ISS. LEVEL: 03	ISSUE DATE: 06 AUG 2015	SUPERSEDES: 0000222	AUTH.
DOC REF: AEU00222	TITLE: EFACS USER GUIDE purchase order in EFACS	 Creating a 	970

Contents

CREATING THE PURCHASE ORDER	1
ADDING ITEMS TO A PURCHASE ORDER	3
PRINTING A PURCHASE ORDER	6

CREATING THE PURCHASE ORDER

1. GO TO PURCHASING > MANAGE PURCHASE ORDERS



2. THEN CLICK ON NEW

Ø Manage Purchase Orders - Windows Internet Explorer							
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Search criteria							
Purchase order							
Supplier							
Name							
Order date							
Status !=COMPLETE -							
Buyer 🗸							
Project Number							
Purchase orders							
Purchase order Supplier Name							

ISS. LEVEL: 03	ISSUE DATE: 06 AUG 2015	SUPERSEDES: 0000222	AUTH.
DOC REF: AEU00222	TITLE: EFACS USER GUIDE – Creating a purchase order in EFACS		9,0

- 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

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D Query	*New Purchase	order 🔀						
Purchase orde	er 📃							
	Supplier					Credit		
Header	Supplier	600001 1. 👻 🕖 600 CENTRE				Credit limit	£ 1,000.	00 GBP
	Address	600 CENTRE 2. GELDERS HALL ROAD, SHEPSHED, LOUGHBOROUGH, LE12 9NH,				Balance	€ 0.0	00 GBP
	Project Numbe	r <u>3.</u>				Ordered not invoiced	£ 371.9	90 GBP
Items	Contact	TEST 4. V				Current order	£ 0.0	00 GBP
						Available credit	£ 628.1	10 GBP
eNotes	Order details				Early settlement discount	0.00 %		
	Order current	y GBP 5. Pounds Sterling			Early settlement period	60.00 days		
- 40	Exchange rate	1.000000			Document sent			
Documents	Nett amount	GBP			Approved			
	Gross amount	GBP						
	Order date 1	4 January 2014 13:47:53						
	Buyer A	REAST ASHLEY REAST						
	Delivery a	ddress	Acknow	ledgement address			Invoice a	oddress
	Type	one address U.V						
	Address		Address				Address	
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			oouniy				200 And y	

4. THE ITEMS TAB WILL THEN BECOME AVAILABLE

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	Purchase order items
eNotes	Item Part number
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Documents	

ISS. LEVEL: 03	ISSUE DATE: 06 AUG 2015	SUPERSEDES: 0000222	AUTH.
DOC REF: AEU00222	TITLE: EFACS USER GUIDE - purchase order in EFACS	- Creating a	9,0

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'

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	Purch	ase order items								_
eNotes	1	Item Part number	Des	scription	Due	late Status	Unit price	Order nett amount Home unit price	Nett amount	Supplier quantity Tra
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Documents										

- 2. ENTER THE ITEM INFORMATION
 - 1. SELECT PART NUMBER
 - SELECT INVOICE METHOD:
 <u>STANDARD</u> = PHYSICAL PRODUCTS THROUGH GOODS-IN <u>FROM PURCHASE ORDER</u> = A SERVICE, NON PHYISCAL 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

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E	Purchase or	er P/009248 item NEW			
eNotes	Purchase order item	Purchase item Part number Description		Revision Supplier part	•
Documents	eNotes	Status NEW Invoice details Invoice method STANDARD • 2.		Category STANDARD	•
		Nominal code + 3.			
		Quantities & unit prices Quantity 1.000 Supplier quantity 1.000 4.		Unit price c	0.0000 GBP 5.
		Rem details Suppler order reference 6.		Requested date 06 August 2015 33 7. Due date 06 August 2015 33 8. Original due date 06 August 2015 33 9.	
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ISS. LEVEL: 03	ISSUE DATE: 06 AUG 2015	SUPERSEDES: 0000222	AUTH.
DOC REF: AEU00222	TITLE: EFACS USER GUIDE – Creating a purchase order in EFACS		9,0

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 SUPLEMENTARY TEXT (TOP RIGHT)
 - 4. ENTER TEXT IN THE WHITE BOX
 - 5. SAVE
 - 6. THIS WILL NOW APPEAR ON THE PURCHASE ORDER AGAINST THE ITEM

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- 4. YOU CAN ADD AND REMOVE AS MANY ITEMS AS REQUIRED
- 5. WHEN YOU ARE HAPPY CLICK ON 'ACTIVATE'

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eNotes	Item	Part number	Description	Due date	Status	Unit price	Order nett amount H	
Documents	. 1	053-04	SCILICON STRIP FOR HEAT SEALERS	24 January 2014	NEW	1.00	50.00	

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.

