



eProc Buyers Manual

Version 17.03.1.0

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Chapter 1: About this Guide

1.1 Purpose

This user guide enables the users of eProc to get acquainted with the application and use it effectively for the following:

- Creating a Purchase Order (PO)
- Converting Requisitions to PO
- Different actions related to a PO: E-mailing PO, closing PO etc.
- Amending a PO
- Onboarding a Supplier onto eProc
- Accessing Pre-packed Reports
- Creating & Editing existing Reports

1.2 Audience Profile

The intended audiences for this guide are the people who are involved in the procurement process and place orders with suppliers. Their goal is to plan, execute, and finalize purchasing and procurement strategies for spend across the organization.

The responsibilities of a Buyer include:

1. Direct and manage the sourcing strategies from beginning to end. This includes PO approval & generation in the source system.
2. Report supplier performance to Sourcing department.
3. Sets cost-center wise limits for approval at buyer and manager level. This is done while keeping the budget in mind.
4. Receives invoices from suppliers, verifies them and enters in the source system. Also needs to handle advance shipping notices (ASNs) that inform him about goods dispatched and to be received.

This user guide has been divided into the following chapters:

- **Chapter 1: About this Guide** - This chapter gives a description about the user guide and how it is organized.
- **Chapter 2: Welcome to eProc** - This chapter gives an overview of the eProc application. It also discusses the key features and benefits of eProc.
- **Chapter 3: Accessing eProc** - This chapter describes how to log on to the application.
- **Chapter 4: Managing your Profile** - This chapter describes how to manage your profile, set preferences, and change password.
- **Chapter 5: Purchase Request & Purchase Order** - This chapter describes how a purchase request is converted to a Purchase Order (PO).
- **Chapter 6: Creating Purchase Orders (PO) Manually** - This chapter describes how to manually create a PO in a simple wizard.
- **Chapter 7: Tracking Purchase Orders (PO)** - This chapter describes how to manage the POs.
- **Chapter 8: Supplier On-boarding** - This chapter describes the procedure to on-board a supplier
- **Chapter 9: Reports** - This chapter explains the procedure of viewing or generating a report.

1.3 Typographical Conventions

Typefaces: The following typefaces are used throughout in this user guide:

Typeface	Description
Italic	<i>This typeface is used to represent cross-references within the user guide. It also represents important and useful information in the form of Notes, Tips, and Warnings.</i>
Bold	This typeface is used to represent screen elements of the eProc application.
CAPS	This typeface is used to represent the keys on the keyboard.
<u>Blue text</u>	This indicates a hyperlink.

Chapter 2: Welcome to eProc

2.1 Introduction

Zycus eProc is an easy-to-use, flexible, and highly configurable tool that is used to request, purchase, and issue payment for goods in an effort to reduce supplier's effort and drive continuous improvement.

The eProc application helps you manage supplier orders efficiently to increase competitiveness by reducing turnaround time and inventory levels. Additionally, the application enables suppliers to place an order for the products they are looking for but are not available currently in the catalog (free text items) which in turn helps organizations and suppliers take better decisions.

2.2 Overview of eProc

Zycus E-Procurement application (eProc) is a web 2.0 based procure to pay (P2P) solution that controls the maverick spending by ensuring proper approvals for organization wide spend, realizes tactical savings by automating and standardizing procurement process, and increases compliance to contracted suppliers and visibility of contracted vendors across the organization. It automates the entire process from requesting items to order to payment and provides innovative ways to gather supplier content /catalogs to automate and reduce time and effort for supplier content management.

Zycus eProc provides an intuitive Amazon-like interface for requisitioning, thereby increasing adoption. Unlike other Vendors, application has automated classification of catalog content, integrated search capabilities to search across local catalogs and punch-out catalogs, and guided procurement to easily navigate buyers through buying process for category. It is completely integrated with other spend management solutions like sourcing, contract management to enable a stronger spend compliance process and supports formats like cXML, OCI, Oracle catalog format.

2.3 Key Benefits

These are some of the key benefits that your organization can gain through eProc:

- Comprehensive procure-to-pay solution
- Quick-setup and Easy-to-use
- Strong approval workflow
- Builds a supplier portal
- Leverages existing products in SRM Suite
- APIs for integration with customer's source systems

Chapter 3: Accessing eProc

3.1 Introduction

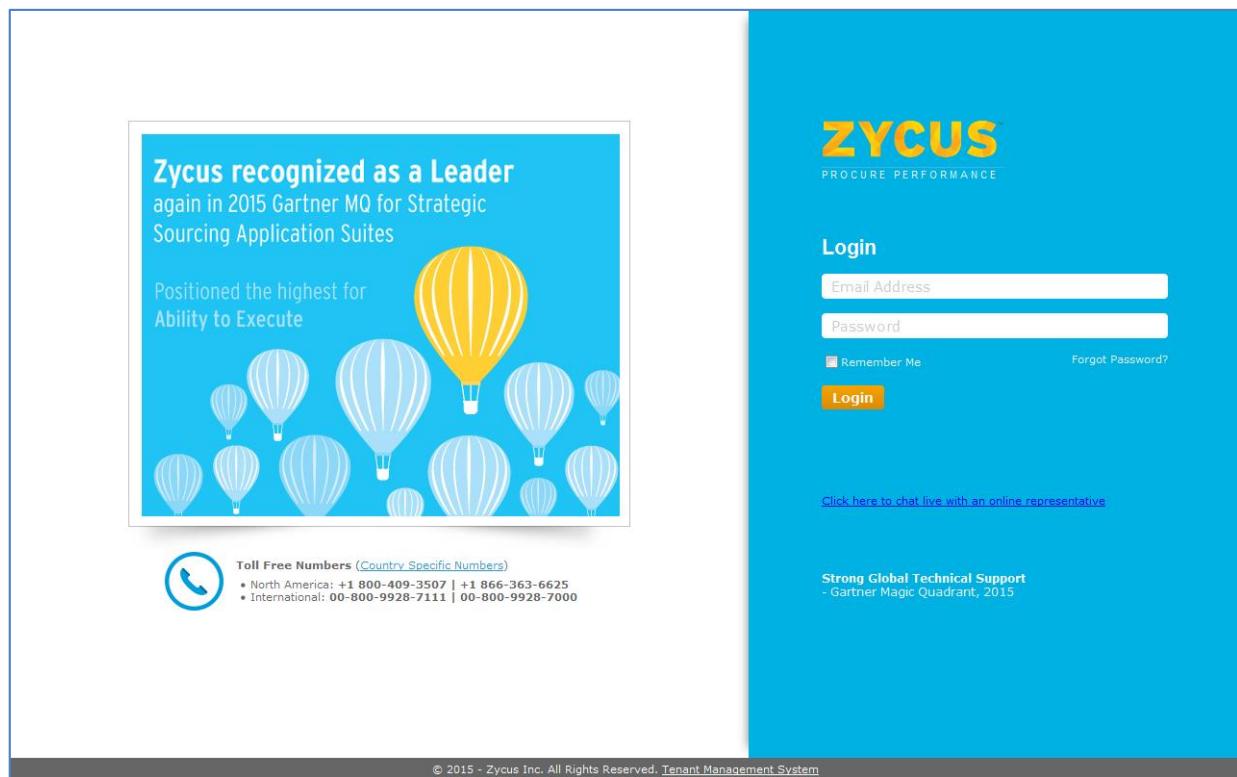
eProc is available in Software as a Service (SaaS) mode over the internet which makes it easier for the user to access it through your organizations intranet.

3.2 Accessing eProc

To access eProc:

1. Open the internet explorer, type the URL in the Address bar box, and click **Go** or press ENTER. The Login page opens.

Note: *The URL is specific to your company name and is provided by Zycus.*



Note: *All the Zycus Suite applications can now be accessed using single login credentials.*

2. Type your email id and password in the **Email Address** and **Password** fields respectively and click **Sign In** or press the ENTER key. The Product Selection page is displayed.



3. Select **eProc** to start using the application.

Note: If you do not see the Product Selection page, but instead see the Login page again, please verify the email id and password you typed and try again.

Note: Email Address and Password fields are case sensitive. Also, please contact your organization's IT team to get details of the URL, email id, and password for eProc.

3.3 Logging Out

To logout from eProc:

- Click the **Logout** link located at the upper-right corner of the window. The **Login** page is displayed.

Note: eProc has a configurable time out period. You are automatically logged out from eProc if you do not use eProc for the configured time out period (For example, 30 minutes).

Note: Closing the browser window is not an appropriate method to exit from eProc.

Chapter 4: Managing your Profile

4.1 Introduction

eProc enables users to manage their profile, set their preferences, and change password.

4.2 Setting your preferences

The **User Profile** page allows you to modify, add, and update personal information.

To update personal details:

1. Log on to the eProc application. The following page is displayed.



2. On the top right corner, click on settings link and select **Manage Profile**. The **User Profile** page is displayed.

Following are the description of the various fields on the User Profile page:

Fields	Description
User Details	
User Name	Displays the name of the logged in user. (For Viewing Only)
Display Name	Enter the user name to be displayed in the application. (Mandatory)
E-mail	Displays the email-id of the logged in user. (For Viewing Only)
Change Password	Click on this button to change the password. For more details see " Changing Password "
Location Details	
Location Name	Specify/Displays the location of the logged in user. (Mandatory)
City	Specify/Displays the city of the logged in user.
State	Specify/Displays the state of the logged in user.
Telephone Number	Specify/Displays the telephone number of the logged in user.
Extension	Specify/Displays the extension of the logged in user.
Alternate Telephone No	Specify/Displays the alternate telephone no of the logged in user.
Preference Details	
Time Zone	Select the applicable time zone from the drop down menu.
Number Format	Select the applicable number format from the following options: <ul style="list-style-type: none"> • US Format: (#,###,###.##) • European Format: (#.###.###,##)
Date Format	Select the applicable date format from the following options: <ul style="list-style-type: none"> • yyyy/MM/dd • dd/MM/yy • MM/dd/yy
Time Format	Select the desired time format from the following options: <ul style="list-style-type: none"> • 12 Horus • 24 Hours
Currency	Select the applicable currency format from the drop down menu.
Locale	Select the applicable locale format from the drop down menu.
Decimal Precision	Select the applicable decimal precision from the drop down menu.

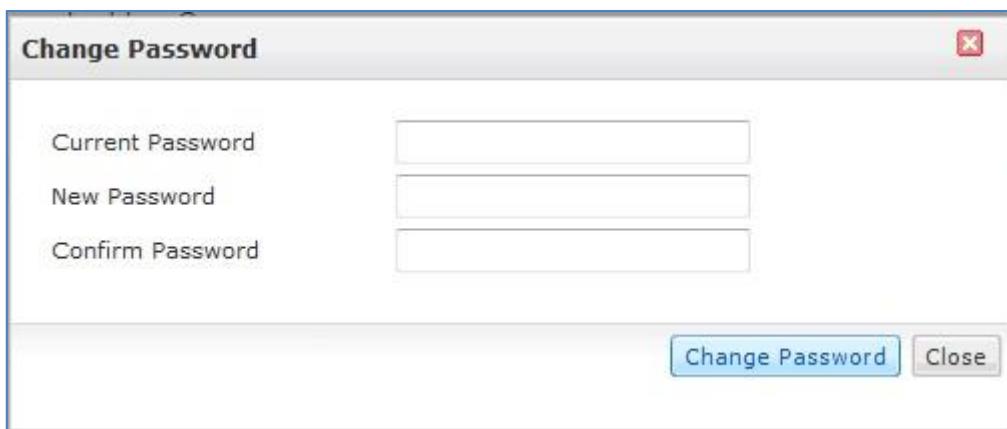
4.3 Changing Password

eProc provides you with a feature to change your password in the **User Profile** page provided within the application under **Settings**.

Note: It is recommended to change your password when you login for the first time. Password must contain minimum eight characters.

To change your password:

1. On the **User Profile** page, click **Change Password**. The **Change Password** page is displayed.



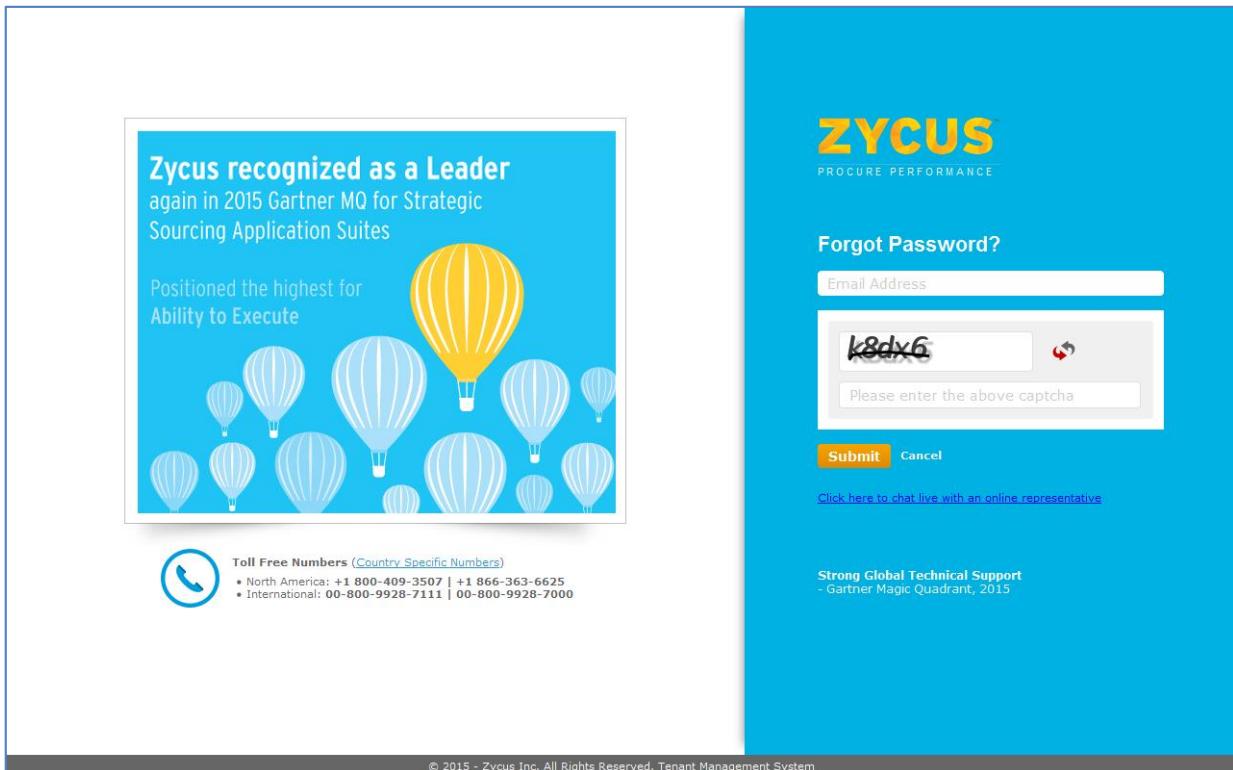
2. Type your current password in the **Current Password** field.
3. Type your new password in the **New Password** field.
4. Type your new password again in the **Confirm Password** field for confirmation.
5. Click **Change Password**. The password gets saved and the following message is displayed.



4.4 Recovering Password

To recover your password:

1. Click on the **Forgot Password?** link in the login page. The Forgot Password page is displayed.



2. Type your official email address in the **Email Address** field.
3. Enter the code, displayed in the **Enter the above code** field and click **Submit**. An email is sent to your email account with your login id and password.

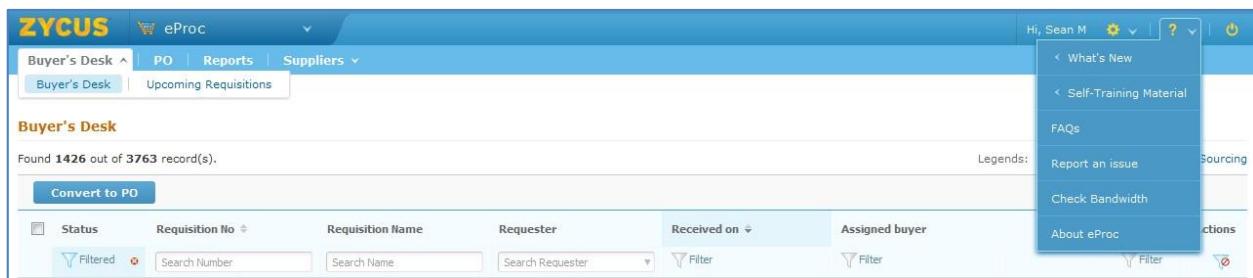
Note: Click to refresh the code.

4.5 Need More Help

This feature makes it easier for you to understand, get self-trained to use eProc with ease. The **Help** options provides you with access to the user manuals, FAQs, Online Videos for suppliers which have been created to give you step by step explanation of different event level activities. In case, you have problems with the application you can chat with customer support and have your problems solved.

To use the help option:

1. On the top right corner of the page, click on  **Help** link.



Option	Description
What's New	Gives you access to Release Notes & Release Specific Videos for the latest release.
Self-Training Material	Gives you access to Help Videos, Online Help & User Manuals for eProc.
FAQs	Gives you detailed information of all the important features
Manuals	Gives you step-by-step information to help you carry out various functions. This section provides customer specific help documents Zycus Knowledge Hub of eProc as shown in the following figure.
Online Videos	Provides a list of videos depicting the functionality of the various features
Report an issue	Gives users an option to contact Zycus Technical Support team
Contact Us	Gives contact details
About	Gives all the version details of eProc

You are now using Release R15.04.1.0

Configure Budget by GL Account dimension

[Learn more](#) or [Check later](#)

Click on Learn More button above to download Release Notes. To see this view again later navigate via Help(?) > What's New

1 / 5

Click and arrow to slide through release notes or click **Learn More** to download the Release Notes in PDF format.

ZYCUS Knowledge Hub Hi Sean M | Logout

I am a: User

- Help
 - User
 - User Requester
 - Buyer
 - Administrator
 - Approver
 - Catalog Manager

Show me: Videos Manuals FAQs HTML

Search

Training Cheatsheet – Requisitioner eProc 1.77 mb	Training Cheatsheet – Approver eProc 0.97 mb
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Buyer Guide eProc 4.47 mb	

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FEEDBACK

Feedback directs to a link to provide feedback for **Knowledge Hub**.

Chapter 5: Purchase Request & Purchase Order

5.1 Introduction

A purchase order (PO) is a commercial document issued by a buyer to a seller, indicating types, quantities, and agreed prices for products or services the seller will provide to the buyer. Sending a PO to a supplier constitutes a legal offer to buy products or services.

POs allow buyers to clearly and explicitly communicate their intentions to sellers, and sellers are protected in case of a buyer's refusal to pay for goods or services. POs also help a purchasing agent manage incoming orders and pending orders. POs also are an economical choice for a business because they streamline the purchasing process to a standard procedure.

5.2 Touchless PO Generation Process

After a requisition is approved and the auto-generation setting is set ON in the system, a requisition is automatically converted into a PO and PO is released to supplier.

Note: An organization can configure POs to be automatically generated when a requisition is approved, and define when they are released to the supplier. Please contact your administrator for more details.

Note: POs will be generated automatically only if requisition contains catalog or punchout items or if it is linked to a blanket purchase order. If a requisition contains free text items then it will always go for buyer's approval and only buyer will be able to generate PO against those requisitions.

Note: POs ordered will be released to suppliers based on the release date settings. PO can be released immediately or after specified timeline.

5.3 Understanding Buyer's Desk Functionality

Buyer's Desk is split into two sub sections: Requisitions and Items.

5.4 Buyer's Desk: Requisition

Every requisition that contains free text items is moved to Buyer's Desk for PO generation. In the Buyer's desk, the buyer decides the supplier from whom the item is to be purchased and can also modify the price and quantity of the requested items but up to a certain tolerance limit.

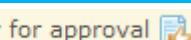
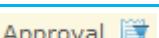
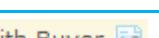
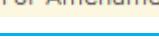
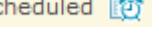
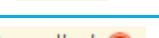
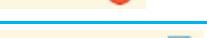
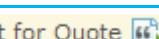
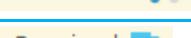
- Requisitions containing catalog punchout items will also be moved to **Buyer's desk** if **Touchless PO generation** setting is **OFF**.
- Approved requisitions that are waiting for buyer's action are present in **Pending** status in **Buyer's Desk** tab

When an assigned buyer opens a requisition from buyer's desk, by default, only those items will be shown by eProc for which the buyer is the category manager and locations of line items are assigned under his scope (not the requester's scope).

Note: An organization can configure POs to be automatically generated when a requisition is approved, and define when they are released to the supplier. Please contact your administrator for more details.

Status	Requisition No.	Requisition Name	Requester	Received on	Assigned buyer	Purchase Amount	Actions
Awaiting Quote	OU_1-001/PR/277	PR Number - 7881498 by Jagrati for guide...*	Jagrati	31/01/2017	Multiple	USD 0.00	Actions
Awaiting Quote	OU_1-001/PR/276	Nilesh Test 213*	Nilesh	31/01/2017	Shadab QS	USD 0.00	Actions
Awaiting Quote	OU_1-001/PR/267	Nilesh Test excel*	Shadab QS	30/01/2017	Shadab QS	INR 0.00	Actions
Pending Order	OU_1-001/PR/270	PR Number - 4379429 by Shadab QS for non...*	Shadab QS	30/01/2017	Shadab QS	INR 4.00	Actions
Awaiting Quote	OU_1-001/PR/268	PR Number - 5720796 by Shadab QS for <...>*	Shadab QS	30/01/2017	Shadab QS	INR 0.00	Actions
Awaiting Quote	OU_1-001/PR/263	PR Number - 4765568 by Nilesh for Quoted...*	Nilesh	26/01/2017	Multiple	USD 0.00	Actions
Pending Order	OU_1-001/PR/261	PR Number - 1839386 by Shadab QS for anl...*	Shadab QS	26/01/2017	Shadab QS	INR 264.00	Actions
Awaiting Quote	OU_1-001/PR/260	PR Number - 7883937 by Nilesh for Bottel...*	Nilesh	26/01/2017	Multiple	USD 0.00	Actions
Pending Order	OU_1-001/PR/259	PR Number - 6447660 by Shadab QS for anl...*	Shadab QS	26/01/2017	Shadab QS	INR 264.00	Actions
Pending Order	OU_1-001/PR/258	Kaustav Test*	Shadab QS	26/01/2017	Shadab QS	INR 264.00	Actions

The following table describes the Requisition status under the **Buyer's Desk** tab in detail:

Status	Description
Draft 	This status describes that the requisition is in draft stage
Ready for approval 	This status describes that the approvers are to be added in the workflow
In Approval 	This status describes that the requisition is sent for approval
With Buyer 	This status describes that the requisition is with the buyer
Returned For Amendment 	This status describes that the requisition has been returned for further amendments
Scheduled 	This status describes that the requisition is scheduled state
Rejected 	This status describes that the requisition is rejected by the requisition approver
Closed	This status describes that the requisition is closed
Cancelled 	This status describes that the requisition is cancelled
Returned with Quote 	This status describes that requisition is returned with quote
Sent for Quote 	This status describes that requisition is sent for quote
Released	
Partially Ordered 	This status describes that requisition is partially ordered
Not Received 	This status describes that items are not yet received against this purchase order
Partially Received 	This status describes that requisition is partially received
Fully Received 	This status describes that requisition is fully received

Note: The assigned buyer should be copied as the buyer on auto generated PO's.

Note: Buyer will be able to edit the price for a free text item without any tolerance checks if the sourcing status of the free-text item is Need a quote.

Note: Depending upon the activity assigned to the user in TMS, the user will be able to:

1. View and edit only those requisitions for which the logged in user is the assigned buyer.
2. View and edit only those requisitions for which the logged in user is the assigned buyer and also view other users requisitions who are within the users scope.
3. Both of above and is also able to edit other requisitions too.

5.5 Viewing a Requisition

1. To view a requisition from Buyer's desk, click the **Requisition Number** hyperlink. You will be navigated to the following page:

Requisition Info

Requisition Name: PR for naq items, pen 2109017

Urgent Requirement: No

Attachments: No attachments available

Reason for ordering: -

Comments for supplier: -

On Behalf of: -

Purchase Type: PROJECT

Billing, Delivery & Cost Allocation Info

Organization Unit (OU): Apeksha's Company > Apeksha's Company BU > SEEZ_LOC

Delivery address: fsef
swfrewrew
Bhayander, Maharashtra
India

Bill-to address: fsef
swfrewrew
Bhayander, Maharashtra
India

Cost Center: ol_po: qweq

Required by: -

Settlement via: Invoice

Retrospective Purchase: No

Items that can be sent for Ordering

Items Grouped by Category, Price Type (Pending Order)

Line No.	Item No.	Item and Supplier Name	Reference Contract	Availability	Unit Price	Qty/Amt	Total Price	Actions
2	34434	pen AVNISH TEST SUPPLIER	-	N/A	INR 33.00000	1 EA	INR 33.00000	

Item-level taxes sub-total: INR 0.00000
Purchase Amount: INR 33.00000

View workflow

Items Grouped by Category, Price Type (Pending Order)

Save Cancel

2. The items in the item table will be split and grouped by the type. For example: grouped by category and grouped by price type as shown in the image below.

Items that can be sent for Ordering

Items Grouped by Category, Price Type (Pending Order)

Line No.	Item No.	Item and Supplier Name	Reference Contract	Availability	Unit Price	Qty/Amt	Total Price	Actions
2	34434	pen AVNISH TEST SUPPLIER	-	N/A	INR 33.00000	1 EA	INR 33.00000	

Item-level taxes sub-total: INR 0.00000
Purchase Amount: INR 33.00000

View workflow

Sub Process 1 approval path Approved

disha Requester Submitted 18/04/2017 09:04:47 PM

Items Grouped by Category, Price Type (Pending Order)

Line No.	Item No.	Item and Supplier Name	Reference Contract	Availability	Unit Price	Qty/Amt	Total Price	Actions
1	N/A	naq items AVNISH TEST SUPPLIER	-	N/A	INR 423.00000	213 EA	INR 90,099.00000	

Item-level taxes sub-total: INR 0.00000
Purchase Amount: INR 90,099.00000

View workflow

Sub Process 1 approval path Approved

disha Requester Submitted 19/04/2017 10:32:48 AM

Save Cancel

3. Since the items are grouped by category and price type, if required, you can choose to approve only one group of items and return the other group to the requisitioner for review.

5.6 Viewing Quick Sourcing Events

As a Buyer, you will be able to view all the quick sourcing events created.

To View Quick Sourcing Events, follow the given steps:

- On the Buyer's Desk page, click **View Quick Sourcing Events** as shown below:

The screenshot shows the 'Buyer's Desk' page with a list of requisitions. The 'Buyer's Desk' tab is selected. In the top right corner, there is a button labeled 'View Quick Source Events' which is highlighted with a red box.

Status	Requisition No.	Requisition Name	Requester	Received on	Assigned buyer	Purchase Amount	Actions
Pending Order	OU_1-001/PR/138	PR by Shadab QS for Gd Item 21 requester*	Shadab QS	04/01/2017	Shadab QS	INR 10.00	Actions
Pending Order	OU_1-001/PR/134	PR by Shadab QS for Gd item restrict*	Shadab QS	03/01/2017	Shadab QS	INR 5.00	Actions
Awaiting Quote	OU_1-001/PR/93	PR by Shadab QS for Test Purchase amt*	Shadab QS	28/12/2016	Shadab QS	INR 0.00	Actions
Awaiting Quote	OU_1-001/PR/74	Gd Item 9 req*	Shadab QS	28/12/2016	Shadab QS	INR 0.00	Actions
Awaiting Quote	OU_1-001/PR/92	PR by Shadab QS for Dibba 1, Gd Item 8*	Shadab QS	28/12/2016	Shadab QS	INR 0.00	Actions
Pending Order	OU_1-001/PR/91	fsdfsdf*	jagrati	28/12/2016	Multiple	USD 144.00	Actions
Awaiting Quote	OU_1-001/PR/85	PR by Shadab QS for Gd Item 7*	Shadab QS	28/12/2016	Shadab QS	INR 0.00	Actions
Awaiting Quote	OU_1-001/PR/51	PR by Shadab QS for desktop*	Shadab QS	23/12/2016	Shadab QS	INR 0.00	Actions
Awaiting Quote	OU_1-001/PR/11	PR by Shadab QS for need a quote item*	Shadab QS	20/12/2016	Shadab QS	INR 0.00	Actions
Awaiting Quote	OU_1-001/PR/10	PR by Shadab QS for pen*	Shadab QS	20/12/2016	Shadab QS	INR 0.00	Actions

- You will land on the following page:

The screenshot shows the 'Latest Quick Source' page. The 'Latest Quick Source' tab is selected. The page displays a list of quick sourcing events with columns for Status, Event Name, Event Creator, Supplier Response Status, Time Ticker, and Actions.

Status	Event Name	Event Creator	Supplier Response Status	Time Ticker	Actions
Draft	test event	Shadab Ansari	0/1 (Supplier Responded / Invited)	-	Actions
In Progress	Gd item restrict	Shadab Ansari	0/1 (Supplier Responded / Invited)	End Time: 03/01/2017 00:00:00	Actions
In Progress	Gd Item 21 requester	Shadab Ansari	1/1 (Supplier Responded / Invited)	End Time: 03/01/2017 00:00:00	Actions
Closed	Gd Item 20	Shadab Ansari	1/1 (Supplier Responded / Invited)	Closed 1 day(s) back End Time: 02/01/2017 00:00:00	Actions
Closed	new todays event	Shadab Ansari	0/1 (Supplier Responded / Invited)	Closed 1 day(s) back End Time: 02/01/2017 00:00:00	Actions
Closed	A	Pooja Singh	0/2 (Supplier Responded / Invited)	Closed 5 day(s) back End Time: 29/12/2016 00:00:00	Actions
Closed	A and 5 more	Pooja Singh	1/5 (Supplier Responded / Invited)	Closed 4 day(s) back End Time: 30/12/2016 00:00:00	Actions
Closed	A and 3 more	Shadab Ansari	0/1 (Supplier Responded / Invited)	Closed 5 day(s) back End Time: 29/12/2016 00:00:00	Actions
Closed	Gd Item 9	Shadab Ansari	1/1 (Supplier Responded / Invited)	Closed 6 day(s) back End Time: 28/12/2016 00:00:00	Actions
Closed	rainboq 1 st event	Shadab Ansari	0/1 (Supplier Responded / Invited)	Closed 6 day(s) back End Time: 28/12/2016 00:00:00	Actions

- All the quick sourcing events you have created will be listed on this page.

5.6.1 Understanding Quick Sourcing Event listing page

2. The sourcing events created for guided procurements items will be tracked through this page. The following table describes the Sourcing status in detail:

Status	Description
Draft	The event is currently in draft stage and can be edited before submitting.
In Progress	The sourcing event is in progress.
Awarded	The sourcing event is complete and the supplier has been awarded.
Closed	The sourcing event is closed and no actions can be taken on it. You can only view the event details and supplier response (if any).

