

## HOW TO PROCESS PURCHASE ORDERS

This document explains the standard procedure of processing purchase orders of the following types:

- General Expenses (line type = O)
- Inventory / Stock (line type = I) – non-serialised
- Overseas Stock (line type = P) – non-serialised

It has been structured with a view to help users understand the processing of purchase orders and purchase order receipts for local and overseas suppliers.

**Software Version: 1701**

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## PROCESSING PURCHASE ORDERS

**Note:** Mandatory and default fields may vary depending on the configuration. Users are required to enter the relevant details accordingly.

### Entering Primary Purchase Order Details

1. From the Menu, select **Purchase Orders > Purchase Orders**

This will open the *Purchase Orders* screen.

2. Click ADD

The following fields must be entered:

- Supplier
- Name
- Warehouse
- Type
- Ordered By

**Note:** The fields **Warehouse**, **Delivery to** and **Ordered by** will default, however, can be changed if required.

3. Select **Supplier** or **Name** from the respective drop down list

**Note:** Selecting an overseas supplier will check the **Overseas PO** checkbox.

4. Click SAVE

This will save the information entered in the *Purchase Order Details* panel.

A unique purchase order number (**PO Number**) will be generated by the system.

The purchase order **Status** will be updated to 'OPEN'.

## Entering Purchase Order Detail Lines

When creating a purchase order for a local supplier, the following purchase order line types can be processed on the *Purchase Orders* screen:

LINE TYPE	DESCRIPTION	EXAMPLE
<b>O</b>	Other/ Operational Expenses	Cleaning supplies, stationery, staff amenities, consumables
<b>I</b>	Inventory/ Stock/ Parts Non-serialised	Non-serialised parts, serialised parts, new equipment
<b>A</b>	Assets	Computer equipment, office furniture

When creating a purchase order for an overseas supplier, the following purchase order line types can be processed on the *Purchase Orders* screen:

LINE TYPE	DESCRIPTION	EXAMPLE
<b>O</b>	Other/ Operational Expenses	Cleaning supplies, stationery, staff amenities, consumables
<b>P</b>	Overseas Stock	Non-serialised parts, serialised parts, new equipment ordered from overseas suppliers

This document describes processing purchase orders with line types **O**, **I** (non-serialised) and **P** (non-serialised).

1. From the Menu, select **Purchase Orders > Purchase Orders**
2. Display the relevant purchase order
3. Click EDIT
4. Click the *Entry/Edit Details (Alt E)* tab

The **Processing Sequence** will default to **Receipt First** for local suppliers and **Invoice First** for overseas suppliers.

**Note:** The processing sequence of purchase order detail lines can be changed after saving the purchase order.

### Entering Purchase Order Details for Line Type O

1. Change **Line Type** to **O**, if not already defaulted
2. Select the **UOM Code** from the drop down list, if required
3. Enter the quantity ordered in the **Qty Ord** field
4. Enter a description in the **Description** field
5. Enter the purchase price excluding GST in the **Unit Cost excl GST** field
6. Select **Major Code** from the drop down list, if not already defaulted
7. Select **Minor Code** from the drop down list, if not already defaulted
8. Select **Account Code** from the drop down list, if not already defaulted
9. Select **Sub Acct** from the drop down list, if not already defaulted

The **Processing Sequence** will default to 'Receipt First'.

10. Click SAVE

This will save the purchase order detail line.

11. Enter the purchase order detail lines as requested
12. Click SAVE in the toolbar

This will save the purchase order.

Entering Purchase Order Details for Line Type I (Non-Serialised)

1. Change **Line Type** to **I**, if not already defaulted
2. Select the **Job No** if the purchase order item/ part pertains to a service job
3. Select the item to be purchased from the **Item** drop down list
4. Select the supplier item code, if available from the **Supp Item** drop down list
5. Enter the quantity to be ordered in the **Qty Ord** field
6. Enter a discount in the **Disc Value** field, if applicable

The **Processing Sequence** will default to 'Receipt First'.

7. Click SAVE

This will save the purchase order detail line.

