USER GUIDE

Purchasing

Supply Chain Management Suite

What's Inside

Introduction

Ormed Purchasing encapsulates all of ORMED MIS's purchasing functionality, allowing you to electronically create, track, and reconcile purchase orders, generate order recommendations, and process requisitions for non-stock, capital, and non-catalog items. Ormed Purchasing ties into the centralized ORMED MIS software system and the ORMED X ecommerce web portal.

What is a purchase order?

A purchase order is a document detailing items and quantities to be purchased from a specific vendor. In ORMED MIS, a purchase order is stored electronically and can be acted upon, both directly and indirectly. Purchase orders are the basis for creating receiving reports in Ormed Receiving, or creating reconcilable returned goods memos in Ormed Returned Goods Memo.

If using ORMED X, purchase orders can be modified and fulfilled by vendors, have vendor adjustments approved by buyers, and be filed electronically for further action and record keeping.

What is an order recommendation (system PO)?

Known in ORMED MIS as a system PO, an order recommendation is a record that contains items recommended for purchase or that can recommend items that should be purchased based on inventory thresholds.

Where should I look?

- Ormed Software Basics familiarizes you with the common elements and shared traits of ORMED MIS software and introduces you to ORMED X.

- ORMED X and Your Supply Chain discusses how ORMED X integrates with ORMED MIS supply chain processes via Ormed Purchasing.

- Procedures – Purchase Order and Requisition Processing contains procedures used to manage purchase orders and process requisitions.

- Procedures – Order Recommendations (System POs) contains procedures used to create and manage order recommendations.

Ormed Software Basics

Before delving into the rest of the user guide, take a brief moment to acquaint yourself with some of the common elements in most ORMED MIS applications.

Common Icons

The following icons appear in most ORMED MIS modules:

- **New** ⬜ or ⬜ – Creates a new record, file, or entry.

- **Required Field** ☞ – This icon denotes a required field that must be filled in. You will not be able to save any items or records missing required fields.

- **Save** 💾 – Save the file or entry you are currently working with.

- **Cancel** ⊘ or 🔃 – Use this icon to cancel entry of a new item or record. If editing an existing item or record, this will revert the item or record to the state it was in before you began your edits.

- **Delete** 🗑 or ✖ – Deletes records, files, or entries in a module. Use this function with care, for in many cases deleted items cannot be recovered.

- **Preview** 🔍 – View a form, file, list, or other item before you print.

- **Print** 🖨 – Print a form, file, list, or other item. In many cases, clicking this icon sends the information directly to the printer without previewing it first. Use the **Preview** 🔍 icon if you want to view the information before printing.

Change Your Password

Depending on your access privileges, you may be able to change your password from the **Security** menu, found in the main menu bar of nearly every ORMED MIS module.

> **Note:** Password changes are effective immediately through all ORMED MIS software suites and modules for your username, <u>except</u> for Ormed Messaging. Ormed Messaging uses a separate password.

To change your password:

1. Click **Security** in the main menu bar, and then click **Change Password**. The **ORMED Security – Change Password** window opens.

2. Fill in your **Old Password**, then type in your new password in both the **New Password** and **Confirm New Password** fields.

3. Click **OK**.

> **Note:** If you do not have the appropriate permissions, you won't be able to change your password. Contact your system administrator for assistance.

Searching

Most ORMED MIS modules use common searching procedures.

Quick Search

You can quickly search for records by using the table in which they are listed.

To use quick search:

1. Click any cell under the column heading you wish to search by (e.g., **PO #**).

2. Type the first few characters of the record you want to find (e.g., type **12** to find purchase order number **12345**). The first record that matches your criteria is highlighted.

Basic Search

The basic search options allow you to search for items that match specific criteria.

