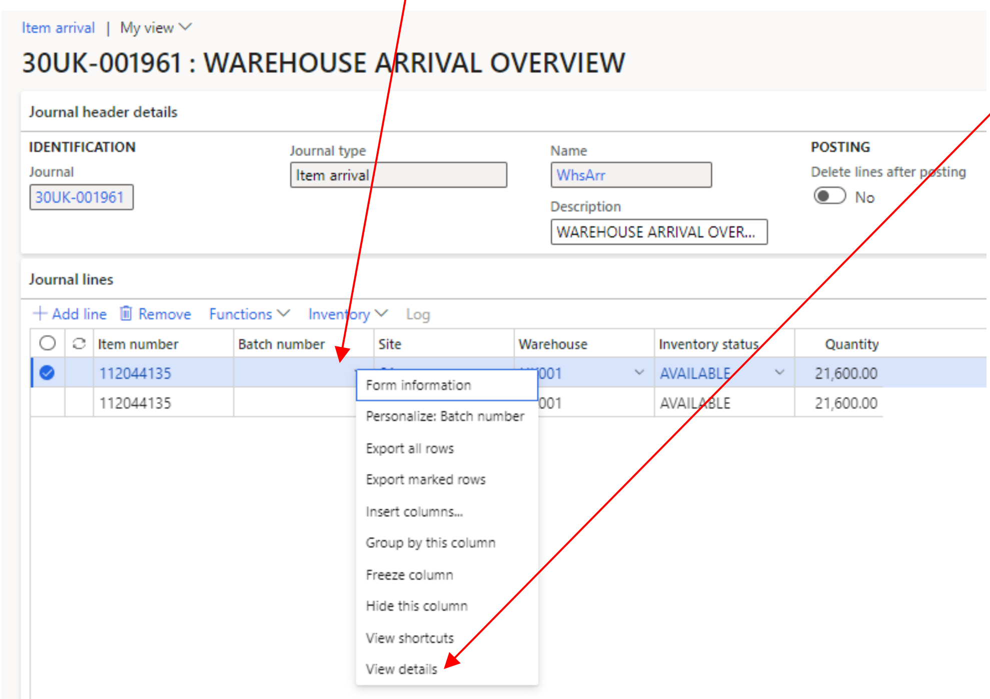
If you decide to split the quantity a pop up screen will appear.



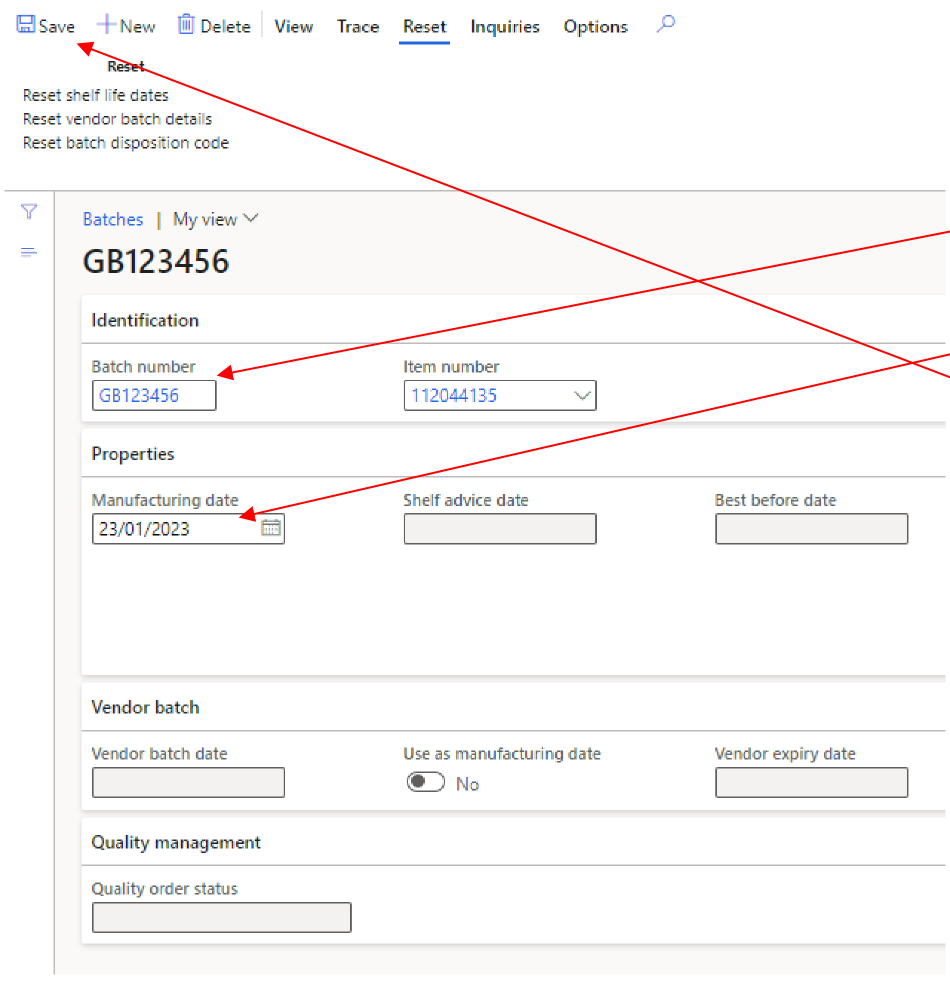
Enter the quantity you want for the second entry in the 'Split quantity' field, the remaining volume will stay in the first line.

Each item received must have a batch reference entered. If the batch already exists you can select it from the drop down menu, but most likely new stock will have a batch number that has not been previously entered in the system.

To add a new batch number right click on the batch drop down menu and choose 'View details'.



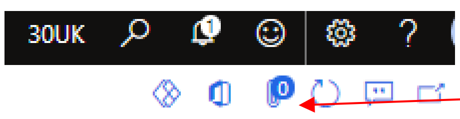
A list of existing batch numbers for the item will appear. Select 'New' to create a batch number not in the list.



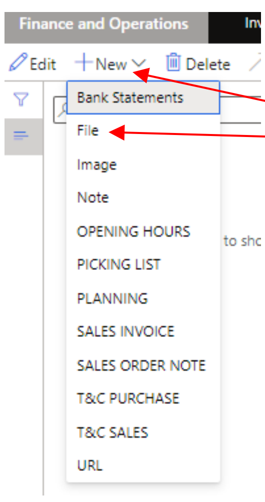
Enter the batch number from the goods in paperwork

Enter the manufacturing date – usually stated on the COA provided by the supplier

Select 'Save' and the best before date and expiration date will automatically update based on the parameters set in the system.

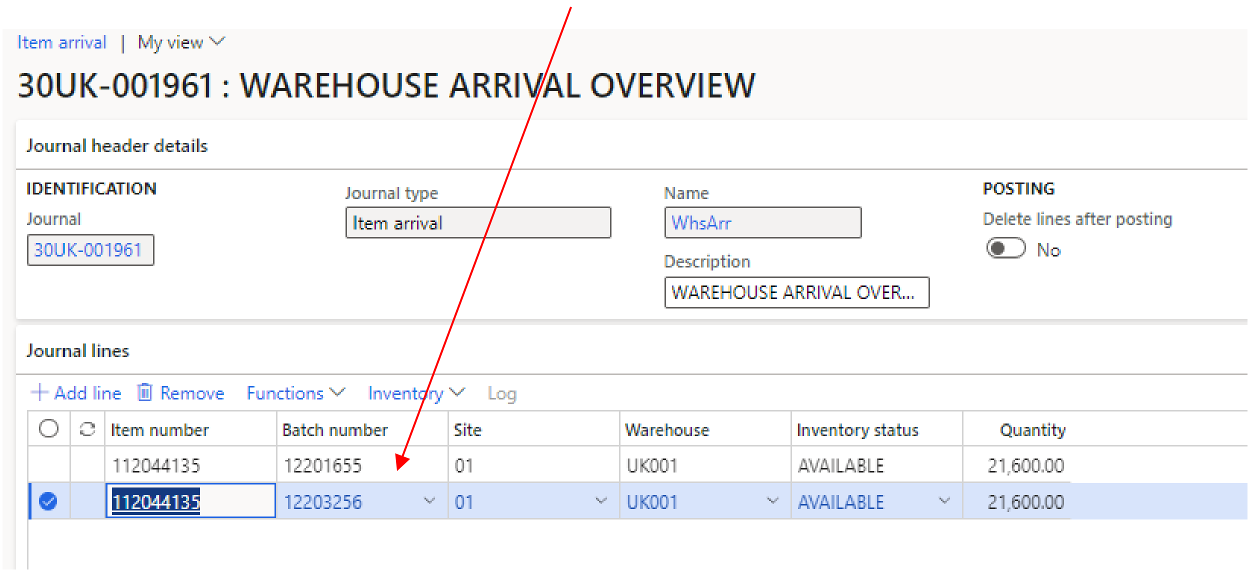


COA's should be saved on sharepoint but for easy reference it is good practice to also save them on D365 on the batch number. To do this select the paperclip icon when creating the batch number