8. Enter the purchase order detail lines as requested
9. Click SAVE in the toolbar

This will save the purchase order.

### Entering Purchase Order Details for Line Type P (Non-Serialised)

**Note:** Line type P will be available only if the **Overseas PO** checkbox is checked in the *Purchase Order Details* panel.

1. Change **Line Type** to **P**, if not already defaulted
2. Select the **Job No** if the purchase order item/ part pertains to a service job
3. Select the item to be purchased from the **Item** drop down list
4. Select the supplier item code, if available from the **Supp Item** drop down list
5. Enter the quantity to be ordered in the **Qty Ord** field
6. Enter the item cost in terms of the foreign currency in the **Foreign Cur** field

In the example above, the currency exchange rate is configured as 0.53. Foreign currency is entered as 150.00, hence, the **Unit Cost** is calculated as  $150.00 / 0.53 = \$283.02$ .

The **Processing Sequence** will default to **Invoice First**.

7. Click SAVE

This will save the purchase order detail line.

8. Enter the purchase order detail lines as requested
9. Click SAVE in the toolbar

This will save the purchase order.



## Confirming the Purchase Order

The purchase order **Status** must be 'CONFIRMED' to print or email the purchase order.

To confirm a purchase order, the user requires sufficient purchase order limits relating to the purchase order line type.

If the user who has entered the purchase order has sufficient purchase order limits to confirm the purchase order, there is no authorisation required.

If authorisation is required, a user with sufficient purchase order limits must authorise the purchase order.

A purchase order can be confirmed by following the below steps:

1. From the Menu, select **Purchase Orders > Purchase Orders**
2. Display the relevant purchase order
3. Click CONFIRM

### User has Sufficient PO Limits or the PO was Authorised

The following message displays if the user confirming the purchase order DOES have sufficient purchase order limits:

**Info:** "Are you sure you want to confirm this order?"

1. Click YES

The purchase order **Status** will be updated to 'CONFIRMED'.

The purchase order can now be printed, emailed or faxed to the supplier.

### User has Insufficient PO Limits

The following message displays if the user confirming the purchase order DOES NOT have sufficient purchase order limits:

**Info:** "User USERNAME does not have enough PO limit for line type I."

## Authorising the Purchase Order

A user with sufficient purchase order limits (**For example:** manager or supervisor) can authorise the purchase order by following the steps below:

1. From the Menu, select **Purchase Orders > Purchase Orders**
2. Display the relevant purchase order
3. Click AUTHORISE

This will open the *PO Authorisation* screen

4. Enter the password (this is the user's network password)
5. Select the purchase order lines to be authorised
6. Click OK

**Info:** "Successfully authorised detail line(s) within your limit."

7. Click OK

This will close the *PO Authorisation* screen and return to the *Purchase Orders* screen.

The name of the user who has authorised the purchase order will be displayed next to the AUTHORISED button on the *Purchase Order Details* panel.

An automated email will be sent to the user who created the purchase order, informing them about the authorisation.

The purchase order can now be confirmed and processed following the usual process.

## RECEIPTING PURCHASE ORDERS

After a purchase order has been processed and the goods ordered have been delivered, the purchase order receipt must be processed and the system will:

- Update the relevant stock levels
- Create the accrual entries in the General Ledger

A purchase order can be:

- Fully received (if the purchase order was fully delivered with the initial delivery)
- Partially received (if the purchase order was not fully delivered with the initial delivery)
- When some purchase order detail lines are yet to be received
- When partial quantities on the detail lines are received
- When the purchase order cost price requires change(s)

Purchase order receipts can be processed from the following screens:

- *Purchase Orders* screen – typically used when:
  - No further changes to the purchase order receipt details are required
  - All the purchase order details lines have the same purchase order line type
  - All the purchase order detail lines have the same processing sequence
  - Not all purchase order detail lines are to be received at the same time
- *Purchase Order Receipts* screen – typically used when:
  - Changes to the purchase order receipt details (**For example:** variances in price and quantities) are required
  - Not all purchase order detail lines are to be received at the same time
  - The purchase order detail lines don't follow the same processing sequence

## Receipt First Purchase Orders

### Fully Receipting the Purchase Order from the Purchase Orders Screen

The **Fully Receive** action is enabled if all purchase order detail lines have the **Receipt First** processing sequence.