To use basic search:

1. Click **Search** in the main toolbar (some ORMED MIS modules display basic search options by default). The basic search options are displayed:

Figure 1: Basic search options.

   a. Specify what you want to search for. Each individual ORMED MIS module will contain different choices here (e.g., Ormed Purchasing will let you search by purchasing-related fields, such as PO #, PO Date, and Vendor).

   b. Specifies how the search will be conducted. Depending on the module, this box can include choices such as **contains** (find items that contain search criteria), **doesn't contain** (find items that do NOT contain search criteria), **is** (find items that match search criteria exactly), and more.

   c. Search criteria. Type your search criteria here.

2. Fill in the fields and click **Find**. If necessary, you can click **Stop** to cancel the search.

Advanced Search

The advanced search options contain all the functionality of the basic search options in **Figure 1** above, but include the capability to specify multiple search criteria.

To conduct an advanced search:

1. From the basic search options, click **Advanced >>**. Additional options are revealed:

Figure 2: Advanced search options.

 a. Specify what you want to search for. Each individual ORMED MIS module will contain different choices here (e.g., Ormed Purchasing will let you search by purchasing-related fields, such as PO #, PO Date, and Vendor).

 b. Specifies how the search will be conducted. Depending on the module, this box can include choices such as **contains** (find items that contain search criteria), **doesn't contain** (find items that do NOT contain search criteria), **is** (find items that match search criteria exactly), and more.

 c. Search criteria. Type your search criteria here

 d. This is where your search criteria, also called the search filter, will show up when added to your search.

2. Enter what you want to search for, how to search, and your search criteria, then click the **Add** button. Repeat this step until you have as many search filters as you need. If you need to remove a search filter, click it, then click the **Remove** button.

3. After entering all of your search criteria, click **Find**. If necessary, you can click **Stop** to cancel the search.

ORMED X and Your Supply Chain

The ORMED MIS Supply Chain Management Suite is more than just a set of synergistic applications made specifically for supply chain needs. Select ORMED MIS modules interface with ORMED X, an online purchasing, reconciliation, and payment portal that streamlines the supply chain process dramatically. ORMED MIS allows you to send purchase orders to vendors, review proposed vendor changes to purchase orders, and, via ORMED X *Easy Pay*, pay for your orders, all online.

While ORMED MIS can still function in a traditional supply chain environment, granting all the functionality you need to keep your supply chain moving, using ORMED X automates many formerly time-consuming tasks. ORMED MIS and ORMED X work in tandem to improve your productivity.

Purchase Orders and ORMED X

Using ORMED X allows you to send purchase orders to vendors electronically. Vendors can then review the purchase order via ORMED X and, if necessary, propose changes to the order, which you can then allow or deny. Once everything has been agreed upon, ORMED X *Easy Pay* allows you to pay the vendor electronically.

Order Recommendations (System POs) and ORMED X

Posting an order recommendation automatically creates purchase orders based on the items in the order recommendation. If an order recommendation contains items from ORMED X vendors, purchase orders will be created and sent to vendors via ORMED X.

ORMED X in this User Guide

Throughout this user guide, the ORMED X logo denotes a step, procedure, or consideration that only applies if using ORMED X. If not using ORMED X, these steps, procedures, and considerations can be ignored.

Additional ORMED X Information

For more information on ORMED X functionality outside of ORMED MIS, please refer to the **ORMED X E-Commerce Business Center User Guide**, available from Ormed upon request or online at http://ormedx.com.

Procedures – Purchase Order and Requisition Processing

Change Purchase Order Viewing Options

In addition to the search procedures covered by the Ormed Software Basics section above, options are available that allow you to broaden or further narrow what purchase orders you see.

> **Note:** By default, you will only see open purchase orders that you have created (the **Open Mine** view).

To change purchase order viewing options:

1. Click **Purchase Order** in the sidebar, or click **PO** in the top menu bar, then **Purchase Order**. The **PO #** window opens.

