

HOW TO PRICE CHECK

➤ PRICING CLERK/COST ANALYST – RETAIL 1 DEPARTMENT

1. Click **PO vs Proforma (per item)** submenu

The screenshot shows the CWO Cash With Order Monitoring System interface. The top navigation bar includes 'Home', 'Master Files', 'Transactions', 'Reports', 'Contact Us', and a user profile 'evelyn'. The 'PO VS PROFORMA' submenu is highlighted with a blue circle and a callout '1'. Below the submenu, there are three buttons: 'Upload Proforma', 'Upload Proforma (Additional)', and 'Create Pro-forma'. The main form area contains fields for 'Supplier Name' (Please Select One), 'Location Name' (Please Select One), 'Date From' (YYYY-MM-DD), and 'Date To' (YYYY-MM-DD). A 'GENERATE' button is at the bottom.

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Viewing/Editing and Matching of PO vs. Proforma Sales Invoice

2. Select Supplier name from the list
3. Select Location Name from the list
4. Select Date Range
5. Click **Generate** button
6. Click **Action** button
7. Select View/Edit (Note, for user can only edit quantity and price with manager's key, allow edit quantity once the supplier will over put quantity in the Proforma/SI versus the quantity that is in the PO only, allow edit price once price is changed)

The screenshot shows the CWO Cash With Order Monitoring System interface after generating the PO vs Proforma data. The top navigation bar is the same. The main form area shows the 'Supplier Name' (JOSELITO LIWANAG), 'Location Name' (LEONARDO DISTRIBUTORS INC.), 'Date From' (2023-01-01), and 'Date To' (2024-01-15). The 'GENERATE' button is highlighted with a blue circle and a callout '5'. Below the form, there is a table with columns: Business Unit Matched, Purchase Order, Purchase Order Date, Proforma, Proforma Date, Status, and Action. The table contains 8 rows of data. The 'Action' column has a dropdown menu with options: Match, View/Edit, Discounts/VAT, and History. The 'View/Edit' option is highlighted with a blue circle and a callout '7'. The 'Action' button is highlighted with a blue circle and a callout '6'.

Business Unit Matched	Purchase Order	Purchase Order Date	Proforma	Proforma Date	Status	Action
JOSELITO LIWANAG vs LEONARDO DISTRIBUTORS INC.	LDGM00000301-LDI-CPO-0000262	Jul 17, 2023	DR#2123	Jul 24, 2023	PENDING	Action
JOSELITO LIWANAG vs LEONARDO DISTRIBUTORS INC.	LDGM00000301-LDI-CPO-0000262	Jul 17, 2023	DR#2125	Jul 24, 2023	PE	Match
JOSELITO LIWANAG vs LEONARDO DISTRIBUTORS INC.	LDGM00000551-LDI-CPO-0000463	Jul 27, 2023	DR#2127	Aug 2, 2023	PE	View/Edit
JOSELITO LIWANAG vs LEONARDO DISTRIBUTORS INC.	LDGM00000551-LDI-CPO-0000463	Jul 27, 2023	DR#2130	Aug 2, 2023	PE	Discounts/VAT
JOSELITO LIWANAG vs LEONARDO DISTRIBUTORS INC.	LDGM00000842-LDI-CPO-0000743	Aug 16, 2023	SI#2132	Aug 24, 2023	PENDING	History
JOSELITO LIWANAG vs LEONARDO DISTRIBUTORS INC.	LDGM00000301-LDI-CPO-0000262	Jul 17, 2023	SI#2126	Aug 24, 2023	PENDING	Action
JOSELITO LIWANAG vs LEONARDO DISTRIBUTORS INC.	LDGM00000301-LDI-CPO-0000262	Jul 17, 2023	SI#2124	Aug 24, 2023	PENDING	Action

Proforma Sales Invoice / Sales Invoice

- Double check the items in the Proforma, if quantity and price is changed, click the small box at the end of each item then user allow to change with manager's key

View Proforma

Acroname: MEAD PO Number/PO Reference: SMGM00400698/SMG-CPO-0380170 SO Number: Proforma Code: 10727291

Total Amount: 2,222,340.93

Proforma Line Discounts and VAT

Item Code	Description	QTY	UOM	Price	Amount	Edit
3149456	ENFAMIL A+ ONE PWD 350G(12CAN)	10	CS	5485.05	54,850.50	<input checked="" type="checkbox"/>
2027328	ENF A+ LACTOSE FREE	3	CS	8489.13	25,467.39	<input type="checkbox"/>
3142724	ENFAMIL A+ TWO PWD 350G(12BIB)	10	CS	5264.40	52,644.00	<input type="checkbox"/>
3142697	ENFAMIL A+ TWO PWD 850G (6CAN)	2	CS	6766.85	13,533.70	<input type="checkbox"/>
2023215	ENFA+ TWO LACTOSE FREE	3	CS	5989.42	17,968.26	<input type="checkbox"/>
2023216	ENFA+ TWO LACTOSE FREE PWD	3	CS	7590.43	22,771.29	<input type="checkbox"/>
3142227	ENFAGROW A+ THREE PWD VAN	2	CS	5390.15	10,780.30	<input type="checkbox"/>
3166790	ENFAGROW A+ THREE PWD	20	CS	7476.58	149,531.60	<input type="checkbox"/>
2023217	ENFGA+ THREE LACTOSEFREE	1	CS	6431.26	6,431.26	<input type="checkbox"/>
3142228	ENFAGROW A+ FOUR PWD VAN	15	CS	3563.43	53,451.45	<input type="checkbox"/>

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- Click Update button to save the changes
- Managers Key to authorize (Note: Don't give away the Managers key)

Managers Key

Supervisor

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Authorize Close

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Update Replace Proforma Close