Columns	Description
Status	Displays the current status of the event.
Event Name	Displays the name of the event.
Event Creator	Displays the name of the eProc user who created the event.
Supplier Response Status	Displays the status on the No. of Suppliers invited v/s the No. of Suppliers responded.
Time Ticker	Displays the time and date by which the event will close.
Actions	<ul style="list-style-type: none"> • For events in Draft stage: Edit Delete • For events in progress: Add Supplier Add Collaborator Modify Closure Date View Responses • For events in closed stage: View Responses • For events which are awarded: View Responses

5.6.1.1 Events in draft stage

1. For events which are in draft stage, you can edit or delete the event. For a given event, go to the **Actions** drop down menu and select **Edit**.
2. A sourcing event side by side panel will open as shown below:

The screenshot shows the eProc interface with the 'Create Quick Source' dialog box open. The dialog box contains fields for 'Quick Source Name' (MySQL Workbench Software), 'Item Name' (A), 'Quantity' (1), 'UOM' (EA), and 'Market/Current Price'. Below this, there are sections for 'Include Item Details', 'Include question for Supplier(s)', 'Include an opening message for your Supplier(s)', 'Attach related documents for your Supplier(s)', and 'Invite Supplier(s) to bid this quick Source'. A list of events is visible on the left, categorized by status (Draft, In Progress, Closed). The URL in the browser bar is https://eproc.eprocddev.zycus.net:7070/eproc/quick_source/default/listing#.

3. Make changes to the event as required. You can publish the event by selecting **Create**. Or you can again **save it as draft**.

5.6.1.2 Events in progress

For events which are in progress, you can add suppliers, collaborators, modify the closure date or view supplier responses.

5.6.1.2.1 Add Supplier

1. For a given event, under the **Actions** drop down menu, select **Add Supplier**.

+ Create New Quick Source Event Latest Quick Source

Found 48 record(s).

Status	Event Name	Event Creator	Supplier Response Status	Time Ticker	Actions
Draft	MySQL Workbench Software	Shadab Ansari	0/1 (Supplier Responded / Invited)	-	Actions
In Progress	Gd Item restrict	Shadab Ansari	0/1 (Supplier Responded / Invited)	End Time: 03/01/2017 00:00:00	Actions
In Progress	Gd Item 21 requester	Shadab Ansari	1/1 (Supplier Responded / Invited)	End Time: 03/01/2017 00:00:00	Actions
Closed	Gd Item 20	Shadab Ansari	1/1 (Supplier Responded / Invited)	Closed 1 day(s) back End Time: 02/01/2017 00:00:00	Actions
Closed	new todays event	Shadab Ansari	0/1 (Supplier Responded / Invited)	Closed 1 day(s) back End Time: 02/01/2017 00:00:00	Actions
Closed	A	Pooja Singh	0/2 (Supplier Responded / Invited)	Closed 5 day(s) back End Time: 29/12/2016 00:00:00	Actions
Closed	A and 5 more	Pooja Singh	1/5 (Supplier Responded / Invited)	Closed 4 day(s) back End Time: 30/12/2016 00:00:00	Actions
Closed	A and 3 more	Shadab Ansari	0/1 (Supplier Responded / Invited)	Closed 5 day(s) back End Time: 29/12/2016 00:00:00	Actions
Closed	Gd Item 9	Shadab Ansari	1/1 (Supplier Responded / Invited)	Closed 6 day(s) back End Time: 28/12/2016 00:00:00	Actions
Closed	rainboq 1 st event	Shadab Ansari	0/1 (Supplier Responded / Invited)	Closed 6 day(s) back End Time: 28/12/2016 00:00:00	Actions

Show 10 records per page.

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1. **Add Supplier** popup will appear as shown below. Enter the company name, supplier name and email ID.

Add Supplier

Company*:

Name*:

Email Id*:

Add Supplier **Cancel**

2. Once you enter all the information, click **Add Supplier**.

5.6.1.2.2 Add Collaborator

1. For a given event, under the **Actions** drop down menu, select **Add Collaborator**.

+ Create New Quick Source Event Latest Quick Source

Found 48 record(s).

Status	Event Name	Event Creator	Supplier Response Status	Time Ticker	Actions
Draft	MySQL Workbench Software	Shadab Ansari	0/1 (Supplier Responded / Invited)	-	Actions
In Progress	Gd Item restrict	Shadab Ansari	0/1 (Supplier Responded / Invited)	End Time: 03/01/2017 00:00:00	Actions
In Progress	Gd Item 21 requester	Shadab Ansari	1/1 (Supplier Responded / Invited)	End Time: 03/01/2017 00:00:00	Actions
Closed	Gd Item 20	Shadab Ansari	1/1 (Supplier Responded / Invited)	Closed 1 day(s) back End Time: 02/01/2017 00:00:00	Actions
Closed	new todays event	Shadab Ansari	0/1 (Supplier Responded / Invited)	Closed 1 day(s) back End Time: 02/01/2017 00:00:00	Actions
Closed	A	Pooja Singh	0/2 (Supplier Responded / Invited)	Closed 5 day(s) back End Time: 29/12/2016 00:00:00	Actions
Closed	A and 5 more	Pooja Singh	1/5 (Supplier Responded / Invited)	Closed 4 day(s) back End Time: 30/12/2016 00:00:00	Actions
Closed	A and 3 more	Shadab Ansari	0/1 (Supplier Responded / Invited)	Closed 5 day(s) back End Time: 29/12/2016 00:00:00	Actions
Closed	Gd Item 9	Shadab Ansari	1/1 (Supplier Responded / Invited)	Closed 6 day(s) back End Time: 28/12/2016 00:00:00	Actions
Closed	rainboq 1 st event	Shadab Ansari	0/1 (Supplier Responded / Invited)	Closed 6 day(s) back End Time: 28/12/2016 00:00:00	Actions

Show 10 records per page.

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3. **Add Collaborator** popup will appear as shown below. Enter the eProc users email ID and click **Add Collaborator**.

Add Collaborator

Email Id*:

Add Collaborator **Cancel**

5.6.1.2.3 Modify Closure Date

1. For a given event, under the **Actions** drop down menu, select **Modify Closure Date**.

+ Create New Quick Source Event Latest Quick Source

Found 48 record(s).

Status	Event Name	Event Creator	Supplier Response Status	Time Ticker	Actions
Draft	MySQL Workbench Software	Shadab Ansari	0/1 (Supplier Responded / Invited)	-	Actions
In Progress	Gd Item restrict	Shadab Ansari	0/1 (Supplier Responded / Invited)	End Time: 03/01/2017 00:00:00	Actions
In Progress	Gd Item 21 requester	Shadab Ansari	1/1 (Supplier Responded / Invited)	End Time: 03/01/2017 00:00:00	Actions
Closed	Gd Item 20	Shadab Ansari	1/1 (Supplier Responded / Invited)	Closed 1 day(s) back End Time: 02/01/2017 00:00:00	Actions
Closed	new todays event	Shadab Ansari	0/1 (Supplier Responded / Invited)	Closed 1 day(s) back End Time: 02/01/2017 00:00:00	Actions
Closed	A	Pooja Singh	0/2 (Supplier Responded / Invited)	Closed 5 day(s) back End Time: 29/12/2016 00:00:00	Actions
Closed	A and 5 more	Pooja Singh	1/5 (Supplier Responded / Invited)	Closed 4 day(s) back End Time: 30/12/2016 00:00:00	Actions
Closed	A and 3 more	Shadab Ansari	0/1 (Supplier Responded / Invited)	Closed 5 day(s) back End Time: 29/12/2016 00:00:00	Actions
Closed	Gd Item 9	Shadab Ansari	1/1 (Supplier Responded / Invited)	Closed 6 day(s) back End Time: 28/12/2016 00:00:00	Actions
Closed	rainboq 1 st event	Shadab Ansari	0/1 (Supplier Responded / Invited)	Closed 6 day(s) back End Time: 28/12/2016 00:00:00	Actions

Show 10 records per page.

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2. **Modify Closure Date** popup will appear as shown below. Select a new date by which you want the event to end. Click **Update**.

Modify Closure Date

Modify Closure Date*: [Clear](#)

[Update](#) [Close](#)

5.6.1.2.4 View Responses

1. For a given event, under the **Actions** drop down menu, select **View Responses**.

+ Create New Quick Source Event Latest Quick Source

Found 48 record(s).

Status	Event Name	Event Creator	Supplier Response Status	Time Ticker	Actions
Draft	MySQL Workbench Software	Shadab Ansari	0/1 (Supplier Responded / Invited)	-	Actions
In Progress	Gd Item restrict	Shadab Ansari	0/1 (Supplier Responded / Invited)	End Time: 03/01/2017 00:00:00	Actions
In Progress	Gd Item 21 requester	Shadab Ansari	1/1 (Supplier Responded / Invited)	End Time: 03/01/2017 00:00:00	Actions
Closed	Gd Item 20	Shadab Ansari	1/1 (Supplier Responded / Invited)	Closed 1 day(s) back End Time: 02/01/2017 00:00:00	Actions
Closed	new todays event	Shadab Ansari	0/1 (Supplier Responded / Invited)	Closed 1 day(s) back End Time: 02/01/2017 00:00:00	Actions
Closed	A	Pooja Singh	0/2 (Supplier Responded / Invited)	Closed 1 day(s) back End Time: 29/12/2016 00:00:00	Actions
Closed	A and 5 more	Pooja Singh	1/5 (Supplier Responded / Invited)	Closed 4 day(s) back End Time: 30/12/2016 00:00:00	Actions
Closed	A and 3 more	Shadab Ansari	0/1 (Supplier Responded / Invited)	Closed 5 day(s) back End Time: 29/12/2016 00:00:00	Actions
Closed	Gd Item 9	Shadab Ansari	1/1 (Supplier Responded / Invited)	Closed 6 day(s) back End Time: 28/12/2016 00:00:00	Actions
Closed	rainboq 1 st event	Shadab Ansari	0/1 (Supplier Responded / Invited)	Closed 6 day(s) back End Time: 28/12/2016 00:00:00	Actions

Show 10 records per page.

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2. **Supplier Response** popup will appear as shown below. This will be a view only popup where you will be able to view the supplier(s) responses for each line item.

Compare Supplier Responses	anil.supplier@zycus.com	Submitted
Gd Item 21 requester	Quantity: 10 EA	INR 1.00
	Price: INR 2.00	Quantity: 10 EA
Total Bid Amount		INR 10.00
Savings?	50.00 %	

[Add Supplier](#) [Add Collaborator](#) OU_1-001/PR/132

3. For reference purpose, you will also be able to view and open the **Requisition Number** from which the quick sourcing event was created (*refer the image below*).

The screenshot shows a requisition list and a detailed view of a bid response.

Requisition List:

Status	Requisition Name	Supplier	Responses	Action
Closed	XYZ	Shadab Ansari	0/1 (Supplier Responded / Invited)	Closed 4 day(s) back End Time: 27/01/2017 00:00:00
Awarded	Flip test	Shadab Ansari	1/1 (Supplier Responded / Invited)	Closed 6 day(s) back End Time: 25/01/2017 00:00:00

Detailed View of Bid Response:

Compare Supplier Responses

Item Description	Quantity	Price	Supplier Response
door knobs	100 EA	-	anil.supplier@zycus.com Submitted
Tiles	100 EA	-	INR 2.00 Quantity: 50 EA
Glass	2 EA	-	INR 2.00 Quantity: 2 EA
Total Bid Amount			INR 204.00

Actions: Award

Requisition Details:

Requisition: OU_1-001/PR/132 - PR by Shadab QS for Gd Item 21 requester - INR 10.00 - V

General Information:

Requisition No:	OU_1-001/PR/132	Parent Requisition:	-
Requisition Name:	PR by Shadab QS for Gd Item 21 requester	Reason for Ordering:	-
Urgent Requirement:	No	Comments for supplier:	-
Created on behalf of:	-	Purchase Type ? :	Raw materials
Created By:	Shadab QS	Attachment(s):	-
Settlement via:	Invoice	Status:	Draft
Suggested PO:	-	Retrospective Purchase:	No

Items:

Line No.	Item No.	Item Name & Supplier Name	Reference Contract	Unit Price	Qty/Amt	Total P
1	N/A	Gd Item 21 requester	-	INR 1.00	10 EA	INR 10

4. The requisition will open in a new tab as shown below:

Requisition Details

Requisition: OU_1-001/PR/132 - PR by Shadab QS for Gd Item 21 requester - INR 10.00 - V

General Information:

Requisition No:	OU_1-001/PR/132	Parent Requisition:	-
Requisition Name:	PR by Shadab QS for Gd Item 21 requester	Reason for Ordering:	-
Urgent Requirement:	No	Comments for supplier:	-
Created on behalf of:	-	Purchase Type ? :	Raw materials
Created By:	Shadab QS	Attachment(s):	-
Settlement via:	Invoice	Status:	Draft
Suggested PO:	-	Retrospective Purchase:	No

Items:

Line No.	Item No.	Item Name & Supplier Name	Reference Contract	Unit Price	Qty/Amt	Total P
1	N/A	Gd Item 21 requester	-	INR 1.00	10 EA	INR 10

5.6.1.2.5 Closed Events

- For an event which is closed, you will be able to **View Supplier Responses** and **Award a Supplier**.
- Under the **Actions** drop down menu, select **View Responses**. Following popup will appear:

Compare Supplier Responses		anil.supplier@zycus.com Submitted	jagrati.supplier@zycus.com Not Viewed	kunal@gmail.com Not Viewed
Quantity: 1 EA Price: -	<input type="checkbox"/> INR 0.00 Quantity: 1 EA	<input type="checkbox"/> N/A Quantity: N/A	<input type="checkbox"/> N/A Quantity: N/A	
Quantity: 2 EA Price: -	<input type="checkbox"/> INR 0.00 Quantity: 1 EA	<input type="checkbox"/> N/A Quantity: N/A	<input type="checkbox"/> N/A Quantity: N/A	
Quantity: 10 EA Price: -	<input type="checkbox"/> INR 0.00 Quantity: 1 EA	<input type="checkbox"/> N/A Quantity: N/A	<input type="checkbox"/> N/A Quantity: N/A	
Quantity: 3 EA Price: -	<input type="checkbox"/> INR 0.00 Quantity: 1 EA	<input type="checkbox"/> N/A Quantity: N/A	<input type="checkbox"/> N/A Quantity: N/A	
Quantity: 4 EA Price: -	<input type="checkbox"/> INR 0.00 Quantity: 1 EA	<input type="checkbox"/> N/A Quantity: N/A	<input type="checkbox"/> N/A Quantity: N/A	

OU_1-001/PR/130 Award

- The **View Response** popup will show a comparison of the prices in line item between each supplier.
- To award a supplier, on the **View Response** popup, select a supplier (who has provided the best bid) for each line item.
- You can either select one supplier for all the line items or you can select different supplier for different line items. Once you select the suppliers for each line item, click **Award** button as shown below:

Compare Supplier Responses		anil.supplier@zycus.com Submitted	jagrati.supplier@zycus.com Not Viewed	kunal@gmail.com Not Viewed
Quantity: 1 EA Price: -	<input type="checkbox"/> INR 0.00 Quantity: 1 EA	<input type="checkbox"/> N/A Quantity: N/A	<input type="checkbox"/> N/A Quantity: N/A	
Quantity: 2 EA Price: -	<input type="checkbox"/> INR 0.00 Quantity: 1 EA	<input type="checkbox"/> N/A Quantity: N/A	<input type="checkbox"/> N/A Quantity: N/A	
Quantity: 10 EA Price: -	<input type="checkbox"/> INR 0.00 Quantity: 1 EA	<input type="checkbox"/> N/A Quantity: N/A	<input type="checkbox"/> N/A Quantity: N/A	
Quantity: 3 EA Price: -	<input type="checkbox"/> INR 0.00 Quantity: 1 EA	<input type="checkbox"/> N/A Quantity: N/A	<input type="checkbox"/> N/A Quantity: N/A	
Quantity: 4 EA Price: -	<input type="checkbox"/> INR 0.00 Quantity: 1 EA	<input type="checkbox"/> N/A Quantity: N/A	<input type="checkbox"/> N/A Quantity: N/A	

OU_1-001/PR/130 **Award**

- You will have an option of flipping the selected quote for an item from the supplier in to a requisition.

5.6.1.2.5.1 Flipping to Linked Requisition

If a sourcing event is created from an existing requisition through eProc, then while awarding, you will have the option to flip the selected items to **Linked Requisition**.



1. Select **Flip to Linked Requisition**. You will be navigated to the **Checkout** page:

2. This will be the same requisition from which you created a quick sourcing event. However now the requisition will be updated since you will have quotes from the suppliers for the selected item(s).
3. Fill in the required information in the requisition and you can proceed to submit or sent the requisition for approval.

5.6.1.2.5.2 Flipping to New Existing Requisition

If a sourcing event is created from scratch through eProc, then while awarding, you will have the option to flip the selected items to **New Requisition** or **Existing Requisition**.



1. Select **Flip to New Requisition**. You will be redirected to the **Checkout** page:

Line No.	Item No.	Item and Supplier Name	Reference Contract	Availability	Unit Price	Qty/Amt	Total Price	Actions
1	N/A	InkJet Printers (AMAZON)	-	N/A	INR 100.00	1 EA	INR 100.00	

Amount: INR 100.00

Requisition Approval Workflow

Mark for adding or selecting approvers

Shadab QS Requester (Pending) → 5 approvers (Workflow Admin) → Buyer → Supplier

I'm Done | Save as Draft | Cancel

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2. Note that the item you selected from the sourcing event will be automatically added to the items in your cart. You can proceed to checkout this item once you fill all the requisition details.

5.6.1.2.5.3 Flipping to Existing Requisition

3. Select **Flip to Existing Requisition**. A popup will appear which will list all the requisitions which are in **Pending Order** or **Awaiting Quote** status.

The screenshot shows a 'Select Requisition' dialog box over a main application window. The dialog has a header 'Select Requisition' with a search bar and buttons for 'View All', 'View Selected (0)', 'Search', 'Requisition Number', and 'Go'. Below is a table with columns: Status, Requisition Number, Requisition Name, and Submitted On. The table contains 10 rows of data. A green border highlights the 10th row, which corresponds to the requisition listed in the main application window below.

Status	Requisition Number	Requisition Name	Submitted On
Pending Order	OU_1-001/PR/138	PR by Shadab QS for Gd Item 21 requester	04/01/2017
Pending Order	OU_1-001/PR/136	PR by jagrati for 234	03/01/2017
Pending Order	OU_1-001/PR/134	PR by Shadab QS for Gd item restrict	03/01/2017
Awaiting Quote	OU_1-001/PR/117	Req for Flip to Existing 3	29/12/2016
Awaiting Quote	OU_1-001/PR/105	PR by Nilesh QS for Toyota Corolla Altis, Toyota Corolla Altis	28/12/2016
Pending Order	OU_1-001/PR/103	Nilesh Quick Source Req with all Sourcing Status	28/12/2016
Awaiting Quote	OU_1-001/PR/93	PR by Shadab QS for Test Purchase amt	28/12/2016
Awaiting Quote	OU_1-001/PR/92	PR by Shadab QS for Dibba 1, Gd Item 8	28/12/2016
Pending Order	OU_1-001/PR/88	1323	28/12/2016

4. You can choose any one requisition in which the selected item will be added. On selecting a requisition, you will be navigated to the **Checkout** page as shown below:

The screenshot shows the 'Checkout' page. It includes fields for Reason for ordering, Comments for supplier, On Behalf of, Purchase Type, Settlement via, Retrospective Purchase, and Add items to existing PO. Below is a 'Requisition Items' section with a table. The table has columns: Line No., Item No., Item and Supplier Name, Reference Contract, Availability, Unit Price, Qty/Amt, Total Price, and Actions. Two items are listed: 'White Board Marker' and 'Ball Pen'. The 'Ball Pen' row is highlighted with a red border. At the bottom, there's a 'Purchase Amount: USD 146.00 (Currency-wise total)' and a 'Requisition Approval Workflow' section with buttons for 'Return to Requester', 'Save', and 'Cancel'.

Line No.	Item No.	Item and Supplier Name	Reference Contract	Availability	Unit Price	Qty/Amt	Total Price	Actions
1	N/A	White Board Marker	-	N/A	USD 12.00	12 Gal/min	USD 144.00	
2	N/A	Ball Pen	-	N/A	INR	100 EA	USD 2.00	

5. The item(s) that you selected to be added to the existing requisition will be highlighted in green as shown in the image above.
 6. You can proceed to checkout the items once you fill all the requisition details.

Note: If you are not the owner of the sourcing event, then you will not be able to award the supplier response.

5.6.1.2.5.4 Flipping Linked and Non-Linked Items

Users can create quick sourcing events for items from different requisitions using the item level view on Buyer's Desk.

When the Quick Source event is awarded and flipped back, the item details will be flipped onto the linked requisitions.

If a quick source event consists of items which have no requisition reference, then the user will also have an option to flip such items into a new or existing requisition.

- On the **Quick Source Events** page, open an event which is awarded. Event consisting of items with reference and without requisition reference will appear as shown below:

Status	Event Name	Event Creator	Supplier Response Status	Time Ticker	Actions
Awarded	Bottle Mix	krishma maniar	1/1 (Supplier Responded / Invited)	Closed 5 minute(s) back End Time: 02/02/2017 19:30:00	Award
Draft	Mix Test	krishma maniar	0/1 (Supplier Responded / Invited)	4 hour(s) to close	Award
In Progress	Mask and 3 more	krishma maniar	0/1 (Supplier Responded / Invited)	4 hour(s) to close	Award
In Progress	Mask and 2 more	krishma maniar	0/1 (Supplier Responded / Invited)	4 hour(s) to close	Award
In Progress	Test 123	krishma maniar	0/1 (Supplier Responded / Invited)	4 hour(s) to close	Award
In Progress	Test	krishma maniar	1/1 (Supplier Responded / Invited)	4 hour(s) to close	Award

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- The linked requisition reference will be displayed as shown below:

Compare Supplier Responses

saw@es.gu **Submitted**

Bottle
Quantity: 300 EA
Price: -

Linked Requisition: COM019/COM019-BU038/532

USD 200
Quantity: 250 EA

- To flip the items into requisitions, click **Award**. Select **Flip to Linked Requisitions** as shown below:

The screenshot shows a supplier response for a requisition. The response is submitted by 'saw@es.gu'. It includes line items for 'Bottle' and 'Dust Bin'. The total bid amount is USD 66,000. The savings are listed as N/A. In the top right corner, there is a button labeled 'Award' with a dropdown arrow, which is highlighted with a red box.

7. You will see the following popup:

Flip Items to Requisition

There are items in this quick source event which are not linked to any requisition. What do you want to do with them?

Flip to existing linked requisition

Select requisition:

Flip to existing requisition (Requisitions)

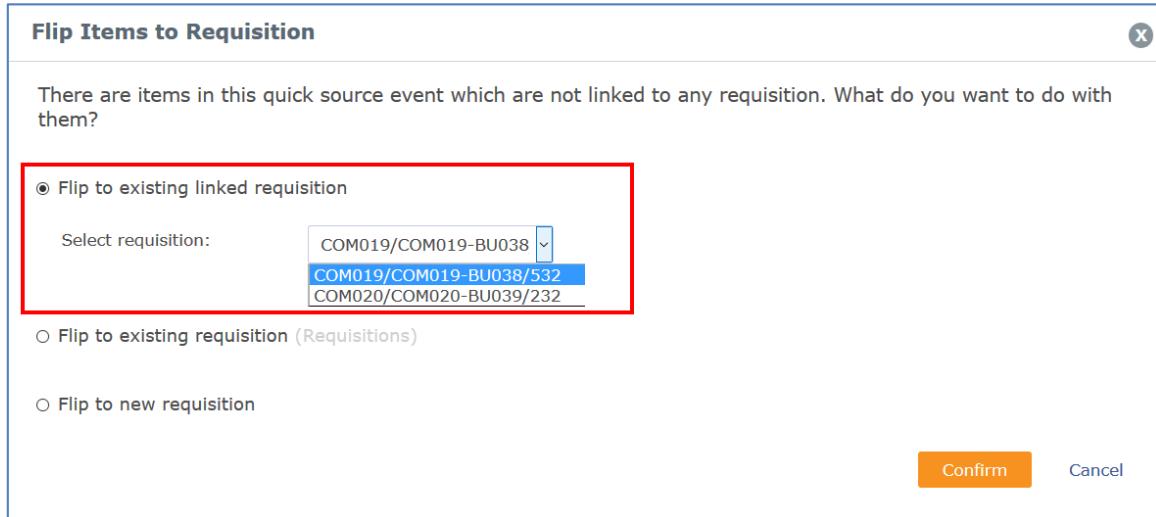
Flip to new requisition

Confirm **Cancel**

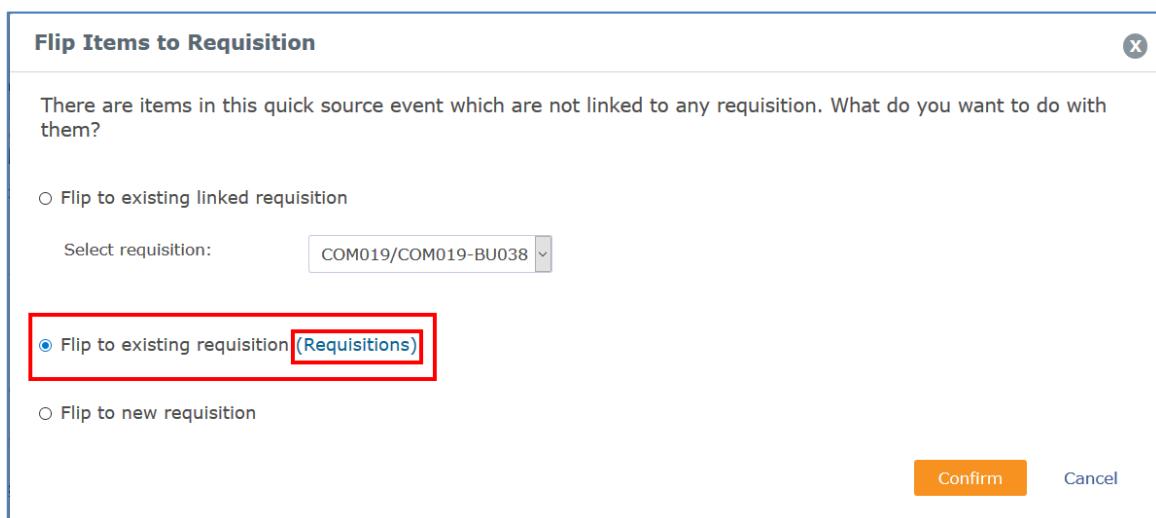
Note: Since your event consists of items without requisition reference, you will see the above popup.

8. To address the line items which is without requisition reference, you have an option of:

- **Flip item to existing linked requisition:** If you want to link the item to any linked requisition from this quick sourcing event, then select the requisition from the drop down list.



- **Flip item to existing requisition:** If you want to link the item to any requisitions on eProc, then select this option. Click **(Requisitions)** link as shown below:



- A popup will appear. This popup will have all those requisitions listed whose status is “Awaiting Quote”. Choose the required requisition from the list and click **Select**.

Select requisition				
Total Records: 932	View All	View Selected (1)	Search <input type="text"/> in Requisition Number	Go
Status	Requisition Number	Requisition Name	Submitted On	
<input type="radio"/>	 Awaiting Quote	COM019/COM019-BU038/532	krishma/Bottle/COM019/2017	02/02/2017
<input type="radio"/>	 Awaiting Quote	COM019/COM019-BU038/530	TesT additional excel 1	02/02/2017
<input type="radio"/>	 Awaiting Quote	COM019/COM019-BU038/529	Nilesh-32	02/02/2017
<input type="radio"/>	 Awaiting Quote	COM019/COM019-BU038/528	Nilesh-23	02/02/2017
<input type="radio"/>	 Awaiting Quote	C002/BU002/524	Micha QS/item 1,fghfhfh item 1/C002/2017	02/02/2017
<input type="radio"/>	 Pending Order	C002/BU002/522	er	02/02/2017
<input type="radio"/>	 Awaiting Quote	C002/BU002/521	Micha QS/wer1/C002/2017	02/02/2017
<input type="radio"/>	 Awaiting Quote	C002/BU002/520	Micha QS/itemtre 1/C002/2017	02/02/2017
<input type="radio"/>	 Awaiting Quote	C002/BU002/519	Micha QS/dSDsd/C002/2017	02/02/2017
<input type="radio"/>	 Awaiting Quote	C002/BU002/518	Micha QS/te/C002fcg2017	02/02/2017

Showing page of 94  

[Select](#) [Cancel](#)

- Your item will be linked to the selected requisition.
- **Flip to new requisition:** If you wish to flip the item to a completely new requisition, then select this option and click **Confirm**. A completely new requisition will be created and listed under **My Requisitions** tab.

5.7 Actions on Item Groups

5.7.1 Filter Items by Assigned Buyers

1. Click the **Requisition Number** to view and update the details. The following page is displayed.

2. Go to **Requisition Items** section. Review all the line items added in the requisition.

3. You can choose to filter the requisition line items based on the assigned buyer since they are assigned at line level.
4. Click **Assigned Buyer Filter**. You can filter the line items based on following parameters:
 - All: View all the line items, irrespective of the buyer assigned.
 - Me: Line items assigned to me
 - Buyer: Line items assigned to a different buyer (search for the buyer by entering the keyword)
 - Buyer Group: Line item assigned to a buyer group (search for the buyer group by entering the keyword)
 - Unassigned Items: Line items which are not assigned to any buyer.
 - Once you make your selection click **Filter**.
5. You can also view the buyers for all line items by expanding the line item details (*highlighted in the image below*).

Requisition Items									
+ Expand All Collapse All		Create Sourcing Event		Update all lines		Assigned Buyer Filter		Item Order Status Filter	
Line No.		Item No.	Item and Supplier Name	Reference Contract	Availability	Unit Price	Qty/Amt	Total Price	Actions
<input type="checkbox"/>		3	N/A	lappy	-	N/A	N/A	1 EA	N/A
Delivery and Asset Tagging		Cost Booking				Accounting		Assigned Buyers	
disha	T3-Acme	31/12/2016	1 EA	asdasd: 2	N/A	CAPITALS		sandeep disha	
<input type="checkbox"/>		4	671724	CHAIRMAT,POLYCARB,46X60	-	0 days	USD 52.36	1 EA	INR 3,665,2000
Delivery and Asset Tagging		Cost Booking				Accounting		Assigned Buyers	
disha	T3-Acme	31/12/2016	1 EA	asdasd: 2	INR 52,3600	CAPITALS		disha	

5.7.2 Filter Items by Item Order Status

1. You can filter for the items based on their order status. Select the status from the options and click **Filter**. The item table will refresh and show only the relevant items.