2. Click the ⬛ portion of the **View** ⬛ button in the main toolbar.

3. Click the view you want to use:

   a. **Open** – Open purchase orders, regardless of who created the order.

   b. **All** – All purchase orders, regardless of who created the order and whether or not it is still open.

   c. **Open Mine** (default) – Open purchase orders that you have created.

   d. **All Mine** – All purchase orders that you have created, regardless of whether or not the order is still open.

> The following three options (**e**, **f**, and **g**) apply only if using ORMED X.

   e. **Not Sent to Vendor** – Purchase orders that have not yet been sent to the vendor via ORMED X, regardless of who created the order.

   f. **Vendor Acknowledged** – Purchase orders that have been sent to a vendor via ORMED X, regardless of who created the order. This option will NOT show purchase orders where a vendor has proposed changes.

   g. **Vendor Acknowledged w/ Changes** – Shows purchase orders that have been sent to a vendor via ORMED X, regardless of who created the order. This option will *only* show purchase orders where a vendor has proposed changes.

Create a New Purchase Order

A purchase order can include catalog, non-catalog, and capital items. Purchase orders may be built one item at a time or built from a pre-defined list of catalog items currently in that department's supply area profiles (SAPs) or pre-created order recommendations.

To create a new purchase order:

1. Click **Purchase Order** in the sidebar, or click **PO** in the top menu bar, then **Purchase Order**. The **PO #** window opens.

2. Click **New** ◻ in the main toolbar, or click **File**, then **New**. Ensure that you are on the **General** tab.

3. In the **Vendor Code** or the **Vendor Name** field, click the ⊻ button (either one will do). The **Vendor Selection** window opens. Search for and select the vendor you wish to purchase from, then click **Use**.

4. In **PO Date**, select a date for the purchase order.

5. In **Req By** (required by), select the date that the items in the purchase order are required by.

6. Ensure that the vendor information in the **Contact**, **Phone #**, **Ext**, and **Fax #** fields is correct. Modify as necessary.

7. Check or uncheck the **Confirmation Only** checkbox accordingly:

   a. For normal orders, ensure that the **Confirmation Only** checkbox is NOT checked. The **Confirmation Only** checkbox is unchecked by default.

   b. Check **Confirmation Only** only if an order has already been placed with a vendor, and the vendor needs a copy of the order.

> **Note:** An order marked as **Confirmation Only** cannot be electronically updated; it exists purely to create a copy of an order already made.
>
> An order marked as **Confirmation Only** will, when emailed or printed, display the words **Confirmation Only** instead of **Original Order**.

8. In the **Inventory** field, click the ⊻ button. The **Inventory Selection** window opens. Search for and select the inventory you wish to use, then click **Use**.

9. In the **Department** field, click the ⊻ button. The **Department Selection** window opens. Search for and select the department you wish to use, then click **Use**.

10. In the **Currency** field, click the ⊻ button. The **Currency Selection** window opens. Search for and select the currency code you wish to use, then click **Use**.

11. Check or uncheck the **No Receiving PO** checkbox accordingly:

    a. For normal purchase orders, ensure that the **No Receiving PO** checkbox is NOT checked. The **No Receiving PO** checkbox is unchecked by default.

    b. For purchase orders that require prepayment or that are for services rather than physical items, ensure that the **No Receiving PO** checkbox is checked, then select an **Expiry Date** for the purchase order.

12. Click the **Detail** tab.

13. For every new item you need to add to the purchase order:

    a. Click the **Add** button. The **New Item** window opens. Ensure you are on the **Select Item** tab.

    b. Click **Catalog** or **Non-Catalog** to specify what sort of item you are ordering.