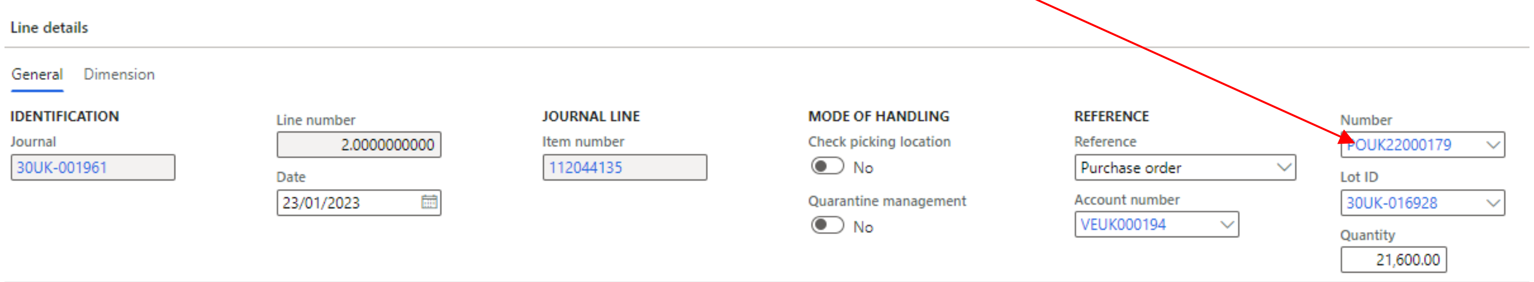


Choose 'New' and select 'File' from the drop down menu.
You can now upload the COA file to the system.

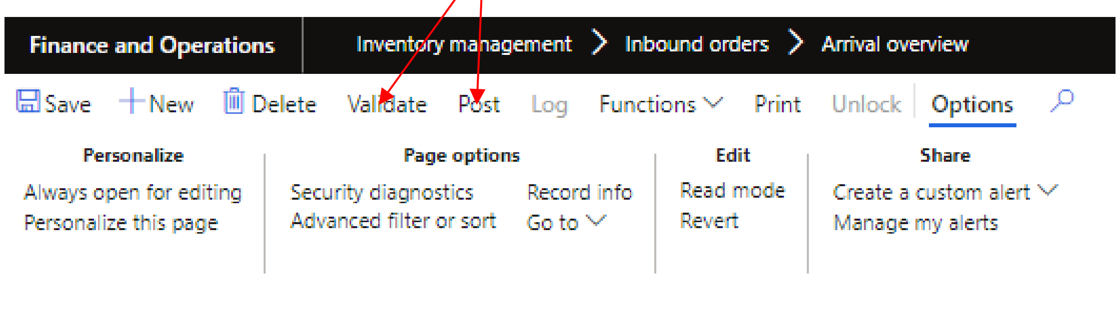
Once the batches are created you can apply them to the goods receipt lines.



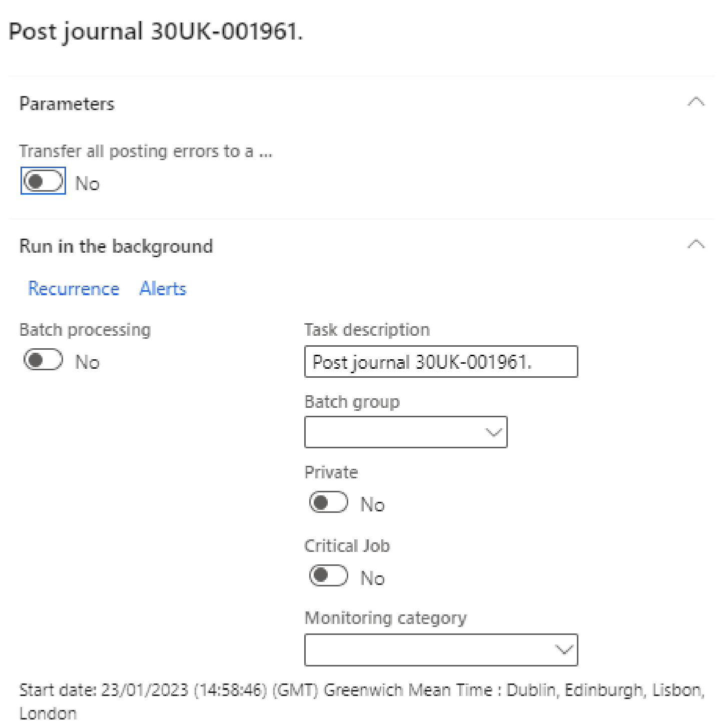
In the line detail at the bottom of the page you can click through to the purchase order. Once in the purchase order select the paperclip icon at the top right of the screen and repeat the process for attaching the COA in the previous step but this time saving the goods in paperwork to the purchase order.



To book the stock in select ‘Validate’ first if you want to check if all the needed information has been compelted and then select ‘Post’.

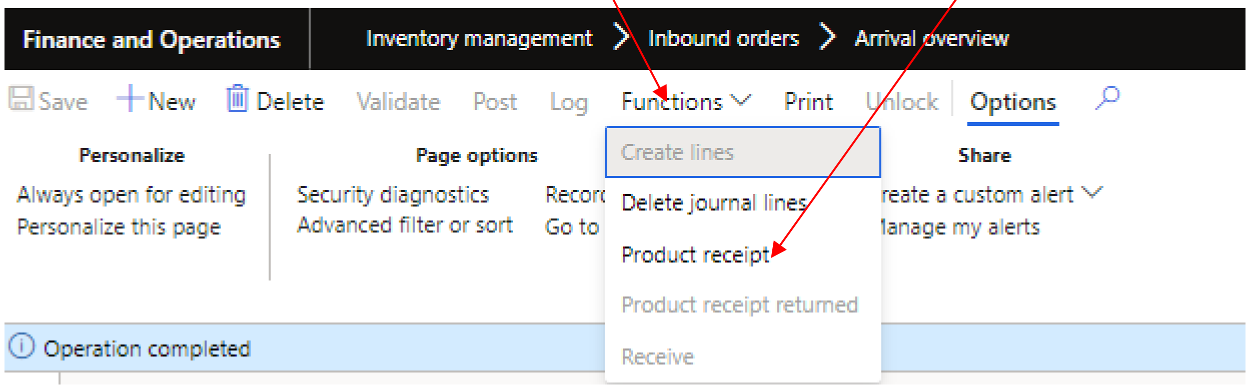


A pop up screen will appear, check the parameters match below and then press ‘Ok’.

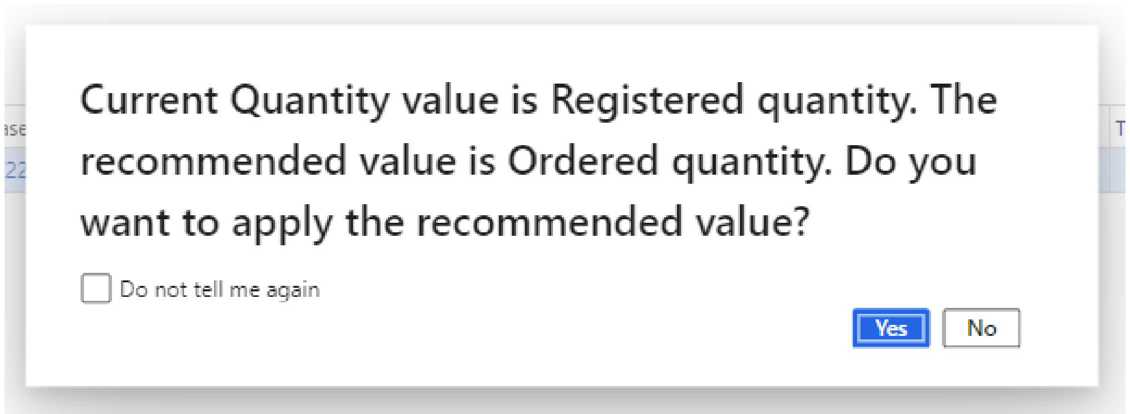


The goods have now been registered in the system but are not yet fully booked in.