Items that can be sent for Ordering

Items Grouped by Category, Price Type (Pending Order)

Line No.	Item No.	Item and Supplier Name	Reference Contract	Availability	Total Price	Actions
<input type="checkbox"/>	2	34434 pen AVNISH TEST SUPPLIER	-	N/A	INR 33.00000	

Assigned Buyer Filter Item Order Status Filter + Add Item Actions Convert to PO

All
Pending
Partially Ordered
Ordered

Clear Filter Filter Cancel

ITEM LEVEL TAXES SUB-TOTAL: INR 0.00000

Purchase Amount: INR 33.00000

5.7.3 Adding Items to a Requisition

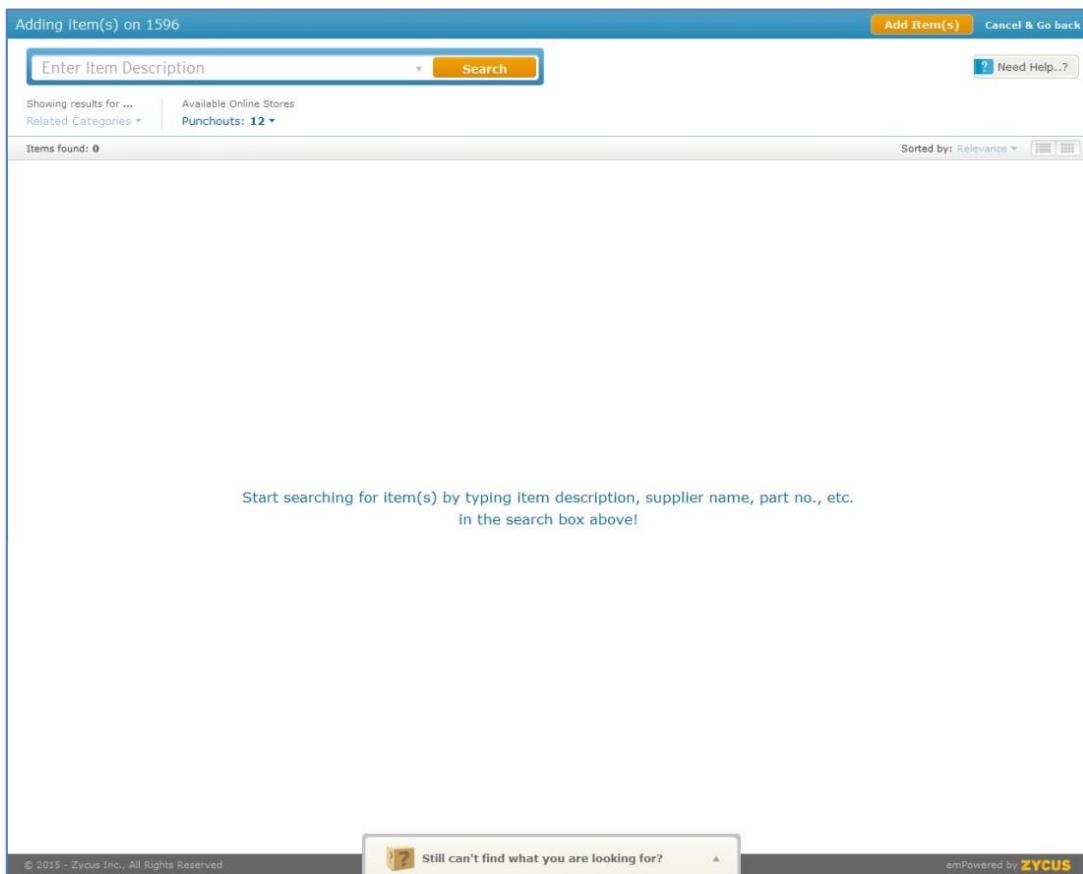
To add items to a requisition on the Buyer's Desk page:

1. Click the **Add Items** to add new items to the Requisition.
2. Select any one of the required options:



- a. **Search Items** – Search the existing items & add the required items

- i. Enter the name or the description of the item to be search & added.



- ii. A list of items matching the entered name or description is displayed.
 - iii. Roll over on the **Related Categories** button to view items from other categories.
 - iv. Roll over on the **Sorted by** button and select an option from the list to sort the items in the list.
 - v. Click **Switch to Grid View** to view the items as grid.
 - vi. Select the required items using the check boxes next to them.
 - vii. Enter the quantity required for the item in the textbox next to the **Item Description**.
 - viii. Click **Add to Cart** to add the items to the Requisition.
- b. **Create a free-text Item** – Create & add the required free-text items
- i. Enter the required details in the **Item** tab.

Item Details

Suppliers

Item Number:	Product Category*:
Short Description*:	Quantity*:
Long description:	UOM*:
	Price*:
<input type="checkbox"/> Zero Price Item	
Item Type* ? :	Goods Services
Receive/Bill by* ? :	<input checked="" type="radio"/> Quantity ? <input type="radio"/> Amount ? <input type="radio"/> No Receipt ?
Sourcing Status* : Buyer Negotiated Price Currency* : USD	
<small>▼ Show extra fields like manufacturer details, specifications, etc.</small>	
<input type="button" value="Add Item"/> <input type="button" value="Cancel & Go back"/> <input type="button" value="Cancel"/>	

- ii. To add information like manufacturer name and so on, click on the **Show extra fields like manufacturer details, specification, etc.** and enter the required details.
- iii. Click on the **Suppliers** tab.

Item Details

Suppliers

Supplier Name*:	Address*:
Supplier Contact:	
Supplier Email Id:	
Contract/Order Number:	
<input type="button" value="Show all"/> <input type="button" value="Add Item"/> <input type="button" value="Cancel & Go back"/> <input type="button" value="Cancel"/>	

- iv. Enter the **Supplier Name** and select the required supplier.
- v. Select the required supplier address. The rest of the information is auto populated as per availability.
- vi. Enter the **Contract/Order Number** or click **Show all** to select an existing contract/order number.
- vii. Search & select the required **Blanket Order** or **Contract** as per requirement.
- viii. Click **Save** to save the selected **Blanket Order** or **Contract**.
- ix. Click **Add Item** to save and add the free-text item.

c. Punchouts—Search the existing punchouts & add the required items

- i. The available Punchouts are displayed. Select the required Punchout.
- ii. You will be automatically directed to the Punchout.
- iii. Select and add items to the cart.

Note: In the punchout cart, you will see items added during that punchout visit along with punchout items added earlier or other items.

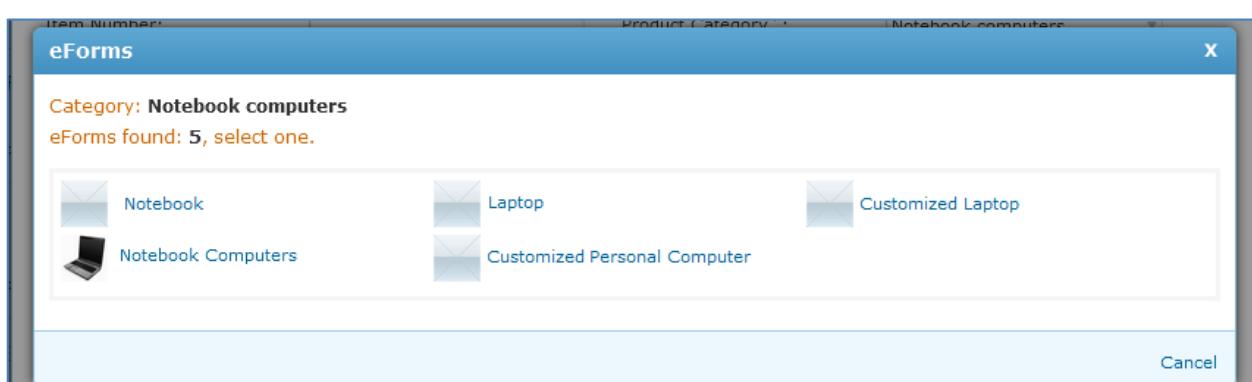
- iv. Add the required items from the Punchouts to the cart.
- v. Checkout the cart from the Punchout.
- vi. All the items from the Punchouts cart will be added to the Requisition.

Note: The items added to a Requisition from under the **Buyer's Desk** tab are displayed with a Green Background to classify.

Note: Items can be added to a Requisition from under the **Buyer's Desk** tab only if none of the items from the Requisition are ordered OR the Requisition has not been converted into a PO.

5.7.3.1 Replacing Items in Requisition

1. Click Replace Item icon  for corresponding item to be replaced. eForms dialog box is displayed.



2. Click any category to select. The **Item Details** dialog box is displayed as shown below.

Item Details

If the category is changed, information present in the "Requirement Details" section will be lost.

Item Number:	Product Category*:	Rollerball pens
Short Description* :	Quantity* :	
Long description:	UOM* :	EA
	Price* :	
	Sourcing Status* :	Buyer Negotiated Price
Item Type* :	Currency* :	USD
Receive/Bill by* :	Quantity Amount No Receipt	
<input type="checkbox"/> Zero Price Item		
Show extra fields like manufacturer details, specifications, etc.		
<input type="button" value="Replace"/> <input type="button" value="Cancel & Go back"/>		<input type="button" value="Cancel"/>

3. Enter the **Item Numbers, Short Description** and **Long Description** for the item. The **Product Category** is automatically populated as per the selected category.

4. Enter the **Quantity**, select the Unit Of Measurement (**UOM**) and **Price** of the item.

NOTE: Check the **Zero Price Item** in order to add an item with no price or zero price to the Catalog.

5. Select the **Item Type** (Goods / Services) and select **Receive / Bill By** from following options:

- Quantity - Selected UOM will be used for invoicing and receiving
- Amount - Selected currency will be used for invoicing and receiving
- No Receipt – Selected UOM will be used for invoicing.

6. Click **Show extra fields like manufacturer details, specifications, etc.** to enter non-mandatory fields related to item as shown below.

Hide extra fields

Is Green:	<input type="radio"/> Yes <input checked="" type="radio"/> No	Is Preferred:	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Manufacturer Name:	<input type="text"/>		Image Url:	<input type="text"/>
Manufacturer Part Id:	<input type="text"/>		Product Url:	<input type="text"/>
Specifications Name:	<input type="text"/> e.g phone		Manufacturer Url:	<input type="text"/>
Specifications:	<input type="text"/> e.g color		<input type="text"/> e.g red	<input type="button" value=""/>

7. Select the appropriate option for **Is Green** and **Is Preferred**. Enter the Specifications Name, the Specifications and click Save.
8. Enter the Manufacturer, Product details and specifications in their respective fields.
9. Click **Replace** to replace the item with the selected item

Replacing "Lenovo Essential G58..." with "HP Pavilion G6-2005AX" on PR/1555

Original Item Details	Replacement Item Details
 Lenovo Essential G580   59-324061 GBP 439.74 EA ~USD 749 EA <input type="button" value="Add to favorites"/> <input type="button" value="Add to Basket"/>	 HP Pavilion G6-2005AX   B3J80PA USD 690.00 EA <input type="button" value="Add to favorites"/> <input type="button" value="Add to Basket"/>
<input type="button" value="Details"/> <input type="button" value="Specifications"/> <input type="button" value="Attachments"/> Description: Lenovo Essential G580 (59-324061) Laptop (3rd Gen Ci5/ 4GB/ 500GB/ DOS) Manufacturer: Category: Notebook computers SPSC Code: 43211503 Supplier: GALAXY CORP Delivery Lead Time (days): N/A Contract No: 18956/NB-1209 <input type="checkbox"/> SAR (6) <input type="checkbox"/> CNY (2)	<input type="button" value="Details"/> <input type="button" value="Specifications"/> <input type="button" value="Attachments"/> Description: HP Pavilion G6-2005AX Laptop (APU Quad Core A8/ 4GB/ 500GB/ Win7 HB/ 1.5GB Graph) Manufacturer: Category: Notebook computers SPSC Code: 43211303 Supplier: GALAXY CORP Delivery Lead Time (days): 7 days Contract No: Price: USD 760.82 <input type="button" value="139.74"/> <input type="button" value="139.74"/> <input type="button" value="690.00"/> <input type="button" value="690.00"/> <input type="button" value="760.82"/> <input type="button" value="760.82"/>
 Lenovo Essential G580   Lenovo Essential G580 (59-324061) Laptop (3rd Gen Ci5/ 4GB/ ...more)	

10. Enter the quantity in the **EA** field and click **Replace**.

Confirm Item Replacement

 Lenovo Essential G580   59-324061 GBP 439.74 EA ~USD 749 EA <input type="button" value="Add to favorites"/> <input type="button" value="Add to Basket"/>	 HP Pavilion G6-2005AX   B3J80PA USD 690.00 EA <input type="button" value="Add to favorites"/> <input type="button" value="Add to Basket"/>
Change comments*: <input type="text" value="Original Item to be replaced"/>	
<input type="button" value="Confirm"/> <input type="button" value="Cancel"/>	

11. Enter **Change Comments** and click **Confirm**. A confirmation message is displayed as shown below.

 IDG07645764 is replaced with IDG07645763 X

5.7.4 Create New Quick Sourcing Event

If there are any **Guided Procurement** items added to your cart, then you will be able to create a quick sourcing event for those items.

- To create a new quick sourcing event, select the (**guided procurement**) items from cart as shown below and click **Create New Quick Sourcing Event**.

The screenshot shows a table titled "Items Grouped by Category, Price Type (Pending Order)". It lists items with columns for Line No., Item No., Item and Supplier Name, Reference Contract, Availability, Unit Price, Qty/Amt, and Actions. One item is selected, highlighted with a red box. The "Actions" column for this item contains a dropdown menu with options: "Create Quick Source Event" (highlighted with a red box), "Link Existing PO", and "Return". Below the table, it says "Item-level taxes sub-total: INR 0.00000" and "Purchase Amount: INR 90,099.00000".

- A side by side Quick Source panel will appear where you can initiate a quick source event.

The screenshot shows the "Edit Requisition" screen on the left and the "Create Quick Source" panel on the right. The requisition details include Requisition Name (PR for naq items, pen 2109017), Urgent Requirement (No), Attachments (None), Reason for ordering (None), Comments for supplier (None), On Behalf of (None), Purchase Type (PROJECT), Settlement via (Invoice), and Retrospective Purchase (No). The "Create Quick Source" panel has sections for "Quick Source Name" (empty), "Currency" (INR), "Include Item Details" (grid showing naq items, quantity 213, UOM EA), "Include question for Supplier(s)" (empty), "Questions" (empty), "Include an opening message for your Supplier(s)" (empty), "Attach related documents for your Supplier(s)" (Select File), "Invite Supplier(s) to bid this quick Source" (Company, Name, Email Id fields), and buttons for "Cancel", "Save as Draft", and "Create".

- Quick Source Name:** Enter the name of the quick source inquiry. This field is marked as mandatory, but however if you don't enter the inquiry name, then it will be auto-set to {first item name & count of remaining items}.
- Currency:** Select the currency for this event. The currency selected here will be used for bidding. Once quick source is awarded and flipped into a requisition, this currency will be maintained.
- Include Item Details:** All the items selected from the item table will appear in a grid on the side by side panel.

You can change the **Item Name**, **Quantity**, **UOM**, and **Market/Current Price**.

You can also add more items on the quick source panel using the icon.

6. **Include questions for Supplier(s):** If there are any questions such as “Will the items be delivered by ship or air?” which you would like to ask the suppliers, you can add those in this section.
7. **Include an opening message for your Supplier(s):** You can write a small message for your suppliers such as “This sourcing event is created for smaller quantity, please submit your bids by the end of Q1.” The opening message you write over here will be appended in the mail sent to the suppliers.
8. **Attach related documents for your Supplier(s):** If you want to upload any supporting documents, such as Disclaimers for your suppliers, then use this section. Any file uploaded in this section will be sent to the supplier as an attachment in the email.
9. **Invite Supplier(s) to bid this quick Source:** You can invite suppliers that may or may not be registered by simply entering the details in this section. The unregistered suppliers will get created as a **Potential Supplier Contact** in your **Zycus Supplier management system** or **iSupplier**.

Enter the supplier **Company, Name** and enter the **email ID**.

You can add more than one supplier for the quick sourcing event.

10. **Invite internal collaborators and colleagues:** You can choose to invite internal eProc users to monitor or amend the quick souring event.
Enter the keywords for the email id of the internal user and the email address will be auto-completed.
You can add more than one internal collaborators and colleagues.
11. **By when you want quotes from the invited suppliers?:** Select a date by which you want to receive bids from your suppliers.
12. Once all the mandatory information is filled, you can choose to save the quick sourcing event as draft or submit it.
13. Click **Save as Draft** if you want to continue later or click **Create** if you want to submit.

Note: You can create a quick source event for items belonging to an item master. Note that when a quick source event is already created for an item from item master, there will be a new tab - **Sourcing** added in the **Item Details** popup as shown below:

5.7.5 [Link Existing PO](#)

You can link the items from your cart to an existing **PO of type Standard or Released**.

1. To add the items click **Actions > Link Existing PO** as shown below:

2. A list of PO's will appear in the popup as shown below:

The screenshot shows a 'List of Purchase Orders' dialog box. At the bottom of the list, there is a red callout pointing to a link labeled 'View PO in new tab'. This link is located next to the fourth purchase order in the list, which has a red circle around its 'View' icon.

PO Number	Type	Supplier	Buyer	PO Date	Amount
COM003/17/000249	Standard	APPLE	disha	10/04/2017	INR 110.00000
COM003/17/000247	Standard	AVNISH TEST SUPLIER	disha	07/04/2017	USD 12.10000
COM003/17/000243	Standard	AVNISH TEST SUPLIER	jQuery	10/04/2017	USD 12.10000
COM001/17/000237	Standard	APPLE	jQuery	09/03/2017	USD 18.00000
COM001/17/000222	Standard	APPLE	jQuery	21/02/2017	USD 55.00000

3. Choose a PO and click **Select**.
4. You will see a confirmation message which will inform you that current requisition will be linked to the selected order and the item details will be set as per the selected purchase order. Click **Yes** if you agree.

The screenshot shows a 'Confirm' dialog box. The message inside states: 'The requisition will now be linked to the selected order. Item details like supplier, supplier address, currency, bpo (if applicable) for free-text items in requisition will be set to that in the selected order.' There are two buttons at the bottom: 'Yes' (highlighted in orange) and 'No'.

Note: Supplier should be same as that in the selected order.

5.7.6 Return

If a certain group of items needs to be reviewed by the requestor, then you can return only that specific group.

1. For a given item group, click **Actions** and select **Return**.

Items that can be sent for Ordering

Items Grouped by Category, Price Type (Pending Order)

Line No.	Item No.	Item and Supplier Name	Reference Contract	Availability	Unit Price	Qty/	Actions
2	34434	pen AVNISH TEST SUPPLIER	-	N/A	INR 33.00000		Return

Item-level taxes sub-total: INR 0.00000
Purchase Amount: INR 33.00000

2. Add comments for returning the group.
3. Once that group is returned, you can work with the other groups in that requisition. As shown in the image below, the status of first group is **Returned for Amendment** and status of second group is **Pending Order**.

Items that can be sent for Approval

Items Grouped by Category, Price Type (Returned For Amendment)

Line No.	Item No.	Item and Supplier Name	Reference Contract	Availability	Unit Price	Qty/Amt	Total Price	Actions
2	34434	pen AVNISH TEST SUPPLIER	-	N/A	INR 33.00000	1 EA	INR 33.00000	View workflow

Item-level taxes sub-total: INR 0.00000
Purchase Amount: INR 33.00000

Items that can be sent for Ordering

Items Grouped by Category, Price Type (Pending Order)

Line No.	Item No.	Item and Supplier Name	Reference Contract	Availability	Unit Price	Qty/Amt	Total Price	Actions
1	N/A	naq items AVNISH TEST SUPPLIER	-	N/A	INR 423.00000	213 EA	INR 90,099.00000	View workflow

Item-level taxes sub-total: INR 0.00000
Purchase Amount: INR 90,099.00000

Requisition Change Comments*:
please review the items

977 characters left (max. 1000)

Save | Cancel

4.

5.7.7 Editing items in a Requisition

If the admin has allowed the user to change the purchase type at line level, then irrespective of header level, user will be able to select different purchase type for every line item.

- Once you proceed to checkout, you will be redirected to following page:

Item No.	Item and Supplier Name	Availability	Unit Price	Qty/Amt	Total Price	Actions
Item2	EBAY OFFICE SUPPLIES	N/A	INR 50.0000	2 Kg	INR 100.0000	
123	laptop EBAY OFFICE SUPPLIES	N/A	INR 123.0000	1 EA	INR 123.0000	
O13S86423415190	KEYBOARD, W/GOPT MOUSE,WRLS DELL MARKETING2	13 days	USD 66.0000	1 EA	INR 3,327.3900	
O13S144039029471	KEYBOARD, W/GOPT MOUSE,WRLS DELL MARKETING2	13 days	USD 66.0000	1 EA	INR 3,327.3900	

- Click edit against any of the line items and select **Cost Allocation** in the popup.

Item Summary

Item2
EPROC SUPPLIER.

INR 50 × 2 Kg = **INR 100.0000**

Delivery **Cost Allocation** **Attachments / Comments**

Accounting

Purchase Type*: **--Select--**

Cost Booking

To book cost at line item level, select option "Book cost at item level" at the requisition header.

Copy cost booking information from the header

Cost Center	Project	Amount
T3-Design Department: Design Team	-	INR 100.0000
<input checked="" type="radio"/> Book cost at the item level		

OK **Cancel**

- Under the **Accounting** section, there will be a drop down for **Purchase Type**. Select the purchase type as required for that particular line item.

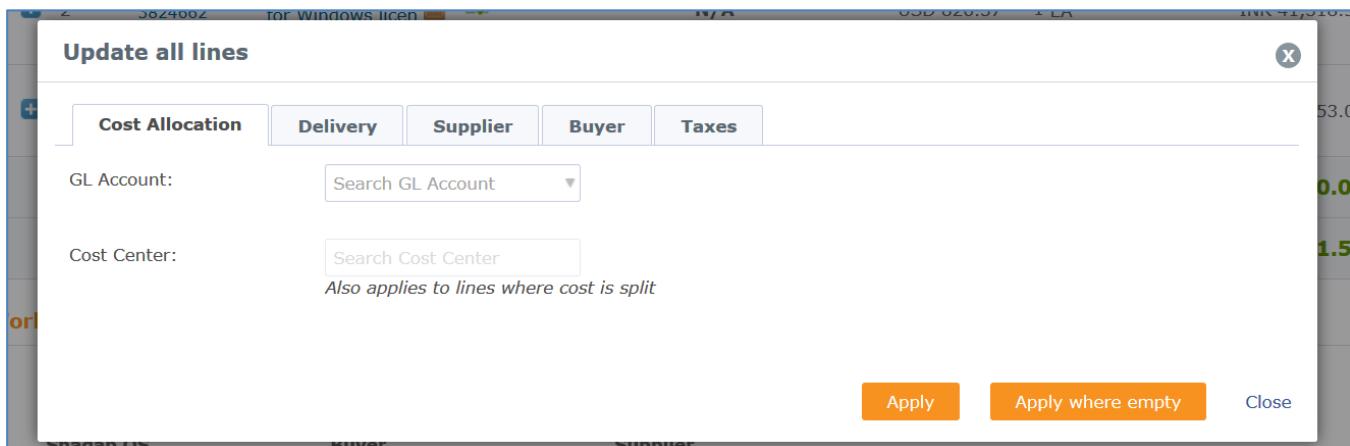
5.7.8 Update All Lines

In order to update information for all the line items in a requisition, use **Update all lines**.

- Open a requisition from your **Buyer's Desk**. Under the **Requisitions Items** table, click **Update all lines** as shown below:

Requisition Items										+ Add Item		
	Line No.	Item No.	Item and Supplier Name	Reference Contract	Availability	Unit Price	Qty/Amt	Total Price	Actions			
	2	3824662	Intel Parallel Studio XE Composer Edition for Fortran for Windows Licen	AMAZON	N/A	USD 826.37	1 EA	INR 41,318.50				
	3	3005727	Panduit Recessed Lock In Device outlet port lock kit	AMAZON	N/A	USD 33.06	1 EA	INR 1,653.00				
Item-level taxes sub-total: INR 0.00												
Purchase Amount: INR 42,971.50 (Currency-wise total)												

- Following popup will appear:



3. Here you can update the Cost Allocation, delivery, supplier, buyer, and tax information.
4. Click **Apply** if you want the updated information to all the line items.
5. Else click **Apply where empty** where only the lines missing information will be updated.

5.7.9 Converting Requisition to Purchase Order

To convert a requisition to purchase order (PO) on the Buyer's Desk page:

1. Click the **Requisition Number** to view and update the details. The following page is displayed.

2. Click the **Item Name** (under **Requisition Items**) to view requirement details requested by the requester.

Item Details

Disposable Pen

Item	Requirement Details	Suppliers		
Item Number:			Product Category*:	Label applying machines
Short Description*:	Disposable Pen		Quantity*:	50
Long description:			UOM*:	EA
Item Type* ? :	<input checked="" type="radio"/> Goods <input type="radio"/> Services		Price*:	0 <input checked="" type="checkbox"/> Zero Price Item
Receive/Bill by* ? :	<input checked="" type="radio"/> Quantity ? <input type="radio"/> Amount ? <input type="radio"/> No Receipt ?		Currency*:	USD
<small>▼ Show extra fields like manufacturer details, specifications, etc.</small>				
<input type="button" value="OK"/> <input type="button" value="Cancel"/>				

3. Click on the **Requirement Details** tab. Verify the details of the requirements.

Item Details

Patent review

Item	Requirement Details	Suppliers
Legal General Service		
Type of service*:	<input type="radio"/> Civil <input type="radio"/> Criminal <input type="radio"/> Tax related <input checked="" type="radio"/> Other	
Services will include*:	<input type="checkbox"/> Drafting <input checked="" type="checkbox"/> Consultation <input type="checkbox"/> Representation	
Jurisdiction*:	UK	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>		

4. Click on the **Supplier** tab. Under this tab you will get the list of suggested supplier. In case there are no suggested suppliers for any request, you can suggest a new supplier or enter the supplier name in the **Supplier** drop down menu and select the supplier.

Item Details

Banners

Suppliers

Place the order with an existing supplier

Select Preferred Suppliers or Suggest a new Supplier Show: All Suppliers

Name	Address	Type	Actions
GRAFIXUSA INC	-	Contracted	Remove
GALAXY CORP	-	Preferred	Select
CREE INC	-	Suggested	Select
GALAXY CORP	-	Suggested	Select
Michael's Print Shop	Mumbai India	Suggested	Select
Graphics Canada	-	Suggested	Remove

Save **Cancel**

5. After verifying the requirement details, click **Save**.
6. Since the items will be grouped as per the price type or category, you can choose to individually convert the item groups into PO or you can convert all the items groups into PO at once.

Items that can be sent for Approval

Items Grouped by Category, Price Type (Returned For Amendment)

Expand All | Collapse All

Line No.	Item No.	Item and Supplier Name	Reference Contract	Availability	Unit Price	Qty/Amt	Total Price	Actions
1	2	pen	-	N/A	INR 33.00000	1 EA	INR 33.00000	

Item-level taxes sub-total: INR 0.00000
Purchase Amount: INR 33.00000

Convert to PO

Items that can be sent for Ordering

Items Grouped by Category, Price Type (Pending Order)

Expand All | Collapse All

Line No.	Item No.	Item and Supplier Name	Reference Contract	Availability	Unit Price	Qty/Amt	Total Price	Actions
1	N/A	naq items	-	N/A	INR 423.00000	213 EA	INR 90,099.00000	

Item-level taxes sub-total: INR 0.00000
Purchase Amount: INR 90,099.00000

Requisition Change Comments*:

1000 characters left (max. 1000)

Save | Cancel

7. Note that in the above image, first item group has been returned to requestor for amendment and the second group is ready to be converted into PO.

8. Click on the **Convert to PO** button to convert the requisition to **PO** (purchase order).
9. Click **Save** to save the requisition for now and convert to PO later.
10. If you click Convert to PO, Convert Requisitions to Purchase Orders page is displayed.

The screenshot shows the 'Convert Requisitions to Purchase Orders' page. At the top, there's a note: 'Purchase orders for selected items are shown below. You can select orders, specify notes & attachments, preview the order and process it in 3 ways: - Submit POs for processing: through configured approval workflow and release mechanism - Save POs as draft: to specify taxes, discount, and make other changes before release - Save PO and Continue: redirect to the selected PO to specify taxes, discount, and make other changes before release'. Below this, a table lists purchase orders with columns for Suggested POs, Supplier, BU, Address, Delivery Date, PO Total, Exchange Rate, and Actions. One row is visible: 'PO 1*' for AVNISS TEST SUPPLIER, delivered to Apexha's Company BU on 27/04/2017, with a total of INR 0.00000. At the bottom, there are buttons for 'Submit POs for processing', 'Save POs as draft', and 'Save PO and Continue'.

11. Click **Submit POs for processing**.

Note: Based on the admin settings, you will be able to view either the “**Submit PO for Processing**” or “**Save PO and Continue**”.

5.7.9.1 Scoping for Buyers

1. In a given requisition, you will be able to process only those line items which are classified under your scope.
2. Based on upon the admin configuration, you might be warned about these line items or you will be restricted to flip the requisition to PO.
3. If the admin has configured to warn the buyer, then as a buyer, you will see following notification message for each line item (*refer the image below*).

Requisition Items

+ Add Item ▾

Expand All | Collapse All | Create Sourcing Event

Update all lines | Assigned Buyer Filter | Item Order Status Filter

Line No.	Item No.	Item and Supplier Name	Reference Contract	Availability	Unit Price	Qty/Amt	Total Price	Actions
<input type="checkbox"/> 1	N/A	Laptop EBAY OFFICE SUPPLIERS	-	N/A	INR 54,0000	540 EA	INR 29,484,0000	
<input checked="" type="checkbox"/> 2	N/A	Keyboard EBAY OFFICE SUPPLIERS	* This item category is not assigned to your profile.	-	INR 56,0000	56 EA	INR 3.136,0000	
<input type="checkbox"/> 3	N/A	Processor EBAY OFFICE SUPPLIERS	-	N/A	INR 8,0000	789 EA	INR 6.312,0000	
<input checked="" type="checkbox"/> 4	gjy	erg EBAY OFFICE SUPPLIERS	-	N/A	INR 5	5 EA	INR 25,0000	
<input checked="" type="checkbox"/> 5	N/A	RAM EBAY OFFICE SUPPLIERS	-	N/A	INR 43	432 EA	INR 18,576,0000	
<input checked="" type="checkbox"/> 6	N/A	Monitor EBAY OFFICE SUPPLIERS	-	N/A	INR 8	776 EA	INR 6.208,0000	

Purchase Amount: INR 63.741,0000

Requisition Approval Workflow

Convert to PO | Save | Return | Cancel

4. If the admin has configured to restrict the buyer to flip a requisition to PO, then as a buyer, you will see following error message for each line item (*refer the image below*).

Note: You can filter the items based on the buyer assigned for each line item. Use the Assigned Buyer Filter as shown below:

+ Add Item ▾

Update all lines | Assigned Buyer Filter | Item Order Status Filter

Select Reference Type

Unit Price: 5

Item-level: **Purc**:

Actions:

Assigned Buyer Filter (highlighted with a red box)

Actions:

Assigned Buyer Filter dropdown menu (highlighted with a red box)

Actions:

Cancel

(*Buyer wise total*)

SAVE PO AND CONTINUE:

This option will save the current PO as draft and draft PO will open directly without redirecting it to the listings page.

