

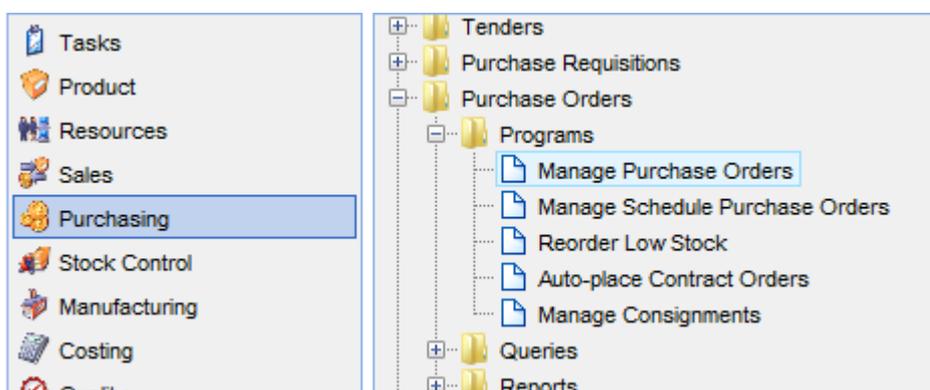
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DOC REF: AEU00222	TITLE: EFACS USER GUIDE – Creating a purchase order in EFACS			

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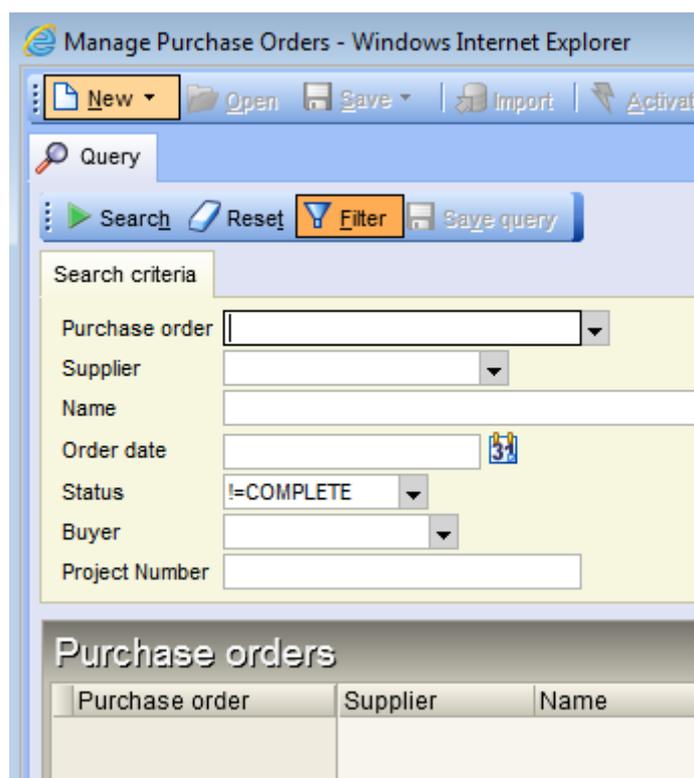
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## CREATING THE PURCHASE ORDER