ISS. LEVEL: 03	ISSUE DATE: 06 AUG 2015	SUPERSEDES: 0000222	AUTH.
DOC REF: AEU00222	970		

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'

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xisting purchase	requisitions	Existing purchase orders	Existing ITT	Existing tenders				
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Search criteria								
Purchase order		-						
Supplier		-						

- 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

ISS. LEVEL: 03	ISSUE DATE: 06 AUG 2015	SUPERSEDES: 0000222	AUTH.
DOC REF: AEU00222	<i>.,</i>		

Existing purchase requisitions Existing purchase orders Existing ITT Existing tenders		
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Name	Order date	
Purchase order items		
Purchase order Item Part number Description	Quantity Supplier	Name
▶ P/007343 1 Z KHEM10 TANGED ELECTRIC M1	10 HEX TOOL 2.000 ALC001	ALCOA FASTENING SYSTEMS
▶ P/007343 2 Z KHEM12 TANGED ELECTRIC M13	12 HEX TOOL 2.000 ALC001	ALCOA FASTENING SYSTEMS

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

Import to Purchase Order		
Existing purchase requisitions Existing purchase	chase orders Existing ITT Existing tenders	
🛛 🕨 Search 🖉 Reset 🔽 Filter 🕞 Save	query 🛛 🗹 Select all 🔲 Deselect all 🕌 Import to Purchase Order 📄	
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Purchase order P/007343	•	Part number
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Dunch and a state to see		
Purchase order ttems		
Purchase order	Item Part number Description	
► P/007343	1 📝 KHEM10 TANGED ELECTRIC M10 HEX TOOL	

- 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'

Print Purchase Orders - Windows Internet Explorer										
Print Purchase Orders										Abor
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ISS. LEVEL: 03	ISSUE DATE: 06 AUG 2015	SUPERSEDES: 0000222	AUTH.
DOC REF: AEU00222	TITLE: EFACS USER GUIDE - purchase order in EFACS	<i>9</i> // -	

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1 ACC-HEALTH AND SAFETY 1 1000 [ACH 00.00000 14 January 2014 00.00 Incomoting Management (ACH 00.00000 14 January 2014 00.00 2 ACC-HEALTH AND SAFETY 1 1000 [ACH 50.240000 14 January 2014 50.24 Incomoting Management (ACH 00.0000 14 January 2014 50.24 Incomoting Management (ACH 00.24) 50.24 Incomoting	1 ACC-HEALTH AND SMPETY 1.000 EACH 60.000000 14 January 2014 60.00 1 ACC-HEALTH AND SMPETY 1.000 EACH 50.000000 14 January 2014 60.00 2 ACC-HEALTH AND SMPETY 1.000 EACH 50.240000 14 January 2014 50.24 1 ACC-HEALTH AND SMPETY 1.000 EACH 50.240000 14 January 2014 50.24 1 SSE 10 SSE 10 SSE 10 SSE 10 SSE 10 SSE 10	Item Part	Supplier reference	Quantity (JOM	Linit aria	Due date	Value	
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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 MUT BE SET TO SUB –CONTRACT.

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eNotes order item	Part number 2TLC-06C-0276W (2) Description TANGLESS 6-32 X 2D LOCK LUBE	Revision 1 Supplier part
	Status COMPLETE	Category SUB-CONTRACT
Documents Cost	Invoice details Invoice method STANDARD	
	Nominal code C423 CT PRODUCTION COSTS	
eNotes	Sub-contract works order C21142-4 Sub-contract operation number 10	
G		
Documents	Quantity 10,000.000 EACH	Unit price £ 0.0150 GBP
	Supplier quantity 10,000.000 EACH	
	Item details	
	Supplier order reference	Requested date 14 November 2013
		Original due date 04 December 2013
	Pricing Order currency GBP	VAT code
	Total amount £ 150.00 GBP	VAT rate 20.00 %
	Discount amount £ 0.00 GBP	Discount 0.00 %
	Settlement discount amount £ 0.00 GBP	Lany sellement uscount V.000 %
	VAT value £ 30.00 GBP	
	Gross amount to too.oo GBP	
	Original order details	Quantity 0.000
	Original order item	Suppler quantity 0.000
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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.