

IES Purchasing: Cancel a Proforma

IES Purchasing: Cancel a Proforma

Purpose

The purpose of this Document is to explain how Proformas may be cancelled, i.e. BEFORE authorization as Purchase Orders.

Summary of Order Types

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

Introduction

There are some differences in the options available for Proforma Cancellation for the different Order Types. In this Document we will show Proforma Cancellation by Order Type.

CP and ASO Proformas

To cancel 1 or many CP and / or ASO Proformas, choose "Cancellations" (4) from the main Purchasing options, then choose "Cancel CP/ASO Proforma".



This will open the Cancellation screen for CP / ASO Proformas.

It is worth noting that this menu option (which of course is access controlled) provides access to the cancellation of any existing CP and ASO Proformas, irrespective of the Originators. Since CP / ASO is a central function in the Purchasing module, this is a control function in general, rather than User specific in terms of 'which' Proformas may be cancelled.

In the screen shown below, the Proforma(s) to be cancelled are listed in the 'Order #' column, and can be directly specified or retrieved by means of the lookup.

Choose 'Cancel Proformas' to cancel the listed Proformas.



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plisz	Buyer	Brightor	
0001 Annad a Withwal	Date Manager	Data Manager	
0003 Wonder Bars	Data Bainger	Data Manager	
0014 Boskins Inc.	Data Manager	Data Manager	
	pliez 0001 Senad e Vithwal 0003 Worder Bars 0014 Hoskins Inc.	pliez Buger 0001 Annad e Vithwal Data Hanager 0013 Wonder Bars Data Hanager 0014 Horkins Inc. Data Hanager	pliez Buyer Driginator 0001 Aanad e Withwal Dets Manager Dets Manager 0003 Wonder Bars Deta Manager Data Manager 0014 Borking Inc. Dets Manager Dets Manager

DDP Proformas

DDP Proformas can be cancelled in 3 ways. As for CP / ASO, there is an option at `Cancellations' from the main Purchasing options.

PO Actions: -			
	Cancel DDP Proforma		
	Cancel CP/ASO Proforma		
	Cancel MOD Proforma		
	Cancel Line Item(s) on an Order		
	Cancel an entire Purchase Order		
	None of These		

This option leads to a wizard that will retrieve any DDP Proforma that the User is eligible to delete, i.e. by being the Originator.

Cancel / Delete Proforma		
Y	ou will be able to Cancel a Proforma if :-	
	It is not yet Authorized	
	You are the Originator	
The Proform	a will 1st be displayed for verification befor the CANCEL button.	e using
Please s	select the Method for specifying the Proform	a #
I know the Number	I need to use the Lookup	Quit

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The 2^{nd} option to delete a DDP Proforma is available by choosing 'Amend DDP Proforma' from the 'Origination' (1) option.



This choice will similarly lead to the Proforma retrieval wizard, as in the 1st option. Once the Proforma is on screen, just choose 'Delete Proforma'.

Finally, the 3rd option to delete a DDP Proforma is available when a Proforma is RETURNED (rejected) by the target Authorizer. Such Proformas are found by choosing 'Returned DDP Proformas' from the 'Origination' options.





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Once again, when the Proforma is on screen, various options are available for the Proforma, including an option to 'Delete Proforma'.

MOD Proformas

MOD Proformas can only be cancelled from the MOD Worksheet. Below, we show an example of an MOD Worksheet, and on the "Input Costs" page, we see 2 items listed. The 1st line is already approved as a Purchase Order (note "PO" in the Ctrl column), and is no longer a Proforma. The 2nd line is a Proforma, and to cancel it, one just has to dbl-click on it and then choose REMOVE ITEM. The system will ask for confirmation before actually cancelling the Proforma, and the action is also dependent on the User's MOD Privileges for the Worksheet.

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