The screenshot shows the 'Convert Requisitions to Purchase Orders' screen. At the top, there's a message box with instructions about purchase orders. Below it, a table lists 'Purchase Orders to be Generated'. The table has columns for Suggested POs, Supplier, BU, Address, Delivery Date, PO Total, Exchange Rate, and Actions. One row is shown for 'PO 1*' with supplier 'APPLE' and BU 'mentor BU'. At the bottom of the table, there's a section for 'Receipt Creation Rule' set to 'Default' for all line items. The table also includes columns for Requisition Line No., Item Name, Deliver to, Req No., Unit Price, Qty/Amt, Receipt Creation, and Total Price. A single item 'laptop' is listed with a quantity of 2. The 'Actions' column contains icons for previewing and printing the PO. Buttons at the bottom of the table area are 'Save POs as draft', 'Save PO and Continue', and 'Cancel'.

Click on **Save PO and Continue**, the PO draft page will open:

The screenshot shows the 'Purchase Order - 1 Items, INR 1.1' screen. At the top, the PO number is \$temp135-PO and the order description is 'Order for Req# REQ :: 962-2'. The 'Supplier Info' section shows 'Name: APPLE' and 'Address*: MUMBAI'. The 'Billing, Delivery & Cost Allocation Info' section shows 'Delivery address: MN-ADD-004' in Surat, Gujarat, India, and 'Bill-to address: MN-ADD-004' in Surat, Gujarat, India. The 'Submit PO for processing' button is highlighted at the bottom.

Make the required changes and click **Submit PO for processing**.

SUBMIT PO FOR PROCESSING:

This option will allow you to directly submit the PO (converted from requisition) for processing.

Purchase Orders to be Generated

* The purchase order number will be automatically generated based on the configuration

Suggested POs	Supplier	BU	Address	Delivery Date	PO Total	Exchange Rate	Actions
PO 1*	EBAY OFFICE SUPPLIERS	T3-Acme Engineering Services		30/07/2015	INR 0.00	-	Preview PO
	Item Name	Deliver to	Req No.	Unit Price	Qty/Amt	Total Price	
	laptop	Sunil	2279 ACMENG	INR 2.00	10 EA	INR 20.00	

Buttons: Submit POs for processing | Save POs as draft | Cancel

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12. Select the requisition and click **Submit POs for processing**. The following page will be displayed where you will get to view the summary of the PO submitted for processing.

Converted Purchase Orders

Sr. No.	Supplier	BU	Address	Delivery Date	PO Total	Base Currency	Status	Actions
PO/0952-2	EBAY OFFICE SUPPLIERS	T3-Acme Engineering Services		30/07/2015	INR 22.40	1 INR = 1 INR	Released	-
Req No.	Item Name	Deliver to		Unit Price	Qty/Amt	Total Price		
2279 ACMENG	laptop	Sunil		INR 2.00	10 EA	INR 20.00		

Note: On Buyer's Desk, if a requisition linked to a purchase order is converted to PO, then the next screen will be the PO Amend screen and the requisition items will be added to PO and the PO can then be submitted.

Note: When converting multiple requisitions to a purchase order, system will generate separate for Project & Non-Project requisitions.

5.8 Mark PO that does not require Receipt

- Once the process of converting requisition to PO is initiated, as a buyer you can configure the **Receipt Creation Rule**.
- On the conversion page, select the items which you want to flip into PO.

3. You will be able to decide whether you want the receipts to be created:

- By default for all line items
- Required for all line items
- Or not required for all line items

The screenshot shows the 'Convert Requisitions to Purchase Orders' screen. At the top, there's a message box with instructions about purchase orders. Below it, the main table displays a purchase order for 'PO 1*'. The 'Receipt Creation Rule' dropdown for the first line item is open, showing four options: 'Not Required', 'Default', 'Required', and 'Not Required'. The 'Required' option is highlighted with a red box.

Suggested POs	Supplier	BU	Address	Delivery Date	PO Total	Exchange Rate	Actions									
PO 1*	STAPLES CONTRACT & COMMERCIAL	business unit2		30/06/2016	INR 55.3	1 INR = 1 USD	Preview PO									
<table border="1"> <tr> <td>Receipt Creation Rule </td> <td>Not Required </td> <td>for all line items</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>Requisition Line No.</td> <td>Item Name</td> </tr> <tr> <td colspan="3"> <input checked="" type="checkbox"/> Not Required </td> </tr> </table>								Receipt Creation Rule	Not Required	for all line items	<input checked="" type="checkbox"/>	Requisition Line No.	Item Name	<input checked="" type="checkbox"/> Not Required		
Receipt Creation Rule	Not Required	for all line items														
<input checked="" type="checkbox"/>	Requisition Line No.	Item Name														
<input checked="" type="checkbox"/> Not Required																
1	item no#1	Noah	REQ :: 880	INR 5.0	10 EA	<input checked="" type="checkbox"/> Receipt Required	INR 50.0									

Buttons at the bottom: Save POs as draft, Save PO and Continue, Cancel.

4. Based on the selection of **Receipt Creation Rule**, you will be able to configure receipt requirement for all the line items.

The screenshot shows the PO draft page for 'PO 1*'. The 'Receipt Creation Rule' is set to 'Required'. In the line item details, the 'Receipt Required' checkbox is checked and highlighted with a red box.

PO 1*	STAPLES CONTRACT & COMMERCIAL	business unit2		30/06/2016	INR 55.3	1 INR = 1 USD	Preview PO									
<table border="1"> <tr> <td>Receipt Creation Rule </td> <td>Not Required </td> <td>for all line items</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>Requisition Line No.</td> <td>Item Name</td> </tr> <tr> <td colspan="3"> <input checked="" type="checkbox"/> Receipt Required </td> </tr> </table>								Receipt Creation Rule	Not Required	for all line items	<input checked="" type="checkbox"/>	Requisition Line No.	Item Name	<input checked="" type="checkbox"/> Receipt Required		
Receipt Creation Rule	Not Required	for all line items														
<input checked="" type="checkbox"/>	Requisition Line No.	Item Name														
<input checked="" type="checkbox"/> Receipt Required																
1	item no#1	Noah	REQ :: 880	INR 5.0	10 EA	<input checked="" type="checkbox"/> Receipt Required	INR 50.0									

5. Click **Save PO and Continue**.

6. Draft version of that PO will open directly.

7. On the PO draft page, you will have **Control Settings** before the **Item Details** to configure **Receipts Creation**.

Control Settings

Receipt Creation Rule ? Specify receipt creation at **Header** level Specify receipt creation at **Line** level
 Default Required Not Required

Items - 1 Items

+ Add Item ▾ Update all lines

Line No.	Item #	Item and Supplier Name	Category	Market Price	Ordered Qty/Amt	Taxes	Total Price	Actions
<input type="checkbox"/>	+ 1	N/A item no#1 STAPLES CONTRACT & COMMERCIAL	Live Plant and Animal Material and Accessories and...	INR 5.0	10 EA ?	INR 0.0	INR 50.0	

Total: **INR 50.0**

Total Discount on the item sub-total: **INR 0.0** Modify

Tax details:

Taxes Inclusive or Not applicable? ? | Remove all taxes

Tax Type	Tax Name	Tax Rate	Amount
ABCDE	Test-Tax-111	@ 10.5 % on INR 50.0	INR 5.3 ?

Submit PO for processing

Review PO | Save as Draft | Cancel

8. You will have option to **Specify receipt creation at header level or at line level**.

Receipt Creation Rule ? Specify receipt creation at **Header** level Specify receipt creation at **Line** level
 Default Required Not Required

9. For **Header Level**, you can make the receipt creation:

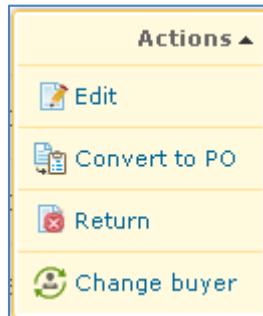
- Default
- Required
- Not required

10. Selecting **Receipt Creation at Line level** will enable creating receipts for all the line items.

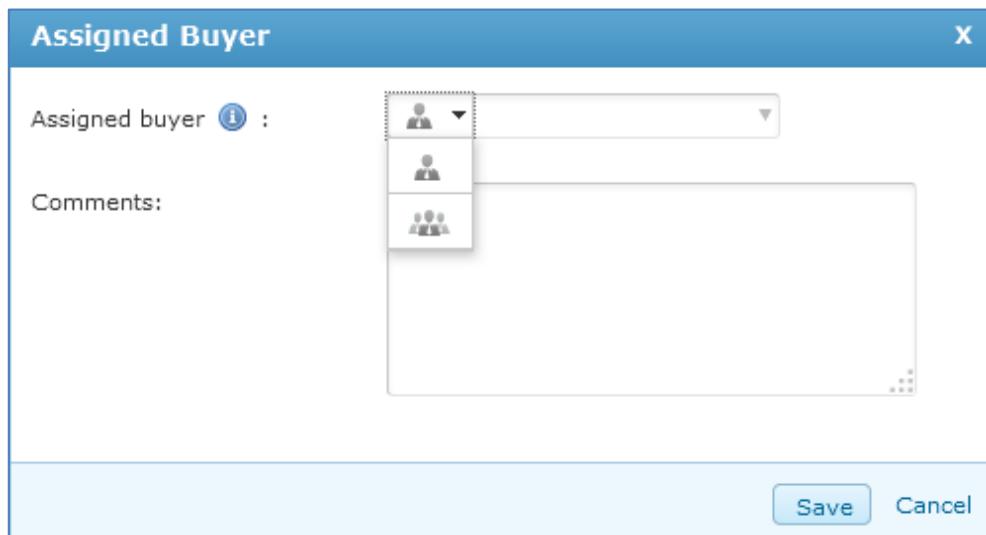
5.9 Changing the Buyer

To change the Buyer for a Requisition on the Buyer's Desk page:

1. For the required requisitions and click on the corresponding **Action** button.



2. Click on the **Change Buyer** option to change the assigned buyer. The following **Assigned Buyer** dialog box is displayed.



3. Enter and select buyer / group of buyers from the auto-suggested options for **Assigned Buyer**.

- a. - Select this option to assign an individual user as the assigned buyer of the requisition.
- b. - Select this option to assign a group of predefined users as the assigned buyers of the requisition.

Above both options displays the list of only Buyers to be selected.

4. Enter the required comments in the **Comments** box.

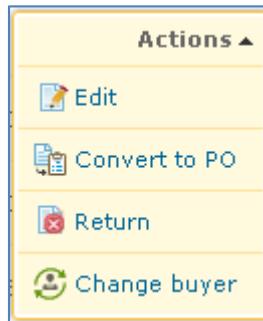
5. Click on the **Save** button to save the assigned buyer.

Note: While creating a requisition, buyers are assigned at line level. For existing documents, if buyers are assigned at header level, then they will be assigned to all the items within the document.

5.10 PO Generation

To generate PO for a Requisition on the Buyer's Desk page:

1. For the required requisitions and click on the corresponding **Action** button.



- Click on the **Convert to PO** button. The **Convert Requisitions to Purchase Orders** page is displayed.

The screenshot shows the 'Convert Requisitions to Purchase Orders' page. At the top, there's a message box with information about purchase orders for selected items. Below it, a table lists 'Purchase Orders to be Generated' with columns for Suggested POs, Supplier, BU, Address, Delivery Date, PO Total, Exchange Rate, and Actions. One row is selected, showing details for 'PO 1*' from 'EBAY OFFICE SUPPLIERS' to 'T3-Acme Engineering Services'. The table includes a header row and several data rows. At the bottom, there are buttons for 'Submit POs for processing', 'Save POs as draft', and 'Cancel'.

- Selected the required PO's from the suggested PO's.
- Edit the exchange rate if necessary and select the required items for the purchase order.
- Click on the **Save POs as draft** button to save the PO in draft status.

OR

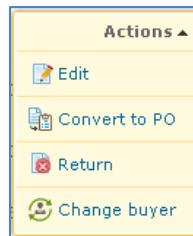
- Click on the **Save POs for processing** button to save the PO for processing. The **Converted Purchase Orders** page is displayed with the converted purchase orders.

The screenshot shows the ZYCUS eProc interface with the title bar "eProc" and the "Buyer's Desk" menu item selected. The main content area is titled "Summary" and displays a table for "Converted Purchase Orders". The table has columns: Sr. No., Supplier, BU, Address, Delivery Date, PO Total, Base Currency, Status, and Actions. One row is visible, showing PO/0952-2 from EBAY OFFICE SUPPLIERS to T3-Acme Engineering Services, delivered to Sunil on 30/07/2015, totaling INR 22.40. The status is "Released". Below the table, there is a detailed view of the requisition, showing Item Name (laptop), Deliver to (Sunil), Unit Price (INR 2.00), Qty/Amt (10 EA), and Total Price (INR 20.00).

5.11 Returning a Requisition

To return a requisition on the Buyer's Desk page:

1. For the required requisitions and click on the corresponding **Action** button.



2. Click on the **Return** option to return a requisition. The following **Return Requisition** dialog box is displayed.

The dialog box is titled "Return Requisition" and shows the requisition number "Requisition: PR/654 : PR by Alice- (6974711)". It contains a "Comments*" text area and a checkbox labeled "Requisition can be resubmitted". At the bottom are "Return" and "Cancel" buttons.

3. Enter the required comments in the **Comments** text box.
4. Select the **Requisition can be resubmitted** checkbox, if you want the requisition to be resubmitted.
5. Click on the **Return** button to return the requisition.

5.12 Upcoming Requisitions

As a buyer, any requisition which contains line items assigned to you as buyer will appear in this tab. All the requisition in this tab will be in approval stage.

1. To access **Upcoming Requisitions**, goto **Buyer's Desk > Upcoming Requisitions**. You will land on the following page:

Requisition No	Requisition Name	Requester	Submitted On	Assigned buyer	Amount	Actions
987/PR/399	PR by Zeba Khalil for 7824590*	Zeba Khalil	17/11/2016	-	USD 1,816.000	Actions

Found 1 record(s).

Show 10 records per page. Showing page 1 of 1

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2. All the requisitions in approval stage will appear on this page.
3. You will only be able to view the requisitions on this page.
4. For a given requisitions, click **Requisition No.** or click **View** from the **Actions** drop down menu. You will land on the following page.

Requisition: 987/PR/399 PR by Zeba Khalil for 7824590 - USD 1,816.000

[« Back](#)

General Information

Requisition No:	987/PR/399	Parent Requisition:	-
Requisition Name:	PR by Zeba Khalil for 7824590	Reason for Ordering:	-
Urgent Requirement:	No	Comments for supplier:	-
Created on behalf of:	-	Purchase Type ? :	EXPENSE
Created By:	Zeba Khalil	Attachment(s):	-
Settlement via:	Invoice	Status:	In Approval
Suggested PO:	-	Retrospective Purchase:	No

Items

Line No.	Item No.	Item Name & Supplier Name	Reference Contract	Unit Price	Qty/Amt	Total Price	Actions
2	4747	574 Supplier: SUPPLIER PORTAL CO	-	USD 4.000	454 EA	USD 1,816.000	
							Approved Amount: USD 0.000
							Purchase Amount: USD 0.000

Delivery

Cost Booking

Accounting

Workflow

Audit Trail

[+ New Discussion](#) | [Filter ▾](#)

Action	User	Shared with	Role	Date/Time	Version	Message	Actions
Requisition submitted <i>Integration failed</i>	System	-	System	17/11/2016 03:33:00 PM	v1	The Integration process for the document is Failed. Kindly contact the Integration Admin for further details.	
Requisition submitted	Zeba Khalil	-	Requester	17/11/2016 03:32:58 PM	v1	Reason for Ordering :	

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5. You will be able to view following details about a requisitions:

- General Information
- Item Details
- Delivery
- Cost Booking
- Accounting

- Workflow
- Audit Trail

5.13 Buyers Desk: Items

Items tab will list all the items which are part of requisitions. All the items displayed in this section would be the manual items requested, as per scope of the requisitions containing the items.

Buyer will be able to filter out the items based on:

- Sourcing status of the item or sourcing events
- Item Name
- ERP number
- Requester
- Assigned Buyer
- Location
- Required by Date

Buyer can also **view/edit** item level details and add/view item comments.

To access the items listing page:

1. Go to **Buyer's Desk > Items** sub-tab as shown below:

Status	Requisition Number/Requester	Item/ERP Part No	Supplier	Category	Delivery Location	Unit Price	Qty/Amt	Assigned buyer	Required By Date
<input type="checkbox"/>	OU_1-001/PR/277 jagrati	non inventory 1	AMAZON	Non electric motors	MIDC	INR 100.00	12 EA	Multiple	31/01/2017
<input type="checkbox"/>	OU_1-001/PR/277 jagrati	guided item 1	MYNTRA	Threatened animals protection associatio...	MIDC	N/A	12 EA	Multiple	31/01/2017
<input type="checkbox"/>	OU_1-001/PR/276 Nilesh	Need a Quote -	Suppliers suggested	-	SEEPZ	USD 100.00	100 EA	Shadab QS	N/A
<input type="checkbox"/>	OU_1-001/PR/276 Nilesh	Quoted by supplier -	Suppliers suggested	-	SEEPZ	USD 1,000.00	10 EA	Shadab QS	N/A
<input type="checkbox"/>	OU_1-001/PR/276 Nilesh	Estimated price	No supplier selected	Label applying machines	SEEPZ	USD 100.00	10 EA	Shadab QS	N/A
<input type="checkbox"/>	OU_1-001/PR/267 Shadab QS	Select Category -	Suppliers suggested	-	SEEPZ	INR 1.00	0 INR	Shadab QS	N/A
<input type="checkbox"/>	OU_1-001/PR/268 Shadab QS	build.number=5571	No supplier selected	Freedom of speech defense associations	SEEPZ	INR 452.00	10 EA	Shadab QS	N/A
<input type="checkbox"/>	OU_1-001/PR/268 Shadab QS	Mask 4 126	AMAZON	Medical staff clothing and related artic...	SEEPZ	USD 145.24	63 EA	Shadab QS	01/02/2017
<input type="checkbox"/>	OU_1-001/PR/268 Shadab QS	Mask 6 128	MYNTRA	Medical staff clothing and related artic...	SEEPZ	USD 145.24	45 EA	Shadab QS	01/02/2017
<input type="checkbox"/>	OU_1-001/PR/268 Shadab QS	Mask 3 125	AMAZON	Medical staff clothing and related artic...	SEEPZ	USD 145.24	10 EA	Shadab QS	01/02/2017

2. Buyer will be able to filter out the items based on:

- Sourcing status of the item or sourcing events

- Item Name
- ERP number
- Requester
- Assigned Buyer
- Location
- Required by Date

3. Hover over the highlighted links to view the legends for Event Status and Item Level Sourcing Status.

Found 19 out of 47 record(s).

Legends: **Event Status** **Item Level Sourcing Status**

Status	Requisition Number/Requester	Item/ERP Part No	Supplier	Category	Delivery Location	Unit Price	Qty/Amt	Assigned buyer	Required by Date
<input type="checkbox"/> Item Not Sourced	AMAZON	Medical staff clothing and related artic...	Multiple	INR 1.00	0 INR	N/A			
<input type="checkbox"/> Sourcing In Progress.	AMAZON	Medical staff clothing and related artic...	Multiple	USD 145.24	100 EA	Shadab QS	Multiple		
<input type="checkbox"/> Sourcing process completed.	AMAZON	Medical staff clothing and related artic...	Multiple	USD 145.24	65 EA	Shadab QS	Multiple		
<input type="checkbox"/> Sourcing Event is in Draft	AMAZON	Medical staff clothing and related artic...	SEEPZ	USD 145.24	63 EA	Shadab QS	01/02/2017		
<input type="checkbox"/> Sourcing Event Closed	MYNTRA	Medical staff clothing and related artic...	SEEPZ	USD 145.24	45 EA	Shadab QS	01/02/2017		
<input type="checkbox"/> Item Level Sourcing Status	AMAZON	Medical staff clothing and related artic...	SEEPZ	USD 145.24	10 EA	Shadab QS	01/02/2017		
<input type="checkbox"/> Freedom of speech defense associations	No supplier selected	Freedom of speech defense associations	SEEPZ	INR 452.00	10 EA	Shadab QS	N/A		
<input type="checkbox"/> Estimated price	MYNTRA	Medical staff clothing and related artic...	SEEPZ	USD 145.24	20 EA	Shadab QS	01/02/2017		
<input type="checkbox"/> Need a Quote	No supplier selected	-	SEEPZ	USD 10.00	10 EA	Multiple	N/A		
<input type="checkbox"/> Shose	AMAZON	Shoes	Multiple	USD 10.00	120 EA	Multiple	Multiple		

Found 19 out of 47 record(s).

Legends: **Event Status** **Item Level Sourcing Status**

Status	Requisition Number/Requester	Item/ERP Part No	Supplier	Category	Delivery Location	Unit Price	Qty/Amt	Assigned buyer	Required by Date
<input type="checkbox"/> Item Not Sourced	AMAZON	Medical staff clothing and related artic...	Multiple	INR 1.00	0 INR	Shadab QS	N/A		
<input type="checkbox"/> Sourcing In Progress.	AMAZON	Medical staff clothing and related artic...	Multiple	USD 145.24	100 EA	Shadab QS	Multiple		
<input type="checkbox"/> Sourcing process completed.	AMAZON	Medical staff clothing and related artic...	Multiple	USD 145.24	65 EA	Shadab QS	Multiple		
<input type="checkbox"/> Sourcing Event is in Draft	AMAZON	Medical staff clothing and related artic...	SEEPZ	USD 145.24	63 EA	Shadab QS	01/02/2017		
<input type="checkbox"/> Sourcing Event Closed	MYNTRA	Medical staff clothing and related artic...	SEEPZ	USD 145.24	45 EA	Shadab QS	01/02/2017		
<input type="checkbox"/> Item Level Sourcing Status	AMAZON	Medical staff clothing and related artic...	SEEPZ	USD 145.24	10 EA	Shadab QS	01/02/2017		
<input type="checkbox"/> Freedom of speech defense associations	No supplier selected	Freedom of speech defense associations	SEEPZ	INR 452.00	10 EA	Shadab QS	N/A		
<input type="checkbox"/> Estimated price	MYNTRA	Medical staff clothing and related artic...	SEEPZ	USD 145.24	20 EA	Shadab QS	01/02/2017		
<input type="checkbox"/> Need a Quote	No supplier selected	-	SEEPZ	USD 10.00	10 EA	Multiple	N/A		
<input type="checkbox"/> Buyer Negotiated Price	AMAZON	Medical staff clothing and related artic...	SEEPZ	USD 145.24	10 EA	Shadab QS	01/02/2017		
<input type="checkbox"/> Quoted by supplier	AMAZON	Medical staff clothing and related artic...	SEEPZ	USD 145.24	65 EA	Shadab QS	Multiple		
<input type="checkbox"/> Estimated price	AMAZON	Medical staff clothing and related artic...	SEEPZ	USD 145.24	63 EA	Shadab QS	01/02/2017		
<input type="checkbox"/> Need a Quote	AMAZON	Medical staff clothing and related artic...	SEEPZ	USD 145.24	10 EA	Shadab QS	01/02/2017		

4. Buyer can also view/edit item level details and add/view item comments.
5. You can view the requisition number and the requestor to which the item is linked (*refer the image below*).

The screenshot shows the Zycus eProc interface with the 'Buyer's Desk' tab selected. The table displays various requisition records, including their status, requisition number, requester, item details, supplier, category, delivery location, unit price, quantity, assigned buyer, and required by date. The first record, OU_1-001/PR/277, is highlighted with a red box around its requisition number and requester information.

Status	Requisition Number/ Requester	Item/ ERP Part No	Supplier	Category	Delivery Location	Unit Price	Qty/Amt	Assigned buyer	Required By Date
<input type="checkbox"/>	OU_1-001/PR/277 jagrati	non inventory 1 🚨 erp001	AMAZON	Non electric motors	MIDC	INR 100.00	12 EA	Multiple	31/01/2017
<input type="checkbox"/>	OU_1-001/PR/277 Jagrati	guided item 1 🚨	MYNTRA	Threatened animals protection association...	MIDC	N/A	12 EA	Multiple	31/01/2017
<input type="checkbox"/>	OU_1-001/PR/276 Nilesh	Need a Quote	Suppliers suggested	-	SEEPZ	USD 100.00	100 EA	Shadab QS	N/A
<input type="checkbox"/>	OU_1-001/PR/276 Nilesh	Quoted by supplier	Suppliers suggested	-	SEEPZ	USD 1,000.00	10 EA	Shadab QS	N/A
<input type="checkbox"/>	OU_1-001/PR/276 Nilesh	Estimated price 🚨	No supplier selected	Label applying machines	SEEPZ	USD 100.00	10 EA	Shadab QS	N/A
<input type="checkbox"/>	OU_1-001/PR/267 Shadab QS	Select Category	Suppliers suggested	-	SEEPZ	INR 1.00	0 INR	Shadab QS	N/A
<input type="checkbox"/>	OU_1-001/PR/268 Shadab QS	build.number=5571	No supplier selected	Freedom of speech defense associations	SEEPZ	INR 452.00	10 EA	Shadab QS	N/A
<input type="checkbox"/>	OU_1-001/PR/268 Shadab QS	Mask 4 🚨 126	AMAZON	Medical staff clothing and related artic...	SEEPZ	USD 145.24	63 EA	Shadab QS	01/02/2017
<input type="checkbox"/>	OU_1-001/PR/268 Shadab QS	Mask 6 🚨 128	MYNTRA	Medical staff clothing and related artic...	SEEPZ	USD 145.24	45 EA	Shadab QS	01/02/2017
<input type="checkbox"/>	OU_1-001/PR/268 Shadab QS	Mask 3 🚨 125	AMAZON	Medical staff clothing and related artic...	SEEPZ	USD 145.24	10 EA	Shadab QS	01/02/2017

6. Click on the **Requisition Number**, you will be navigated to the linked requisition page as shown below:

The screenshot shows the 'Edit Requisition' page for requisition number OU_1-001/PR/277. The requisition info section includes the requisition name (PR Number - 7881498 by Jagrati for guided item 1, non inventory 1), delivery address (MIDC, Floral Deck Plaza, Andheri (E), Mumbai, Maharashtra 400096, India), bill-to address (MIDC, Floral Deck Plaza, Andheri (E), Mumbai, Maharashtra 400096, India), and cost center (CC1). The requisition items section is currently empty. At the bottom, there are buttons for 'Convert to PO', 'Save', 'Return', and 'Cancel'.

7. Click on the **Item Name** to view all the details. Following popup will appear where you can view the:

- Item Details:

Item Details

Standard Fields

- Sourcing Status: Quoted by supplier
- Supplier Name*: AMAZON
ISupplier ID: 2185176
- Supplier Part ID:
- Short Description*: non inventory 1
- Item Description: wq

Required By Date

Date	Comments
31/01/2017	
31/01/2017	
N/A	
01/02/2017	
01/02/2017	
01/02/2017	
01/02/2017	

- **Sourcing Details:**

Item Details

Sourcing Event Details

Event Name	Status
New today 7416	Awarded

Event Details

Event Name	Status
New today 7416	Awarded

Supplier Responses

Supplier Name	Bid Quantity	Bid Price	Bulk Price	Savings	Bid Validity	Actions
MYNTRA	1 EA	USD 10.00	-	-	-	-

Sourcing tab will display event details and supplier responses.

- **Attachments / Comments:**

Here you will be able to add comments for internal eProc users and suppliers. You can also upload any supporting documents if required and click **OK**.

5.13.1 Ability to Create Sourcing Events

You have a functionality to directly create a sourcing event from the Items page.

To create sourcing event:

1. Select multiple items from the listing page and click **Create New Quick Source Events**.

Requisitions Items

+ Create New Quick Source Event

Status	Requisition Number/ Requester	Item/ ERP Part No	Supplier	Category	Delivery Location	Unit Price	Qty/Amt	Assigned buyer	Required By Date
<input type="checkbox"/>	OU_1-001/PR/277 jagrati	non inventory 1 ! erp001	AMAZON	Non electric motors	MIDC	INR 100.00	12 EA	Multiple	31/01/2017
<input checked="" type="checkbox"/>	OU_1-001/PR/277 Jagrati	guided item 1 !	MYNTRA	Threatened animals protection association	MIDC	N/A	12 EA	Multiple	31/01/2017
<input checked="" type="checkbox"/>	OU_1-001/PR/276 Nilesh	Need a Quote	Suppliers suggested	-	SEEPZ	USD 100.00	100 EA	Shadab QS	N/A
<input checked="" type="checkbox"/>	OU_1-001/PR/276 Nilesh	Quoted by supplier	Suppliers suggested	-	SEEPZ	USD 1,000.00	10 EA	Shadab QS	N/A
<input checked="" type="checkbox"/>	OU_1-001/PR/276 Nilesh	Estimated price !	No supplier selected	Label applying machines	SEEPZ	USD 100.00	10 EA	Shadab QS	N/A
<input type="checkbox"/>	OU_1-001/PR/267 Shadab QS	Select Category	Suppliers suggested	-	SEEPZ	INR 1.00	0 INR	Shadab QS	N/A
<input type="checkbox"/>	OU_1-001/PR/268 Shadab QS	build.number=5571 !	No supplier selected	Freedom of speech defense associations	SEEPZ	INR 452.00	10 EA	Shadab QS	N/A
<input type="checkbox"/>	OU_1-001/PR/268 Shadab QS	Mask 4 ! 126	AMAZON	Medical staff clothing and related artic...	SEEPZ	USD 145.24	63 EA	Shadab QS	01/02/2017
<input type="checkbox"/>	OU_1-001/PR/268 Shadab QS	Mask 6 ! 128	MYNTRA	Medical staff clothing and related artic...	SEEPZ	USD 145.24	45 EA	Shadab QS	01/02/2017
<input type="checkbox"/>	OU_1-001/PR/268 Shadab QS	Mask 3 ! 125	AMAZON	Medical staff clothing and related artic...	SEEPZ	USD 145.24	10 EA	Shadab QS	01/02/2017

Note: For easier functioning, filter the events by **Status: Item Not Sourced**.

2. QuickSource form will appear as shown below:

Buyer's Desk

Requisitions Items

+ Create New Quick Source Event

Quick Source Name*:

Include Item Details:

Item Name*	Quantity*	UOM
Laptop	100	EA
Pens	10	EA
Monitor Screens	10	EA

Include question for Supplier(s):

Questions

Write a question here

Include an opening message for your Supplier(s):

Write an opening message here

Attach related documents for your Supplier(s):

Select File "Browse" to select files to upload

Cancel Save as Draft Create

3. Selected items will be appended to the QuickSource event page automatically.
4. Enter the details for the items on the QuickSource form. Refer **Filter Items by Assigned Buyers**
6. Click the **Requisition Number** to view and update the details. The following page is displayed.