1. GO TO PURCHASING > MANAGE PURCHASE ORDERS



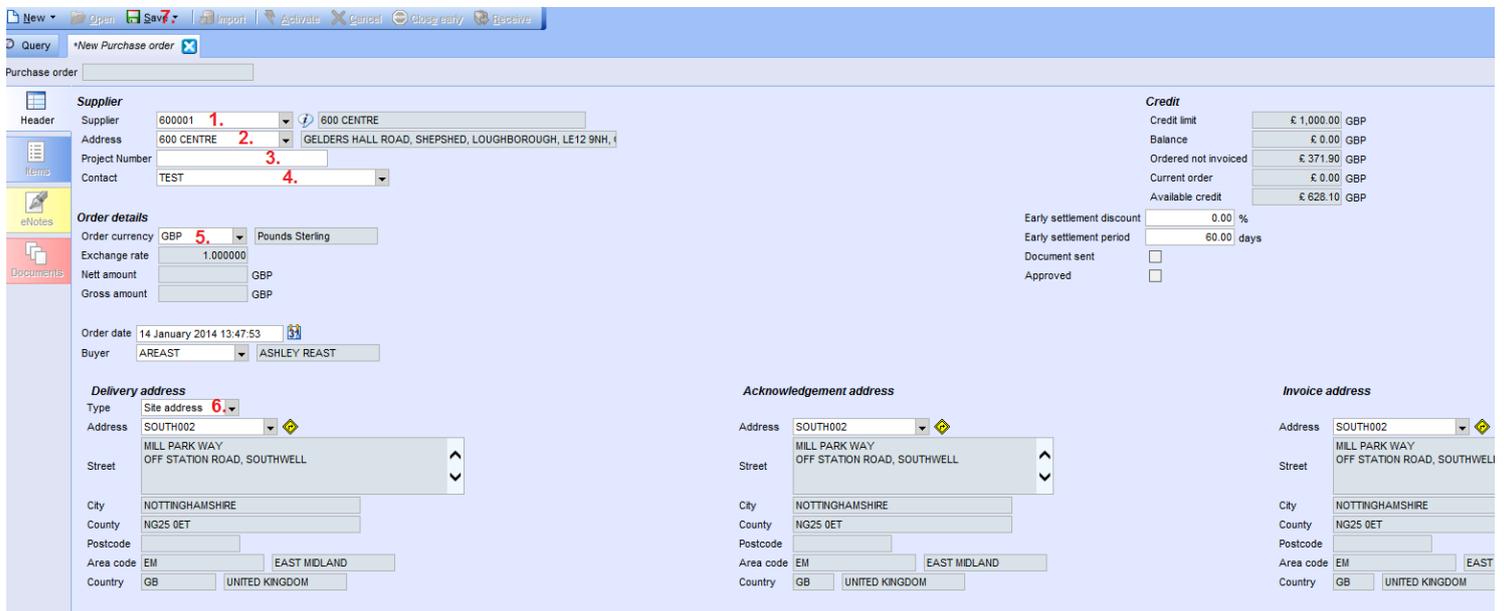
2. THEN CLICK ON NEW



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### 3. ENTER THE HEADER INFORMATION

1. SELECT SUPPLIER
2. CHECK/SELECT ADDRESS IF NOT AUTO POPULATED
3. ENTER TRADER REFERENCE/PROJECT NUMBER/QUOTE NUMBER (THIS WILL THEN APPEAR AGAINST EACH ITEM)
4. SELECT THE CONTACT IF NOT AUTO POPULATED
5. SELECT THE CURRENCY
6. YOU CAN CHANGE THE DELIVERY ADDRESS, ACKNOWLEDGEMENT ADDRESS AND INVOICE ADDRESS IF DIFFERENT FROM ORDER ADDRESS
7. THEN CLICK SAVE



Purchase order: \*New Purchase order

**Supplier**

Supplier: 600001 **1.** 600 CENTRE  
Address: 600 CENTRE **2.** GELDERS HALL ROAD, SHEPshed, LOUGHBOROUGH, LE12 9NH,  
Project Number: **3.**  
Contact: TEST **4.**

**Order details**

Order currency: GBP **5.** Pounds Sterling  
Exchange rate: 1.000000  
Nett amount: GBP  
Gross amount: GBP

Order date: 14 January 2014 13:47:53  
Buyer: AREAST ASHLEY REAST

**Delivery address**

Type: Site address **6.**  
Address: SOUTH002  
Street: MILL PARK WAY  
OFF STATION ROAD, SOUTHWELL  
City: NOTTINGHAMSHIRE  
County: NG25 0ET  
Postcode:  
Area code: EM EAST MIDLAND  
Country: GB UNITED KINGDOM

**Acknowledgement address**

Address: SOUTH002  
Street: MILL PARK WAY  
OFF STATION ROAD, SOUTHWELL  
City: NOTTINGHAMSHIRE  
County: NG25 0ET  
Postcode:  
Area code: EM EAST MIDLAND  
Country: GB UNITED KINGDOM

**Invoice address**

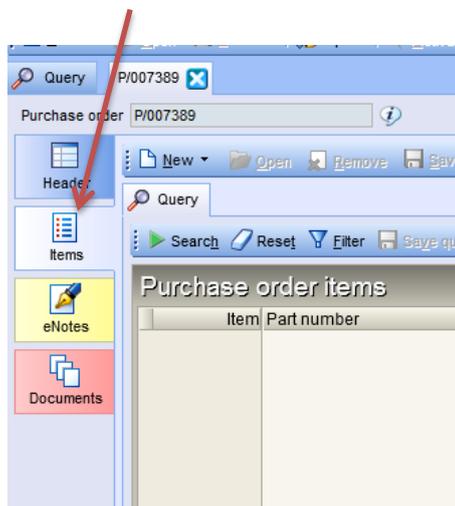
Address: SOUTH002  
Street: MILL PARK WAY  
OFF STATION ROAD, SOUTHWELL  
City: NOTTINGHAMSHIRE  
County: NG25 0ET  
Postcode:  
Area code: EM EAST  
Country: GB UNITED KINGDOM