To complete the booking choose the 'Function' tab and select 'Product receipt'.

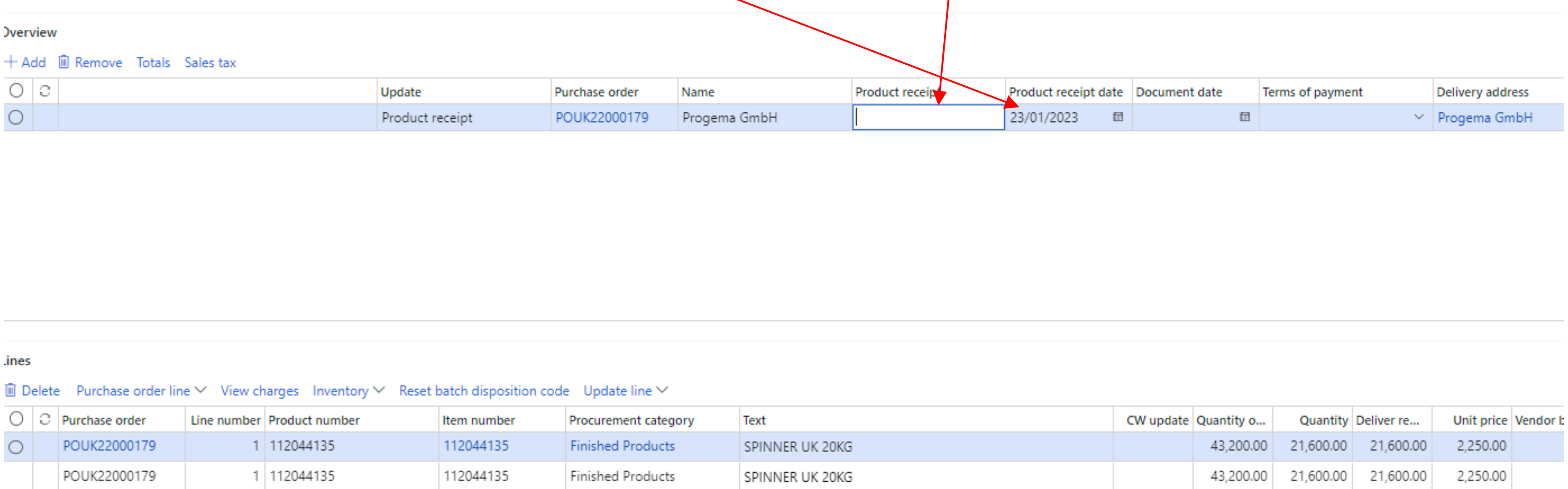


The following message will appear, choose 'No'.



A product receipt reference must be entered, use a reference from the goods in receipt that can easily be linked to this transaction. If nothing exists copy the purchase order number into this field. Be aware that if you later process another receipt on the same order you can't use the same product receipt reference.

Make sure the date matches the date the goods were received. If you are booking the goods on the system a few days after they arrived, change the date here to reflect the correct date of receipt.



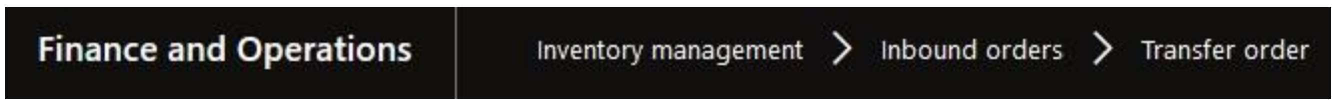
Select 'Ok' at the bottom of the screen – the goods are now booked in the system.

1.7. Transfer orders

A flow diagram outlining the transfer process is shown below:

Note that the physical picking step is grayed out in the above flow, as it is a manual step that takes place outside of the system.

1.7.1. Create a transfer order



Transfer orders are found both in the inbound and outbound menus of the Inventory management module. Click on any of the links to open a list of all transfer orders.

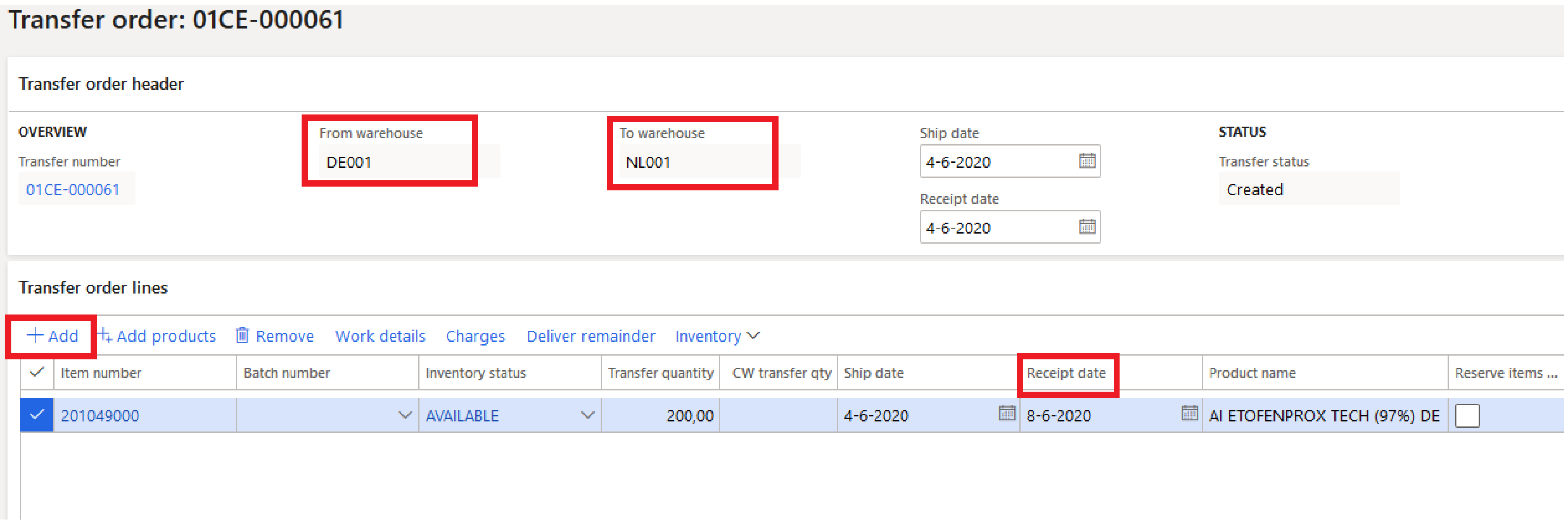
On the list page, click the **New** button to create a new transfer order. The transfer order page opens up where you need to provide the "From warehouse" and the "To warehouse" on the header.

1.7.1.1. Add products

With the +**Add** button you can add the items which you want to transfer. You won't fill in Batch numbers (if it concerns a batch item) here yet, since the external WH will let you know which batches are actually picked.

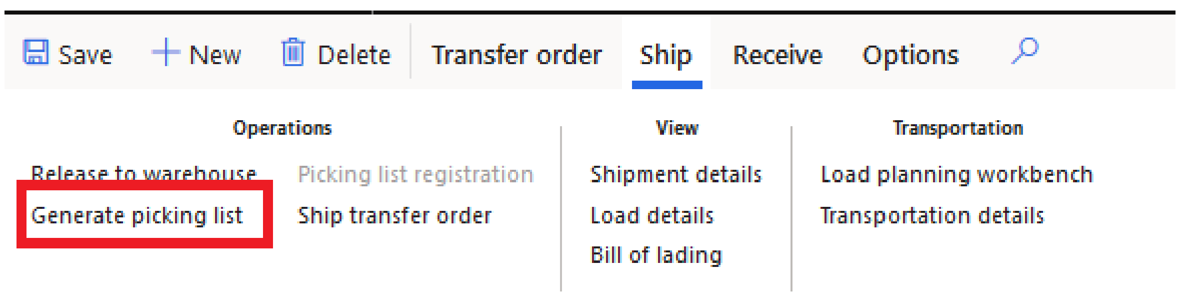
Change the receipt date to the date that the goods will be delivered to the other warehouse to your best knowledge.