7. Go to Requisition Items section. Review all the line items added in the requisition.

8. You can choose to filter the requisition line items based on the assigned buyer since they are assigned at line level.
9. Click **Assigned Buyer Filter**. You can filter the line items based on following parameters:
 - All: View all the line items, irrespective of the buyer assigned.
 - Me: Line items assigned to me
 - Buyer: Line items assigned to a different buyer (search for the buyer by entering the keyword)
 - Buyer Group: Line item assigned to a buyer group (search for the buyer group by entering the keyword)
 - Unassigned Items: Line items which are not assigned to any buyer.
 - Once you make your selection click **Filter**.
10. You can also view the buyers for all line items by expanding the line item details (*highlighted in the image below*).

Requisition Items									
+ Expand All Collapse All		Create Sourcing Event		Update all lines		Assigned Buyer Filter		Item Order Status Filter	
Line No.		Item No.	Item and Supplier Name	Reference Contract	Availability	Unit Price	Qty/Amt	Total Price	Actions
<input type="checkbox"/>		3	N/A	lappy	-	N/A	N/A	1 EA	N/A
Delivery and Asset Tagging		Cost Booking				Accounting		Assigned Buyers	
disha	T3-Acme	31/12/2016	1 EA	asdasd: 2	N/A	CAPITALS		sandeep disha	
		4	671724	CHAIRMAT,POLYCARB,46X60	-	0 days	USD 52.36	1 EA	INR 3,665,2000
Delivery and Asset Tagging		Cost Booking				Accounting		Assigned Buyers	
disha	T3-Acme	31/12/2016	1 EA	asdasd: 2	INR 52,3600	CAPITALS		disha	

5.13.2 Filter Items by Item Order Status

1. You can filter for the items based on their order status. Select the status from the options and click **Filter**. The item table will refresh and show only the relevant items.

Items that can be sent for Ordering									
- Items Grouped by Category, Price Type (Pending Order)									
+ Expand All Collapse All								Actions	
								Assigned Buyer Filter Item Order Status Filter + Add Item	
<input type="checkbox"/>	Line No.	Item No.	Item and Supplier Name	Reference Contract	Availability	Total Price	Actions		
<input type="checkbox"/>		2	34434 pen AVNISH TEST SUPPLIER	-	N/A	INR 33.00000			
Purchase Amount: INR 33.00000									
ITEM-LEVEL TAXES SUB-TOTAL: INR 0.00000									

5.13.3 Adding Items to a Requisition

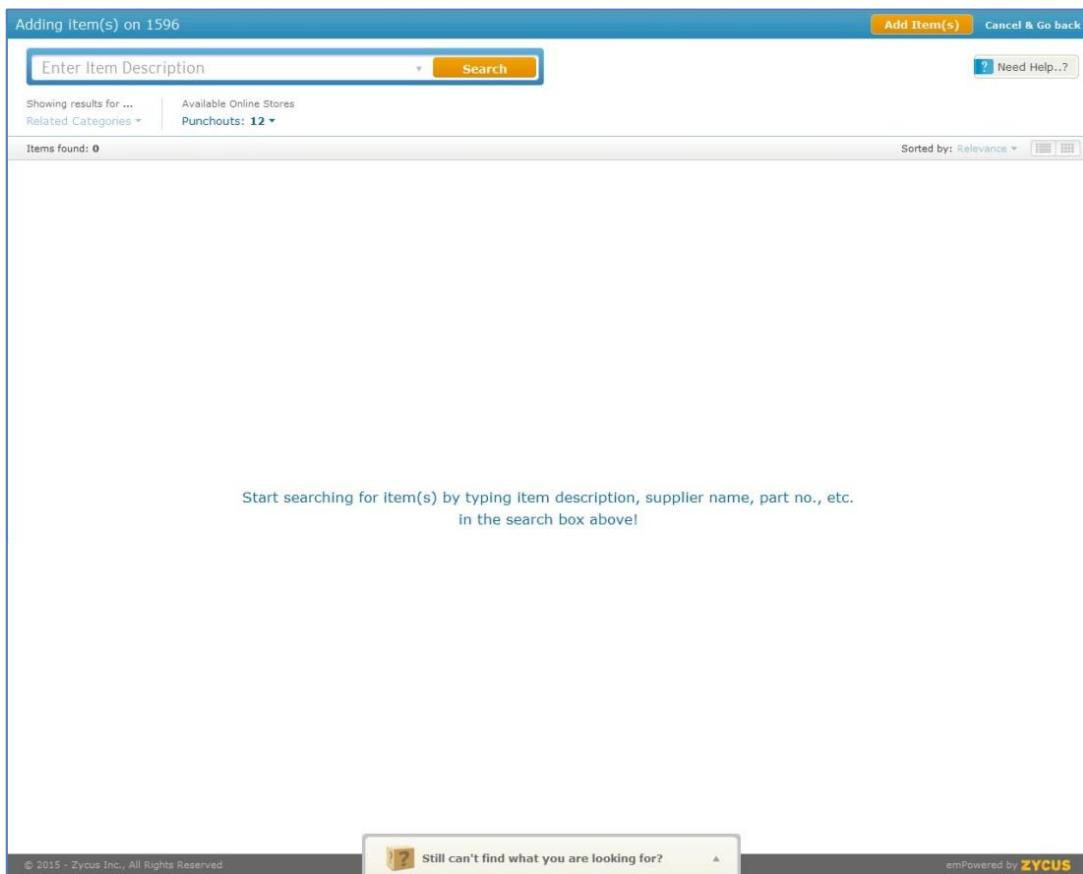
To add items to a requisition on the Buyer's Desk page:

3. Click the **Add Items** to add new items to the Requisition.
4. Select any one of the required options:



- a. **Search Items** – Search the existing items & add the required items

- i. Enter the name or the description of the item to be search & added.



- ii. A list of items matching the entered name or description is displayed.
 - iii. Roll over on the **Related Categories** button to view items from other categories.
 - iv. Roll over on the **Sorted by** button and select an option from the list to sort the items in the list.
 - v. Click **Switch to Grid View** to view the items as grid.
 - vi. Select the required items using the check boxes next to them.
 - vii. Enter the quantity required for the item in the textbox next to the **Item Description**.
 - viii. Click **Add to Cart** to add the items to the Requisition.
- b. **Create a free-text Item** – Create & add the required free-text items
- i. Enter the required details in the **Item** tab.

Item Details

Suppliers

Item Number:	Product Category*:
Short Description*:	Quantity*:
Long description:	UOM*:
	Price*:
<input type="checkbox"/> Zero Price Item	
Item Type* ? :	Goods Services
Receive/Bill by* ? :	<input checked="" type="radio"/> Quantity ? <input type="radio"/> Amount ? <input type="radio"/> No Receipt ?
Sourcing Status* : Buyer Negotiated Price Currency* : USD	
<small>▼ Show extra fields like manufacturer details, specifications, etc.</small>	
<input type="button" value="Add Item"/> <input type="button" value="Cancel & Go back"/> <input type="button" value="Cancel"/>	

- ii. To add information like manufacturer name and so on, click on the **Show extra fields like manufacturer details, specification, etc.** and enter the required details.
- iii. Click on the **Suppliers** tab.

Item Details

Suppliers

Supplier Name*:	Address*:
Supplier Contact:	
Supplier Email Id:	
Contract/Order Number:	
<input type="button" value="Show all"/> <input type="button" value="Add Item"/> <input type="button" value="Cancel & Go back"/> <input type="button" value="Cancel"/>	

- iv. Enter the **Supplier Name** and select the required supplier.
- v. Select the required supplier address. The rest of the information is auto populated as per availability.
- vi. Enter the **Contract/Order Number** or click **Show all** to select an existing contract/order number.
- vii. Search & select the required **Blanket Order** or **Contract** as per requirement.
- viii. Click **Save** to save the selected **Blanket Order** or **Contract**.
- ix. Click **Add Item** to save and add the free-text item.

c. Punchouts—Search the existing punchouts & add the required items

- i. The available Punchouts are displayed. Select the required Punchout.
- ii. You will be automatically directed to the Punchout.
- iii. Select and add items to the cart.

Note: In the punchout cart, you will see items added during that punchout visit along with punchout items added earlier or other items.

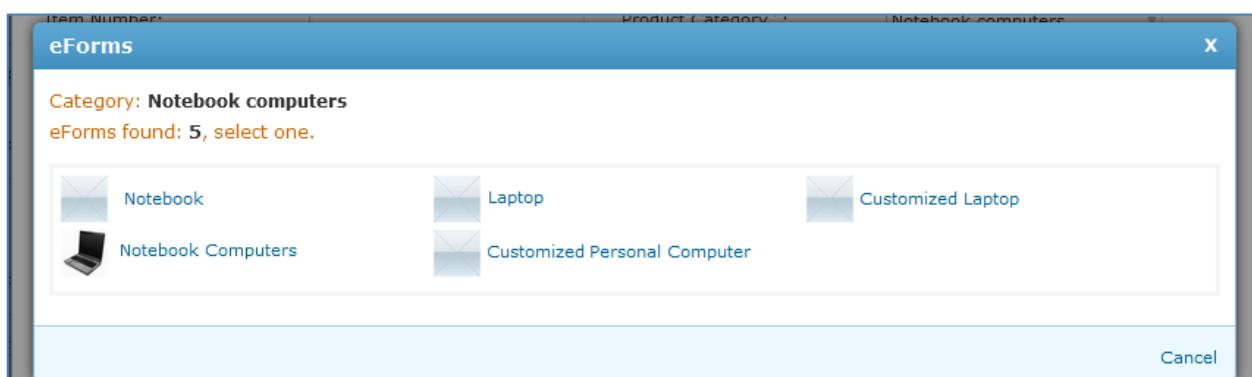
- iv. Add the required items from the Punchouts to the cart.
- v. Checkout the cart from the Punchout.
- vi. All the items from the Punchouts cart will be added to the Requisition.

Note: The items added to a Requisition from under the **Buyer's Desk** tab are displayed with a Green Background to classify.

Note: Items can be added to a Requisition from under the **Buyer's Desk** tab only if none of the items from the Requisition are ordered OR the Requisition has not been converted into a PO.

5.13.3.1 Replacing Items in Requisition

12. Click Replace Item icon  for corresponding item to be replaced. eForms dialog box is displayed.



13. Click any category to select. The **Item Details** dialog box is displayed as shown below.

Item Details

If the category is changed, information present in the "Requirement Details" section will be lost.

Item Number:	Product Category*:	Rollerball pens
Short Description* :	Quantity* :	
Long description:	UOM* :	EA
	Price* :	
	Sourcing Status* :	Buyer Negotiated Price
Item Type* :	Currency* :	USD
Receive/Bill by* :	Quantity Amount No Receipt	
<input type="checkbox"/> Zero Price Item		
Show extra fields like manufacturer details, specifications, etc.		
<input type="button" value="Replace"/> <input type="button" value="Cancel & Go back"/>		<input type="button" value="Cancel"/>

14. Enter the **Item Numbers, Short Description** and **Long Description** for the item. The **Product Category** is automatically populated as per the selected category.

15. Enter the **Quantity**, select the Unit Of Measurement (**UOM**) and **Price** of the item.

NOTE: Check the **Zero Price Item** in order to add an item with no price or zero price to the Catalog.

16. Select the **Item Type** (Goods / Services) and select **Receive / Bill By** from following options:

- Quantity - Selected UOM will be used for invoicing and receiving
- Amount - Selected currency will be used for invoicing and receiving
- No Receipt – Selected UOM will be used for invoicing.

17. Click **Show extra fields like manufacturer details, specifications, etc.** to enter non-mandatory fields related to item as shown below.

Hide extra fields

Is Green:	<input type="radio"/> Yes <input checked="" type="radio"/> No	Is Preferred:	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Manufacturer Name:	<input type="text"/>		Image Url:	<input type="text"/>
Manufacturer Part Id:	<input type="text"/>		Product Url:	<input type="text"/>
Specifications Name:	<input type="text"/> e.g phone		Manufacturer Url:	<input type="text"/>
Specifications:	<input type="text"/> e.g color		<input type="text"/> e.g red	<input type="button" value=""/>

18. Select the appropriate option for **Is Green** and **Is Preferred**. Enter the Specifications Name, the Specifications and click Save.

19. Enter the Manufacturer, Product details and specifications in their respective fields.

20. Click **Replace** to replace the item with the selected item

Replacing "Lenovo Essential G58..." with "HP Pavilion G6-2005AX" on PR/1555

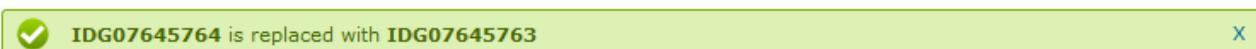
Original Item Details	Replacement Item Details
 Lenovo Essential G580   59-324061 GBP 439.74 EA ~USD 749 EA <input type="button" value="Add to favorites"/> <input type="button" value="Add to Basket"/>	 HP Pavilion G6-2005AX   B3J80PA USD 690.00 EA <input type="button" value="Add to favorites"/> <input type="button" value="Add to Basket"/>
<input type="button" value="Details"/> <input type="button" value="Specifications"/> <input type="button" value="Attachments"/> Description: Lenovo Essential G580 (59-324061) Laptop (3rd Gen Ci5/ 4GB/ 500GB/ DOS) Manufacturer: Category: Notebook computers SPSC Code: 43211503 Supplier: GALAXY CORP Delivery Lead Time (days): N/A Contract No: 18956/NB-1209 <input type="checkbox"/> SAR (6) <input type="checkbox"/> CNY (2)	<input type="button" value="Details"/> <input type="button" value="Specifications"/> <input type="button" value="Attachments"/> Description: HP Pavilion G6-2005AX Laptop (APU Quad Core A8/ 4GB/ 500GB/ Win7 HB/ 1.5GB Graph) Manufacturer: Category: Notebook computers SPSC Code: 43211303 Supplier: GALAXY CORP Delivery Lead Time (days): 7 days Contract No: Price: USD 760.82 <input type="checkbox"/> ISD 203 <input type="checkbox"/> EA <input type="checkbox"/> ISD 715 <input type="checkbox"/> EA
  Lenovo Essential G580   Lenovo Essential G580 (59-324061) Laptop (3rd Gen Ci5/ 4GB/ ...more)	

21. Enter the quantity in the **EA** field and click **Replace**.

Confirm Item Replacement

 Lenovo Essential G580   59-324061 GBP 439.74 EA ~USD 749 EA <input type="button" value="Add to favorites"/> <input type="button" value="Add to Basket"/>	 HP Pavilion G6-2005AX   B3J80PA USD 690.00 EA <input type="button" value="Add to favorites"/> <input type="button" value="Add to Basket"/>
Change comments *: <input type="text" value="Original Item to be replaced"/>	
<input type="button" value="Confirm"/> <input type="button" value="Cancel"/>	

22. Enter **Change Comments** and click **Confirm**. A confirmation message is displayed as shown below.



5. Create New Quick Sourcing Event for more details and publish the event by clicking **Create**. Your event will be published
6. To view your published event, go to **View Quick Sourcing Events** as shown in the image below:

The screenshot shows the Zycus eProc interface with the 'Buyer's Desk' selected in the navigation bar. The main content area displays a table of requisitions. A red box highlights the 'View Quick Source Events' button in the top right corner of the table header.

Status	Requisition Number/Requester	Item/ERP Part No	Supplier	Category	Delivery Location	Unit Price	Qty/Amt	Assigned buyer	Required By Date
Filtered	OU_1-001/PR/276 Nilesh	Need a Quote	Suppliers suggested	-	SEEPZ	USD 100.00	100 EA	Shadab QS	N/A
Quoted by supplier	OU_1-001/PR/276 Nilesh	Quoted by supplier	Suppliers suggested	-	SEEPZ	USD 1,000.00	10 EA	Shadab QS	N/A
Estimated price	OU_1-001/PR/276 Nilesh	Estimated price	No supplier selected	Label applying machines	SEEPZ	USD 100.00	10 EA	Shadab QS	N/A
Select Category	OU_1-001/PR/267 Shadab QS	Select Category	Suppliers suggested	-	SEEPZ	INR 1.00	0 INR	Shadab QS	N/A
<script>alert("Hi");</script>	OU_1-001/PR/268 Shadab QS	<script>al... 123	AMAZON	Medical staff clothing and related artic...	Multiple	USD 145.24	100 EA	Shadab QS	Multiple
Mask 4	OU_1-001/PR/268 Shadab QS	Mask 4	AMAZON	Medical staff clothing and related artic...	SEEPZ	USD 145.24	63 EA	Shadab QS	01/02/2017
Mask 6	OU_1-001/PR/268 Shadab QS	Mask 6	MYNTRA	Medical staff clothing and related artic...	SEEPZ	USD 145.24	45 EA	Shadab QS	01/02/2017
Mask 3	OU_1-001/PR/268 Shadab QS	Mask 3	AMAZON	Medical staff clothing and related artic...	SEEPZ	USD 145.24	10 EA	Shadab QS	01/02/2017
build.number=5571	OU_1-001/PR/268 Shadab QS	build.number=5571	No supplier selected	Freedom of speech defense associations	SEEPZ	INR 452.00	10 EA	Shadab QS	N/A
Mask 5	OU_1-001/PR/268 Shadab QS	Mask 5	MYNTRA	Medical staff clothing and related artic...	SEEPZ	USD 145.24	20 EA	Shadab QS	01/02/2017

7. Your newly created event will be listed on the following page (*highlighted in the image below*).

The screenshot shows the Zycus eProc interface with the 'Latest Quick Source' section selected in the navigation bar. The main content area displays a table of quick source events. A red box highlights the first row, which corresponds to the event 'Laptop and 2 more'.

Status	Event Name	Event Creator	Supplier Response Status	Time Ticker	Actions
In Progress	Laptop and 2 more	Shadab Ansari	0/1 (Supplier Responded / Invited)	1 day(s) to close End Time: 02/02/2017 00:00:00	Actions
Draft	Mix	Shadab Ansari	0/1 (Supplier Responded / Invited)	-	Actions
Draft	TEST QS	Shadab Ansari	0/1 (Supplier Responded / Invited)	-	Actions
Closed	Bank-ICICI BANK	Shadab Ansari	1/1 (Supplier Responded / Invited)	Closed 1 day(s) back End Time: 30/01/2017 00:00:00	Actions
Closed	Coffee Mug	Shadab Ansari	1/1 (Supplier Responded / Invited)	Closed 1 day(s) back End Time: 30/01/2017 00:00:00	Actions
Closed	Mask 12 - !@#\$%^&*(*)_+){:"><?/*-+~	Shadab Ansari	1/1 (Supplier Responded / Invited)	Closed 1 day(s) back End Time: 30/01/2017 00:00:00	Actions
Closed	<script>alert("Hi");</script>لى... Arabic No...	Shadab Ansari	0/1 (Supplier Responded / Invited)	Closed 1 day(s) back End Time: 30/01/2017 00:00:00	Actions
Closed	TEST QS	Shadab Ansari	1/2 (Supplier Responded / Invited)	Closed 1 day(s) back End Time: 30/01/2017 00:00:00	Actions
Closed	<script>chen and 6 more	Shadab Ansari	1/1 (Supplier Responded / Invited)	Closed 1 day(s) back End Time: 30/01/2017 00:00:00	Actions
Closed	anil-13 and 1 more	Shadab Ansari	0/1 (Supplier Responded / Invited)	Closed 1 day(s) back End Time: 30/01/2017 00:00:00	Actions

8. To understand the functionalities on this page, please refer **Viewing Quick Sourcing Events**.

Chapter 6: Creating Purchase Orders (PO) Manually

6.1 Introduction

eProc enables to create POs manually in very simple steps with the help of a wizard.

Note: When requisitions are manually converted into PO, logged in user will be the assigned buyer.

6.2 Creating a PO Manually

To create a new PO:

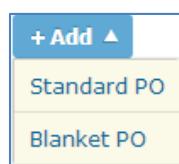
1. Click on the **PO** tab.

Status	PO Number	Type	Supplier	Buyer	PO Date	Amount	Actions
Released	PO/0952-2	Release	EBAY OFFICE SUPPLIERS	Sean M	29/07/2015	INR 22.40	Actions
Released	PO/0962-Asset	Standard	EBAY OFFICE SUPPLIERS	Ram	29/07/2015	USD 58,542.40	Actions
Released	PO/0951	Standard	EBAY OFFICE SUPPLIERS	ACMTECH-PRD	29/07/2015	USD 6,897.00	Actions
Released	PO/0950	Blanket	EBAY OFFICE SUPPLIERS	Sunil	29/07/2015	AUD 100,000.00	Actions
Closed	PO/0959-1	Release	EBAY OFFICE SUPPLIERS	<H1>"BUG"</h1>	29/07/2015	USD 570.00	Actions
Released	PO/0959	Blanket	EBAY OFFICE SUPPLIERS	<H1>"BUG"</h1>	29/07/2015	USD 5,700.00	Actions
Released	PO/0958	Standard	EBAY OFFICE SUPPLIERS	34737	29/07/2015	USD 1,241.46	Actions
Released	PO/0955	Standard	EBAY OFFICE SUPPLIERS	Ram	28/07/2015	USD 58,542.40	Actions
Released	Testing a logic-5	Release	EBAY OFFICE SUPPLIERS	Test_new	28/07/2015	USD 1.14	Actions
Released	PO/0954	Standard	EBAY OFFICE SUPPLIERS	Sunil	28/07/2015	INR 14,909.53	Actions

Show 10 records per page. Showing Page 1 of 483

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2. Place your cursor on **Add** button; you will get the following options.



- **Standard PO:** A Standard PO is created for a one time buying process with defined delivery scheduled, goods, and cost.

- Blanket PO:** A Blanket PO is created for long-term service, maintenance agreements as well as standing orders for goods or services wherein a blanket purchase order uses the same purchase order number for multiple purchases (you can issue a blanket release against the Blanket PO).

6.3 Creating a Standard PO

6.3.1 PO Details

Purchase Order - 0 Items, 0.00

PO #*: PO/0896 Order Description*: [empty field]

- The **PO number** is auto generated that can be editable based on administrator settings.
- Enter Purchase Order description in the **Order Description** field.

6.3.2 Adding Scope

Note: The organization unit is pre-populated based on buyer's default scope. Buyer can change delivery and billing addresses by selecting other business unit or location from his scope

To add a scope:

Billing, Delivery & Cost Booking Info

Organization Unit (OU): T3-Acme Engineering Services > T3-Acme Engineering Services > T3-Pittsford Chamber of Commerce

<p> Delivery address: T3-Pittsford Chamber of Commerce 57 St Paul St T3-Pittsford Chamber of Commerce Rochester, New York 14604, United States</p> <p>Deliver to: Prashant</p> <p>Required by* <input type="text"/> </p>	<p> Bill-to address: T3-Pittsford Chamber of Commerce 57 St Paul St T3-Pittsford Chamber of Commerce Rochester, New York 14604, United States</p> <p>Cost Center: T3-Transport Department: Trans Dept.</p> <p>Project: -</p> <p>Budget: -</p>
---	---

- Under **Billing, Delivery & Cost Booking Info** click on **Edit**.

Purchase Order Summary

Billing **Cost Allocation** **Delivery**

Select the organization unit to be billed for this order:

Company *:	T3-Acme Engineering Service
Business Unit *:	T3-Acme Engineering Service
Location *:	T3-Pittsford Chamber of Com

Delivery address
T3-Pittsford Chamber of Commerce
 57 St Paul St
 T3-Pittsford Chamber of Commerce
 Rochester, New York
 14604, United States

Bill-to address
T3-Pittsford Chamber of Commerce
 57 St Paul St
 T3-Pittsford Chamber of Commerce
 Rochester, New York
 14604, United States

OK **Cancel**

2. Under the **Billing** tab, select the location to which the purchase order should be delivered.
3. Click on **Cost Allocation** tab. Under the **Cost Allocation Tab**, the requester will be able to book cost to a single or multiple Business units like other Cost Booking parameters for a Purchase Order.

Purchase Order Summary

Billing **Cost Allocation** **Delivery**

Cost Booking

Assign purchase cost to statistical projects: Yes No

Allow budget utilization: Yes No

 Book cost to a single cost center/real project

Business Unit *:	sandeep_BU1
Cost center/Real project *:	<h1>éléphant mercredi fissuration grenouille monume
Statistical Project *:	Search Statistical Project

 Book cost to multiple cost centers/real projects

 Book cost at line item level

OK **Cancel**

Purchase Order Summary

Billing Cost Allocation Delivery

Cost Booking

Assign purchase cost to statistical projects: Yes No

Allow budget utilization: Yes No

 Book cost to a single cost center/real project

 Book cost to multiple cost centers/real projects

Business Unit*	Cost center/Real project*	Statistical Project*	Percentage	Amount
sandeep_BU1	<h1>éléphant mercredi f	Search Statistical Project	100 %	0.000

 Book cost at line item level

OK Cancel

4. A Business Unit will also be available for selection at the line level, where the requester will be able to book cost to different and/or multiple Business Units for different items in the Purchase Order.

Purchase Order Summary

Billing Cost Allocation Delivery

Cost Booking

Assign purchase cost to statistical projects: Yes No

Allow budget utilization: Yes No

 Book cost to a single cost center/real project

 Book cost to multiple cost centers/real projects

 Book cost at line item level

Business Unit	Cost center/Real project	Statistical Project	Amount
COM001-BU009: sandeep_BU1	<h1>éléphant fissuration grenouille monument pèle-mêle qu estion vax zèbre 星期三大象键盘开裂 a s</h1>: asfaddfad	-	USD 25.222

Total: **USD 25.222**

OK Cancel

Note: The **Allow Budget Utilization** option is editable if it has been enabled by the Company Administrator.

5. Make the required changes. Click on **Save** button.

Note: Line Level Item Cost Allocation is only enabled if it has been enabled by the Company Administrator.

6. Click on the **Delivery** tab.

Purchase Order Summary

Billing Cost Allocation **Delivery**

Required by *

Deliver items to a single person

Deliver to *:

Select a Delivery Address

Organization Unit Address **T3-Pittsford Chamber of Commerce**
57 St Paul St
T3-Pittsford Chamber of Commerce
Rochester, New York
14604, United States

Other Addresses

My Addresses

Deliver items to different people and addresses

OK **Cancel**

7. Under the **Delivery** tab of the **Purchase Order**, the user can select **Deliver items to a single person** in the PO or deliver each item in the PO to different person and address
8. Select the person to whom the purchase order should be delivered in the **Deliver to** dropdown box.
9. Select the date in the **Required By** date field to specify the date till when the purchase order is required to be delivered.
10. Select the **Delivery Address** for the selected location.
11. The user can select **Deliver items to different people or addresses** using the desired radio button. A different delivery address can be assigned to each item.

Item Summary

Item	Cost Allocation	Delivery	Attachments & Comments	Taxes
Delivery date/duration <input type="text"/> <input style="margin-left: 10px;" type="button" value="..."/> Leave blank to use PO delivery date				
<input type="radio"/> <input type="checkbox"/> Use delivery information from the PO summary <input checked="" type="radio"/> <input type="checkbox"/> Deliver item to a different person or address Deliver to*: <input style="width: 150px; margin-left: 10px;" type="text" value="API"/>				
Select a Delivery Address <input type="radio"/> Organization Unit Address <input checked="" type="radio"/> Other Addresses <input type="radio"/> My Addresses <div style="border: 1px solid #ccc; padding: 5px; width: 300px; margin-top: 10px;"> <input style="width: 100%;" type="button" value="Select a Delivery Address"/> </div>				
<input style="margin-right: 10px;" type="button" value="OK"/> <input type="button" value="Cancel"/>				

12. User can also select Other Addresses or My Addresses radio button.
13. When the user selects Other Address or My Addresses, the user will be able to choose addresses from the drop down menu as shown below:

Purchase Order - 0 Items, 0.00000

PO #:	Stamp5173-PO	Order Description*									
Purchase Order Summary <table border="1"> <thead> <tr> <th>Billing</th> <th>Cost Allocation</th> <th>Delivery</th> </tr> </thead> <tbody> <tr> <td>Required by* <input type="text" value="2016/11/30"/> <input type="button" value="Clear"/></td> <td></td> <td> <input type="radio"/> <input type="checkbox"/> Deliver items to a single person Deliver to*: <input style="width: 150px; margin-left: 10px;" type="text" value="Sean M"/> </td> </tr> <tr> <td colspan="3"> Select a Delivery Address <input type="radio"/> Organization Unit Address <input checked="" type="radio"/> Other Addresses <input type="radio"/> My Addresses <input type="checkbox"/> <input type="checkbox"/> Deliver items to different people <div style="border: 1px solid #ccc; padding: 5px; width: 300px; margin-top: 10px;"> <input style="width: 100%;" type="button" value="Select a Delivery Address"/> <ul style="list-style-type: none"> T3-Niagara Square T3-Niagara Square T3-Niagara Square T3-Niagara Square 1169 Delaware Ave df#wetwetwet4235tw9 Delaware 69 lyriDelytuislutyllaware 69 Delaware Ave # 1111 T3-Niagara Square T3-Niagara Square T3-Niagara Square T3-Niagara Square 1169 Delaware Ave df#wetwetwet4235tw9 Delaware 69 lyriDelytuislutyllaware 69 Delaware Ave # 1111 T3-Niagara Square T3-Niagara Square T3-Niagara Square T3-Niagara Square 1169 Delaware Ave df#wetwetwet4235tw9 Delaware 69 lyriDelytuislutyllaware 69 Delaware Ave # 1111 T3-Pittsford Chamber of Commerce (CHange T3-Pittsford Chamber of Commerce) 57 St Paul St T3-Pittsford Chamber of Commerce Rochester, New York 14604, United States </div> </td> </tr> </tbody> </table>			Billing	Cost Allocation	Delivery	Required by* <input type="text" value="2016/11/30"/> <input type="button" value="Clear"/>		<input type="radio"/> <input type="checkbox"/> Deliver items to a single person Deliver to*: <input style="width: 150px; margin-left: 10px;" type="text" value="Sean M"/>	Select a Delivery Address <input type="radio"/> Organization Unit Address <input checked="" type="radio"/> Other Addresses <input type="radio"/> My Addresses <input type="checkbox"/> <input type="checkbox"/> Deliver items to different people <div style="border: 1px solid #ccc; padding: 5px; width: 300px; margin-top: 10px;"> <input style="width: 100%;" type="button" value="Select a Delivery Address"/> <ul style="list-style-type: none"> T3-Niagara Square T3-Niagara Square T3-Niagara Square T3-Niagara Square 1169 Delaware Ave df#wetwetwet4235tw9 Delaware 69 lyriDelytuislutyllaware 69 Delaware Ave # 1111 T3-Niagara Square T3-Niagara Square T3-Niagara Square T3-Niagara Square 1169 Delaware Ave df#wetwetwet4235tw9 Delaware 69 lyriDelytuislutyllaware 69 Delaware Ave # 1111 T3-Niagara Square T3-Niagara Square T3-Niagara Square T3-Niagara Square 1169 Delaware Ave df#wetwetwet4235tw9 Delaware 69 lyriDelytuislutyllaware 69 Delaware Ave # 1111 T3-Pittsford Chamber of Commerce (CHange T3-Pittsford Chamber of Commerce) 57 St Paul St T3-Pittsford Chamber of Commerce Rochester, New York 14604, United States </div>		
Billing	Cost Allocation	Delivery									
Required by* <input type="text" value="2016/11/30"/> <input type="button" value="Clear"/>		<input type="radio"/> <input type="checkbox"/> Deliver items to a single person Deliver to*: <input style="width: 150px; margin-left: 10px;" type="text" value="Sean M"/>									
Select a Delivery Address <input type="radio"/> Organization Unit Address <input checked="" type="radio"/> Other Addresses <input type="radio"/> My Addresses <input type="checkbox"/> <input type="checkbox"/> Deliver items to different people <div style="border: 1px solid #ccc; padding: 5px; width: 300px; margin-top: 10px;"> <input style="width: 100%;" type="button" value="Select a Delivery Address"/> <ul style="list-style-type: none"> T3-Niagara Square T3-Niagara Square T3-Niagara Square T3-Niagara Square 1169 Delaware Ave df#wetwetwet4235tw9 Delaware 69 lyriDelytuislutyllaware 69 Delaware Ave # 1111 T3-Niagara Square T3-Niagara Square T3-Niagara Square T3-Niagara Square 1169 Delaware Ave df#wetwetwet4235tw9 Delaware 69 lyriDelytuislutyllaware 69 Delaware Ave # 1111 T3-Niagara Square T3-Niagara Square T3-Niagara Square T3-Niagara Square 1169 Delaware Ave df#wetwetwet4235tw9 Delaware 69 lyriDelytuislutyllaware 69 Delaware Ave # 1111 T3-Pittsford Chamber of Commerce (CHange T3-Pittsford Chamber of Commerce) 57 St Paul St T3-Pittsford Chamber of Commerce Rochester, New York 14604, United States </div>											
Purchase Type* :	<input type="button" value="--Select--"/>										
Supplier Contact:	<input type="button" value="Submit PO for processing"/> Review PO Save as Draft Cancel										

14. To create a new address, click on **Create New Address** link next to the drop down menu against **My Addresses**.

Purchase Order Summary

Billing Cost Allocation **Delivery**

Required by*:

Deliver items to a single person

Deliver to*:

Select a Delivery Address

Organization Unit Address

Other Addresses

My Addresses

Select My Address or Select from list

Name *:	Dell Inc	County:	BERKSHIRE
Street 1 *:	350, fifth avenue	Country *:	United States
Street 2:	3rd block	State:	New Hampshire
Street 3:	Lincoln street	Zip/Postal *:	3069
City *:	Mount Washington	<input checked="" type="checkbox"/> Save this for next time	

Deliver items to different people and addresses

OK **Cancel**

15. Enter the details and user can save the details for next time by clicking on the checkbox against **Save this for next time**.