**Credit**

Credit limit: £ 1,000.00 GBP  
Balance: £ 0.00 GBP  
Ordered not invoiced: £ 371.90 GBP  
Current order: £ 0.00 GBP  
Available credit: £ 628.10 GBP

Early settlement discount: 0.00 %  
Early settlement period: 60.00 days  
Document sent:   
Approved:

### 4. THE ITEMS TAB WILL THEN BECOME AVAILABLE



Query: P/007389

Purchase order: P/007389

Header

Items

eNotes

Documents

Purchase order items

Item	Part number

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## ADDING ITEMS TO A PURCHASE ORDER

THERE ARE 2 WAYS TO ADD ITEMS TO A PURCHASE ORDER:-

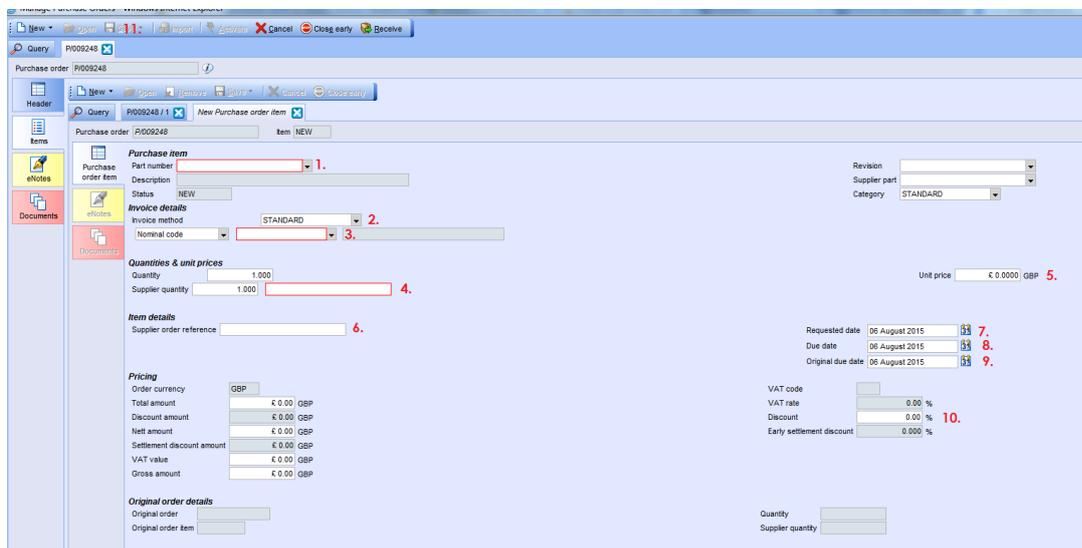
### OPTION 1 – (MOST COMMON)

1. IN THE ITEMS TAB CLICK ON 'NEW'



2. ENTER THE ITEM INFORMATION

1. SELECT PART NUMBER
2. SELECT INVOICE METHOD:  
STANDARD = PHYSICAL PRODUCTS THROUGH GOODS-IN  
FROM PURCHASE ORDER = A SERVICE, NON PHYSICAL I.E MAINTENANCE
3. ENTER NOMINAL CODE (AUTO POPULATED IF SET AGAINST PART)
4. ENTER QUANTITY REQUIRED
5. ENTER UNIT PRICE (AUTO POPULATED IF SET AGAINST PART)
6. ENTER REFERENCE IF REQUIRED
7. SELECT REQUESTED DATE
8. SELECT DUE DATE (AUTO POPULATED IF LEAD TIME SET AGAINST PART)
9. ORIGINAL DUE DATE (ONLY USED IF DUE DATE CHANGES AT LATER DATE)
10. ANY DISCOUNT APPLIED CAN BE ADDED HERE
11. CLICK SAVE



