# Purpose

Use this Standard Operating Procedure (SOP) to purchase an equipment item where it is not available in stock.

In the NAXT system, purchase orders are created:

* Directly as a purchase order refer to (SOP)Create and Manage a Purchase Order
* From within a service call refer to (SOP)Create a Purchase Order from within a Service Call
* From within a sales order

Refer to SOPs Create and manage purchase orders; Create a purchase order for a non-interface equipment item

**What is covered in this guide**

[Task 1. Create a purchase order from a sales order 3](#_Toc521317846)

[Task 2. Complete the purchase order 7](#_Toc521317847)

# Audience

This procedure will be used by staff in the following areas:

* Sales staff
* Administration staff

# Prerequisites

* The Equipment Model must exist in the system
* The Vendor must exist in the system
* Ordering configurations must exist in the system

# Terminology

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| **Consist** | A ‘consist’ comprises the specifications and feature packages available from a price list that is compiled to produce an equipment item |
| **Price model** | The price list supplied by an OEM (Original Equipment Manufacturer) |
| **FX rate** | Exchange rate |
| **Interface** | Electronic transmission of order direct into supplier’s computer system |

# Use of icons

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|  | **Business rule** |  | **Key point / Tips** |  | **Information** |

1. Create a purchase order from a sales order

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| 1. Navigate to:   **GGNZ > Sales and marketing > Common > Sales orders > All sales orders**  **All sales orders** window will display |
| 1. Double click on the sales order line to select   **Sales order** window will display |
| 1. Select **Header view**   Open **Setup** fast tab |

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| 1. In the **Setup** tab, check and and, if necessary, complete the fields:    1. **Order class**    2. **Division –** for GMH this is **GEQ**   Select **Purchase order** in the ribbon |
| Create purchase order window will display   1. Select the item you want  * If multiple lines, you will need to select each line in turn |
| 1. Complete the following fields:    1. Select **Vendor account**    2. Select **Exchange rate information**       * If using general FX pool leave rate type as PUR-PTS-STD       * If using a specific contract from treasury, change to contract and enter contract number in **Contract** field    3. If Hyster part, select the currency of the factory that it is coming from |
| The **Vendor address** field will automatically populate, but you will not see the details at this stage. |
| If Purchase price is not populated:   1. Enter Purchase price manually |
| 1. Select **OK** |
| Infolog appears   1. Select line with **Purchase order** created   Select **Show** |

1. Complete the purchase order

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| You may need to refer to:   * SLS\_3.1\_Create purchase order for non-interface equipment * SLS\_3.2\_Create purchase order for interface equipment |
| 1. Navigate to:   **GGNZ > Procurement and sourcing > Common > Purchase orders > All purchase orders**  or  **GGNZ > Accounts Payable > Common > Purchase orders > All purchase orders**  Open Purchase order |
| 1. Select **Edit** |
| 1. In the **Purchase order lines** tab, scroll right or press tab, complete the following fields:    1. **Warehouse** Choose the required warehouse    2. **Fleet/batch ‘**New’ or ‘Used’    3. **Quantity** This should be ‘1’    4. **Unit price** This is populated by default from the equipment builder    5. **Unit** The unit will usually be ‘ea’    6. **Currency** This should default to the purchase currency for the vendor |
| You do not need to update the **Exchange rate** or the **Exchange rate type** as these will automatically update based on your order class and the exchange rates table. |
| 1. To create an equipment number, select the **Equipment** tab   Select **Create equipment** from the dropdown box |
| **Create equipment** window will display, with the equipment number automatically populated to be the next sequential number available   1. Select **OK** |
| A confirmation message that the equipment item has been created will display   1. Select **Close** |
| The **Purchase order** window re-displays   1. Select **Purchase** tab > **Confirm** |
| 1. Select **Close** |