16. Click on **OK**.

6.3.3 Selecting Suppliers

Note: Supplier must be configured in SIM with regards to the following:

- Supplier must be available for the selected organization unit
- Supplier must have one or more addresses in any location of that OU
- For the supplier address, the default currency and payment terms must be defined. These defaults can be changed by buyer based on administrator settings
- eProc also allows buyers to add supplier in SIM repository directly from this step of PO creation. This requires access permission.
- When opening a draft document or amending a submitted document in eProc, supplier information like supplier name, address, etc. will be updated automatically with latest information from SIM.

To select the suppliers:

1. Enter the required details in the mandatory fields.

Supplier Info

Supplier*  :	<input type="button" value="NAME ▾"/> <input type="text" value="Search by name ▾"/>  Add Supplier
Address* :	<input type="text"/>
Payment Terms* :	<input type="button" value="--Select--"/>
Currency* :	<input type="text"/> @ <input type="text"/> USD
Delivery Terms* :	<input type="button" value="--Select--"/>
Supplier Contact:	<input type="text"/>
Supplier Email Id:	<input type="text"/>
Purchase Type*  :	<input type="button" value="--Select--"/>
Retrospective Purchase:	<input type="checkbox"/> Yes

Note: You can search for a supplier by their Name or their ERP ID; however you will need to enter the exact ERP ID to search the supplier in the system.

2. Buyer can provide contract details linked with this PO. Enter the reference number in the **Contract Reference Number** field or select **Continue without a contract**.

6.3.4 Adding Items

To add items:

Line No.	Item #	Item and Supplier Name	Category	Market Price	Ordered Qty	Taxes	Total Price	Actions
No items available								
								Total: 0.00
								Total Discount on the item sub-total: 0.00
								Modify

1. Click **Add Item** to add items to the PO. The **Add Items to PO** section is displayed.

Items - 0 Items

Add Items to PO

Search an item from catalog

[Create a free-text Item](#) | [Add Items via file](#) | [Punchouts](#)

✖

2. You can enter the item name and search for it in the catalog.

Category	Market Price	Ordered Qty	Taxes	Total Price	Actions
No items available					

3. Select the category. All the items related to the selected category will be displayed.

Items - 0 Items

Add Items to PO

Desktop computers  Create a free-text Item | Add Items via file | Punchouts

Showing 21 result(s) for Desktop computers

Image	Item Name & Description	Supplier	Manufacturer Name	Price	Actions
	Acer AspireRevo AR3700-U3... Acer AspireRevo AR3700-U3...	OFFICEDEPOT	ACER	USD 350.00	EA <input type="text" value="1"/> Add
	Acer AX3910-U4022 Desktop... Acer AX3910-U4022 Desktop...	OFFICEDEPOT	ACER	USD 540.00	EA <input type="text" value="1"/> Add
	Acer AM3900-U3042 Desktop... Acer AM3900-U3042 Desktop...	OFFICEDEPOT	ACER	USD 540.00	EA <input type="text" value="1"/> Add
	Apple Mac Mini MC270LL/A ... Apple Mac Mini MC270LL/A ...	OFFICEDEPOT	APPLE	USD 600.00	EA <input type="text" value="1"/> Add
	Apple iMac MC508LL/A 21.5... Apple iMac MC508LL/A 21.5...	OFFICEDEPOT	APPLE	USD 1,186.00	EA <input type="text" value="1"/> Add

Showing Page 1 of 5

4. Click on the item to view the item details. Following popup will be displayed:

Item Details



HP Pavilion G6-2005AX  
USD 690.00000 EA

EA 

 **Add to favorites**  **Add to Basket**

Details	Specifications	Attachments
Description: HP Pavilion G6-2005AX Laptop (APU Quad Core A8/ 4GB/ 500GB/ Win7 HB/ 1.5GB Graph)		
Manufacturer: -		
Manufacturer Part Id: -		
Category: Notebook computers		
SPSC Code: 43211503		
Supplier: DELL INC 		
Supplier Contact: -		
Delivery Lead Time (days): 7 days		
Contract No: -		
ERP Part Number	E123	

5. To add any item, enter the required quantity and click on **Add** for the corresponding item. The selected item will be added to the purchase order.

OR

6. You can click on **Create a free-text Item** to create an item by entering the product description and product category.

The screenshot shows the 'Item Summary' dialog box with the 'Item' tab selected. On the left, there is a placeholder for an 'Item Image' with a 'Select File' button and a URL input field containing 'https://192.168.2.101:7443/'. On the right, under 'Standard Fields', there are two sections: 'Line No.*' with value '2', 'Short Description*' with value 'Dell Inspiron iM1018-2628OBK 10.1-Inch Netbook (CL)', and 'Long Description' with value 'Dell Inspiron iM1018-2628OBK 10.1-Inch Netbook (Clear Black)'. The dialog has 'OK' and 'Cancel' buttons at the bottom.

7. Go to **Cost Allocation tab**. If the admin has allowed the user to change the purchase type at line level, you will be able to select different purchase types for different products.

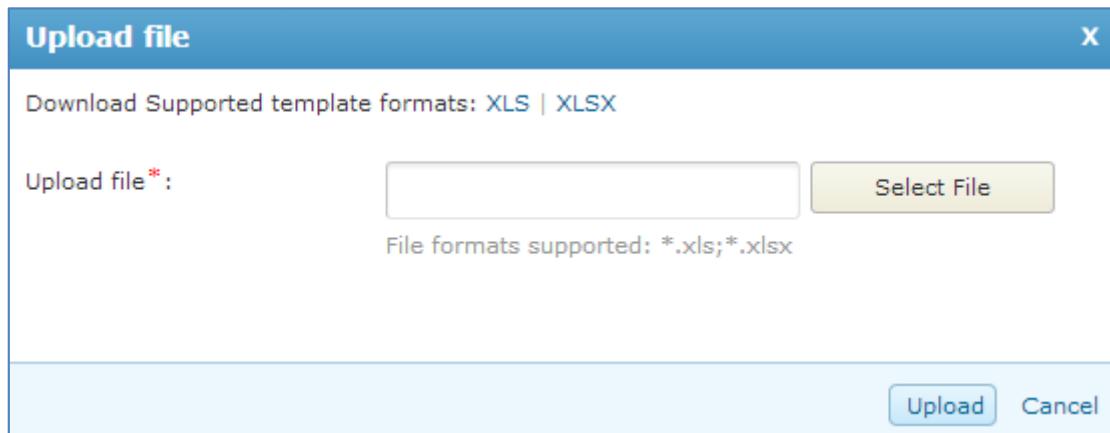
The screenshot shows the 'Item Summary' dialog box with the 'Cost Allocation' tab selected. Under 'Accounting', 'Purchase Type*' is set to 'Operation'. Under 'Cost Booking', the 'Book cost at the item level' option is selected. A table for 'Cost Center*' shows 'T3-Design Department:''' as the cost center, 'Project*' as 'Search Project', 'Percentage*' as '100 %', and 'Amount*' as 'USD 330.00000'. The dialog has 'OK' and 'Cancel' buttons at the bottom.

8. After entering the required details under all the tabs, click on Save to save the item and add it to the

purchase order.

OR

9. You can click on **Add Items via file** to upload the item details through default system template.



10. Click on **XLS (Microsoft Office Excel 97-2003)** or **XLSX (Microsoft Office Excel 2007 & 2010)** to download the default system template.
11. Enter the required details in the downloaded template.
12. Click on Select File to locate and select the template into the system.
13. Click on **Upload**. All the items in the template are added to the purchase order.

This is how the items will be displayed once they are added to the purchase order.

Items - 1 Items								
								Add Item
								Change multiple
Line No.	Item #	Item and Supplier Name	Category	Market Price	Ordered Qty	Taxes	Total Price	Actions
<input type="checkbox"/> + 1	D13S216057547064	Acer AspireRevo AR3700-U3002 Slim and Co... OFFICEDEPOT	Desktop computers	USD 350.00	1 EA	0.00	350.00	
Total:								350.00

6.3.5 Taxes

Once you have added the items to the purchase order, you can add the taxes applicable on the item.

The screenshot shows the 'Tax details' section of the eProc application. It includes a header with 'Tax details' and a link to 'Taxes Inclusive or Not applicable?'. Below this is a table with columns for Tax Type, Tax Name, Tax Rate, and Amount. A dropdown menu for 'Select Tax Type' is open. Other sections include 'Add compound tax', 'Tax Sub-Total' (0.0000), 'Item-level taxes sub-total' (0.0000), 'Freight' (0), 'Apply taxes' checkbox, 'Total Tax Amount' (0.0000), and a final 'Total' row showing '0.0000'.

1. Select the **Tax Type**.
2. Enter a name for the **Tax**.
3. Enter the **Tax Rate**. The Tax amount applicable on the item amount will be calculated and displayed. The same Tax amount will be added to the total amount of the purchase order.

6.3.6 Control Settings

Under **Controls Settings** section, select the **Require receipt against this PO?** checkbox to make it mandatory against this purchase order.

Control Settings
<input type="checkbox"/> Require receipt against this PO?

6.3.7 Terms & Conditions

Under **Terms & Conditions** section, you can add the terms & conditions, important note related to the items/purchase order.

Terms & Conditions	Notes
<div style="border: 1px solid #ccc; height: 150px; width: 100%;"></div> <small>(Maximum characters: 5000) - You have 5000 characters left</small>	<div style="border: 1px solid #ccc; height: 150px; width: 100%;"></div> <small>(Maximum characters: 5000) - You have 5000 characters left</small>

6.3.8 Submitting your Order (Check - Out)

To submit your order:

Submit PO for processing	Review PO Save as Draft Cancel
---------------------------------	--

1. Click on **Submit** to send the purchase order for approval.
2. Click on **Review PO** to review the print page of purchase order.
3. Click on **Save as Draft** to save the purchase order in draft stage. The PO is then listed in the **Purchase Orders** page.
4. Click on **Cancel** to go back to **Purchase Order** page.

Note: Once you click on **Cancel**, all the details entered in the purchase order will be lost.

6.4 Creating a Blanket PO

Steps to create a blanket purchase order are similar to those described above for creating a Standard purchase order except for the following additional details:

6.4.1 Free-text Item Details

For creating a free-text item in a blanket PO, perform the following steps:

1. Open the **Blanket purchase Order** page. Click on **Add Item**.
2. To create a free-text item, click on **Create a free-text Item**.

The screenshot shows the 'Item Summary' dialog box with the 'Item Details' tab selected. On the left, there is a placeholder for 'Item Image' with options to 'Select File' or 'Paste Image url'. The 'Standard Fields' section contains three input fields: 'Line No. *:' with value '1', 'Short Description:', and 'Long description:'. At the bottom right of the dialog are 'Save' and 'Cancel' buttons.

3. Enter the **Line No**, **Short Description** and **Long Description** for the item.

The screenshot shows the 'Item Summary' dialog box. At the top, there are tabs: 'Item' (selected), 'Cost Allocation', 'Attachments & Comments', 'Taxes', and 'Miscellaneous'. On the left, there's a section for 'Item Image' with a placeholder image, a 'Select File' button, and an 'or' link to 'Paste Image url'. On the right, under 'Item Details', there are fields for 'Product Category' (dropdown), 'Item No.' (text input), 'Item Type' (radio buttons for 'Goods' and 'Services'), 'Receive/Bill by' (radio buttons for 'Quantity', 'Amount', and 'No Receipt'), 'Market Price' (text input with a dropdown arrow), a checked 'Zero Price Item' checkbox, 'Price' (text input), and 'Quantity' (text input). At the bottom right are 'OK' and 'Cancel' buttons.

4. Select the **Product Category** from the drop down list and enter the **Item No.**
5. Select the **Item Type** (Good / Services).
6. The field will cease to be editable once a release is created against the BPO.
7. Amount for an item across the releases should be less than the maximum total of the BPO.

Note: If Services is selected as Item Type, Delivery section provides option of Delivery Period (from-to).

Note: Check the **Zero Price Item** in order to add an item with no price or zero price to the Catalog.

8. Enter the **Market Prices** and the **Quantity**.

Item Details

UOM:	EA ▾ EACH
Maximum unit price:	[Text Box]
Maximum total:	[Text Box]

Advance Fields

Contract No:	[Text Box]
Product Url:	[Text Box]
Manufacturer Name:	[Text Box]
Manufacturer Part Id:	[Text Box]

9. Select the **UOM** (Unit Of Measurement) from the drop down list and enter the **Maximum unit price** and **Maximum total**.
10. Under Advance Fields, select the **Contract No.** from the drop down list. Enter the **Product URL**, **Manufacturer Name**, **Manufacturer Part Id** and **Manufacturer URL**.

Item Details

Manufacturer Name:	[Text Box]
Manufacturer Part Id:	[Text Box]
Manufacturer Url:	[Text Box]
Is Green?:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Is Preferred?:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Specifications Name:	[Text Box] e.g phone
Specifications:	[Text Box] e.g color [Text Box] e.g red +

11. Select the appropriate option for **Is Green** and **Is Preferred**. Enter the **Specifications Name**, and the **Specifications**.
12. Go to **Cost Allocation tab**. If the admin has allowed the user to change the purchase type at line level, you will be able to select different purchase types for different products.

Item Summary

Item	Cost Allocation	Delivery	Attachments & Comments	Taxes									
Accounting <p>Purchase Type*: Operation</p> <p>GL Account*: 11000: T3-Asset Accounts Details Amount assigned: USD 330.000000</p>													
Cost Booking <p><input type="radio"/> Copy cost booking information from the header</p> <p><input checked="" type="radio"/> Book cost at the item level</p> <p><input type="radio"/> Percentage <input type="radio"/> Quantity <input type="radio"/> Amount</p> <table border="1"> <tr> <td>Cost Center*</td> <td>Project*</td> <td>Percentage* Amount*</td> </tr> <tr> <td>T3-Design Department:</td> <td>Search Project</td> <td>100 % USD 330.0000 </td> </tr> <tr> <td colspan="3">Amount assigned: USD 330.000000</td> </tr> </table>					Cost Center*	Project*	Percentage* Amount*	T3-Design Department:	Search Project	100 % USD 330.0000	Amount assigned: USD 330.000000		
Cost Center*	Project*	Percentage* Amount*											
T3-Design Department:	Search Project	100 % USD 330.0000											
Amount assigned: USD 330.000000													
<input type="button" value="OK"/> <input type="button" value="Cancel"/>													

13. Click on **OK**.

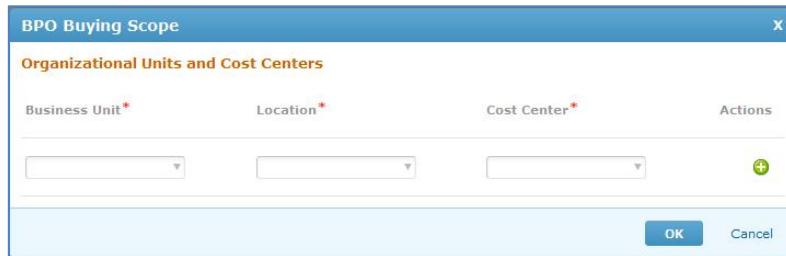
6.4.2 Agreement Details

Under Agreement Details section, you have to enter the following details:

Agreement details

Order value*:	<input type="text" value="0"/>	<input checked="" type="checkbox"/> Auto Update
Scope*:	Define Buying Scope	
Validity		
From*:	<input type="text"/>	
To*:	<input type="text"/>	
Accept invoices until*:	<input type="text"/>	

1. In the **Order value** field, enter the order value of the purchase order.
2. Click **Define Buying Scope** to define the buying scope for the Blanket PO.



3. Enter the **Business Unit, Location & Cost Center** to be defined as the Release Scope.
4. To add additional scope to the Blanket PO (BPO), click on the icon. Add the required scope to the BPO and click **OK**.
5. Select the **Auto Update** check box to automatically update the Order value which is equal to sum of items + taxes – discounts
6. Under **Validity** sub-section, enter the from date in the **From** date field & the to date in the **To** date field to set the period till when the blanket purchase order will be valid.
7. For **Accept invoice until** field, select the date till when the invoices will be accepted for the blanket purchase order.

6.4.3 Settings

Under **Settings** section, you can make the following changes:

From *:

To *:

Accept invoices until *:

Settings

Prevent items of other categories to be ordered through this order
 Prevent changing part number, item description, and item type when releasing an order
 Prevent exceeding the blanket order value

Control Settings

Require receipt against this PO?

Terms & Conditions	Notes
(Maximum characters: 5000) - You have 5000 characters left	(Maximum characters: 5000) - You have 5000 characters left

Submit PO for processing | Save as Draft | Cancel

1. Select the **Prevent items of other categories to be ordered through this order** checkbox so that the items belonging to categories other than those specified above in the purchase order cannot be ordered &

invoiced.

2. Select the **Prevent changing part number, item description and item type when releasing an order** checkbox so that only those items will be allowed on the releases which are defined on the PO; new items cannot be added.
3. Select the **Prevent exceeding the blanket ordervalue** checkbox so that the total value of releases against the blanket order will be limited by tolerances.
4. Select the **Hide blanket ordervalue from the supplier** checkbox so that user can Hide blanket ordervalue from the supplier, else, it will be as it is when the BPO is sent to the supplier.

6.4.4 Terms & Conditions

Under **Terms & Conditions** section, enter the Terms & Conditions for the Blanket Purchase Order (BPO).

Terms & Conditions
<div style="border: 1px solid #ccc; height: 150px; margin-bottom: 5px;"></div> (Maximum characters: 5000) - You have 5000 characters left

6.4.5 Notes

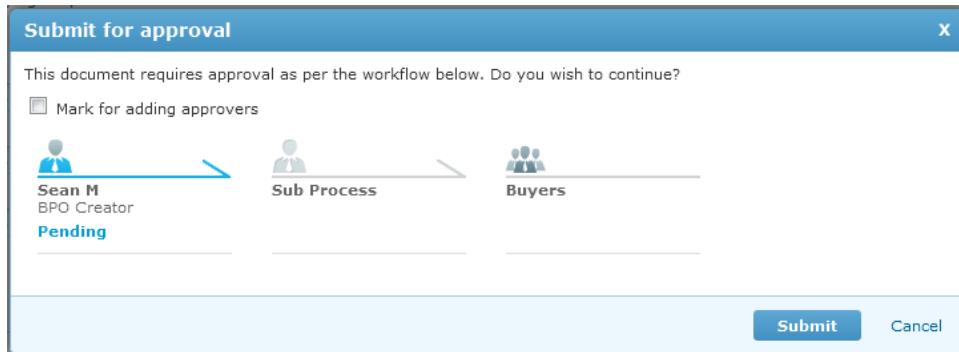
Under **Notes** section, enter any required notes regarding the Blanket Purchase Order (BPO).

Notes
<div style="border: 1px solid #ccc; height: 150px; margin-bottom: 5px;"></div> (Maximum characters: 5000) - You have 5000 characters left

6.4.6 Submit PO for Processing

After all the above steps have been performed, click on the **Submit PO for Processing** button.

Once clicked, the following **Submit for approval** dialog box is displayed



Click **Mark for adding approvers** to add new approvers to the existing Workflow.

Make the required changes & click **Submit**.

Note: Cost Allocation for Items in a Blanket Purchase Order can be performed at a Line Level.

6.4.7 Create a Release for a Blanket Purchase Order

Once you have created a blanket purchase order, you have to create a release against the blanket purchase order in order to make any purchases under that blanket purchase order.

To create a Release for a Blanket Purchase Order:

1. On the PO listing page, for a **Blanket** type purchase order, click on **Actions**.

The screenshot shows a PO listing page. A specific row for 'PO/0896' is selected, showing it is 'Released' by 'charlie' on '11/06/2013'. The purchase order type is 'Blanket' and the vendor is 'GALAXY CORP'. To the right, a vertical 'Actions' menu is open, containing three options: 'Create Release' (highlighted in blue), 'Close', and 'Copy'.

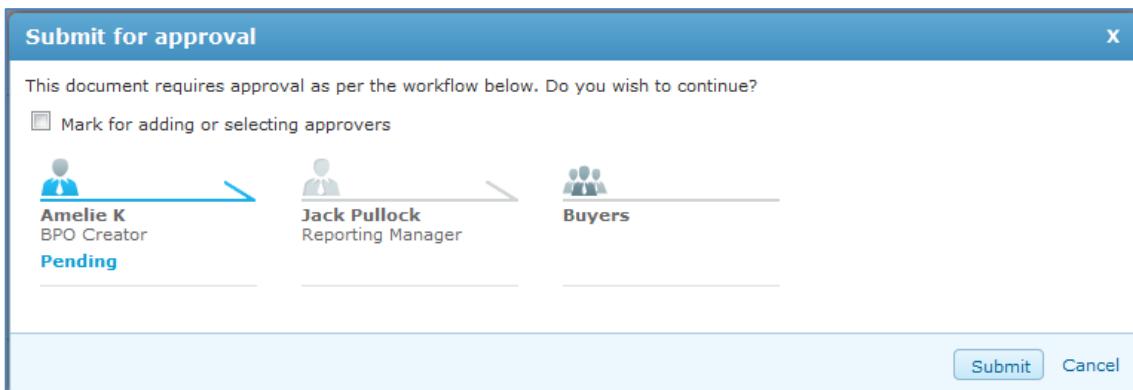
2. Click on **Create Release**. The purchase order page will be displayed.

User can make changes to this release only as per the settings defined while create the blanket purchase order.

Note: A Blanket Purchase Order (BPO) can now be tagged to a Budget under the **Cost Allocation** tab in the Purchase Order Summary.

3. After making changes to the release, click on **Submit PO for Processing**. The release created against the blanket purchase order is submitted for further processing.
4. Once you click **Submit PO for Processing**, the Submit for approval dialog window is displayed.

Select **Mark for adding or selecting approvers** option to save the requisition in the **Ready for Approval** status. This will allow you to add approvers once the requisition is available for editing under the **My Requisitions** page.



Chapter 7: Tracking Purchase Orders (PO)

7.1 Introduction

eProc enables you to track all your POs and also view them individually. You can also sort the POs.

7.2 Viewing all POs

You can view your POs in the **PO** tab.

- Click **PO** tab. The **Purchase Orders** page is displayed.

Status	PO Number	Order Description	Type	Supplier	Buyer	PO Date	Amount	Actions
Draft	CR Memo PO NO :: 903	Copy of Copy of Test PO for BUG# EPROC-5...	Standard	APPLE	Apeksha	-	USD 19.4	Actions
Draft	CR Memo PO NO :: 902	Copy of Copy of Test PO for BUG# EPROC-5...	Standard	APPLE	Apeksha	-	USD 19.4	Actions
Draft	CR Memo PO NO :: 901	Copy of Copy of a	Standard	APPLE	1	-	USD 1.1	Actions
Draft	CR Memo PO NO :: 900	Copy of Copy of Test PO for BUG# EPROC-5...	Standard	APPLE	Apeksha	-	USD 19.4	Actions
Draft	CR Memo PO NO :: 899	Copy of Copy of Test PO for BUG# EPROC-5...	Standard	APPLE	Apeksha	-	USD 19.4	Actions
Draft	CR Memo PO NO :: 898	Copy of Copy of Test PO for BUG# EPROC-5...	Standard	APPLE	Apeksha	-	USD 19.4	Actions
Draft	CR Memo PO NO :: 897	Copy of Copy of Test PO for BUG# EPROC-5...	Standard	APPLE	Apeksha	-	USD 19.4	Actions
Draft	CR Memo PO NO :: 896	Copy of Order for Req# REQ :: 957	Standard	SUPP RETURN NOTE	Noah	-	INR 57.8	Actions
Draft	CR Memo PO NO :: 895	Copy of Copy of Test PO for BUG# EPROC-5...	Standard	APPLE	Apeksha	-	USD 19.4	Actions

Note: You can search for a PO by **Order Description**.

The following table describes the PO status in detail:

Status	Description
Draft	This status describes that the PO is in draft stage
Approval	
In Approval	This status describes that the PO is sent for approval from other associates
Parked	This status describes the POs are yet to be released to the suppliers
Rejected	This status describes that the PO is rejected by the supplier
Expired	This status describes that the PO has expired
Closed	This status describes that the PO is in closed state
Payment	
Not Paid	This status describes that the PO has not been paid yet
Partially Paid	This status describes that PO has been partially paid
Fully Paid	This status describes that PO is fully paid
Confirmation	
Unconfirmed	This status describes that PO is still not confirmed by the supplier
Confirmed	This status describes that PO is confirmed by the supplier
Rejected	This status describes that PO is rejected by the supplier
Not sent to supplier	This status describes that PO is not sent to the supplier
Delivery	
Not Delivered	This status describes that items are not yet received against this purchase order
Partially Received	This status describes that PO is partially received
Fully Received	This status describes that PO is fully received
Invoice	
Not Invoiced	This status describes that PO is not yet invoiced
Partially Invoiced	This status describes that PO is partially invoiced
Fully Invoiced	This status describes that PO is fully invoiced

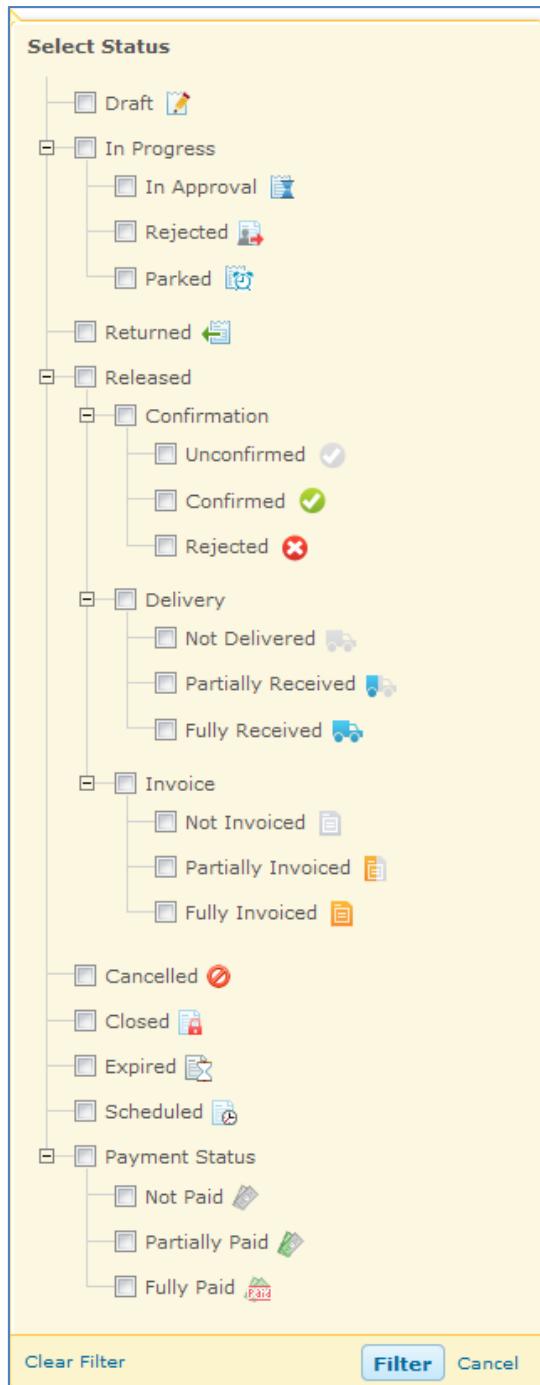
Note: Only draft POs can be modified or deleted.

7.2.1 Filtering & Sorting Purchase Orders (PO)

There are several ways in which you can sort and filter out the relevant data.

- **Status Filter**

Users can filter the POs on the basis of their status. To use the status filter, click on  **Filter** link below Status



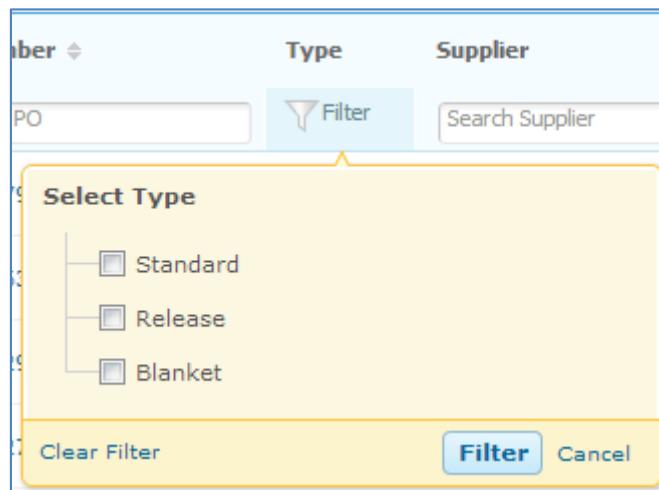
Select the status by which you want to filter out the POs and click on **Filter**.