**Purchase order:** P009248

**Item:** NEW

**Purchase item:** Part number [1], Description [2], Status: NEW

**Invoice details:** Invoice method: STANDARD [2], Nominal code [3]

**Quantities & unit prices:** Quantity: 1.000, Supplier quantity: 1.000 [4], Unit price: £ 0.0000 GBP [5]

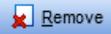
**Item details:** Supplier order reference [6], Requested date: 06 August 2015 [7], Due date: 06 August 2015 [8], Original due date: 06 August 2015 [9]

**Pricing:** Order currency: GBP, Total amount: £ 0.00 GBP, Discount amount: £ 0.00 GBP, Net amount: £ 0.00 GBP, Settlement discount amount: £ 0.00 GBP, VAT value: £ 0.00 GBP, Gross amount: £ 0.00 GBP

**Original order details:** Original order: [ ], Original order item: [ ], Quantity: [ ], Supplier quantity: [ ]

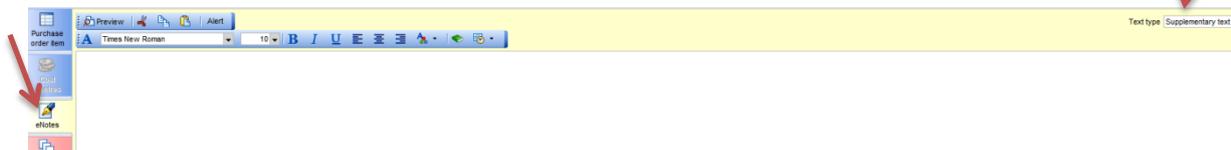
**Other fields:** Revision: [ ], Supplier part: [ ], Category: STANDARD, VAT code: [ ], VAT rate: 0.00 %, Discount: 0.00 %, Early settlement discount: 0.000 % [10]

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**NOTE:** THERE IS AN OPTION TO 'REMOVE' ITEMS ON THE TOOLBAR 

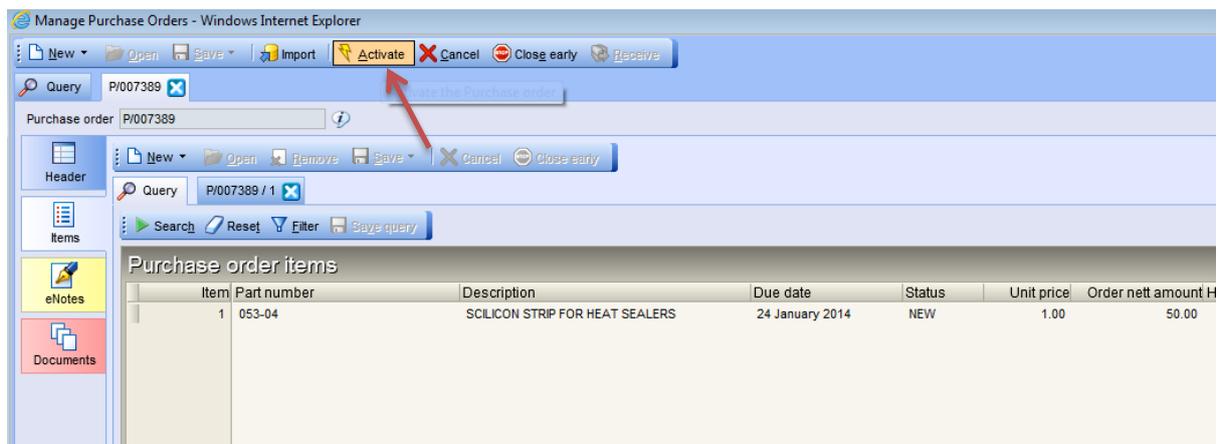
3. YOU CAN THEN ADD ENOTES AGAINST THE ITEM

1. CLICK ON ENOTES TAB
2. CLICK EDIT
3. CHOOSE SUPPLEMENTARY TEXT (TOP RIGHT)
4. ENTER TEXT IN THE WHITE BOX
5. SAVE
6. THIS WILL NOW APPEAR ON THE PURCHASE ORDER AGAINST THE ITEM 



