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

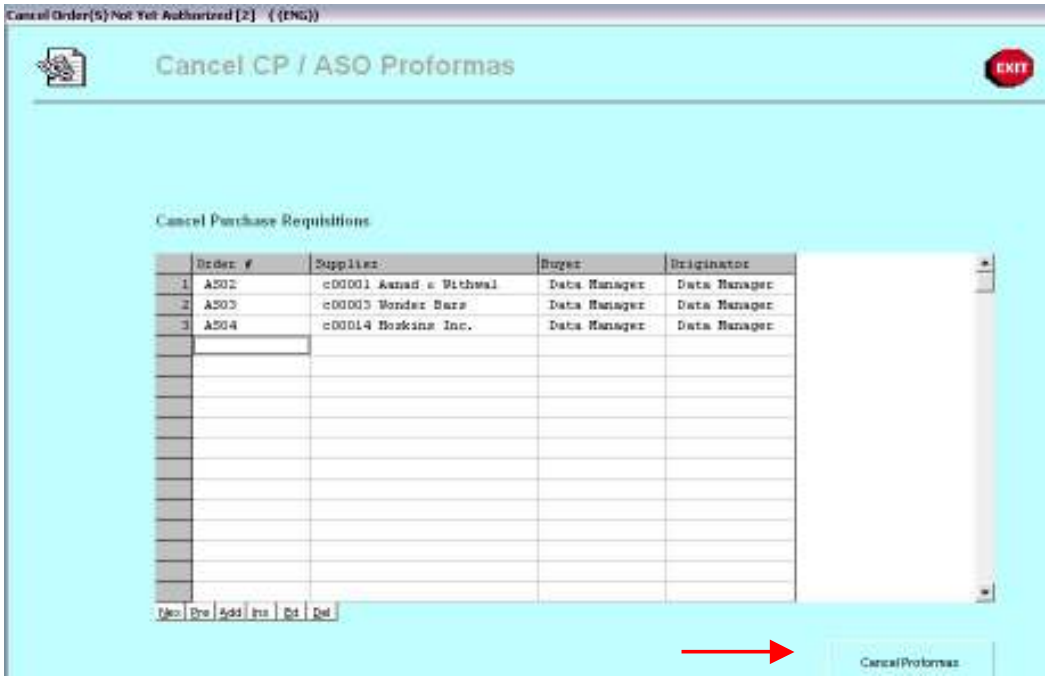
To cancel 1 or many CP and / or ASO Proformas, choose "Cancellations" (4) from the main Purchasing options, then choose "Cancel CP/ASO Proforma".

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.

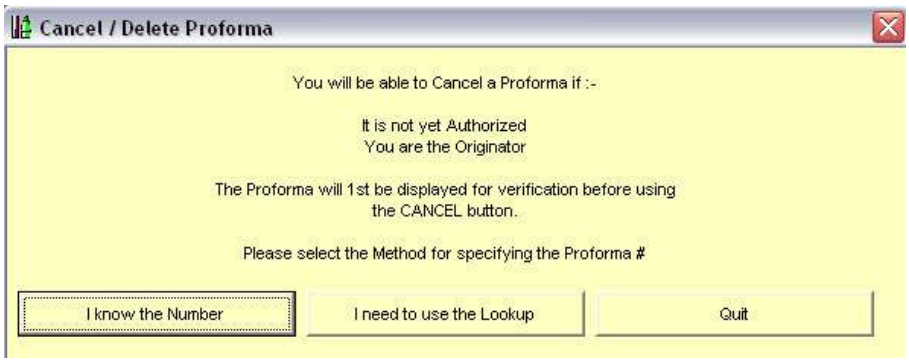
Choose 'Cancel Proformas' to cancel the listed Proformas.