Click Save. Note that the current status of the transfer order is **Created**.

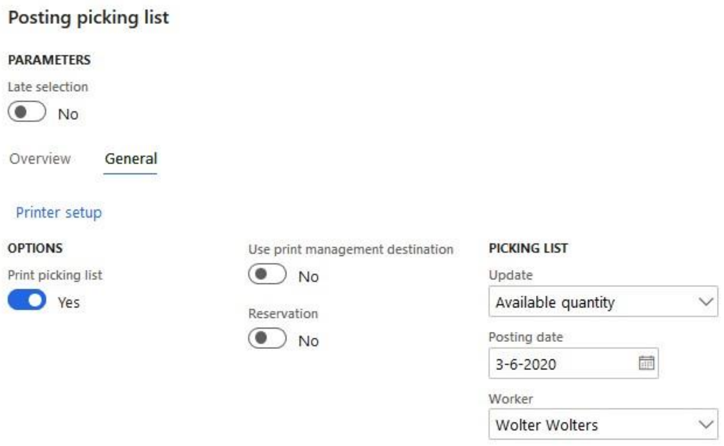


1.7.1.2. Generate picking list

Once the transfer order is created, we need to create a picking list which we can use to instruct the outbound WH to pick the products. So, while on the transfer order, you can click on the **Generate picking list** option on the **Ship** tab of the page.



On clicking the **Generate picking list** button, the **posting picking list** form opens for the transfer order. You have an optional checkbox to print the picking list while you post.



Click OK to post and print the picking list. This picking list document can be sent over to the warehouse to physically pick all the products to be transferred as per the order.


IMPERIAL LOGISTICS BV, NL
Stepvelden 12
4704 RM Roosendaal
The Netherlands

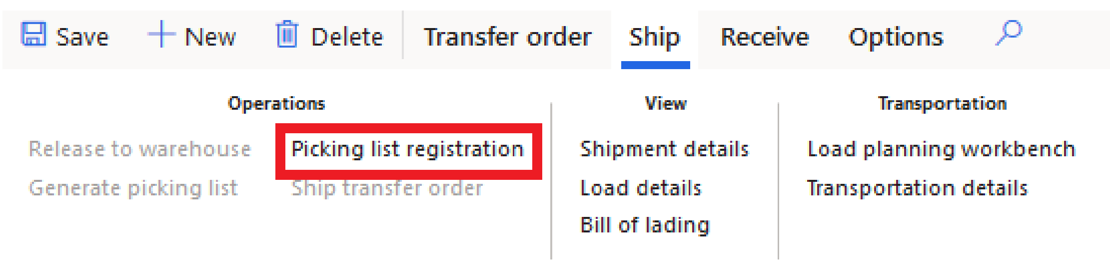
Picking list

Reference	Transfer order shipment		
Number	01CE-000061		
Activation date	6/3/2020 12:25 PM		
End date/time			
Mode of delivery		Picking route	01CE-000082
Delivery terms			
Handling status	Activated		

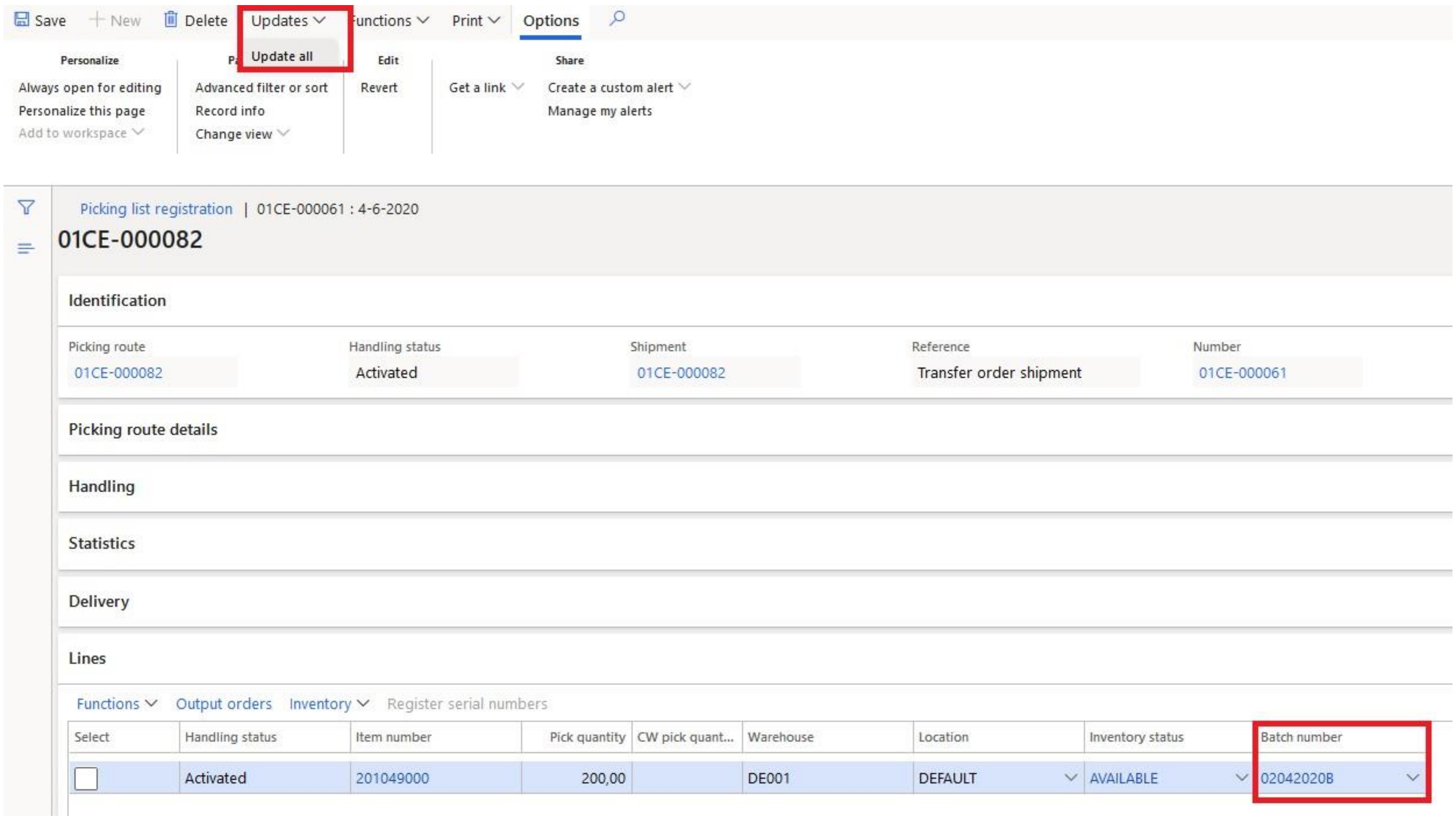
Item number	Handling status	Description	Order quantity	Order unit	CW quantity	CW unit	Delivery date	Quantity	Picked
201049000	Activated	AI ETOFENPROX TECH (97%) DE	200.00	KGM	0.00		6/4/2020	200.00	

1.7.1.3. Pick list registration

Once the picking in the warehouse is completed, the user can register the picking for the order back into the system. In order to register, you have to open the transfer order and click on the **Picking list registration** option on the **Ship** tab of the transfer order. Note that once the picking list has been generated, the **generate picking list** option will be disabled and the **picking list registration** option will get enabled on the transfer order form.