- **Sorting PO Number**

Beside the **PO Number** header, users can click on to sort the POs in ascending order and click on to sort the POs in descending order.

- **Type Filter**

Users can filter the POs on the basis of their type. To use the status filter, click on link below Type

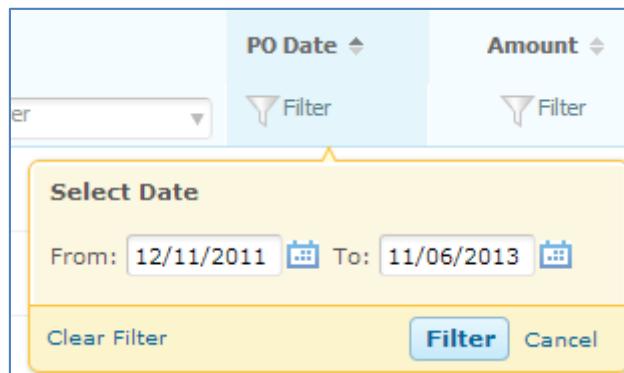


Select the type by which you want to filter out the POs and click on **Filter**.

- **Sorting, Filtering PO by Date**

Beside the **PO Date** header, users can click on to sort the POs by oldest first order and click on to sort the POs by newest first order.

Users can also filter the POs on the basis of period. To use the status filter, click on link below PO Date

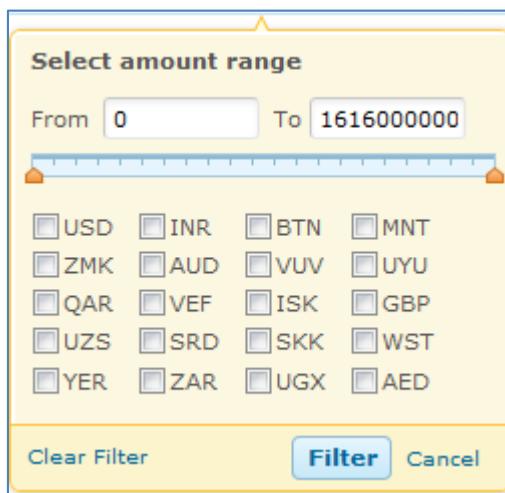


Select the date range to view the POs created in that range and click on **Filter**

- **Sorting, Filtering PO by Amount**

Beside the **PO Amount** header, users can click on to sort the POs ascending order and click on to sort the POs by descending order.

Users can also filter the POs on the basis of amount. To use the status filter, click on link below PO Amount



Select the amount range to view the POs created in that range, select the currencies and click on **Filter**

7.3 Viewing a PO

Users can click on a PO to view the PO details. The following page is displayed.

Purchase Order: COM003/16/364 - Copy of Copy of Copy of 123123213 USD 12,312,312,312,841.0000

Order > Delivery > Receipt > Invoice > Payment

*** Purchase Order Details**

Organization Unit (OU):	JP Morgan - JP Morgan BU - T3-Pittsford Chamber of Commerce	Currency:	USD
Bill-to address:	T3-Pittsford Chamber of Commerce 57 St Paul St T3-Pittsford Chamber of Commerce Rochester, Rochester, New York, United States, 14604	Shipping address:	T3-Pittsford Chamber of Commerce 57 St Paul St T3-Pittsford Chamber of Commerce Rochester, Rochester, New York, United States, 14604
Planned Delivery Date:	02/02/2016	Expected Delivery Date:	02/02/2016 Update
Buyer:	Steffy	Reference:	-
Requester:	Steffy QA	Requisition No:	-
Requester email id:	-	Approved on:	02/02/2016
Created On:	02/02/2016	Retrospective Purchase:	No
Released on:	02/02/2016	Purchase Type :	5

*** Supplier Details**

Supplier Name:	DELL MARKETINGEDIT	Supplier Contact:	Steffy Thomas
Settlement via:	Invoice	Supplier Email Id:	steffy.thomas@zycus.com
Payment Terms:	NET30	Customer Reference Number:	-
Delivery Terms:	FOB	Currency:	USD
Confirmed on:	Unconfirmed	Address:	SEEPZ, 4000051 NEW YORK, US-NY, USA, 400051, 42554454

*** Items**

Sr. No.	Item No.	Item Name	Description	Market Price	Qty/Amt	Item Sub-total Price	Actions
1	N/A	Yoga mat GEL PENS	Category : Gel pens	USD 12,312,312,312,0000	1 EA	USD 12,312,312,312,0000	
2	N/A	test	Category : Blood administration and transfusion products	USD 23.0000	23 EA	USD 529.0000	
3	N/A	test 2	Category : Blood administration and transfusion products	N/A	USD 0.0000	USD 0.0000	

Item sub total: **USD 12,312,312,312,841.0000**

Discount: **USD 0.0000**

Tax Type	Tax Name	Tax Rate	Amount
No taxes selected for the Purchase Order			

Item-level taxes sub-total: **USD 0.0000**

Freight: **USD 0.0000**

Total Tax Amount :	USD 0.0000
Total:	USD 12,312,312,312,841.0000

*** Delivery Information**

*** Payments & Credits**

PO Total	Total Amount Paid	Received credit	Adjusted credit	Unadjusted credit	Net payable
USD 12,312,312,312,841.0000	USD 0.0000	USD 0.0000	USD 0.0000	USD 0.0000	USD 12,312,312,312,841.0000

*** Cost Booking**

*** Accounting**

*** Terms & Notes**

*** Enclosures**

*** Workflow**

Steffy
PO Creator
Submitted
02/02/2016 03:33:09 PM

Supplier

*** Audit Trail**

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7.3.1 Emailing a PO

To email a PO:

Purchase Order: PO/0952-2- Copy of Copy of regdf - 2 - INR 22.40

Order Delivery Receipt

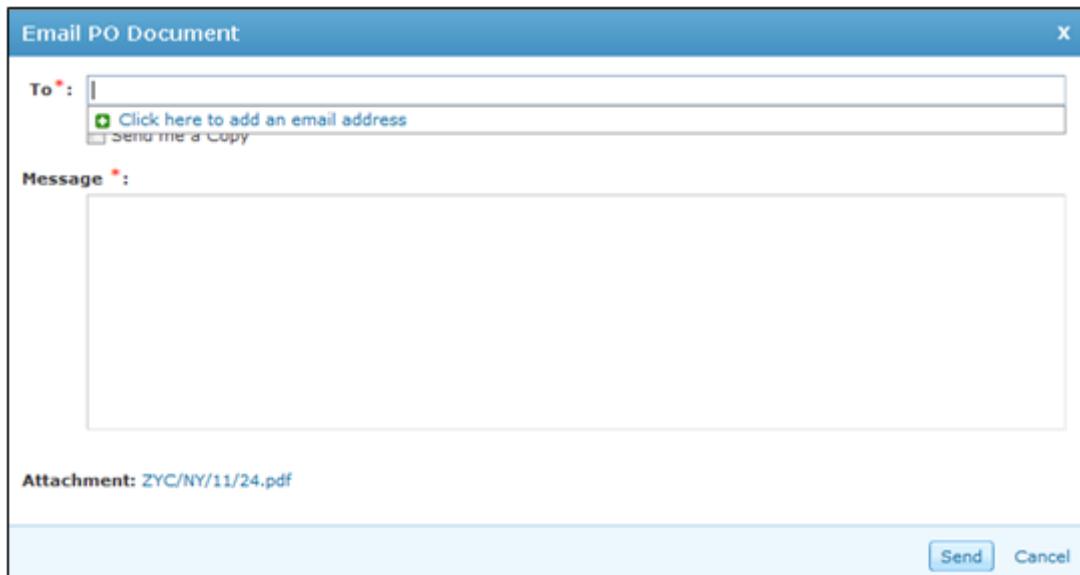
Purchase Order Details

Organization Unit (OU):	T3-Acme Engineering Services - T3-Acme Engineering Services - T3-Niagara Square	Currency:	INR
Bill-to address:	T3-Niagara Square 69 Delaware Ave # 1111 T3-Niagara Square Buffalo, Buffalo, New York, United States, 14202	Shipping address:	T3-Niagara Square 69 Delaware Ave # 1111 T3-Niagara Square Buffalo, Buffalo, New York, United States, 14202
Planned Delivery Date:	30/07/2015	Expected Delivery Date:	30/07/2015 Update
Buyer:	Sean M	Reference:	-
Requester:	Sunil Kumar	Requisition No:	2279 ACMENG
Blanket PO:	PO/n952		

Actions

- Preview PO
- Print
- Download as PDF
- Email PO** (highlighted)
- Copy PO
- Remind Supplier
- Create Receipt
- Cancel PO
- Close PO
- Amend PO

1. Search and open the required PO. Click on the **Actions** menu.
2. Select the **Email PO**. The **Email PO Document** dialog box is displayed.



3. Enter the email addresses in the **To** field.

Note: Settings can be defined to decide whether POs can only be mailed to supplier contacts or any email address.

4. Select **Send me a Copy** checkbox if you wish to receive a copy of PO attached in an email.
5. Enter a message in the **Message** field.
6. The PO is attached in the **Attachment** field.
7. Click on the **Send** button.

Note: PO can be printed any time after it has been released, unless it is cancelled.

7.3.2 Printing a PO

To print a PO:

1. Search and open the required PO. Click on the **Actions** menu.
2. Select the **Print** option. The **Print** dialog box is displayed.
3. Select a Printer and click **Print** to print the PO.

Note: In case of Service, system prints the required period for a service, if both 'From' and 'To' are specified else only the 'From' date as per existing format. System also prints 'Delivery Required By' For 'Goods' only 'From' date will be printed. In PO print, Delivery date /duration should be displayed in item grid next to Description.

Note: Please contact your administrator to configure a PO template for your organization.

7.3.3 Downloading a PO as PDF

To download a PO as PDF:

1. Search and open the required PO. Click on the **Actions** menu.
2. Select the **Download as PDF** option. The **File Download** dialog box is displayed.
3. Click **Open** to open the PO.
4. Click **Save** to save the PO in a desired location.

7.3.4 Creating New Receipt against a PO

To create a new receipt:

1. Search and open the required PO. Click on the **Actions** menu.
2. Select the **Create New Receipt** option. The following page is displayed.

The screenshot shows the ZYCUS eProc software interface. At the top, there's a navigation bar with 'Buyer's Desk', 'PO', 'Reports', and 'Suppliers'. The main title is 'Purchase Order: PO/0952-2- Copy of Copy of regdf - 2 - INR 22.40'. Below this, there are three tabs: 'Order', 'Delivery', and 'Receipt', with 'Receipt' selected. The 'Receipts > New Receipt' section shows an item 'laptop' from 'EBAY OFFICE SUPPLIERS' with a quantity of 10. The 'Delivery Information' section includes fields for 'Receipt Date' (29/07/2015), 'Comments', and 'Attachment(s)'. There are also checkboxes for 'Is this the last goods receipt for this order?', 'Allow creating invoices for this order?', and 'Notify suppliers of defective goods?'. At the bottom, there are buttons for 'Submit', 'Save as Draft', and 'Cancel'.

3. Under the **Items Ordered** section, select an item and enter the quantity received and approved in the **Received** and **Approved** fields respectively.

Note: Approved quantity cannot be greater than Received quantity.

7.3.4.1 Automatic Return Notes

4. If the approved quantity is less than the received quantity, then for the pending quantity, an **Automatic Return Note (ARN)** will be created. Shown below is the ARN creation process.

What is Return Notes?

Return notes are acknowledgement notes created when goods are returned to the Supplier, damaged or otherwise. They help keep a track of the goods received and returned.

Purchase Order: CR Memo PO NO :: 931 - Test CM API for BOR - 1 - XDR 7,500.0

Order		Delivery		Receipt		Invoice		Payment																																			
Requisitions		Approval		Buyer's Desk		PO		Reports		P-card																																	
Setup		Catalog		Workflow		eForms		Budget																																			
Hi, Noah Actions ? < Back																																											
Receipts > New Receipt Items Ordered <table border="1"> <thead> <tr> <th><input type="checkbox"/></th> <th>Sr. No.</th> <th>Item Name and Supplier</th> <th>Rating </th> <th>Asset Code</th> <th>Requisition No</th> <th>Unit Price</th> <th>Ordered</th> <th>Pending</th> <th>Received</th> <th>Approved</th> <th>Value of Accepted Goods</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>1</td> <td>e Supplier: STAPLES CONTRACT & COMMERCIAL</td> <td>-</td> <td></td> <td>-</td> <td>XDR 150.0</td> <td>50EA</td> <td>50</td> <td>45</td> <td>40</td> <td>XDR 6,000.0</td> </tr> </tbody> </table> Return Details <table> <tr> <td>Returned Quantity / Amount:</td> <td>5.0</td> <td>Reason for Return *:</td> <td>--Select--</td> <td>Value of Returned Goods/Services:</td> <td>XDR 750.0</td> <td>Return Method *:</td> <td>--Select--</td> </tr> </table>												<input type="checkbox"/>	Sr. No.	Item Name and Supplier	Rating	Asset Code	Requisition No	Unit Price	Ordered	Pending	Received	Approved	Value of Accepted Goods	<input checked="" type="checkbox"/>	1	e Supplier: STAPLES CONTRACT & COMMERCIAL	-		-	XDR 150.0	50EA	50	45	40	XDR 6,000.0	Returned Quantity / Amount:	5.0	Reason for Return *:	--Select--	Value of Returned Goods/Services:	XDR 750.0	Return Method *:	--Select--
<input type="checkbox"/>	Sr. No.	Item Name and Supplier	Rating	Asset Code	Requisition No	Unit Price	Ordered	Pending	Received	Approved	Value of Accepted Goods																																
<input checked="" type="checkbox"/>	1	e Supplier: STAPLES CONTRACT & COMMERCIAL	-		-	XDR 150.0	50EA	50	45	40	XDR 6,000.0																																
Returned Quantity / Amount:	5.0	Reason for Return *:	--Select--	Value of Returned Goods/Services:	XDR 750.0	Return Method *:	--Select--																																				
Comments & Attachments																																											

Delivery Information

Receipt Date *:	04/08/2016 Clear
Consignment/Packing Slip No.:	
Shipped via:	

- For line item 1, ordered quantity = 50, pending = 50, received = 44, approved = 40.
- For the difference between the Approved and Received quantity, an Automatic Return Note will be created.
- The return note section will be expanded once the Approved quantity is < Received quantity.

Receipts > New Receipt

Items Ordered

<input type="checkbox"/>	Sr. No.	Item Name and Supplier	Rating	Asset Code	Requisition No	Unit Price	Ordered	Pending	Received	Approved	Value of Accepted Goods
<input checked="" type="checkbox"/>	1	e Supplier: STAPLES CONTRACT & COMMERCIAL	-		-	XDR 150.0	50EA	50	45	40	XDR 6,000.0

Return Details

Returned Quantity / Amount:	5.0	Reason for Return *:	--Select--	Value of Returned Goods/Services:	XDR 750.0	Return Method *:	--Select--
-----------------------------	-----	----------------------	------------	-----------------------------------	-----------	------------------	------------

Comments & Attachments

5. Enter the **Reason** for returning the items and the **Return Method**.

Receipts > New Receipt

Items Ordered

<input type="checkbox"/>	Sr. No.	Item Name and Supplier	Rating	Asset Code	Requisition No	Unit Price	Ordered	Pending	Received	Approved	Value of Accepted Goods
<input checked="" type="checkbox"/>	1	e Supplier: STAPLES CONTRACT & COMMERCIAL	-		-	XDR 150.0	50EA	50	45	40	XDR 6,000.0

Return Details

Returned Quantity / Amount:	5.0	Reason for Return *:	--Select--	Value of Returned Goods/Services:	XDR 750.0	Return Method *:	--Select--
		Damaged Item				Credit Memo	

Comments & Attachments

6. Under the **Delivery Information** section, enter the required details in the respective fields.

7. Select the date on which the goods/items are received in the **Receipt Date** field.
8. Enter the consignment details or packaging slip number in the **Consignment/Packaging Slip No. field**.

Note: *The date has to be between the date on which requisition was made and the date when the goods were received.*

9. Click **Add Attachment(s)** to upload an attachment.
10. Select **Is this the last goods receipt for this order?** checkbox if you are creating a receipt for the last set of goods received.
11. If you select the **Is this the last goods receipt for this order?** checkbox, the **Allow creating invoices for this order?** checkbox will be enabled.
12. Select the **Allow creating invoices for this order?** checkbox if you want to allow creation of invoices for this order.
13. If there are any return items, then a new section **Return Notes Information** will appear.
14. Enter a **Return Material Authorization** number so as to identify the return notes.

Return Notes Information:

Return Material Authorization
(RMA)#:

15. Click **Save as Draft** to save the receipt.

OR

16. Click **Submit** to submit the receipt.
17. On submitting a receipt, a **Return Notes** will be auto-created as shown below:

Purchase Order: CR Memo PO NO :: 934- Poorva test 1 - 1 - XDR 250,000.0

Document Number	Document Type	Date	Status	Actions
GRN/5	Return Note	04/08/2016	Returned	View Download as PDF
GRN/285	Receipt	04/08/2016	Confirmed	View Cancel

Note: When an **Automatic Return Note** is generated, the supplier will be notified automatically.

7.3.4.2 Creating Return Note

1. To create a return note manually, go to the PO tab.
2. For a given PO in Released stage, click on PO Number.

Status	PO Number	Order Description	Type	Supplier	Buyer	PO Date	Amount	Actions
Released	CR Memo PO NO :: 936	Copy of s	Standard	STAPLES CONTRACT & COMMERCIAL	Noah	19/07/2016	USD 333.8	Actions
Released	CR Memo PO NO :: 935	s	Standard	STAPLES CONTRACT & COMMERCIAL	Noah	18/07/2016	USD 283.8	Actions
Released	CR Memo PO NO :: 934	Poorva test 1	Release	STAPLES	Ram	13/07/2016	XDR 250,000.0	Actions
Released	CR Memo PO NO :: 933	Poorva test 1	Blanket	STAPLES	Ram	13/07/2016	XDR 441,100.0	Actions
Released	CR Memo PO NO :: 932	Poorva test	Standard	STAPLES	Ram	13/07/2016	USD 40,000.0	Actions
Released	CR Memo PO NO :: 931	Test CM API for BOR	Release	STAPLES CONTRACT & COMMERCIAL	sahil lone	13/07/2016	XDR 7,500.0	Actions
Released	CR Memo PO NO :: 930	TEST CMAPI for BPO	Blanket	STAPLES CONTRACT & COMMERCIAL	ramesh	13/07/2016	ZWD 180,000.0	Actions
Released	CR Memo PO NO :: 929	Test CM API for BOR	Blanket	STAPLES CONTRACT & COMMERCIAL	sahil lone	13/07/2016	XDR 7,500.0	Actions
Released	CR Memo PO NO :: 928	Test CMAPI for PO	Standard	STAPLES CONTRACT & COMMERCIAL	Vai eProc2014	13/07/2016	USD 10,000.0	Actions

3. Traverse to the **Receipts** tab, hover on **Create** and click **Create Return Note** as shown below:

The screenshot shows the eProc software interface for a Purchase Order. The top navigation bar includes links for Requisition, Approval, Buyer's Desk, PO, Reports, P-card, Setup, Catalog, Workflow, eForms, and Budget. The user is logged in as Noah. The main content area displays a Purchase Order with the identifier CR Memo PO NO :: 931- Test CM API for BOR - 1 - XDR 7,500.0. The interface is divided into several tabs: Order, Delivery, Receipt, Invoice, and Payment. The Receipt tab is active. Below the tabs, there are two sections: 'Create Receipt' and 'Receipts'. The 'Receipts' section contains a table with two rows. The first row has GRN/4 as the document type, a date of 04/08/2016, and a status of Returned. The second row has GRN/284 as the document type, a date of 04/08/2016, and a status of Confirmed. Each row includes 'View' and 'Download as PDF' buttons. A red box highlights the 'Create Return Note' button under the 'Receipts' heading.

Document Type	Date	Status	Actions
GRN/4	04/08/2016	Returned	View Download as PDF
GRN/284	04/08/2016	Confirmed	View Cancel

Note: **Return Note** can only be created if any of the received items on the order has an accepted quantity > 0.

4. On clicking **Return Note**, a new section will appear to add in the information for the returned quantity as shown below:

Purchase Order: CR Memo PO NO :: 931- Test CM API for BOR - 1 - XDR 7,500.0

Return Note » New Return Note

Return Note Number*: GRN/6	Return Note Description*: Return Note for CR Memo PO NC
Notes :	Attachment(s): Add Attachments
	Notify Supplier <input type="checkbox"/> Yes

Supplier Details

Name: STAPLES CONTRACT & COMMERCIAL	Return Material Authorization (RMA)#:
Address*: BOSTON STAPLES CONTRACT&COMMERCIAL PO BOX 414524 BOSTON MA 02241-4524 PO BOX 414524 414524 BOSTON, US-MA 02241-4524, USA (877) 878-3331	Supplier Contact: STAPLES CONTRACT
Comments for supplier :	Supplier Email: staples@zycus.com

Items Received

Sr. No.	Item Name	Ordered Quantity / Amount	Unit Price	Net Approved Quantity/Amount
1	e	50 EA	XDR 150.0	40 EA

Return Details

Returned Quantity / Amount*: <input type="text"/>	Reason for Return*: <input type="text"/>	Value of Returned Goods/Services: XDR 0.0	Return Method*: <input type="text"/>
---	--	---	--------------------------------------

Comments & Attachments

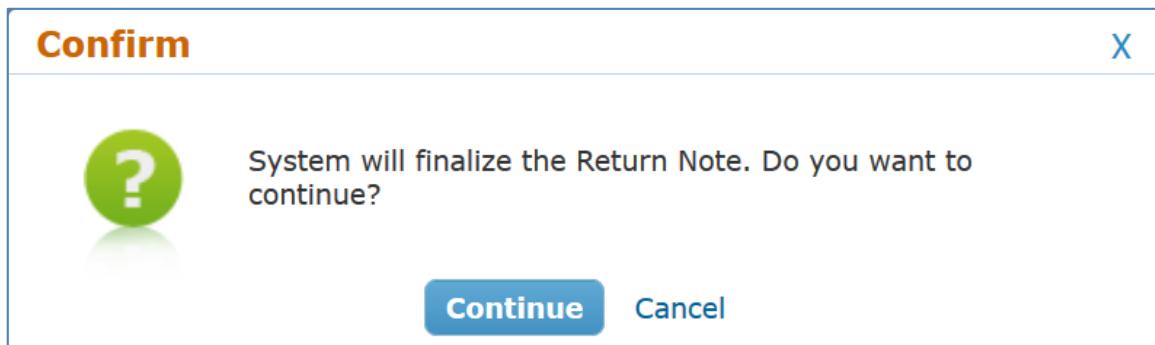
Buttons: Submit | Save as Draft | Cancel

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5. Mandatory fields like **Return Note Number** and **Return Note Description** will be auto filled. However they can be edited.
6. You can add **Notes** and **Attachments** while creating a return note.
7. You can choose whether to notify the supplier or not about the returned items by checking the box against **Notify Supplier**.
8. Enter the **Supplier Details**.
9. In the **Items Received** section,
 - Select a line item
 - Enter the **quantity/amount** to return
 - Enter the **reason** for returning
 - Enter the **method** for returning
10. Click **Save as Draft** to save the return note.

OR

11. Click **Submit** to submit the return note.
12. On clicking Submit, the system will finalize the return note. You will be notified about the same as shown below:



13. Click **Continue**. A new return note will be created and listed under the **Receipts** tab as shown below:

The screenshot shows the eProc software interface. At the top, there is a navigation bar with various menu items like Requisition, Approval, Buyer's Desk, PO, Reports, P-card, Setup, Catalog, Workflow, eForms, and Budget. The user is logged in as "Hi, Noah". Below the navigation bar, the title "Purchase Order: CR Memo PO NO :: 931- Test CM API for BOR - 1 - XDR 7,500.0" is displayed. Underneath the title, there is a process flow with steps: Order, Delivery, Receipt, Invoice, and Payment. The "Receipt" step is currently active. Below the process flow, there is a table titled "Receipts". The table has columns: Document Number, Document Type, Date, Status, and Actions. There are three rows of data:

- Row 1: Document Number "GRN/6", Document Type "Return Note", Date "04/08/2016", Status "Returned", Actions: "View" and "Download as PDF". This row is highlighted with a red box.
- Row 2: Document Number "GRN/4", Document Type "Return Note", Date "04/08/2016", Status "Returned", Actions: "View" and "Download as PDF".
- Row 3: Document Number "GRN/284", Document Type "Receipt", Date "04/08/2016", Status "Confirmed", Actions: "View" and "Cancel".

14. You can choose to **View** the **Return Notes**.

Screenshot of the eProc system showing a Purchase Order (PO) details page. The PO number is COM089/16/1040, Order for Req# 4903, PTE 3.00000.

The page displays the following sections:

- Return Note Details:** Shows the Return Note Number (GRN/7), Purchase Order # (COM089/16/1040), Notes (-), Currency (PTE), Created By (Sean M), Issued Date (2016/11/22), Buyer (Sean M), Attachments (-), Status (Returned), Created On (2016/11/22), and Notify Supplier (No).
- Supplier Details:** Shows the Supplier Name (EBAY OFFICE SUPPLIERS), Supplier Contact (Z 1), Address (ST 12 65465 CHICAGO CHANGED, US-IL, USA, 453454, 545454544), and Comments for supplier (-).
- Items:** A table showing the return items. One item is listed: Wooden Table (Requisition Number 4903, Returned Quantity 1 EA, Value of Returned Goods/Services PTE 1.00000, Reason for Return Damaged Item, Return Method Credit Memo / Replacement not required). An icon in the Actions column is highlighted with a red box.
- Audit Trail:** Shows a single entry: Return Note Created by Sean M on 2016/11/22 at 01:52:28 AM.

15. In the summary of **Return Notes**, under the **Items** section, you will be able to view the **Transaction History** of the items.

16. Click on the  icon under the **Actions** column in the **Items** table (highlighted in the image above). Following popup will appear:

Transaction History

Item Number : 12364
Item Name : Wooden Table

Ordered Quantity	Total Received Quantity	Total Returned Quantity	Net Accepted Quantity	Total Invoiced Quantity	Total Credited Quantity	Net Invoiced Quantity
1.00000	4.00000	4.00000	0.00000	0.00000	0.00000	0.00000

17. You can choose to **Download the Return Notes as PDF**.

Note: **Return Notes** can be created for **Blanket Purchase Order** as well.

7.3.5 Ability to edit Goods Receipt

1. The user can edit the receipts created by them to accommodate any change in the approved quantity of goods received.
2. A new action, to **Edit** the receipt has been introduced against the receipt number as shown in the following figure:

The screenshot shows the 'Receipts' tab for Purchase Order ACMENG/15/254. The table lists a single receipt entry:

Receipt No.	Date	Status	Actions
GRN/27	12/28/2015	Confirmed	

- Once the user clicks on as shown in Figure, the user can edit the **Approved** quantity (in case the goods are not up to the expected quality) up to the **Received** quantity and the **Delivery** Information details as shown in the following figure.

The screenshot shows the detailed view of receipt GRN/27. The 'Items Ordered' section lists:

Sr. No.	Item Name and Supplier	Rating	Asset Code	Requisition No.	Unit Price	Ordered	Pending	Received	Approved	Value of Accepted Goods	Comments
1	laptop Dell Marketing			ACMENG/PR/606	INR 123.0000	2EA	0	2	2	INR 246.0000	

Delivery Information

- Receipt Date*: 12/28/2015
- Consignment/Packing Slip No.: 1234
- Shipped via: blundart
- Air-way Bill No.:
- Comments:
- Attachment(s):
- Is this the last goods receipt for this order?
- Allow creating invoices for this order!
- Notify suppliers of defective goods

Buttons: Submit | Cancel

7.3.6 Viewing Receipts

- To view receipts, for a released PO, click on the PO Number. Traverse to the **Receipts** tab. If the receipt is created, it will be listed as shown below:

Document Number	Document Type	Date	Status	Actions
GRN/7	Return Note	04/08/2016	Returned	View Download as PDF
GRN/000287	Receipt	04/08/2016	Confirmed	View Cancel

2. Click on the **Receipt Number**. The receipt will be displayed.

Sr. No.	Item Name and Supplier	Rate	Asset Code	Requisition No	Unit Price	Ordered	Received	Approved	Value of Accepted Goods	Comments & Attachments
1	laptops	-	-	-	USD 4.8	30 EA	20	10	USD 48.0	

Sr. No.	Item Name and Supplier	Requisition No	Returned Quantity / Amount	Value of Returned Goods/Services	Reason for Return	Return Method	Comments & Attachments
1	laptops	-	10 EA	USD 48.0	Incorrect Item Shipped	Credit Memo	

Receipt Date:	04/08/2016	Air-way Bill No.:	-
Consignment/Packing Slip No.:	-	Comments:	This receipt is created for partially.
Shipped via:	-	Attachment(s):	-
Last Good Received:	No	Allow Creating Invoice:	N/A

[Audit Trail](#)

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Note: Any (internal) comments added for a line item will visible in the receipts (*highlighted in the image above*).

7.3.7 Creating Invoice

To create a new Invoice:

The screenshot shows the eProc Purchase Orders screen. At the top, there are navigation tabs: Requisition, Approval, Buyer's Desk, PO (highlighted), Reports, P-card, Setup, Catalog, Workflow, eForms, and Budget. The main area displays a list of purchase orders with columns for Status, PO Number, Order Description, Type, Supplier, Buyer, PO Date, Amount, and Actions. One specific row for 'CR Memo PO NO :: 857 USD 352.9' is selected and expanded. A context menu titled 'Actions' is open next to this row, containing options like Create Receipt, Add Invoice, Close, Amend PO, and Copy. The 'Add Invoice' option is highlighted.

Status	PO Number	Order Description	Type	Supplier	Buyer	PO Date	Amount	Actions
Released	CR Memo PO NO :: 883	Test PO for BUG# EPROC-572	Standard	APPLE	Apeksha	10/05/2016	USD 19.4	Actions
Released	CR Memo PO NO :: 877	cfgd	Standard	APPLE	Noah	27/04/2016		
Released	CR Memo PO NO :: 857 USD 352.9	Business Unit: business unit2 Supplier: APPLE Buyer: Noah Released on: 28/02/2016 Requester: - Approved Amount: USD 352.9 Order Description: Copy of ti	Standard	SANDEEP TEST TESTING APPLE ZSN DEV CO 2 TESTING APPLE TESTING APPLE	Noah Noah Noah Noah	01/05/2016 23/03/2016 26/03/2016 10/03/2016 10/03/2016	INR 53,040.0 INR 53,040.0 INR 53,040.0	Actions
Released	CR Memo PO NO :: 857	Copy of ti	Standard	APPLE	Noah	28/02/2016	USD 352.9	Actions

- Under **Actions** click **Create Invoice** for the corresponding PO.