The **Fully Receive** action can only be applied when all the detail lines on the purchase order are of the same line type. **For example:** All the purchase order lines types must have the line type I.

1. From the Menu, select **Purchase Orders > Purchase Orders**
2. Display the relevant purchase order
3. Click **Actions > Fully Receive**

**Info:** "The full receive operation was successful."

4. Click OK

The purchase order **Status** will be updated to 'PARTLY RECD' and the **Fully Received** checkbox will be checked.

All detail lines on the purchase order will then be receipted into stock. However, if the item(s) received was for a service job, the stock quantities will not be updated.

### Partly Receipting the Purchase Order from the Purchase Orders Screen

The **Partly Receive** action is enabled if one or more purchase order detail lines have the **Receipt First** processing sequence.

1. From the Menu, select **Purchase Orders > Purchase Orders**
2. Display the relevant purchase order
3. Click **Actions > Partly Receive**

This will open the *Purchase Order Receipts* screen.

4. Click SELECTED against individual lines or click SELECT ALL
5. Click CONFIRM RECEIPT

**Info:** "This procedure will update Stock quantity, Cost and Assets. Continue?"

6. Click YES

The purchase order receipt **Status** will be updated to 'RECEIVED'.

The purchase order **Status** will be updated to 'PARTLYRECD'.

### Receiving Selected Detail Lines from the Purchase Order Receipts Screen

A purchase receipt can be created as below:

1. From the Menu, select **Purchase Orders > Purchase Receipts**

This will open the *Purchase Order Receipts* screen.

2. Click ADD
3. Select the **Supplier** for the **P.O. Number** from the respective drop down list

This will default the relevant information from the purchase order.

4. Click SAVE

Information in the *Purchase Order Receipt Details* panel will be saved and a purchase receipt number (**Receipt ID**) will be generated by the system.

The purchase order receipt **Status** will be updated to 'OPEN'.

Selected detail lines on the purchase order can be received as below:

1. From the Menu, select **Purchase Orders > Purchase Receipts**
2. Display the relevant purchase receipt
3. Click EDIT
4. Click **Actions > Receipt Goods**

This will open the *Receipt Goods* screen.

5. Click on the **Line Number** drop down list

This drop down list will only display items from the purchase order detail lines that had the **Receipt First** processing sequence.

6. Click APPLY FILTER
7. Select the item to be receipted from the **Line Number** drop down list

This will display the details for the line selected.

8. Enter the received quantity, if different to the quantity displayed
9. Enter the **Unit Cost excl GST**, if different to the **Unit Cost excl GST** displayed
10. Click OK

**Info:** "Operation Successful."

11. Click OK

12. Click CLOSE

This will return to the *Purchase Order Receipt* screen with the updated **PO Total**.

### *Receiving All Detail Lines from the Purchase Receipts Screen*

1. From the Menu, select **Purchase Orders > Purchase Receipts**

2. Display the relevant purchase receipt

3. Click **Actions > Receipt Goods**

This will open the *Receipt Goods* screen.

4. Select the **Line Number** from the drop down list

5. Click APPLY FILTER

This will display the details for the line selected.

6. Click RECEIPT ALL GOODS

**Info:** "Operation Successful."

This will open the *Purchase Order Receipts* screen.

The purchase order receipt **Status** will be 'OPEN'.

## Invoice First Purchase Orders

To receive purchase order detail lines that have the **Invoice First** processing sequence:

1. Create a supplier invoice from **Suppliers > Invoicing**
2. Create a purchase receipt using the supplier invoice no

**Note:** When processing an invoice for an overseas supplier, freight charges will invariably apply. This freight charge must be added to the purchase order with the line type **O**. When adding the freight charge as the purchase order detail line, using the *Overseas Purchase on Cost* account must be considered, as this will offset the expense of the freight (uplift percentage).

Please refer to the 'How to Process Supplier Invoices' guide for more information.