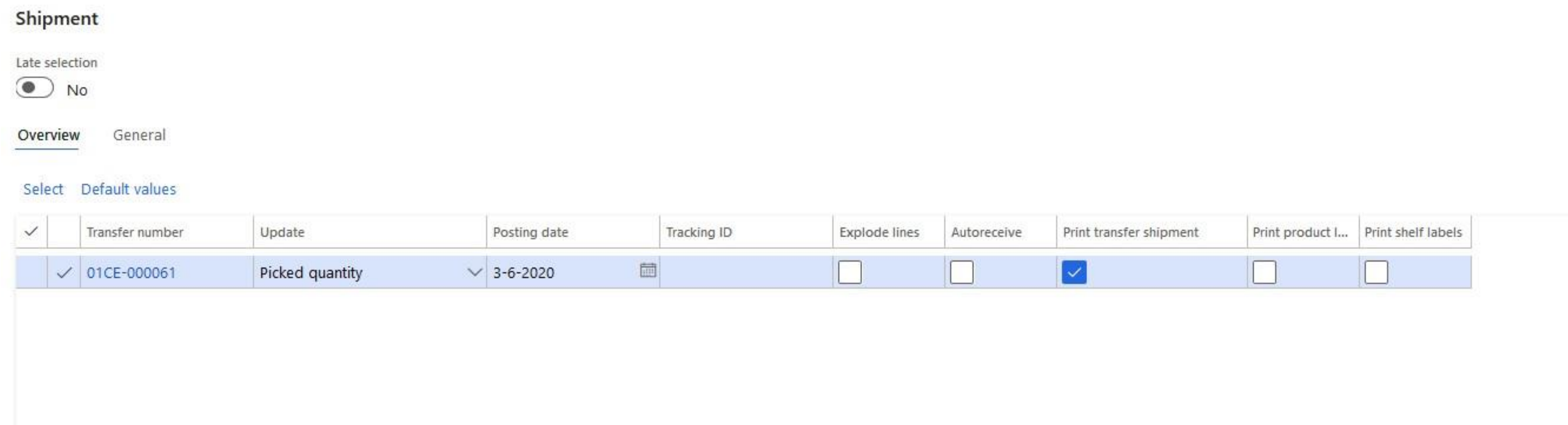
On the picking list registration form that opens up, you will have to fill in the batch number(s) if applicable and click on the **Update all** button to finish the registration of the outbound transfer order.



Now, the status of the picking list registration lines are changed from **Activated** to **Completed**. Now you can close the form, go back to the transfer order and ship the order to its destination. You might have to refresh the page to make the Ship Transfer Order button activated.

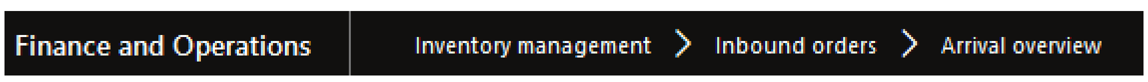
1.7.1.4. Ship a transfer order

After registering the picking list, click on the **Ship transfer order** option on the **Ship** tab of the transfer order screen. The shipment screen opens as shown below:

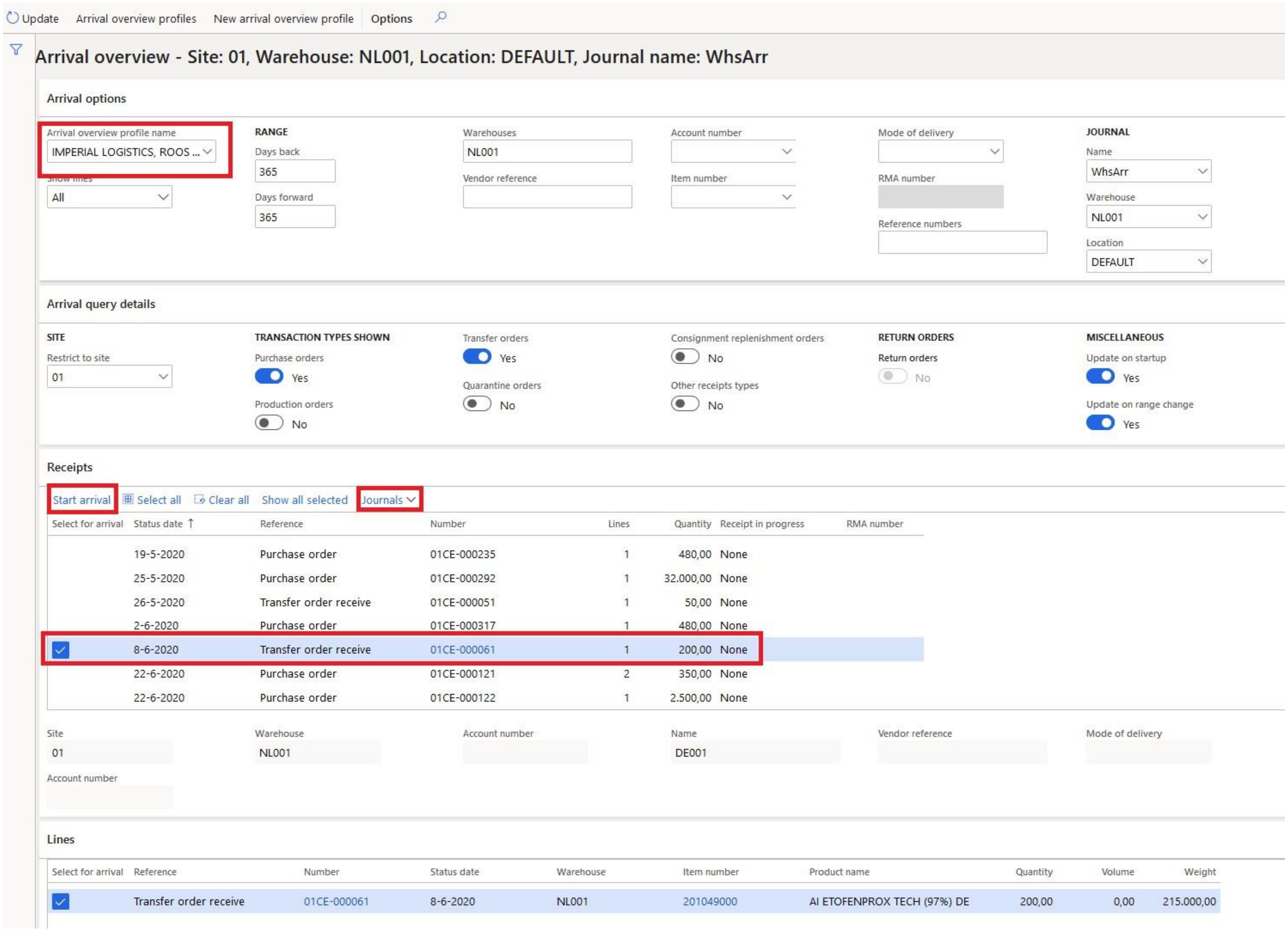


Click OK to post the shipment. You can optionally tick the printing of the transfer order shipment checkbox to print a delivery note before you post the shipment. Once the shipment is posted, you will notice that the status on the transfer order has changed to **Shipped**. The inventory of the transferred products at this time are reduced from the sending warehouse and posted to the **In-Transit** warehouse.

