

IES Purchasing: Query an Order

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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

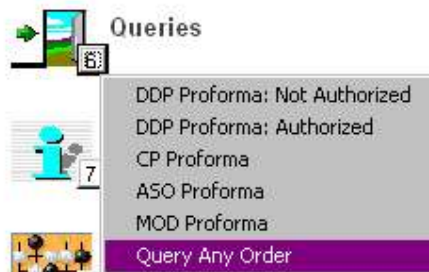
Methods to Query Orders

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.

Query Order [2] (Save / Update : Inactive(ENG))

1 Main | 2 Line Status | 3 Allocations | 4 Stock | 5 Direct

PO NUMBER: CP1020

Line Item Status: -

Ln Order	Code	Descr	Unit	Price	Quantity	Actual	
1	00011003	c/2 FRAME TENSION P	EA		25.00	3.00	75.00
2	1121520	ac/1 CAMERON #3 BLAC	ea		29.88	1.00	29.88

Received	Code	Descr	Unit	Price	Quantity	Actual	
1	00020001	c/1 CAUTION NOTE BD	EACH		1.50	20.00	30.00

Invoiced	Code	Descr	Unit	Price	Quantity	Actual	
1	1389530295	n/1 Widgets	ea		10.00	10.00	100.00

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.

Query Order [2] (Save / Update : Inactive(ENG))

1 Main	2 Line Status	3 Allocations	4 Stock	5 Direct
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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

PO NUMBER: **CF1020**

Purchase Order Enquiry

STATUS:

Order Number	CF1020
Status	ORDER IS OPEN
Mode	STANDARD

DELIVERY:

Delivery Inst	REP Main Warehouse
Tot Exp Cde/Dt	EL/02/2006
Latest Exp Cde/Dt	L4/02/2006

ORIGINATION:

Created By	Info Manager
Originator	Info Data Manager
Buyer	Info Data Manager
Authorized By	Info Manager
Date Authorized	15/01/2006

NOTES:

INDICATORS:


Period/Phase	66 (Mar 2005)
Currency	Local
Tax Type	15 Non-Capital Goods (Input) VAT
Tax Rate %	10.00
Re-Charge Tax	0.00 Tax Received

TOTALS:

Original Stock Value	100.00
Original Total Min Stock	100.00
Original Total Value	200.00

SUPPLIER:

Supplier	CF-0012 Commercial Suppliers Ltd
For Attention	

Order Re-Print option 

Pertinent Order parameters are shown on 'Main'

ALLOCATIONS

PO NUMBER: **CF1020**

Order Item List:


Code	Qty Ordered	Qty Received	Qty Invoiced
c/1	20.00	20.00	0.00
c/2	5.00	0.00	0.00
n/1	10.00	10.00	10.00
ac/1	1.00	0.00	0.00

Transaction View per Supplier:

Transaction	Ordered	Committed	Actual	Period
1389530623C	20.00	0.00	0.00	66 [N]
1389530623E	75.00	0.00	0.00	66 [N]
1389530623F	100.00	0.00	0.00	66 [N]
1389530655B	-100.00	100.00	0.00	66 [N]
1389530674B	0.00	-100.00	100.00	66 [N]
1389530689A	-30.00	30.00	0.00	66 [N]
1389530945B	20.00	0.00	0.00	66 [N]

The initial Order and Supplement list is shown here ...

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 CAM	CAMFION NOTE B0	01	EACH	1.50	20.00	30.00
2	00010003 FRA	FRAME TENSION P	01	EA	25.00	3.00	75.00

Stock Supplements

>>> Suppl	Descr	Store	Unit	Price	Quantity	Actual	
1	1121520 CASE	CASEION #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	1388530595 W	Widgets	ea	10.00	10.00	100.00

Direct Supplements

>>> Suppl Non-Stock	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

PO NUMBER: CP1000

Purchase Order Events

STATUS:

Order Number	CP1000
Status	ORDER IS OPEN
Program #	
Note	STANDARD

DELIVERY:

Delivery Inst	DEF Bldg Warehouse
Ful Exp Date	14/02/2006
Latest Exp Date	14/02/2006

ORIGINATION:

Captured By	Data Manager
Originator	Dr Data Manager
Buyer	Dr Data Manager
Authorized By	Data Manager
Date Authorized	13/01/2006

INDICATORS:

Period Period	66 [Max: 2003]
Currency	Local
Fac Type	IS Inv-Capital Goods (Input) Vat
Tax Rate %	12.00
Inv Charge Tax	9 Inv Tax Recruit

SUPPLIER:

Supplier	CO-8812 Commercial Suppliers Inc
For Attention	

NOTES:

CANCELLATION:

Cancel Order **Reset**

OL QRY	AR QRY	AP QRY	BATCHREP
PO EXPEDITE	SHOW ALLOC	PO QRY	SAVE

Order Query option

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