After the supplier invoice for a purchase order has been successfully posted:

- The **Status** of the purchase order will be updated to 'INVOICED'
- The **Status** of the supplier invoice will be updated to 'POSTED'

## Fully Receipting the Purchase Order

1. From the Menu, select **Purchase Orders > Purchase Receipts**
2. Display the relevant purchase receipt
3. Click **Actions > Receipt Goods**

This will open the *Receipt Goods from Supplier Invoice* screen.

4. Select the **Line Number** from the drop down list
5. Click APPLY FILTER

This will display the details for the line selected.

6. Click RECEIPT ALL GOODS

**Info:** Operation Successful.”

7. Click OK

The will return to the *Purchase Order Receipts* screen.

The purchase order receipt **Status** will be 'OPEN'.

### Partly Receipting the Purchase Order

1. From the Menu, select **Purchase Orders > Purchase Receipts**
2. Display the relevant purchase receipt
3. Click **Actions > Receipt Goods**

This will open the *Receipt Goods from Supplier Invoice* screen.

4. Click on the **Line Number** drop down list
5. Select the item to be receipted from the **Line Number** drop down list
6. Click APPLY FILTER

This will display the details for the line selected.

7. Enter the received quantity
8. Click OK

**Info:** "Operation Successful."

9. Click OK
10. Click CLOSE

This will return to the *Purchase Order Receipts* screen, displaying the updated **PO Total**.



### Confirming the Purchase Order Receipt

1. Click CONFIRM RECEIPT in the toolbar of the relevant purchase receipt

**Info:** “This procedure will update Stock quantity, Cost and Assets. Continue?”

2. Click YES

The purchase order receipt **Status** will be updated to ‘RECEIVED’.

### Deleting the Purchase Order Receipt

A purchase order receipt can be deleted if the **Status** of the purchase receipt is ‘OPEN’.

1. Display the relevant purchase receipt
2. Highlight each detail line and press DELETE on the keyboard

**Info:** “Are you sure you wish to delete this line?”

3. Click YES
4. Click DELETE in the toolbar of the *Purchase Order Receipts* screen

**Info:** “Are you sure you want to delete this record?”

5. Click YES

This will delete the purchase receipt.

## PURCHASE ORDER ACTIONS

The **Actions Menu** on the *Purchase Orders* screen provides purchase order processing functions for the purchase order currently displayed on the screen.

The availability of the actions depend on the status of the purchase order and the user security settings of the user.

The purchase order actions are:

- Cancel
- Change ETA
- Change Processing Sequence
- Change Job No
- Change Qty Ordered
- Complete
- Complete Detail Line
- Change Supplier
- Confirm
- Copy Order
- Link/Update to PI/SO/Job
- Remove PI/SO Link
- Return Order
- Reopen Purchase Order

Please see below table for the purchase order actions corresponding to the status:

ACTIONS AVAILABLE	STATUS
Copy Order Return Order	'CANCELLED'
Copy Order Return Order Change ETA	'COMPLETED'
Cancel Change ETA Change Job No Change Qty Ordered Complete Detail Line Copy Order Fully Receive Link/Update to PI/SO/Job Partly Receive Remove PI/SO Link Reopen Purchase Order Return Order	'CONFIRMED'
Change ETA Change Job No Complete Complete Detail Line Copy Order Link/Update to PI/SO/Job Remove PI/SO Link Return Order	'INVOICED'
Cancel Change ETA Confirm Copy Order Link / Update to PI/SO/Job Return Order	'OPEN'

### Cancelling the Purchase Order

A purchase order can be cancelled if the purchase order **Status** is 'OPEN'.

1. From the Menu, select **Purchase Orders > Purchase Orders**
2. Display the relevant purchase order
3. Click **Actions > Cancel**

The purchase order **Status** will be updated to 'CANCELLED'.

### Changing the ETA

1. From the Menu, select **Purchase Orders > Purchase Orders**
2. Display the relevant purchase order
3. Click **Actions > Change ETA**

This will open the *Change ETA* screen.

4. Enter the new ETA in the **New ETA** field
5. Click OK

This will close the *Change ETA* screen and return to the *Purchase Orders* screen.