4. YOU CAN ADD AND REMOVE AS MANY ITEMS AS REQUIRED

5. WHEN YOU ARE HAPPY CLICK ON 'ACTIVATE'



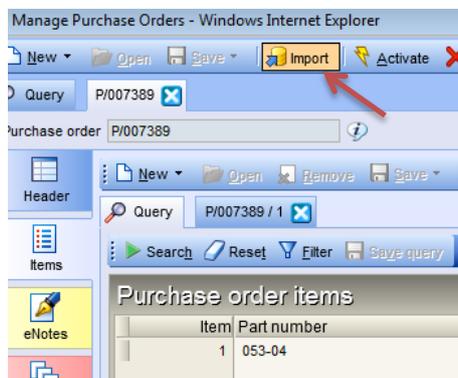
6. THERE IS ALSO THE OPTION TO 'CANCEL' AND ASLO 'CLOSE EARLY' – CLOSE EARLY LETS YOU COMPLETE THE PURCHASE ORDER IF FOR EXAMPLE YOU HAVE 2 ITEMS, 1 HAS BEEN RECEIVED BUT THEN YOU DON'T WANT THE OTHER, YOU WOULD CHOOSE TO CLOSE EARLY SO ITS NO LONGER SAT WAITING IN THE SYSTEM FOR A PART THAT WILL NEVER ARRIVE.

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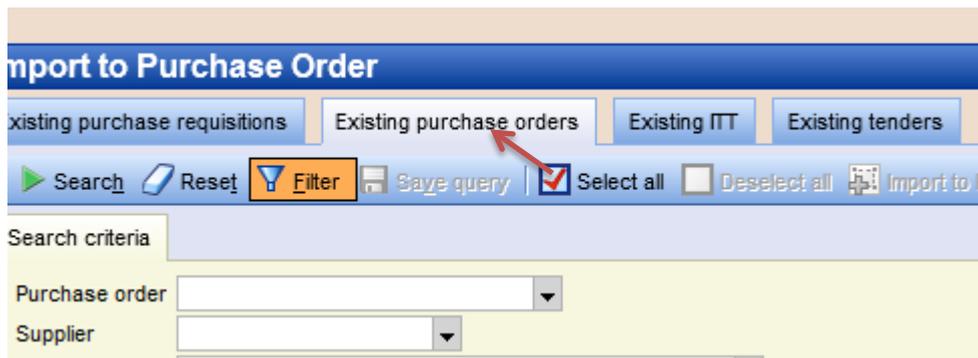
**OPTION 2 – IMPORTING ITEMS FROM PREVIOUS PURCHASE ORDERS/PURCHASE REQUISITIONS/INVITATIONS TO TENDER/TENDERS TO SAVE TIME**

IF FOR EXAMPLE YOU ARE ORDER THE SAME THINGS OVER AND OVER AGAIN AND THERE ARE A LOT OF ITEMS YOU CAN SAVE TIME AND USE THE IMPORT FUCTION. THIS WILL LET YOU CHOOSE AN OLD PURCHASE ORDER YOU OR SOMEONE ELSE HAS CREATED AND IMPORT ALL THESE ITEMS INTO THE NEW PURCHASE ORDER. YOU CAN ALSO USE THIS TO CONVERT A QUOTATION (TENDER) INTO A PURCHASE ORDER.