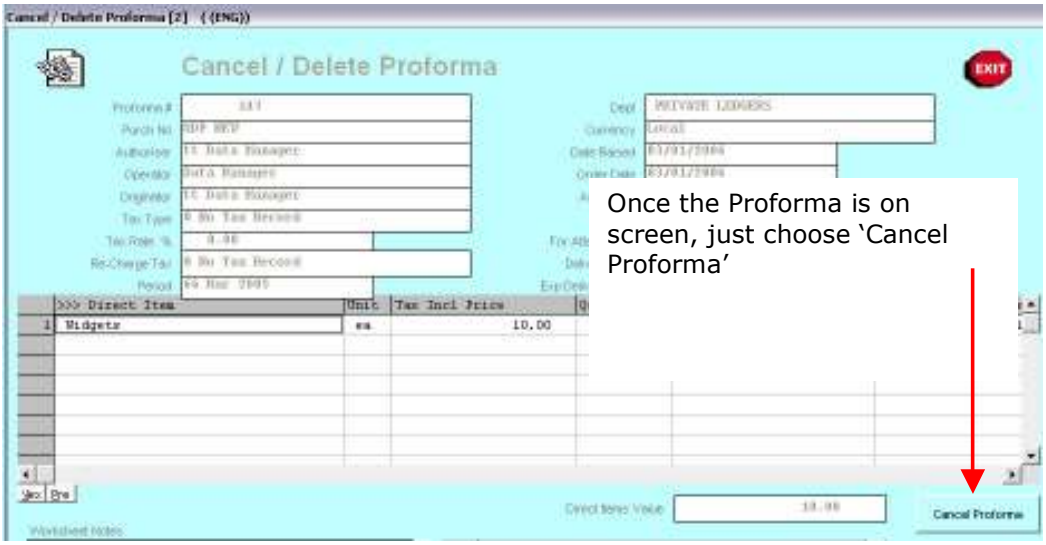


DDP Proformas

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

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.





The 2nd 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'.

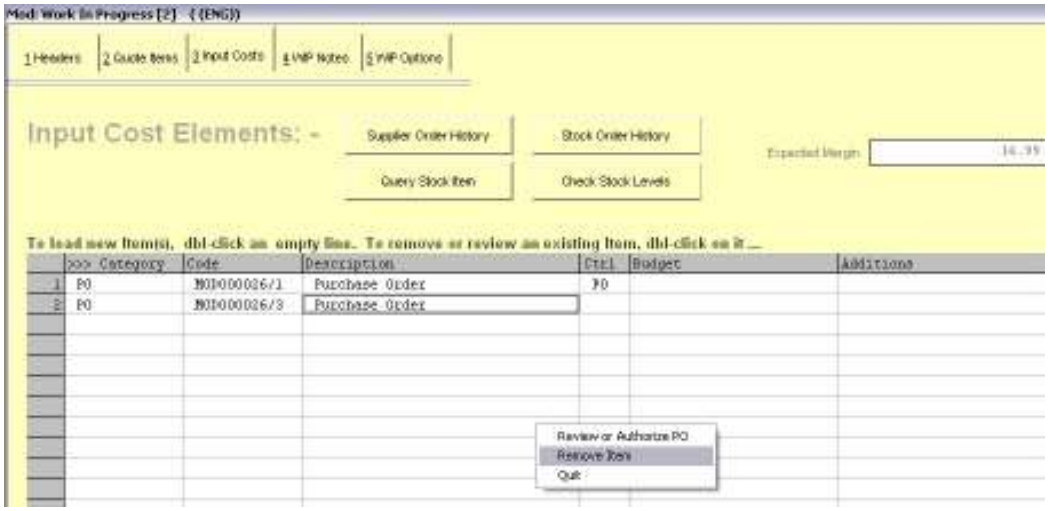
Finally, the 3rd option to delete a DDP Proforma is available when a Proforma is RETURNED (rejected) by the target Authorizer. Such Proformas are found by choosing 'Returned DDP Proformas' from the 'Origination' options.

Have you used your IES today?

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.



© Infolab, 2006.

This Documentation is copyrighted by Infolab (Pty) Ltd. [www.infolab.cc] All rights are reserved. Licensed INFOLAB Business Partners and Users are granted permission, for internal use ONLY, to reproduce the Documentation, and to include amendments dealing with specific instructions local to your installation.