1.7.1.5. Receiving a transfer order

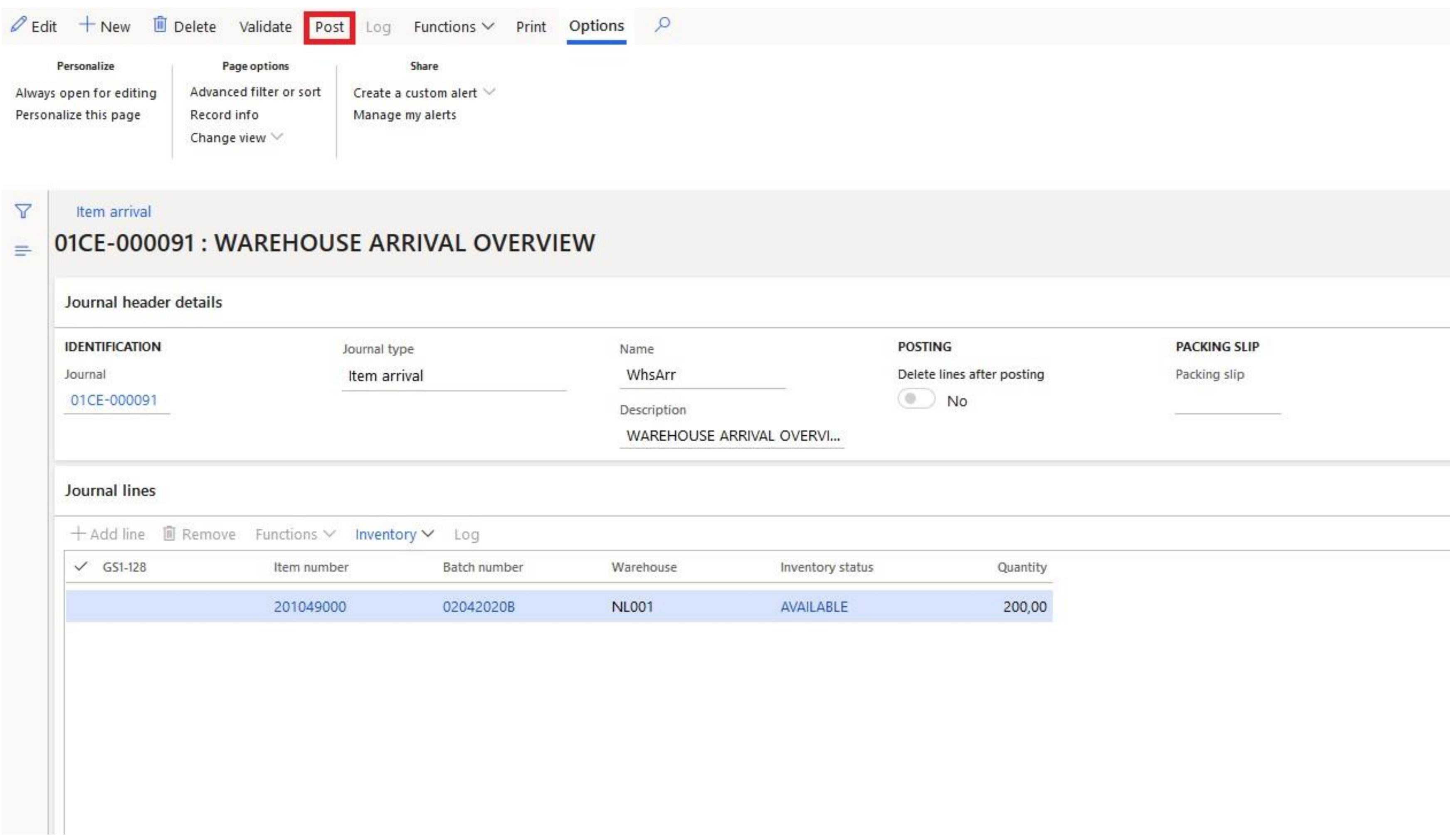


On the **arrival overview** screen, we can view all orders arriving at the warehouse that we select



Here, we will have to select our transfer order and click the **Start arrival** button to create a new inventory arrival journal. On clicking the button, the system will automatically create an **inventory item arrival journal** and willdisplay the journal number as an info-log message. Now we can click on the **Journals** button and select the **Show arrivals from receipts** menu to check the item arrival journal.

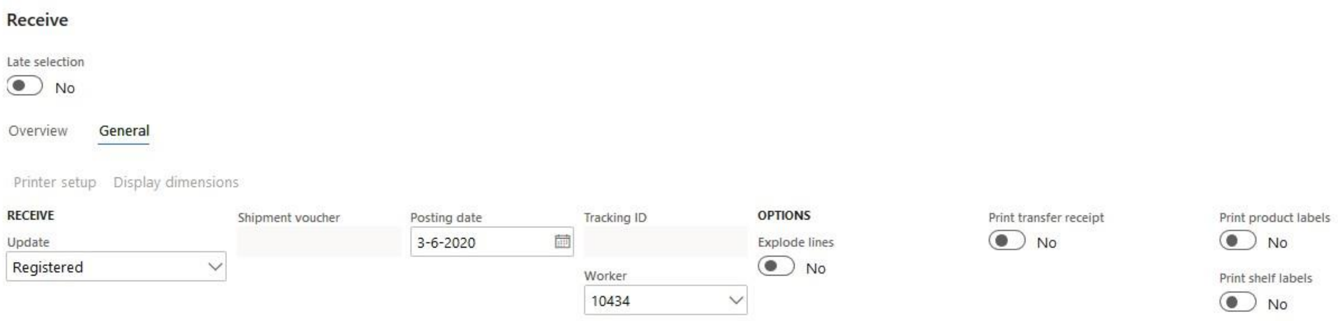
The inventory item arrival journal will contain the list of the transfer order lines of the products with their shipped quantities.



Click the **Post** button on the item arrival journal to post.

Posting the item arrival journal registers the quantities into the stock of the receiving warehouse.
After registration,you can either go back to the transfer order to receive it or you can directly receive the order from the item arrival journal.

In the item arrival journal, you have the option of receive under functions menu to directly receive the transfer order. When clicking receive, choose “registered quantity”



Now that the transfer order has been completely received, the order number will not show any more on the arrival overview screen. You can check back the transfer order and you would notice that the status of the order has now changed to **Received**.

1.7.2. Planned transfer orders

When master planning generates planned transfer orders, these transfer orders have a status of Unprocessed.
If you want to firm a planned transfer order, you can change the status to Approved. Planned transfer orders with Approved status are respected by master planning, so they are not modified or deleted during a later master planning run. To achieve this, the planning logic copies the Approved planned transfer orders from the old plan version to the new plan version during master planning.

1.7.2.1. From planned transfers to firm transfers

There are two different plans: PURCH and O&F

The O&F plan contains planned transfer orders calculated on all entered forecasts The PURCH plan

contains only the transfer orders based on *firmed production orders*.

In the planned transfer order list you can select a transfer order and click approve in the top menu.

This will have the effect that the master planning will leave the planned transfer order in unchanged, even on refresh of the schedule.

In most cases, however, you will choose Firm. This will convert the planned transfer order to an open transfer order. The planned purchase order disappears from the list, and you will find it back in the All purchase orders list with status Created.

1. In the list, select the transer order you want to firm
2. Click Firm.
3. Click OK.
4. The planned transfer order disappears from the list.
5. Go to Inventory management -Inbound orders-Transfer order
6. In the list, find and select the transfer order you just created.
7. Review the transfer order per line and on header level
8. You can then proceed as with a manual transfer order as described above.

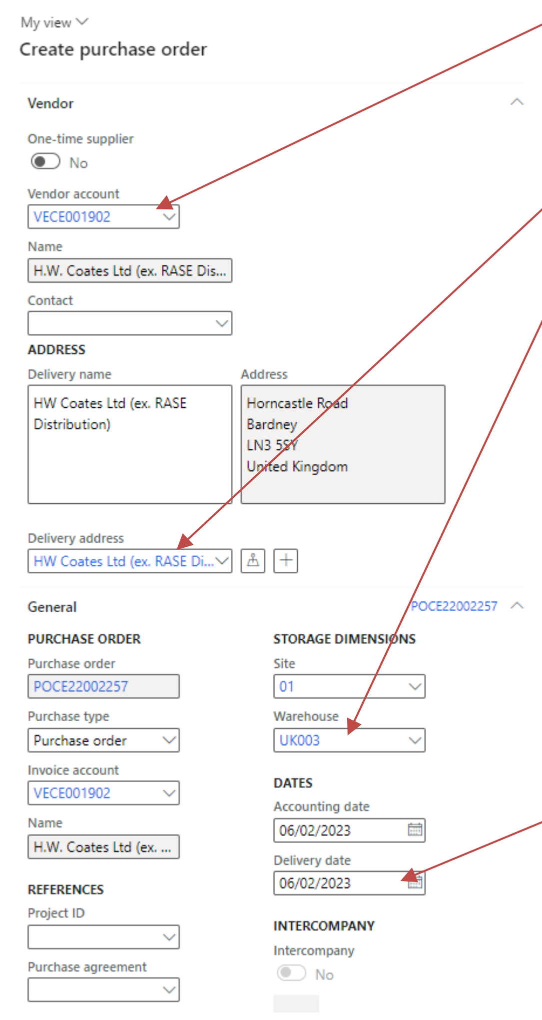
1.8. Service purchase orders

Sometime it is necessary to create a purchase order for a service that is not generated by the system e.g. warehouse costs

1.8.1. Creating a service purchase order

Go to the following path and selecr 'New' at the top left of the screen.

Procurement and sourcing > Purchase orders > All purchase orders

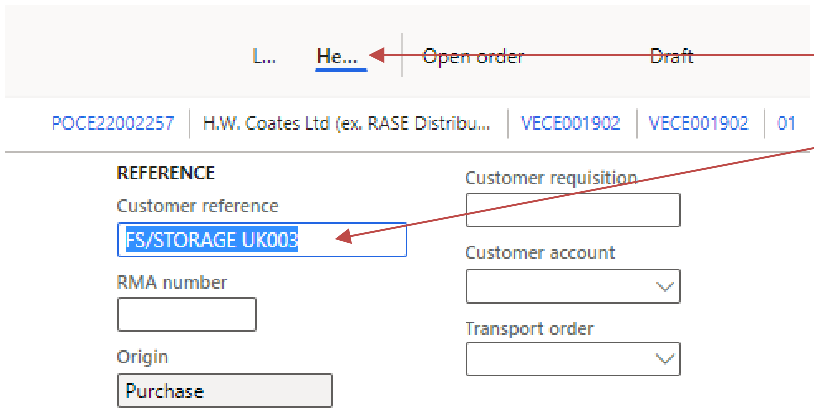


Enter the supplier in the 'vendor account' field.

