# CREATE A NEGATIVE PO FOR A WARRANTY CLAIM

## Introduction

This procedure outlines how to create a negative purchase order. These are required when processing a warranty service call for a Palfinger warranty.

This procedure is linked to the following business processes:

* SER 8.1

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## Prerequisites

A warranty service call needs to have been created and a best estimate figure of the amount to be charged to Palfinger Europe for the warranty repair

## Terminology and Icons

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| Service Call | A job that a technician must complete |
| Segment/Operation | A task within a service call |
|  | Displayed on the Status bar of a NAXT window. Opens the Document Handling window |
| J:\Training - Inspire\eMerge training icons\Important Black.png | This icon highlights important or useful information that is related to the step you are completing |

## STEPS

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| CREATE AND CONFIRM A PURCHASE ORDER | |
|  | Follow one of the menu paths to open **All purchase orders**:   * **GGNZ > Procurement and sourcing > Common > Purchase orders > All purchase orders** * **GGNZ > Accounts Payable > Common > Purchase orders > All purchase orders**   C:\Users\johi\AppData\Local\Temp\SNAGHTML965784.PNG |
|  | On the top navigation ribbon, click **Purchase order > New > Purchase order**  C:\Users\johi\AppData\Local\Temp\SNAGHTML96ee66.PNG |

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|  | *The* ***Create purchase order*** *window will display*  Select “Palfinger Europe GMBH’ in the **Vendor account** field and click **OK** |
|  | *The* ***Purchase order*** *will display*  In the **Purchase order lines** fast tab, complete the following fields:   * **Item number –** select ‘Warranty Claim’   The **Product name** and **Unit** will automatically populate once an item number is entered   * **Quantity –** enter ‘-1’ * **Currency** – default is the currency of the vendor. This should be ‘EUR’ for Euro * **Unit price –** enter the amount you expect to be getting from Palfinger Europe in a credit for labour only. The **Net amount** field will update with the negative amount for the purchase order   C:\Users\johi\AppData\Local\Temp\SNAGHTMLaa3d03.PNG |

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|  | In the Status bar at the bottom of the window, click on the **Document Handling** icon  C:\Users\johi\AppData\Local\Temp\SNAGHTMLaea91d.PNG |
|  | *The* ***Document handling of Purchase order*** *window will display*  Click **New > Note** |
|  | In the **Description** field enter “Ref Service Call:” and the warranty service call number  Click **Close** |
|  | *The* ***Purchase order*** *will display*  Click **Close** |
|  | Highlight the purchase order you have just created and click **Purchase > Confirmation**  C:\Users\johi\AppData\Local\Temp\SNAGHTMLb365b8.PNG |
|  | ***Confirm Purchase Order*** *window opens*  Click **OK** |
|  | *The* ***All purchase orders*** *window will display with the* ***Approval status*** *updated to Confirmed* |

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| CONFIRM AND RECEIPT THE NEGATIVE PURCHASE ORDER | |
|  | When you have received confirmation of the credit about from Palfinger Europe GMBH, follow one of the menu paths to open **All purchase orders**:   * **GGNZ > Procurement and sourcing > Common > Purchase orders > All purchase orders** * **GGNZ > Accounts Payable > Common > Purchase orders > All purchase orders**   C:\Users\johi\AppData\Local\Temp\SNAGHTML965784.PNG |
|  | Once you have made any changes that are required, highlight the purchase order you have just created and click **Purchase > Confirmation**  C:\Users\johi\AppData\Local\Temp\SNAGHTMLb365b8.PNG |

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|  | ***Confirm Purchase Order*** *window opens*  Click **OK** |
|  | With the required purchase order still highlighted, click **Receive > Product receipt**  C:\Users\johi\AppData\Local\Temp\SNAGHTMLb6a8c0.PNG |

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|  | *The* ***Posting product receipt*** *window will display*  Enter the **Product receipt** number and click **OK** |
|  | *The puchase order will be updated to have an* ***Approval status*** *of ‘Approved’ and a* ***Status*** *of ‘Received’*  C:\Users\johi\AppData\Local\Temp\SNAGHTML1b8832.PNG |