IES Purchasing: Query an Order

Purpose

The purpose of this Document is to explain how to query a Purchase Order, also called 'drilling into' an Order.

Summary of Order Types

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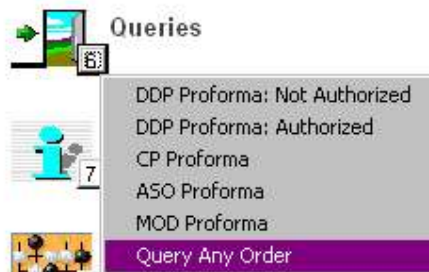MOD = Manufacture On Demand

Methods to Query Orders

There are essentially 2 primary methods to Query a Purchase Order: -

- ❑ From the Menu
- ❑ From the Purchase Order Events processing screens

From the Menu

To Query an Order from the Menu, choose Queries (8) from the main Purchasing options, then choose 'Query Any Order'

When the system opens the Query screen, you can either use the standard lookup function to retrieve the correct Order Number, or you can specify it directly.

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Usually, once the Order Number is specified or retrieved, the system will default directly to the current Line Status of the Order.

At a glance, you can immediately discern the current status of the Line Items. Any Items still On Order and not Received will be on the 'On Order' grid. Received but not Invoiced Items will sit on the 'Received' grid, and Items that are fully invoiced will sit on the 'Invoiced' grid.

The tabs at the top show various other aspects of the Purchase Order that may be viewed.

The 1st picture (shown above), correlates to tab # 2, i.e. Line Status. The 'Main' tab shows the official Order status (Open / Closed) and other pertinent information, while the 'Allocations' page shows the initial Order Items plus the current Transaction list which can be drilled. The 'Stock' and 'Direct' pages show the Stock and Directs Items on the Order specifically, together with any Supplements on either.

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MAIN

Purchase Order Enquiry

Pertinent Order parameters are shown on 'Main'

Order Re-Print option

ALLOCATIONS

The initial Order and Supplement list is shown here …

Order Item List: -

	Code	Qty Ordered	Qty Received	Qty Invoiced
1	c/1	20.00	20.00	0.00
2	c/2	3.00	0.00	0.00
3	n/1	10.00	10.00	10.00
4	sc/1	1.00	0.00	0.00

Show Allocations

Transaction View per Supplier: -

	>>> Transaction Ordered	Committed	Actual	Period
1	1389530623C	30.00	0.00	0.00	66 [M
2	1389530623E	75.00	0.00	0.00	66 [M
3	1389530623F	100.00	0.00	0.00	66 [M
4	1389530655B	-100.00	100.00	0.00	66 [M
5	1389530674B	0.00	-100.00	100.00	66 [M
6	1389530680A	-30.00	30.00	0.00	66 [M
7	1389530945B	29.88	0.00	0.00	66 [M

The Transaction Audit Trail for this Purchase Order is listed here, and a dbl-click on any Transaction will drill into it …

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Stock Order Items: -

>>> StockItem	Descr	Store	Unit	Price	Quantity	Actual
1	00020001 CAU	CAUTION NOTE BO	01	EACH	1.50	20.00	30.00
2	00011003 FRA	FRANK TENSION P	01	EA	25.00	3.00	75.00

Stock Supplements

>>> Suppl Comm	Descr	Store	Unit	Price	Quantity	Actual
1	1121520 CAME	CAMERON #3 BLAC	01	ea	29.88	1.00	29.88

Stock Items and Supplements are shown on the 'Stock' tab (above), and Direct Items and Supplements are shown on the 'Direct' tab (below). Any Item can be drilled into by dbl-clicking on it.

Direct Order Items: -

>>> Non-Stock	Descr	Unit	Price	Quantity	Actual
1	138953059S W	Widgets	ea	10.00	10.00	100.00

Direct Supplements

>>> Suppl Non-	Descr	Unit	Price	Quantity	Actual
1						

Query Order from the Order Events processing screen

The Order detail shown on the Query screen exceeds what is available on the standard Order processing screens, and can also be reached by choosing the QUERY option directly on Purchase Order events processing screens.

Of course, in this case there is no need to specify an Order Number, since one already has the Order open.

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When on a PO processing screen, just choose the 'Order Detail' tab, and then choose the Query option

Order Query option

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