Make sure the delivery address is correct, if the delivery site is a warehouse you can add the warehouse and the delivery address will update itself.

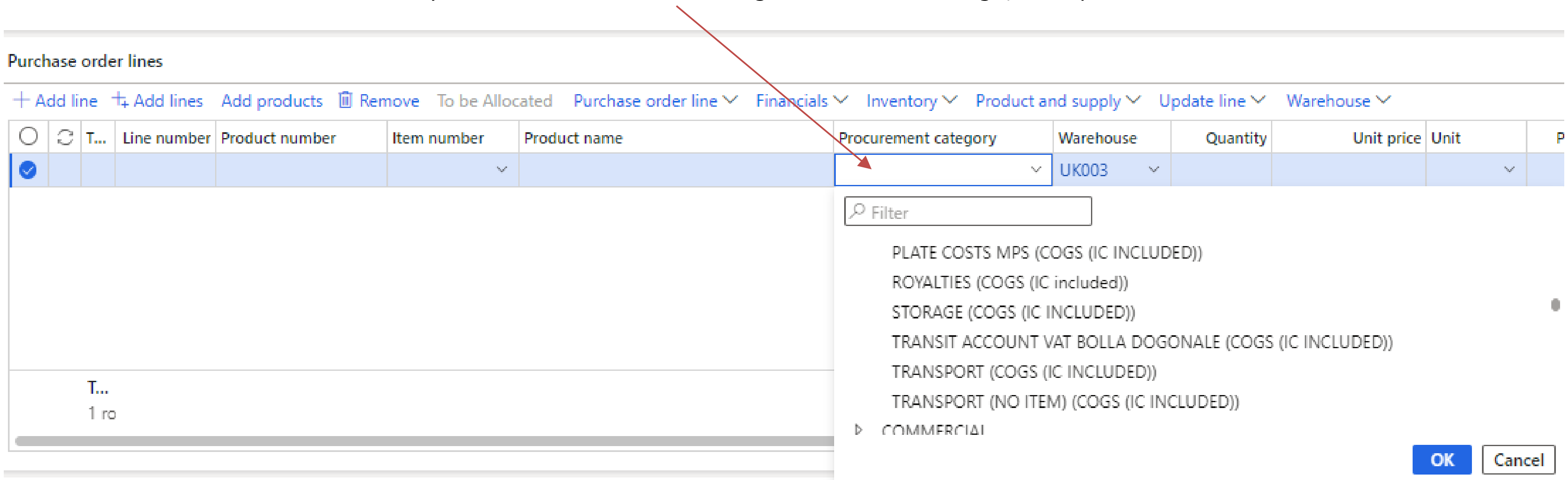
Enter the desired delivery date of the service

Select 'Ok'.

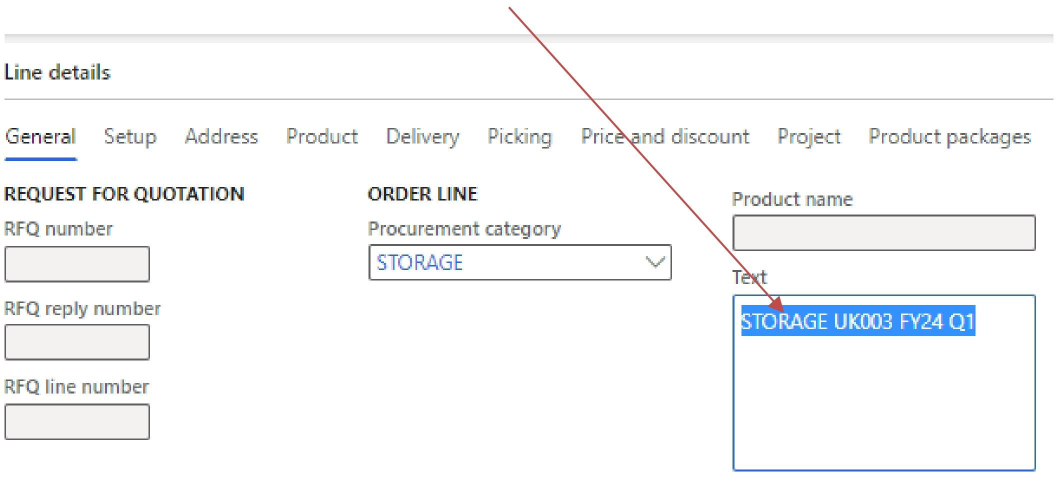


Go to the 'header' tab and enter a description of the order in the customer reference. The format should be: your initials / description of the service

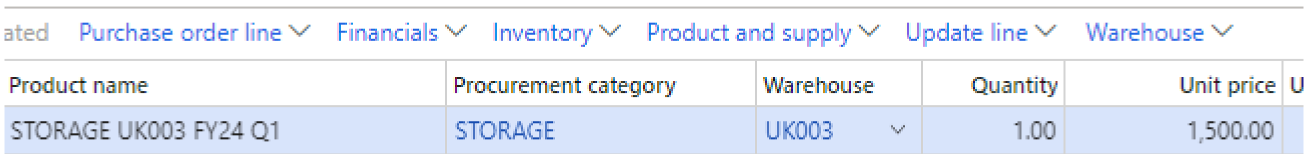
Go back to the lines tab and enter a procurement category for the service. Not all procurement categories are valid for supply chain, most will be found under 'COGS' and there you will find several sub categories such as storage, transport and custom clearance costs.



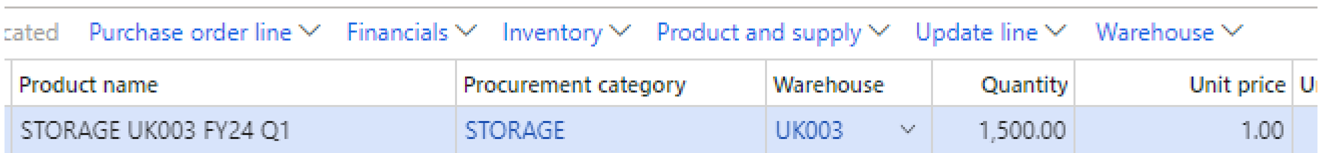
Once you have selected the procurement category you can give the purchase order line a description in the text box at the bottom of the screen, this description will show in the line detail of the purchase order once you select 'Save' at the top left of the screen.

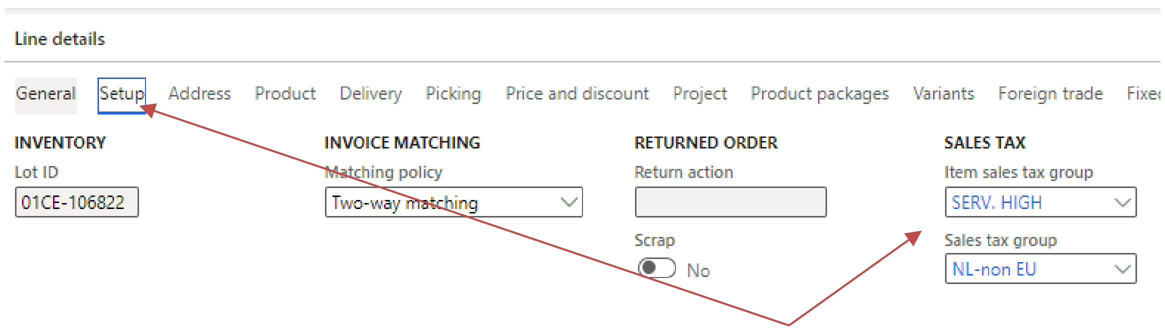


If you know the exact price of the service enter the quantity and the unit price, checking the correct currency is applied.



If you don't know the exact price you can create a budget purchase order. In this case enter the total value that you want to limit the purchase order to in the quantity field and a '1' in the unit price field.