1. ON THE ITEMS SCREEN CLICK 'IMPORT FROM THE TOOLBAR

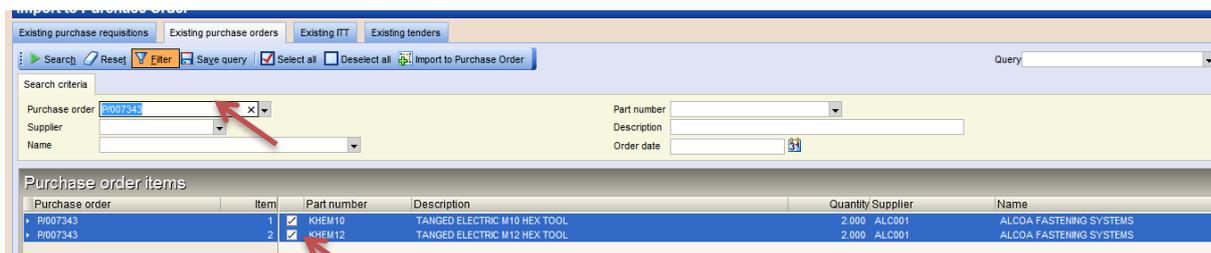


2. CLICK ON THE TAB WITH THE TYPE YOU WANT TO IMPORT FROM, IN THIS CASE 'EXISTING PURCHASE ORDERS'

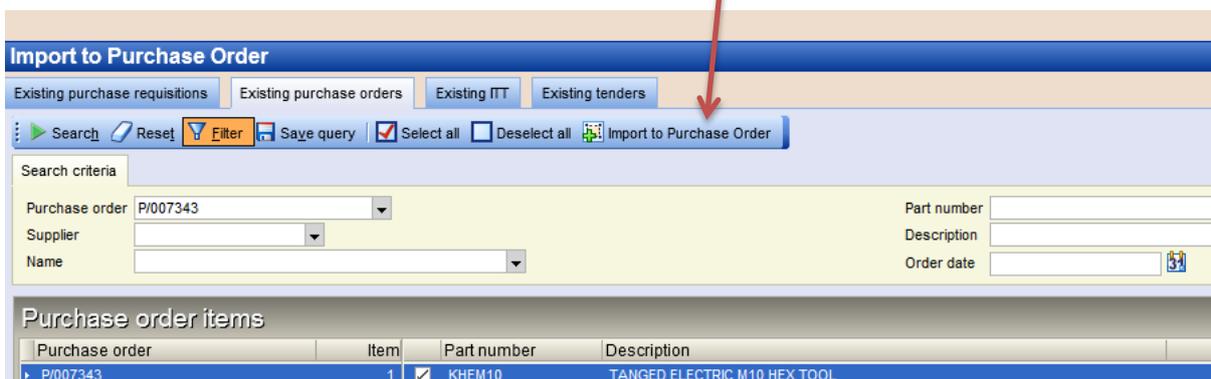


3. YOU CAN THEN ENTER EITHER THE PURCHASE ORDER OR PART NUMBER ETC TO BRING UP A LIST OF PREVIOUSLY ORDERED ITEMS. IN THIS EXAMPLE WE'LL USE P/007343 IN THE PURCHASE ORDER FIELD AND CLICK 'SEARCH'
4. THIS WILL GIVE YOU A LIST OF ITEMS WHICH YOU CAN SELECT AS MANY AS YOU WANT TO ADD TO YOU PURCHASE ORDER IN ONE GO

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5. ONCE YOU HAVE SELECTED THE ITEMS TO IMPORT CLICK 'IMPORT TO PURCHASE ORDER'

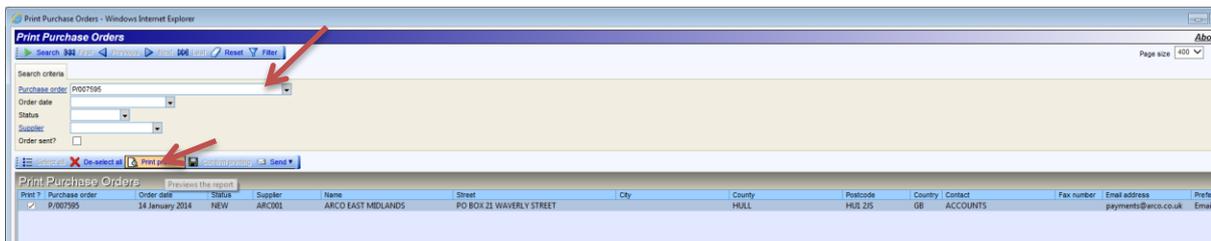


6. AFTER THAT CLICK CANCEL (OR OK) AND YOU WILL SEE THE ITEMS ADDED TO THE LIST

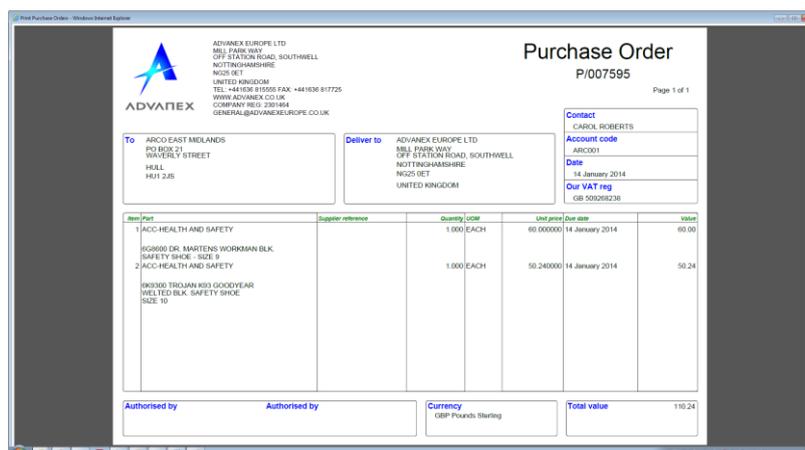
7. YOU CAN THEN GO INTO THE ITEMS AND MAKE ANY PRICE MODIFICATIONS AND ADD ENOTES ETC

