

VM3COP20.82 Supplier Purchase Orders


Section 1: Updating Supplier Pricing

Should you have been provided with supplier pricing to us, these can now be updated in the CRM system as follows:



1. Click magnifying glass, click in the box underneath contacts, type relevant contact and press Enter:

2. Click company required, make sure you use the correct account for the correct host company, i.e. one with the correct Viamed/Vandagraph/VST logo to the left.

 00009147	Contacts #11	Teledyne Analytical Instruments	City Of Industry	91748-1020	0016 269 341589	Company Supplier Customer
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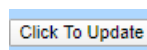
If we have recently used a contact in the new system this will show in green.

3. Click 'Stock Reference', this will show you a list of products linked to this company.



Should the relevant parts not appear you can add them individually by 'Add Single Item' or you can add by stock group, 'Import Stock References from a Stock group to this Supplier'.

Should you wish to update any information, click into the box and edit. This will then add a 'Click to Update' button to the end of the line, once you are happy with the information you have inputted then click this. It will then save the information you have included. If you do not do this it will not be saved and will not show on any purchase orders you try to process.




Section 2: Enabling Companies and Contacts to be able to produce Purchase Orders



1. Click magnifying glass, click in the box underneath contacts, type relevant contact and press Enter:

2. Click company required, make sure you use the correct account for the correct host company, i.e. one with the correct Viamed/Vandagraph/VST logo to the left.

 00009147	Contacts #11	Teledyne Analytical Instruments	City Of Industry	91748-1020	0016 269 341589	Company Supplier Customer
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If we have recently used a contact in the new system this will show in green.

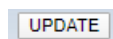
3. Click 'Edit Address'



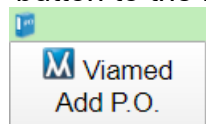
4. Fill in the following fields:

- Is Purchase Order Supplier
- Our PO Supplier Account number
- Host Company

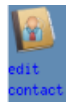
5. Click 'Update'



6. To be able to send a purchase order the relevant contact needs to be setup correctly. If the contact has the '*HOST* Add P.O.' button to the left of their name they are fine.



If not you need to click the contact name, 'Edit Contact'




Click the box next to Purchase orders and click 'Submit', this will then show the '*HOST* Add P.O.' button next to the edited contact.

Section 3: How to Process Purchase Orders



1. Click magnifying glass, click in the box underneath contacts, type relevant contact and press Enter:

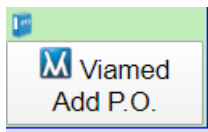
2. Click company required, make sure you use the correct account for the correct host company, i.e. one with the correct Viamed/Vandagraph/VST logo to the left.

 M00009147	Contacts #11	Teledyne Analytical Instruments	City Of Industry	91748-1020	0016 269 341589	Company Supplier Customer
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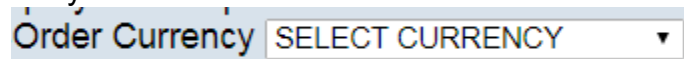
If we have recently used a contact in the new system this will show in green.

3. This page is the full CRM for the company. It shows outstanding purchase orders and their status, contacts within the company and will also show who we usually send purchase orders to (if this is not shown, please see section 1 of this COP to setup).

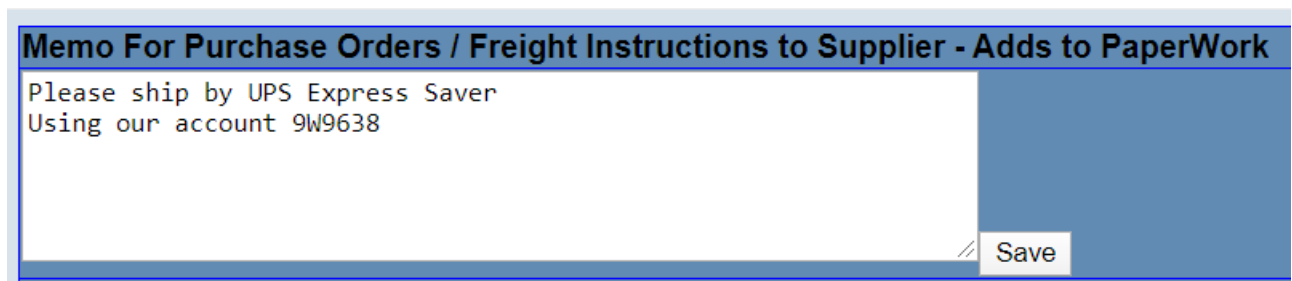
Click '*HOST* Add P.O.'



4. If required, set currency:



5. Should there be a need for memos to be printed on purchase orders, they can be edited in the order memos screen, do this in a separate tab so you don't lose your place on your order.



In some instances, i.e. Maxtec Eyemax and Maxtec Oxygen sensors, these memos may be required to be amended for each order. See 'Notes to Purchasing Stock ordering Screens if applicable' which is shown on the order picking page.

6. Search 'Add Items', insert part number and click search.

Search to Add Item :

Search

7. Check the correct supplier description and reference are included, if not click New and this will open a text box to enter the correct information.

Stock Reference	Description	Supplier Ref	Supplier Description	Quantity To Order	Unit Price	Required Date	Memo	Duplicate	Add To Order
0110081	Oxygen sensor, UFO 130-2	C-73894 New	Teledyne Oxygen sensor UFO 130-2 New	<input type="text"/> Update QTY	150.00 New	17/03/20	<input type="text"/>	<input type="checkbox"/>	Add to Order

8. Insert unit price, if not available – if not available and will be the same going forwards please insert to 'Stock References' page as per section 1 of this COP. Previously paid pricing can be found in previous purchase orders found in Intrastats.

Stock Reference	Description	Supplier Ref	Supplier Description	Quantity To Order	Unit Price	Required Date	Memo	Duplicate	Add To Order
0110081	Oxygen sensor, UFO 130-2	C-73894 New	Teledyne Oxygen sensor UFO 130-2 New	100 Update QTY	107.50	12/05/20	<input type="text"/>	<input type="checkbox"/>	Add to Order

9. Required date – always check memos, Envitec for example take 23 days to produce product. Always include a realistic delivery date.

10. Click Add to Order.

Items on Purchase Order:

Stock Reference	Supplier ref	Description	Qty On the Purchase Order	Unit Price	Total Value	Date Required	Memo	Update	Remove
0110081 PO History	C-73894	Teledyne Oxygen sensor UFO 130-2	100	107.5	10750	12 May 2020		Update	Remove
					10750				
				Preview Order	Commit Order				

11. You can preview the order by clicking 'Preview Order', this will open the PDF. Should you be working remotely you can download the purchase order here.

12. Should you wish to ask someone else to check this order you can go back into the CRM, this will show the order as uncommitted and can be edited at this stage. To edit, click 'Details' against the PO and it will open the purchase order for further editing, follow the above steps again to add further products.

13. Once you are happy with the order click 'Commit Order'. Once the order is committed, this will download the purchase order PDF and add to Operadocs in U drive.

14. Once the order has been sent please update the purchase order log as per VM3COP20.29.