### Changing the Processing Sequence

The processing sequence can be changed for purchase orders with the following **Status**:

- 'OPEN'
  - 'CONFIRMED'
1. From the Menu, select **Purchase Orders > Purchase Orders**
  2. Display the relevant purchase order
  3. Click **Actions > Change Processing Sequence**

This will open the *Change Processing Sequence* screen.

4. Select the **PO Line Number** that requires a new processing sequence
5. Select the new processing order in the **New Processing Sequence** field
6. Click OK

This will close the *Change Processing Sequence* screen.

The processing sequence of the selected purchase order detail line(s) will be updated.

### Changing the Job Number

The Job No can only be changed on purchase orders with the **Status** 'CONFIRMED' or 'INVOICED'.

1. From the Menu, select **Purchase Orders > Purchase Orders**
2. Display the relevant purchase order
3. Click **Actions > Change Job No.**

This will display the *Change Job No* screen.

4. Select the new job no in the **New Job No** field
5. Click OK

This will close the *Change Job No* screen and return to the *Purchase Orders* screen.

### Changing the Quantity Ordered

1. From the Menu, select **Purchase Orders > Purchase Orders**
2. Display the relevant purchase order
3. Click **Actions > Change Order Line Qty**

This will open the *Change Order Line Qty* screen.

4. Enter the new quantity to be ordered in the **New Qty Ordered** field

**Note:** The system will only accept a quantity less than the current ordered quantity.

5. Click OK

This will close the *Change Order Line Qty* screen and return to the *Purchase Orders* screen.

### Completing the Purchase Order

Completing a purchase order will lead to the following:

- Unreceived purchase order detail lines/purchase order quantities can no longer be received
- A supplier invoice can no longer be processed for the purchase order

1. From the Menu, select **Purchase Orders > Purchase Orders**
2. Display the relevant purchase order
3. Click **Actions > Complete Purchase Order**

**Info:** “Completing this purchase order manually prevents the supplier from being paid. Are you sure you want to complete this order?”

4. Click OK

**Info:** “Purchase Order has successfully been completed.”

5. Click OK

The purchase order **Status** will be updated to ‘COMPLETED’.

### Confirming the Purchase Order

This will update the purchase order **Status** to 'CONFIRMED', enabling it to be further processed.

**Note:** The user confirming the purchase order will need sufficient purchase order limits to do so. Otherwise, the purchase order can be confirmed only after authorisation by a user with sufficient PO limits.

### Copying the Order

This will create a copy of the purchase order currently displayed on the screen.

The purchase order **Status** of the copied purchase order will be 'OPEN'.

### Link/Update to PI/SO/Job

This opens the *Link PO to PI/SO/Job* screen so that the user can select a line and link it to a sales order, parts issue or a service job.

1. From the Menu, select **Purchase Orders > Purchase Orders**
2. Display the relevant purchase order
3. Click on **Actions > Link PO to PI/SO/Job**
4. Select the **Line Number**
5. Select the required **Link To** option
6. Select the entity number for linking
7. Click SAVE

This will close the *Link PO to PI/SO/Job* screen and return to the *Purchase Orders* screen.

The purchase order detail line will be updated with the selection saved.

### Removing PI/SO Link

This opens the *Remove PI/SO Link* screen and the user can select a line and remove its link it to a sales order or parts issue.

1. From the Menu, select **Purchase Orders > Purchase Orders**
2. Display the relevant purchase order
3. Click on **Actions > Remove PI/SO Link**
4. Select the **PO Line No** from the drop down list
5. Click SAVE

**Info:** "Operation Successful."

6. Click OK

This will close the *Remove PI/SO Link* screen and return to the *Purchase Orders* screen.

The purchase order detail line link will be removed.

### Reopening the Purchase Order

This action will re-open a confirmed purchase order, updating the purchase order **Status** to 'OPEN' so that the purchase order can be edited.