> **Note:** If you selected **Non-Catalog**, skip step **c**.

    c. For catalog items, under **Selection**, click the ⊻ button in the **Item No** field. Optionally, before clicking the ⊻ button, click **Show only items for this vendor** to narrow the list down to items this vendor carries. Search for and select the item number you wish to use, then click **Use**.

    d. Click **Next**.

    e. Under **Order Information**, enter an item **Quantity**.

    f. Optionally, for non-catalog items, check the **Make this a Catalog Item upon saving the Purchase Order** checkbox and enter a new **Item #**. When the item line is saved, the non-catalog item will be added to your catalog.

    g. Review and modify the fields and options in the **Item Detail** tab as necessary.

    h. Click the **Notes** tab and enter notes for this item line.

    i. Click **Finish**.

14. For every new asset you need to add to the purchase order:

    a. Click the **Add** button. The **New Item** window opens. Ensure you are on the **Select Item** tab.

    b. Click **Asset**.

    c. Under **Selection**, click the ⊻ button in the **Asset No** field, search for and select the asset number you wish to use, then click **Use**.

    d. Click **Next**.

    e. Review and modify the fields and options in the **Asset Detail** tab as necessary.

    f. Click the **Notes** tab and enter notes for this asset line.

    g. Click **Finish**.

15. For every item or asset line need to edit:

    a. Click an existing item line, then click the **Edit** button.

    b. Review and modify fields and options as necessary.

    c. Click the **Notes** tab and modify notes for this item or asset line.

    d. Click **Finish**.

16. Click the **Notes** tab and, if necessary, add notes to the purchase order:

    a. **PO Notes** – Are displayed on the printed or emailed purchase order. For notes the vendor is meant to see (e.g., special shipping/contact instructions).

    b. **Shipping Notes** – Are NOT displayed on the printed or emailed purchase order. For internal use notes (e.g., potential shipping concerns).

17. Click the **Shipping Info** tab and fill it out:

    a. Under **FOB**, select **Facility** or **Vendor**. **Facility** indicates that the shipping facility will be paying the shipping charges due, whereas **Vendor** indicates that the vendor will pay the shipping charges.

    b. Under **Bill**, select **Prepaid** or **Collect**. **Prepaid** indicates that the shipping charges have already been paid, whereas **Collect** indicates that the shipping charges will be due on delivery.

    c. Under **Charges**, select **Actual** or **Estimated**. **Actual** indicates that the shipping charge is definitive, whereas **Estimated** indicates that the shipping charges are estimated.

    d. Under **Taxes on Freight**, place a checkmark on each tax that will be applied to shipping charges.

    e. In the **Amount** field, enter the shipping charge for the order.

18. Click the **Save** 💾 icon in the toolbar, or click **File**, then **Save**.

Modify an Existing Purchase Order

Purchase orders can be modified before being printed or sent to vendors.

> **Note:** When following the procedure below for modifying a purchase order, only modify what needs to be changed. Skip steps for anything that doesn't need editing.

To modify an existing purchase order:

1. Click **Purchase Order** in the sidebar, or click **PO** in the top menu bar, then **Purchase Order**. The **PO #** window opens.

2. Search for and select the purchase order you want to modify. Ensure that you are on the **General** tab.

3. In the **Vendor Code** or the **Vendor Name** field, click the ⌶ button (either one will do). The **Vendor Selection** window opens. Search for and select the vendor you wish to purchase from, then click **Use**.

4. In **PO Date**, select a date for the purchase order.

5. In **Req By** (required by), select the date that the items in the purchase order will be required by.

6. Ensure that the vendor information in the **Contact**, **Phone #**, **Ext**, and **Fax #** fields is correct. Modify as necessary.

7. Check or uncheck the **Confirmation Only** checkbox accordingly:

   a. For normal orders, ensure that the **Confirmation Only** checkbox is NOT checked. The **Confirmation Only** checkbox is unchecked by default.

   b. Check **Confirmation Only** only if an order has already been placed with a vendor, and the vendor needs a copy of the order.

> **Note:** An order marked as **Confirmation Only** cannot be electronically updated; it exists purely to create a copy of an order already made.
>
> An order marked as **Confirmation Only** will, when emailed or printed, display the words **Confirmation Only** instead of **Original Order**.

