IES Purchasing: Facilitated Event Processing

Purpose

The purpose of this Document is to explain the use of the "Facilitated Event Processing" option.

Summary of Order Types

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

Introduction

Facilitated Event Processing is used to –

a) access different Purchase Order types from the same place, i.e. without having to open different Order Processing type screens
b) to let the system automatically offer DDP Invoices that have been approved, for processing;
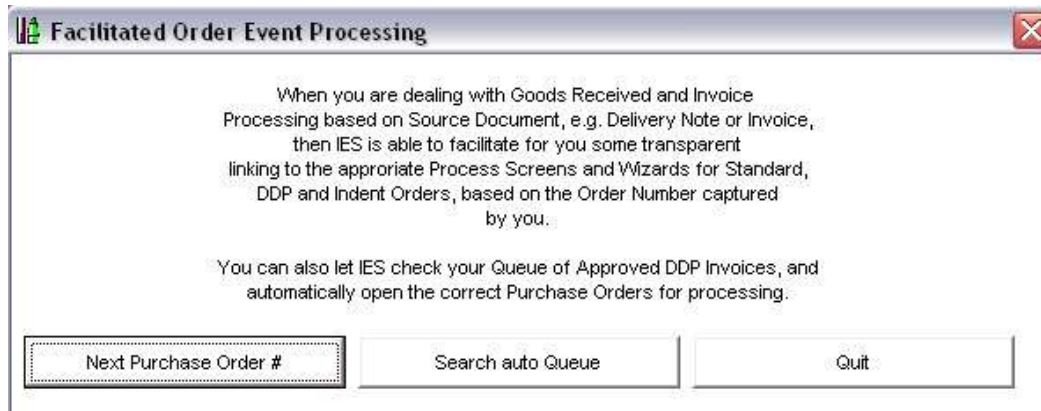
Where to Process

Facilitated Event Processing is part of what is referred to as Purchase Order Events, and the Purchase Order Events are all processed from the visual Event Screens, where the entire status of a Purchase Order is visible on a single screen.
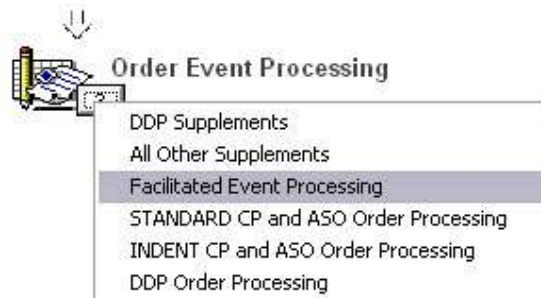
From the main Purchasing options, choose "Order Event Processing" and then choose "Facilitated Event Processing". This will open facilitated event processing with an initial dialog where you can choose to operate by Purchase Order Number, or to Auto Search the Queue for actions that await your attention.

We will look at the option to process by Purchase Order Number 1st.

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There are 2 main reasons to choose "Next Purchase Order #" –

❑ You have a number of Delivery Notes and / or Invoices to process on a range of Orders that possibly include different Order Types. In this case, by specifying the next PO number to process, the system will automatically open the correct PO screen as determined by the PO Number, i.e. whether CP / ASO, Standard or Indent or DDP. This is indeed easier than to open the CP option, then still specify the PO number, then open the Indent option for the next PO, and so on.

❑ You have Payment Requests to process for DDP Orders, and this option opens the screen with the option to Request Payment Authorization. (Hint: For DDP Orders, Invoices cannot be processed until Payment is authorized by the DDP Authoriser of the Order.)

When you choose "Next Purchase Order #", the system prompts for the PO to process … ➡ (Any Order Type except MOD is permissible.)	

The system will open the appropriate Event Processing screen, and on the example shown below, any permitted Order Events may be processed. Note also the specific option to request Payment Authorisation (which is used for DDP Orders to get Payment Approval, i.e. before an Invoice can actually be processed.)

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The Order Event screen shown above allows Order Event processing in similar fashion to other Event Processing screens for Purchase Orders, but in addition it has 2 more option, i.e. "Show Current Authorisations" and "Pmt Requests and Auths" – the former is used to view current Authorizations on this Order and the latter is used to request a (new) Payment Authorization.

If the next Payment Authorization to be requested is for an Invoice number already used on this Order, then you will choose "Select Existing Invoice" else you will choose "Specify Invoice Number".

The system will automatically generate the Payment Request by including Items that are Received, but not yet Invoiced. You can amend the auto Request before choosing "Request Authorisation".

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When you choose "Request Authorisation", the Request is automatically placed in the queue for the correct Authorizer, to whom it will be offered when he / she uses the "Payment Authorizations" sequence.

The other option on facilitated event processing is to "Search auto Queue". In this case, if there are Purchase Orders (DDP) on which Payment has been authorized and where you are marked as the next person to process the Invoice (i.e. the AP Creditors Clerk who requested the Payment Authorization), then the system will automatically open these Order Screens 1 by 1 for you to process the Invoices.

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