## PRINTING A PURCHASE ORDER

1. GO TO PURCHASING > PURCHASE ORDERS > DOCUMENTS > PRINT PURCHASE ORDERS
2. SELECT YOUR PURCHASE ORDER FROM THE DROP DOWN (MOST RECENT LISTED FIRST) AND PRESS 'SEARCH'
3. SELECT IT AND CLICK ON 'PRINT PREVIEW'

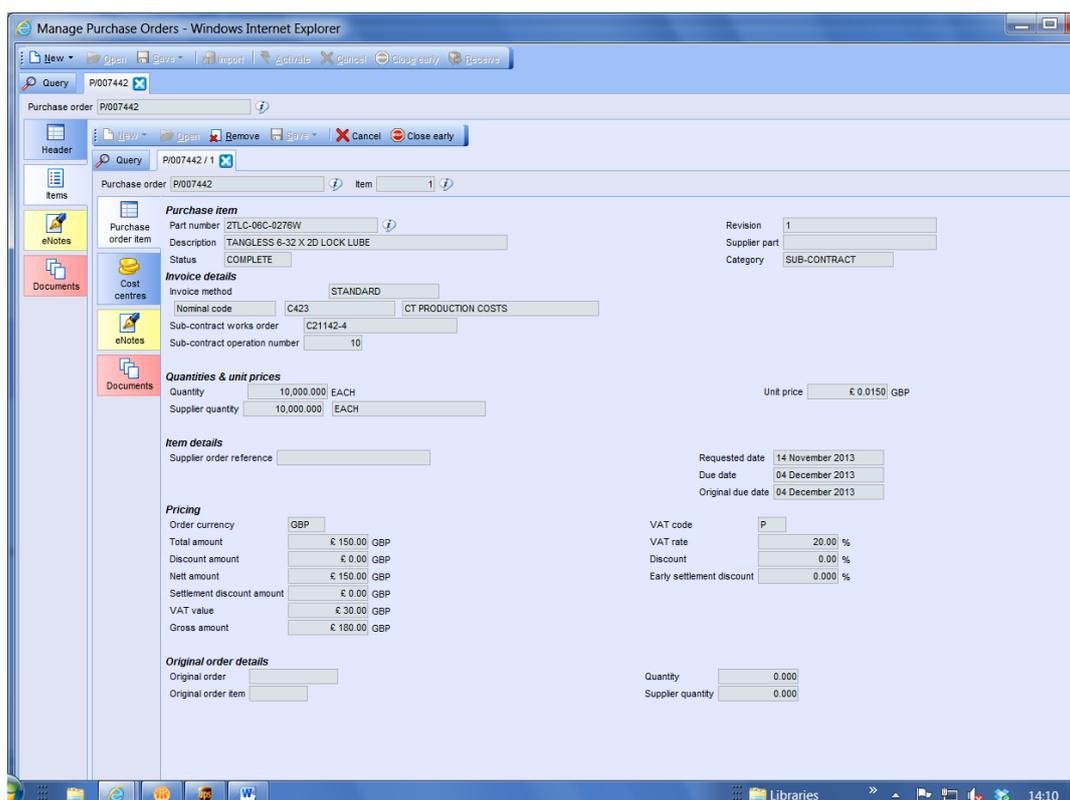


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## ADDING SUBCONTRACTED ITEMS TO A PURCHASE ORDER

THIS IS DONE IN THE SAME WAY AS ADDING A PURCHASED PART, BUT THE CATEGORY FIELD MUST BE SET TO SUB –CONTRACT.



THIS GIVES US ACCESS TO THE REQUIRED EXTRA FIELD, THE SUB-CONTRACT WORKS ORDER WILL SELF POPLATE, THE SUB-CONTRACT OPERATION CAN THE BE SELECTED. PRICING AND DELIVERY INFORMATION ARE ENTERED IN THE SAME WAY AS PURCHASED PARTS.

Putting a total amount in will calculate the unit price.