8. In the **Inventory** field, click the ⬆ button. The **Inventory Selection** window opens. Search for and select the inventory you wish to use, then click **Use**.

9. In the **Department** field, click the ⬆ button. The **Department Selection** window opens. Search for and select the department you wish to use, then click **Use**.

10. In the **Currency** field, click the ⬆ button. The **Currency Selection** window opens. Search for and select the currency code you wish to use, then click **Use**.

11. Check or uncheck the **No Receiving PO** checkbox accordingly:

    a. For normal purchase orders, ensure that the **No Receiving PO** checkbox is NOT checked. The **No Receiving PO** checkbox is unchecked by default.

    b. For purchase orders that require prepayment or that are for services rather than physical items, ensure that the **No Receiving PO** checkbox is checked, then select an **Expiry Date** for the purchase order.

12. Click the **Detail** tab.

13. For every new item you need to add to the purchase order:

    a. Click the **Add** button. The **New Item** window opens. Ensure you are on the **Select Item** tab.

    b. Click **Catalog** or **Non-Catalog** to specify what sort of item you are ordering.

> **Note:** If you selected **Non-Catalog**, skip step **c**.

    c. For catalog items, under **Selection**, click the ⬆ button in the **Item No** field. Optionally, before clicking the ⬆ button, click **Show only items for this vendor** to narrow the list down to items this vendor carries. Search for and select the item number you wish to use, then click **Use**.

    d. Click **Next**.

e. Under **Order Information**, enter an item **Quantity**.

f. Optionally, for non-catalog items, check the **Make this a Catalog Item upon saving the Purchase Order** checkbox and enter a new **Item #**. When the item line is saved, the non-catalog item will be added to your catalog.

g. Review and modify the fields and options in the **Item Detail** tab as necessary.

h. Click the **Notes** tab and enter notes for this item line.

i. Click **Finish**.

14. For every new asset you need to add to the purchase order:

a. Click the **Add** button. The **New Item** window opens. Ensure you are on the **Select Item** tab.

b. Click **Asset**.

c. Under **Selection**, click the ⊼ button in the **Asset No** field, search for and select the asset number you wish to use, then click **Use**.

d. Click **Next**.

e. Review and modify the fields and options in the **Asset Detail** tab as necessary.

f. Click the **Notes** tab and enter notes for this asset line.

g. Click **Finish**.

15. For every item or asset line need to edit:

a. Click an existing item line, then click the **Edit** button.

b. Review and modify fields and options as necessary.

c. Click the **Notes** tab and modify notes for this item or asset line.

d. Click **Finish**.

16. Click the **Notes** tab and, if necessary, add notes to the purchase order:

a. **PO Notes** – Are displayed on the printed or emailed purchase order. For notes the vendor is meant to see (e.g., special shipping/contact instructions).

b. **Shipping Notes** – Are NOT displayed on the printed or emailed purchase order. For internal use notes (e.g., potential shipping concerns).

17. Click the **Shipping Info** tab and fill it out:

a. Under **FOB**, select **Facility** or **Vendor**. **Facility** indicates that the shipping facility will be paying the shipping charges due, whereas **Vendor** indicates that the vendor will pay the shipping charges.

b. Under **Bill**, select **Prepaid** or **Collect**. **Prepaid** indicates that the shipping charges have already been paid, whereas **Collect** indicates that the shipping charges will be due on delivery.

c. Under **Charges**, select **Actual** or **Estimated**. **Actual** indicates that the shipping charge is definitive, whereas **Estimated** indicates that the shipping charges are estimated.

d. Under **Taxes on Freight**, place a checkmark on each tax that will be applied to shipping charges.

e. In the **Amount** field, enter the shipping charge for the order.

18. Click the **Save** 🖫 icon in the toolbar, or click **File**, then **Save**.

Cancel an Existing Purchase Order

To cancel an existing purchase order:

1. Click **Purchase Order** in the sidebar, or click **PO** in the top menu bar, then **Purchase Order**. The **PO #** window opens.

