

IES Purchasing: Query DDP Proforma

Purpose

The purpose of this Document is to explain how to query a DDP Proforma.

Summary of Order Types

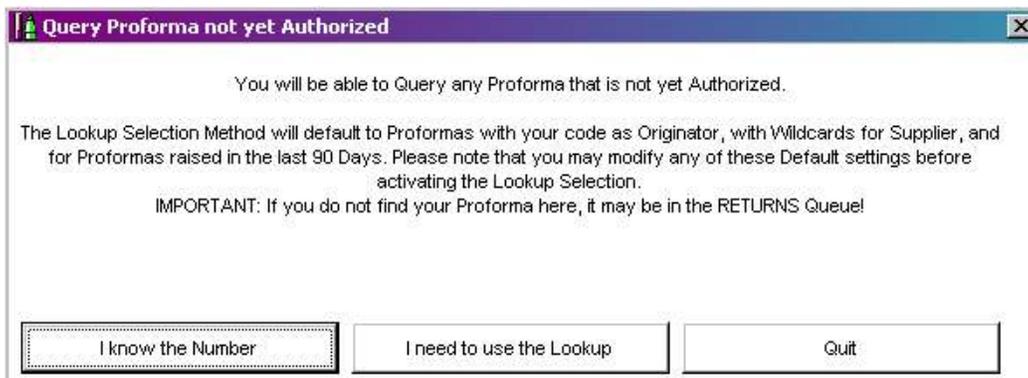
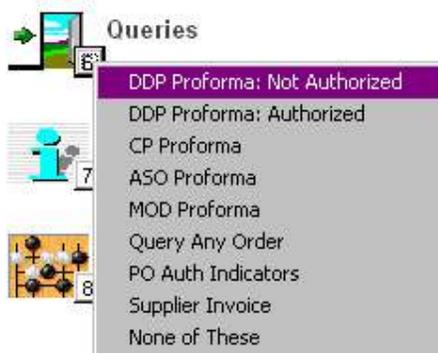
CP = Central Purchasing
ASO = Automated Stock Orders
DDP = Delegated Direct Purchasing
MOD = Manufacture On Demand

DDP Proforma Queries

DDP Proforma Queries are available before AND after Authorization.

DDP Proforma Query: Not yet Authorized

To Query a DDP Proforma that is not yet Authorized, choose QUERIES (8) from the main Purchasing Options, then select "DDP Proforma: Not Authorized"



You can directly specify the Proforma Number to query (if known), or find it with the Lookup option.

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The selection tips tell you what kind of selection rule is being applied ...



You may change any 'My Choice' value to prescribe which data should be selected ...



	Selection Tip	My Choice
1	Originator Code = ?	dm
2	Supplier Account = ?	[]
3	Date Raised >= ?	08/10/2005
4	Date Raised <= ?	06/01/2006

Note that when you use the lookup, the system will default to your own User Code (which will list only your own Proformas), but that you can overwrite this with wildcards or another User Code, in order to see Proformas that are not necessarily your own.

Once you specify or select the Proforma Number, the system opens it in the Query screen.

DDP Proforma Query: Authorized

This time, select "DDP Proforma: Authorized"



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Authorized Proformas are stored in 2 separate Queues. Once the linked Purchase Order is fully satisfied, the Proforma is moved to the CLOSED Queue. Until fully satisfied, the Proforma remains in the OPEN Queue. Should you not find it in the 1st Queue selected, you may also try the other Queue.

Please select Queue to select from ...

IMPORTANT: If you do not find your Proforma here, it may be in the RETURNS Queue.

from the OPEN Queue	from the CLOSED Queue
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For authorized Proformas, i.e. already Purchase Orders, there is an OPEN queue and a CLOSED queue. The open queue will list Proformas where the Purchase Order is still open, i.e. in process, and the closed queue will list Proformas where the Purchase Order is already complete and therefore closed. If you do not find it where you expect it, then you will simply look in the other queue also.

The rest is the same as for querying a Proforma that is not yet Authorized, except that on this Query you can drill through to the Purchase Order to see the status of it.

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