**Note:** A confirmed purchase order can be reopened only after all the related 'OPEN' purchase receipts are deleted.



## Returning the Purchase Order

A return can be processed only on received or partly received purchase orders, following the below steps:

1. From the Menu, select **Purchase Orders > Purchase Orders**
2. Display the relevant purchase order
3. Click **Actions > Return Order**

This will display a screen to enter the purchase order detail line number that must be returned. If left blank, all the detail lines will be returned.

4. Enter the relevant PO line number
5. Click OK

This will return to the *Purchase Orders* screen.

A new PO record will be displayed with the Type 'R' (return order).

To complete the process, the PO return must be confirmed and then, fully receipted. This receipting will create the reverse GL journal.

## PURCHASE ORDER VIEWS

The following Views are available from the *Purchase Orders* screen:

- Notes
- Equipment
- Receipts
- Service
- View Trans

### Entering Purchase Order Notes

Notes relevant to the purchase order can be entered in the *Purchase Order Notes* screen. The notes will be printed on the purchase order.

1. From the Menu, select **Purchase Orders > Purchase Orders**
2. Display the relevant purchase order
3. Click **Views > Notes**

This will open the *Purchase Order Notes* screen.

4. Click EDIT
5. Enter the relevant note
6. Click SAVE
7. Click CLOSE to close the *Purchase Order Notes* screen

### Enquiring on Equipment

This will open the *Equipment Ledger* screen.

1. From the Menu, select **Purchase Orders > Purchase Orders**
2. Display the required purchase order
3. Click **Views > Equipment Ledger**

This will open the *Equipment Ledger* screen.

4. Proceed with the Equipment Ledger enquiry as required
5. Click CLOSE to close the *Equipment Ledger* screen and return to the *Purchase Orders* screen

### Displaying the Purchase Order Receipts

This will enable the user to view the purchase order receipt details from the *Purchase Orders* screen.

1. From the Menu, select **Purchase Orders > Purchase Orders**
2. Display the relevant purchase order
3. Click **Views > Receipts**

This will display the *Purchase Order Receipts* screen.

4. Proceed with the purchase receipt enquiry as required
5. Click CLOSE to close the *Purchase Order Receipts* screen

### Viewing the Service Job

This will enable the user to view the service job related to a purchase order.

1. From the Menu, select **Purchase Orders > Purchase Orders**
2. Display the relevant purchase order
3. Click **Views > Service**

This will open the *Service Jobs* screen.

4. Proceed with the service job enquiry as required
5. Click CLOSE to close the *Service Jobs* screen

### Viewing Transaction

This will enable the user to view the transactions related to a purchase order.

1. From the Menu, select **Purchase Orders > Purchase Orders**
2. Display the required purchase order
3. Click **Views > View Trans**

This will open the *Purchase Order Transactions* screen.

4. Proceed with the transaction enquiry as required
5. Click CLOSE

This will close the *Purchase Order Transactions* screen.

## PURCHASE ORDER RECEIPT ACTIONS

There are several actions available from the *Purchase Orders Receipts* screen.

The available actions are:

- Change Serial No
- Print Barcodes
- Receipt Goods

**Note:** The availability of these actions depends on the user's security access and the status of the purchase order currently displayed.

Please see below table for purchase order receipt status and corresponding actions:

ACTIONS AVAILABLE	STATUS
Receipt Goods	'OPEN'
Change Serial No. Print Barcodes	'INVOICED'
Change Serial No. Print Barcodes	'RECEIVED'
No actions available	'CANCELLED'

### Changing the Serial No.

1. From the Menu, select **Purchase Orders > Purchase Receipts**
2. Display the relevant purchase receipt
3. Select **Actions > Change Serial No.**

This action is only applicable if:

- The purchase order receipt **Status** is 'OPEN'
- The item to be received is a serialised item

A screen will display so that the user can enter the new serial number for the item.

### Printing Bar Codes

1. From the Menu, select **Purchase Orders > Purchase Receipts**
2. Display the relevant purchase receipt
3. Check **Print Bar Code** for the required lines
4. Click **Actions > Print Barcodes**

### Receipting Goods

This will open the *Receipt Goods* screen.

If a purchase order receipt is generated from a supplier invoice, this view will open the *Receipt Goods from Supplier Invoice* screen.

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