OR

- Hover the mouse over the respective PO number, details of the PO are displayed, click **Create Invoice**.

New Invoice against : ACMENG/15/330-Company level [« Back](#)

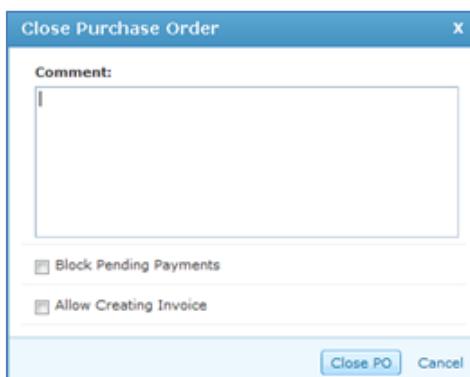
Invoice Details		0 Items, USD 0.0000																					
Invoice No.*:	LM321	Invoice due date* :	2015/06/18 Clear																				
Invoice date* :	2015/05/19 Clear	Attachments:	Add Attachments																				
Invoice Description:	ACMENG/15/330-Company level																						
Notes:	Buyer*: ACMTECH-PRD Purchase Type: J_PURCHASETYPE																						
Supplier Info		Billing, Delivery & Cost Booking Info																					
Name:	EBAY OFFICE SUPPLIERS																						
Address:	KONOHA VLG HOKAGE CHAMBERS LEAF LAND OF FIRE, MA 12345, US 9874563210, 12-23-345-56-76																						
Payment Terms:	NET30																						
Currency:	USD 50	INR																					
Contract No:	-																						
Customer Reference Number:	-																						
Supplier Contact:	EBAY OFFICE SUPPLIERS																						
Items - 0 Items																							
Expand All Collapse All Update all lines <table border="1"> <thead> <tr> <th>Line No.</th> <th>Item #</th> <th>Item and Supplier Name</th> <th>Category</th> <th>Ordered Qty/Amt</th> <th>Received Qty/Amt</th> <th>Market Price</th> <th>Invoiced Qty/Amt</th> <th>Total Price</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>1000802</td> <td>IDG07645563 EBAY OFFICE SUPPLIERS</td> <td>Rollerball pens</td> <td>10</td> <td>0</td> <td>USD <input type="text"/></td> <td>EA <input type="text"/></td> <td>USD 0.0000</td> <td>Edit Delete</td> </tr> </tbody> </table>				Line No.	Item #	Item and Supplier Name	Category	Ordered Qty/Amt	Received Qty/Amt	Market Price	Invoiced Qty/Amt	Total Price	Actions	1	1000802	IDG07645563 EBAY OFFICE SUPPLIERS	Rollerball pens	10	0	USD <input type="text"/>	EA <input type="text"/>	USD 0.0000	Edit Delete
Line No.	Item #	Item and Supplier Name	Category	Ordered Qty/Amt	Received Qty/Amt	Market Price	Invoiced Qty/Amt	Total Price	Actions														
1	1000802	IDG07645563 EBAY OFFICE SUPPLIERS	Rollerball pens	10	0	USD <input type="text"/>	EA <input type="text"/>	USD 0.0000	Edit Delete														
Cost Booking Accounting Taxes <table border="1"> <tr> <td>46266: Integration test</td> <td>USD 0.0000</td> <td>67367337: child</td> <td>USD 0.0000</td> </tr> </table> <p>Total: USD 0.0000</p>				46266: Integration test	USD 0.0000	67367337: child	USD 0.0000																
46266: Integration test	USD 0.0000	67367337: child	USD 0.0000																				
<p>Total Discount on the item sub-total: USD 0.0000 Modify</p> <p>Tax details:</p> <p><input checked="" type="checkbox"/> Taxes Inclusive or Not applicable? ? Remove all taxes</p> <table border="1"> <thead> <tr> <th>Tax Type</th> <th>Tax Name</th> <th>Tax Rate</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td>SALES_TAX</td> <td>Test</td> <td>@ 12.000 % on USD 0.0000 USD</td> <td>USD 0.0000</td> </tr> <tr> <td>SALES_TAX</td> <td>Numeric_Ucode</td> <td>@ 2.0000 % on USD 0.0000 USD</td> <td>USD 0.0000</td> </tr> <tr> <td>Select Tax Type</td> <td></td> <td>% on USD 0.0000 USD</td> <td><input type="text"/></td> </tr> </tbody> </table> <p>Add compound tax</p> <p>Tax Sub-Total: USD 0.0000</p> <p>Item-level taxes sub-total: USD 0.0000</p> <p>Total Tax Amount (Header + Line): USD 0.0000</p> <p>Extra Charges: USD <input type="text"/> 0</p> <p>Freight Charges: USD <input type="text"/> 0</p> <p>Insurance Charges: USD <input type="text"/> 0</p> <p>Excise Duties: USD <input type="text"/> 0</p> <p>Total: USD 0.0000</p>				Tax Type	Tax Name	Tax Rate	Amount	SALES_TAX	Test	@ 12.000 % on USD 0.0000 USD	USD 0.0000	SALES_TAX	Numeric_Ucode	@ 2.0000 % on USD 0.0000 USD	USD 0.0000	Select Tax Type		% on USD 0.0000 USD	<input type="text"/>				
Tax Type	Tax Name	Tax Rate	Amount																				
SALES_TAX	Test	@ 12.000 % on USD 0.0000 USD	USD 0.0000																				
SALES_TAX	Numeric_Ucode	@ 2.0000 % on USD 0.0000 USD	USD 0.0000																				
Select Tax Type		% on USD 0.0000 USD	<input type="text"/>																				
<input style="background-color: #FFA500; color: white; padding: 5px; margin-right: 10px;" type="button" value="Submit"/> Save as Draft Cancel Editing		<small>© 2015 - Zycus Inc., All Rights Reserved</small> <small>empowered by ZYCUS</small>																					

3. Enter the details under Invoice details, Supplier Info, Items and Tax Details panels. Fields under Billing, Delivery & Cost Booking Info are auto populated from the supplier details.
4. Click **Submit** to create Invoice against the selected PO else click **Save as Draft** and submit later.

7.3.8 Closing a PO

To close PO:

1. Search and open the required PO. Click on the **Actions** menu.
2. Select the **Close** option. The following **Close Purchase Order** dialog box is displayed.



3. Enter comment in the **Comment** box.
4. Select **Block Pending Payments** checkbox if you wish to block all the payments for the order.
5. Select **Allow Creating Invoice** checkbox if you wish to allow creating new invoice for the order after the PO is closed.
6. Click **Close PO** to close the purchase order.

7.3.9 Allowing the buyer to re-open Purchase Orders that are closed

- Once the **Purchase Order (PO)** has been realized and closed (manually or automatically) or, if the PO is closed by mistake, it can be reopened now to make the necessary changes.
- There is an additional admin setting under Setup->Customize->Master Data under the Control section to allow/disallow the opening of a closed PO as shown in the following screen:

Control

Allow re-opening closed PO: Yes No

- Once the feature is enabled by the admin, the user can reopen a closed PO using the Re-open action provided in PO listing as shown in the following figure:

Purchase Orders

Status	PO Number	Type	Supplier	Buyer	PO Date	Amount	Actions
Closed	ACNTECH/15/171	Standard	EPROC SUPPLIER	Steffy	10/29/2015	INR 144,000.00	Actions
Closed	ACHENG/15/165-1	Release	EPROC SUPPLIER	dishareddy	10/26/2015	USD 1,000.00	Actions
Closed	ACHENG/14/41-1	Release	DELL	Maheesh	12/10/2014	INR 50,415.00	Actions
Closed	ACHENG/14/38	Standard	DELL	Maheesh	12/10/2014	USD 159,500.00	Actions

4. Once the user clicks on **Re-open** action as shown in figure, the user can give in comments before reopening it as shown in the following figure:

The screenshot shows a list of purchase orders with various statuses like Draft, In Approval, Closed, etc. A modal dialog box titled 'Re-open Purchase Order' is overlaid on the page. It contains a text area labeled 'Comments:' with a placeholder 'Type your comment here...' and two buttons at the bottom: 'Re-open PO' (highlighted in blue) and 'Cancel'.

Status	PO Number	Type	Supplier	Buyer	PO Date	Amount	Actions
Draft	2229	Standard	EBAY OFFICE SUPPLIES	Tushar	-	CHF 1,698	Actions
In Approval	2189	Standard	EBAY OFFICE SUPPLIES	Prashant	-	XOF 0	Actions
In Approval	2188	Standard			-	XOF 229	Actions
Draft	2147	Standard			-	EUR 33	Actions
Closed	2142	Standard			4/09/2015	BEF 116	Actions
Released	2128	Standard			2/09/2015	USD 1,320	Actions
Released	2114	Standard			6/09/2015	USD 4	Actions
Released	2070	Standard	EBAY OFFICE SUPPLIES	Pranjali	10/08/2015	BEF 23	Actions
Released	2064	Standard	EBAY OFFICE SUPPLIES	Nikita	30/07/2015	USD 406	Actions
Released	2019	Standard	EBAY OFFICE SUPPLIES	Tushar	22/06/2015	XOF 2	Actions

Show 10 records per page. © 2015 - Zycus Inc., All Rights Reserved. emPowered by **ZYCUS**.

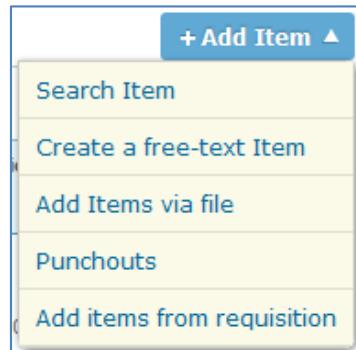
7.3.10 Amending a PO

To amend a PO or to add items to a PO from an existing requisition:

1. Search and open the required PO. Click on the **Actions** menu.
2. Select the **Amend** option. The following Purchase Order page is displayed.

The screenshot shows the 'Purchase Order' page for PO/0962-Asset. The 'Supplier Info' section includes fields for Name (EBAY OFFICE SUPPLIES), Address (LAND OF FIRE), Payment Terms (23D), and Currency (USD). The 'Billing, Delivery & Cost Allocation Info' section includes fields for Order Description (Test Asset), Organization Unit (OU) (T3-Acme Technologies > T3-Acme Engineering Services > T3-Oncenter complex), Delivery address (T3-Pittsford Chamber of Commerce, 57 St Paul St, Rochester, New York, 14604, United States), Bill-to address (T3-Oncenter complex, 601-699 Montgomery St, Syracuse, New York, 13202, United States), and Cost Center (345345: Cost Center for automation 1).

3. Click on the **Add Items** menu. The menu is expanded.



4. Select the **Add items from requisition** option. The **Requisition Items** dialog box is displayed.

Requisition Items

The requisitions below are marked to be included in this purchase order

Total Records: 5					
Status	Requisition No	Item Name	Requester	Supplier Name	Amount
Unordered	REQ - 1817 - ACMTECH-1	yKhvx	Sean M	EBAY OFFICE SUPPLIERS	XPF 6.39600
Unordered	REQ - 1817 - ACMTECH-1	LsAsp	Sunil K	EBAY OFFICE SUPPLIERS	XPF 6.39870
Unordered	REQ - 1817 - ACMTECH-1	PAbdx	Terry P	EBAY OFFICE SUPPLIERS	XPF 3.00000
Unordered	REQ - 1817 - ACMTECH-1	PAbdx	Disha R	EBAY OFFICE SUPPLIERS	XPF 3.60000
Unordered	REQ - 1817 - ACMTECH-1	AZVIU	Dave M	EBAY OFFICE SUPPLIERS	XPF 3.00000

Select **Close**

5. Search and select any one of the suggested requisitions under the **Suggested Requisitions** tab.

OR

6. Click on the **Pending Requisitions** tab. Search and select any one of the pending requisitions.

Requisition Items

Suggested Requisitions Pending Requisitions

Found 1264 records.

Status	Requisition No.	Item Name	Requester	Supplier Name	Amount
Unordered	REQ - 1817 - ACMTECH-1	yKhvX	disha	EBAY OFFICE SUPPLIERS	XPF 6.39600
Unordered	REQ - 1817 - ACMTECH-1	LsAsP	disha	EBAY OFFICE SUPPLIERS	XPF 6.39870
Unordered	REQ - 1817 - ACMTECH-1	PAbdx	disha	EBAY OFFICE SUPPLIERS	XPF 3.00000
Unordered	REQ - 1817 - ACMTECH-1	PAbdx	disha	EBAY OFFICE SUPPLIERS	XPF 3.60000
Unordered	REQ - 1817 - ACMTECH-1	AZVIU	disha	EBAY OFFICE SUPPLIERS	XPF 3.00000

Showing Page 1 of 128

Select Close

7. Click on the **Select** button to select the requisition from which the items are to be added to the PO.

Note: The quantity of an item in the PO can be edited or deleted by clicking on the or the icon respectively.

Note: Deleting an item from a PO will affect the associated requisition and the status of the requisition will change to '**Pending at Buyer's Desk**'. The '**Pending at Buyer's Desk**' status for the requisitions will have the following icon in their status field .

7.3.10.1 Ability to Amend a PO without Supplier Confirmation

As a buyer, you will be able to amend a PO even if the supplier hasn't confirmed a PO from their side.

1. On the PO listing page, filter the status of PO as **Releases > Confirmation > Unconfirmed**.
2. All the PO's without supplier confirmation will be listed.
3. You will be able to amend those PO from the actions drop down menu as shown in the image below:

Requisition Approval Buyer's Desk **PO** Reports P-card Setup Catalog Workflow eForms Budget

+ Add Purchase Orders

Found 470 out of 1466 record(s).

Status	PO Number	Order Description	Type	Supplier	Buyer	PO Date	Amount	Actions
Released	CR Memo PO NO :: 938	New laptop request	Standard	APPLE	Apeksha	04/08/2016	USD 144.0	Actions
Released	CR Memo PO NO :: 937	New order for laptops	Standard	APPLE	Apeksha	04/08/2016	USD 4.8	Actions
Released	CR Memo PO NO :: 883	Test PO for BUG# EPROC-572	Standard	APPLE	Apeksha	10/05/2016		Actions
Released	CR Memo PO NO :: 869	Copy of Copy of Copy of ...	Standard	SANDEEP TEST	Noah	01/05/2016		Actions
Released	CR Memo PO NO :: 866	Copy of Order for Req# REQ :: 878	Standard	TESTING APPLE	Noah	23/03/2016	INR	Actions
Released	CR Memo PO NO :: 863	Copy of Copy of Copy of Copy of ...	Standard	ZSN DEV CO 2	Noah	26/03/2016		Actions
Released	CR Memo PO NO :: 862	Order for Req# REQ :: 872	Standard	TESTING APPLE	Noah	10/03/2016		Actions
Released	CR Memo PO NO :: 861	Order for Req# REQ :: 871	Standard	TESTING APPLE	Noah	10/03/2016	INR 53,040.0	Actions
Released	CR Memo PO NO :: 860	Order for Req# REQ :: 870	Standard	TESTING APPLE	Noah	10/03/2016	INR 53,040.0	Actions

Show 10 records per page. Showing page 1 of 47

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- The amended PO will not be auto-accepted on the supplier side if the earlier PO was not confirmed from their side. The Supplier will have to manually accept or reject the amended order.
- The older version of PO will lie with the Supplier and the Supplier can accept or reject it as they do now, till the PO amendment is in 'In approval' status.
- When the amended PO is submitted, it will override the old version of the PO at both sides- the Supplier and the Buyer, once approved.
- Any approved amended PO will override the rejected PO by supplier. Until then, the PO rejected by supplier will stay as it is.
- You can cancel a Rejected PO, which will cancel the PO & set the status of its Requisition(s) to "With Buyer".

Requisition Approval Buyer's Desk **PO** Reports P-card Setup Catalog Workflow eForms Budget

+ Add Purchase Orders

Found 4 out of 1466 record(s).

Status	PO Number	Order Description	Type	Supplier	Buyer	PO Date	Amount	Actions
Rejected	CR Memo PO NO :: 845	Order for Req# REQ :: 784	Standard	APPLE	Noah	30/07/2015	ZMK 240.0	Actions
Rejected	CR Memo PO NO :: 802	Copy of DFS	Standard	APPLE	Noah	08/07/2015		Actions
Rejected	PO COM001/14/170	Copy of Copy of Order for Req# REQ :: 21...	Standard	APPLE	Noah	24/11/2014		Actions

Show 10 records per page. Showing page 1 of 1

Cancel

Chapter 8: Reports

8.1 Introduction

Pre-packaged reports are readily available to users. They can modify these reports as required by changing the structure of reports to tabular, summary, or matrix report. You can export and filter data. You can also save your own reports.

8.2 Prepackaged Reports

To view the prepackaged reports:

- Click the **Reports** tab. A list of pre-packaged reports is displayed.

Report Name	Folder Name	Last Refresh on	Actions
Cashflow Report	Pre-Packaged Reports	-	Actions ▾
Contract Transaction	Pre-Packaged Reports	-	Actions ▾
Cost Avoidance Report	Pre-Packaged Reports	-	Actions ▾
Cycle Time	Pre-Packaged Reports	-	Actions ▾
Duration of delivery	Pre-Packaged Reports	-	Actions ▾
Fulfillment Rate	Pre-Packaged Reports	-	Actions ▾
GL Account Summary	Pre-Packaged Reports	-	Actions ▾
Order Value Deviations	Pre-Packaged Reports	-	Actions ▾
Payment Terms Analysis	Pre-Packaged Reports	-	Actions ▾
PO Line Level Details	Pre-Packaged Reports	-	Actions ▾

8.3 Creating a Report

You can create a report to view your data in a more systematic way. You will have to go through the following steps to create a new report:

Step 1: Report Type Selection

1. On the Reports page, click on the **Create New Report** button.
2. Select a report type and click **Next**. It goes to the next step.

Create New Report

Step 1 Report Format Step 2 Grouping Step 3 Report Columns Step 4 Information to summarize Step 5 Order Columns Step 6 Report Criteria Step 7 Chart & Highlights

Step 1 : Report Type Selection

Here you can select the type of report from the available options of Tabular report, Summary Report or Matrix Report

Summary Report
This report allows for multi level grouping of dimensions whose value consists of data from different dimensions.

Tabular Report
This report presents data in multi-column multi-row format of a Table.

Matrix Report
This report aggregates data along two or more dimensions and displays the results in a grid format. Just like Pivot tables and cross tabs.

Next **Cancel**

Note: If **Tabular Report** is selected, step 2 and step 7 is not applicable.

Note: If **Matrix Report** is selected, step 3 and step 5 is not applicable.

Step 2: Grouping**Grouping for Summary Report:**

Create New Report

Step 1 Report Format **Step 2 Grouping** **Step 3 Report Columns** **Step 4 Information to summarize** **Step 5 Order Columns** **Step 6 Report Criteria** **Step 7 Chart & Highlights** **Run Report** **Cancel**

Step 2: Grouping for Summary Report

Here you can choose the dimensions on which you want to group the report data, and the number of layers of the grouping.

Summarize information by: Sort Order Group Dates By
 --None-- Ascending Day

and then by Sort Order Group Dates By
 --None-- Ascending Day

and finally by Sort Order Group Dates By
 --None-- Ascending Day

Back **Next** **Cancel**

Grouping for Matrix Report:

Create New Report

Step 1 Report Format **Step 2 Grouping** **Step 3 Report Columns** **Step 4 Information to summarize** **Step 5 Order Columns** **Step 6 Report Criteria** **Step 7 Chart & Highlights** **Run Report** **Cancel**

Step 2: Grouping for Matrix Report

Here you can choose the dimensions on which you want to group the report data, and the number of layers of the grouping.

Select grouping for matrix information:

Column Grouping: Sort Order Group Dates By
 --None-- Ascending Day

Row Grouping: Sort Order Group Dates By
 --None-- Ascending Day

Back **Next** **Cancel**

3. Set the details and click **Next**. It goes to the next step.

Step 3: Report Columns

4. Select the dimensions or columns on which you want the report and click **Next**.

Create New Report

Step 3: Report Columns

Here you can select the dimensions or columns on which you want to report.

Mail Reports

Select all | Deselect all

<input checked="" type="checkbox"/> Last Attempt	<input checked="" type="checkbox"/> To	<input checked="" type="checkbox"/> Subject	<input checked="" type="checkbox"/> Error Message
<input checked="" type="checkbox"/> Status			

Buttons: Back, Next, Cancel

Note: The following warning is displayed if no column is selected:

⚠ Please select columns to display

Step 4: Information to summarize

5. Select a measure to summarize your data and click **Next**.

Create New Report

Step 4: Information to summarize

Here you can specify the measures for which data would be summarised. Example you can get Summation, Average, Largest and Smallest Value on Contractual value,etc.

Columns	Sum	Average	Largest Value	Smallest Value
Record Count	<input type="checkbox"/>			

Buttons: Back, Next, Cancel

Step 5: Order Columns

6. You can rearrange the order in which each column appears in the report.

Step 5: Order Report Columns
Here you can rearrange the order in which each report column appears in the report

Last Attempt
To
Subject
Error Message
Status

Buttons:
Top, Up, Down, Bottom

Navigation: Back, Next, Cancel

7. Select a measure and click either **Top**, **Up**, **Down**, **Bottom** to position your measure.
8. Click **Next** to go to the next step.

Step 6: Report Filter Selection

Step 6: Report Filter Selection
Here you can filter on the report data by using standard Time period filter or by defining custom filters on different report columns or dimensions

Duration Filter
Filter On: Contract Effective Date, Select Period: Custom
Start Date: _____, End Date: _____

Advance Filter
Match all conditions (radio button selected), Match any of the condition
--None--

Navigation: Back, Next, Cancel

9. Set the conditions to view your report and click **Next**.

Step 7: Chart & Highlights

The screenshot shows the 'Create New Report' interface with the title bar 'Create New Report'. Below it is a navigation bar with tabs: Step1 Report Format, Step2 Grouping, Step3 Report Columns, Step4 Information to summarize, Step5 Order Columns, Step6 Report Criteria, and Step7 Chart & Highlights. The Step7 tab is highlighted. In the main content area, there is a section titled 'Step 7: Charts and Highlights' with the sub-instruction: 'Here you can provide visual representation to your report by selecting suitable chart type from a list of chart types. Also you can customize the look and feel of these charts using this interface.' Below this, there is a 'Standard Settings' section with a 'Chart Type:' dropdown menu. The dropdown menu is open, showing several categories of charts:

- None--
- None--
- Single Series Charts**
 - Vertical Bar Chart 2D
 - Vertical Bar Chart 3D
 - Horizontal Bar Chart
 - Line Chart
 - Area Chart
 - Pie Chart
 - Pie Chart 3D
 - Doughnut Chart
- Multi Series Charts**
 - Multi Series Vertical Bar Chart
 - Multi Series Vertical Bar Chart 3D
 - MultiSeries Horizontal Bar Chart
 - MultiSeries Line Chart
 - MultiSeries Area Chart
- Stacked Charts**
 - Stacked Vertical Bar Chart
 - Stacked Vertical Bar Chart 3D
 - Stacked Horizontal Bar Chart
 - Stacked Area Chart

10. You can provide a visual representation to your report by selecting a chart type.

11. Select a chart type from the drop down list and click **Run Report**.

8.4 Exporting a Report

You can export the specific data of a report as a summary in Excel (.xls) or Portable Document (.pdf) formats.



To export a report:

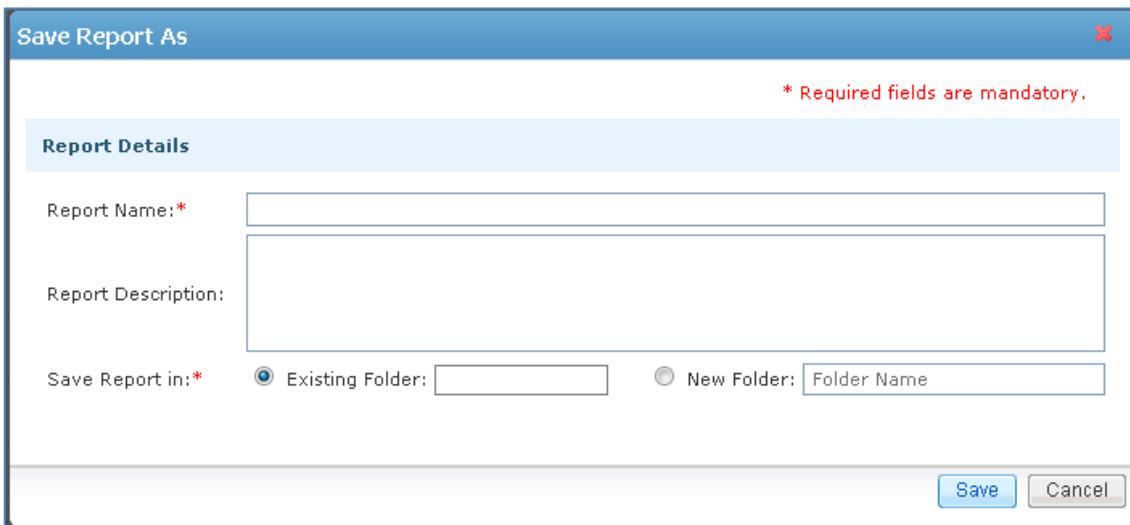
1. Open the required report.
2. Select the **Export Data** icon.
3. Select the format you want to save the file to.
 - In Excel – to export the data in excel
 - In PDF – to export the data in pdf
4. Click **OK**. The **File Download** dialog box opens.
5. Click **Save** to save the file.

8.5 Saving a Report

You can save reports either in the pre-packaged reports folder or in a new folder.

To save a report:

1. Open the required report.
2. Click on the **Save As** button. The **Save Report** dialog box is displayed.



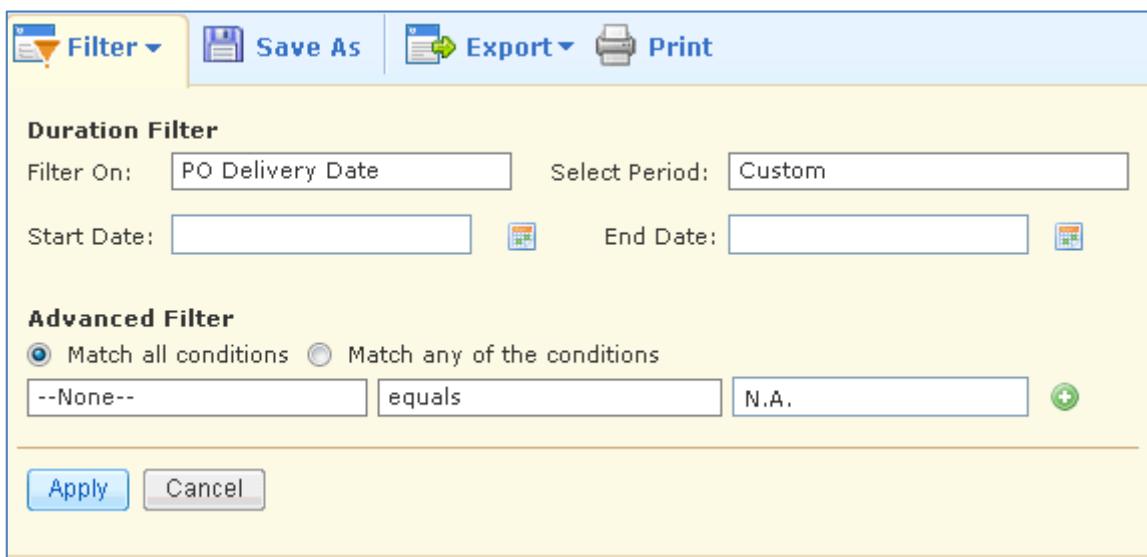
3. Specify the details.
4. Click **Save**. The report is saved.

8.6 Filtering a Report

You can filter a report to view your desired result.

To filter a report:

1. Open the required report.
2. Click on the **Filter** button.



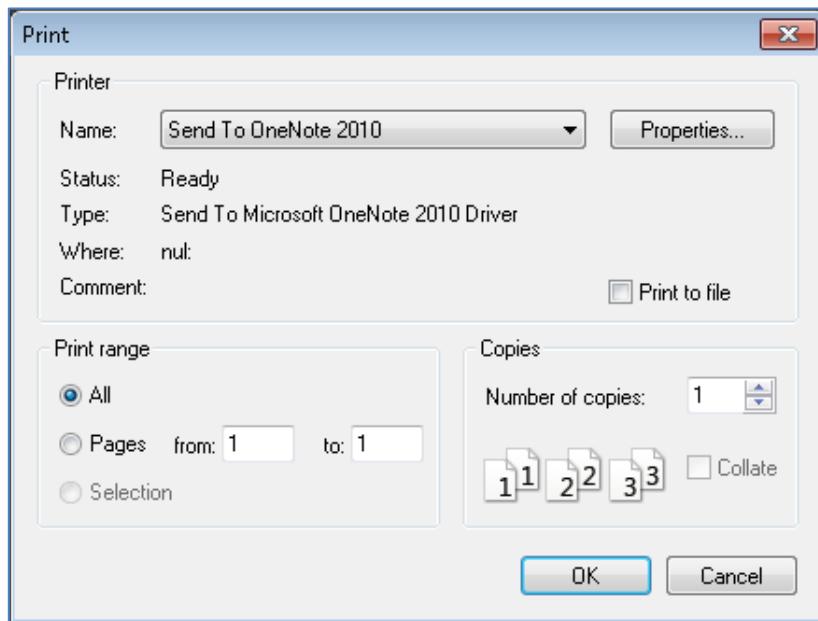
3. Set your desired requirement in the **Duration Filter** and **Advance Filter** section.
4. Click **Apply**. The report is displayed.

8.7 Printing a Report

You can print a report to obtain a hard copy of the report.

To print a report:

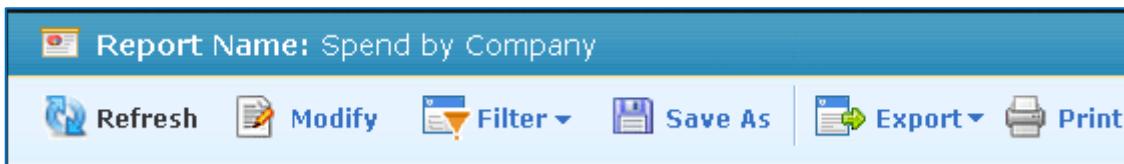
1. Open the required report.
2. Click on the **Print** button. The **Print** dialog box is displayed:



3. Set your desired requirement in the **Printer**, **Print Range** and **Copies** section.
4. Click on the **OK** button to print the report.

8.8 Modifying a Report

You can modify specific parts of an existing report as per requirements.



To modify a report:

1. Open the required report and select the **Modify** option.
2. Make the required changes within Step 1 to Step 7.
3. After the required changes are made, click on the **Run Report** button.