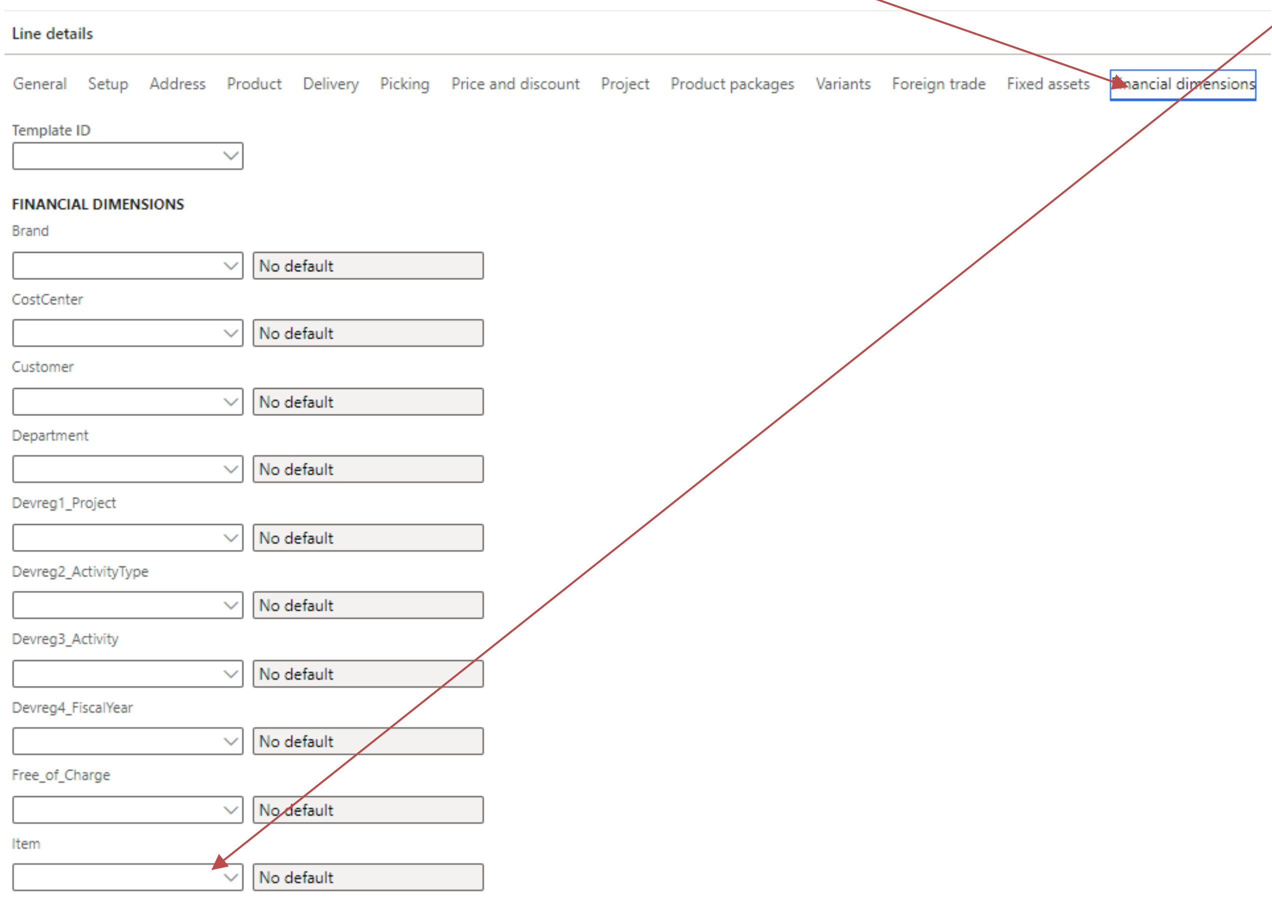
Check the correct sales tax is applied to the purchase order by checking the 'Set up' tab in the line details at the bottom of the screen. It should have automatically populated but please review it and if in doubt contact the finance department.

Sales tax group
'NL-Local' = purchases from a local/Dutch supplier;
'NL-non EU' = purchases from a non EU supplier;
'NL -EU'= purchases from a non-Dutch, however an EU supplier.

Item sales tax group:
In 99% of the cases it should be SERV.HIGH;
Only for purchases of food and beverage an Low Item Sales Tax Group is applicable.

If you have selected a procurement category that relates to a service for a specific item you will need to link the item to the purchase order line. This doesn't apply to services such as storage at the warehouse but it would apply to customs clearance or transport for a specific item.

To assign the item go to the 'Financial dimensions' tab in the line details and enter the item in the 'Item' field and then select 'Save' at the top left of the screen.

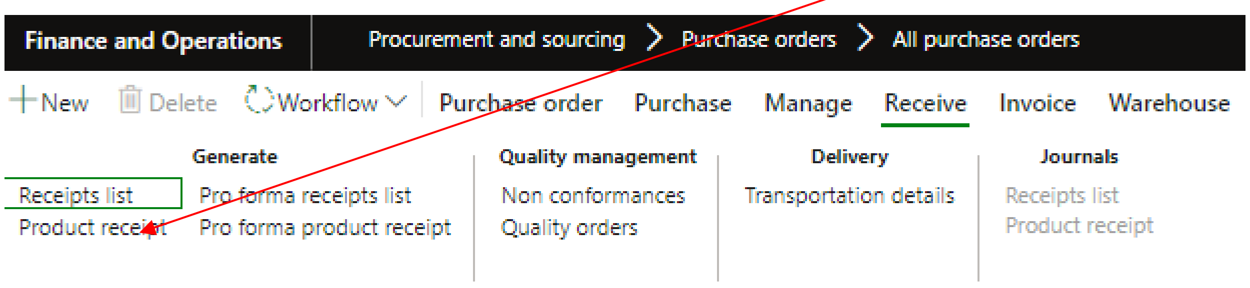


Once the purchase order is ready you can send it through the workflow in the same way as a normal purchase order.

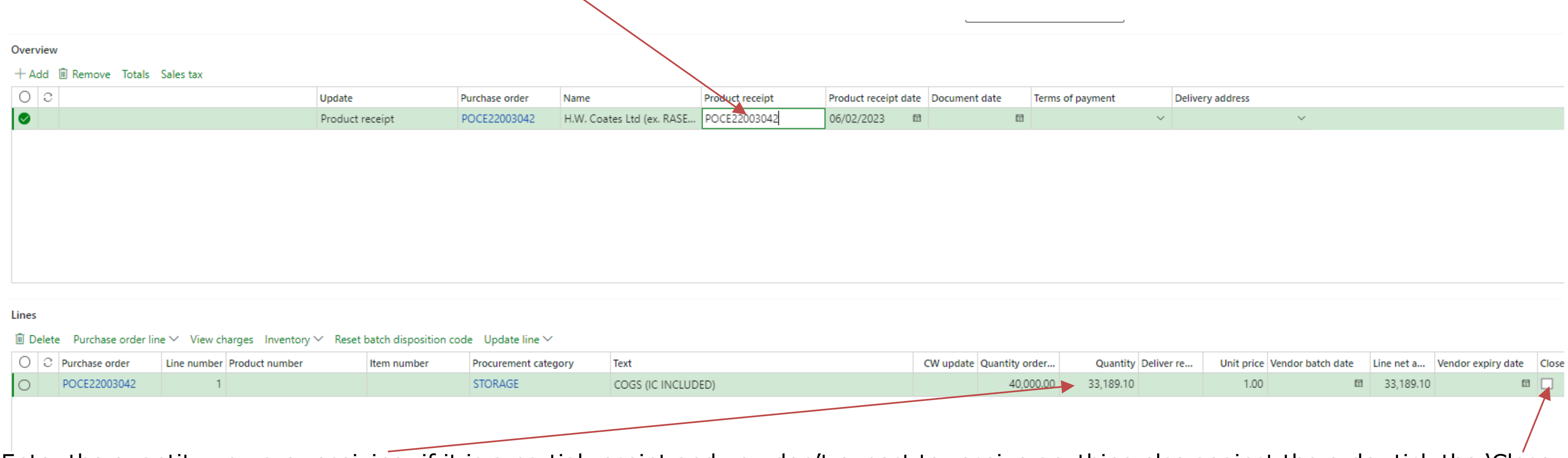
1.8.2. Receiving a service purchase order

It is not essential to receive a service purchase order but it is good practice to keep the system tidy.

To receive the PO, open the order and go to the 'Receive' tab and select 'Product receipt'.



Enter a receipt reference in the 'Product receipt' field, the PO reference can be used if necessary but remember that if there are multiple receipts against the PO the same reference cannot be used again.



Enter the quantity you are receiving, if it is a partial receipt and you don't expect to receive anything else against the order tick the 'Close receipt' box.
Select 'Ok', the service is now received financially and can be matched to the incoming invoice.