IES Purchasing: Returned DDP Proformas

Purpose

The purpose of this Document is to explain where to find "Returned DDP Proformas", and how to deal with them.

Summary of Order Types

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

Introduction

After Origination, a DDP Proforma is always submitted for Authorization. The Authorizer has a number of choices what to do with the Proforma. For example, the Authorizer may direct the Proforma to another Authorizer, effectively replacing him or herself as the Authorizer, or "skip" the Proforma for later Authorization, or Authorize or Decline to Authorize (i.e. reject). The Authorizer also has an option to "Return to Originator", effectively re-directing the Proforma back to the Originator for changes or some further action before re-submission of the Proforma for Authorization.

This Document is about where the Proforma "lands" after being "Returned to Originator", and how to deal with it further.

The RETURNS Queue

When a Proforma is returned by a target Authorizer, the Originator may be alerted by a system message of the fact, although this is at the discretion of the Authorizer (i.e. whether to send a message or not).

With or without message, the Proforma is always returned to a special queue called the "Returns Queue". To find Proformas returned to yourself, it is necessary to check your Returned DDP Proformas.

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The system will automatically facilitate by opening Proformas returned for your attention, one after the other.

Once your returned Proforma is on screen, it is effectively in "amend" mode. You can make additions, changes, update the Worksheet, attach further documents, etc.

The "View RETURN Notes" option is usually an important choice, i.e. to see what the Authorizer is saying with regards to the Proforma, and what should be done before re-submitting it.

You also have the choice of deleting the Proforma at this stage, or re-assigning it to another Authorizer.

Returned Proformas are just Proformas that need further action before being submitted again for Authorization.

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