2. Search for and select the purchase order you want to cancel.

3. Click the **Delete** 🗑 icon. You are prompted for confirmation.

> **Note:** Cancelling a purchase order is an action that CANNOT be undone. Be certain you want to cancel the purchase order before proceeding!

4. Click **Yes**.

Send a Purchase Order to a Vendor via ORMED X

After creating a purchase order, it can be sent electronically to a vendor via ORMED X.

> This procedure applies only if using ORMED X.

> **Note:** Ensure that the new purchase order is accurate before sending it. Refer to Modify an Existing Purchase Order for directions on how to double-check and change your purchase orders.

To send a purchase order to a vendor via ORMED X:

1. Click **Purchase Order** in the sidebar, or click **PO** in the top menu bar, then **Purchase Order**. The **PO #** window opens.

2. Search for and select the purchase order you want to send.

3. Click the **Send to Vendor via ORMED X** 🔀 icon.

4. Enter your ORMED X password in the **Password** field and your ORMED X registration email address in the **Email** field, then click **OK**.

> **Note:** If your user account is already set up as an ORMED X user, you may not be prompted for your ORMED X password.

Review and Accept/Reject Proposed Changes

For purchase orders sent via ORMED X, after a vendor has reviewed a purchase order and made edits, a purchase order acknowledgement is sent back to you. A purchase order acknowledgement is an electronic copy of your purchase order that is compared to your original order, allowing you to view, accept, and reject each change proposed by the vendor.

> This procedure applies only if using ORMED X.

To review and accept/reject proposed changes:

1. Click **Purchase Order** in the sidebar, or click **PO** in the top menu bar, then **Purchase Order**. The **PO #** window opens.

2. Search for and select the purchase order you want to review.

3. Click the **Buyer/Vendor Audit** tab. The components of this tab are as follows:

   a. **Reconciliation** – Purchase order lines where vendor changes have been proposed. If a vendor has added one or more new item lines to the purchase order acknowledgement, the new item line(s) will appear here without line numbers. The **Edit** button below this section opens a new window, allowing you to review, accept, and reject each individual change

   b. **Audit** – Record of changes proposed by the vendor, as well as your approvals and/or rejections.

   c. **Communication** – Allows you to send simple messages to the vendor (in tandem with the **Add Note** button below it) and view vendor messages.

   d. **Edit PO Prior to Acknowledgement** – Allows you to edit a sent purchase order. The vendor is notified of changes made.

4. Click the item line you want to review, then click **Edit**. A new window opens that allows you to compare the line from your original purchase order against the vendor's proposed amendments.

5. Check and uncheck checkboxes as necessary:

   a. **Accept** – Checkmark for each change you want to approve.

   b. **Reject** – Checkbox for each change you want to reject.

   c. **All** (one each under **Accept** and **Reject**) – You can check either of the **All** checkboxes to accept or reject all changes at once.

6. Click **OK** to finalize approvals and rejections made, or click **Edit Next** to finalize approvals/rejections and move on to the next item line.

7. Repeat steps **4** to **6** for every item you need to review.

> **Note:** There is NO confirmation after clicking **Save**. Ensure that the approvals and rejections you made are correct before saving. If you want to cancel your approvals and rejections or start the approval process over again, click the **Cancel** 🚫 icon in the toolbar.

8. Click the **Save** 💾 icon in the toolbar, or click **File**, then **Save**.

Assign an Alternate Buyer

Circumstances, such as vacation or illness, may call for the assignment of temporary alternate buyers. Ormed Purchasing allows alternate buyers to be assigned for a specified date range.

To assign an alternate buyer:

1. Click **File** in the top menu bar, then **Alternative Buyer**. A new window opens.

2. In the **Buyer** section to the left, click the ⊻ button, search for and select the buyer you wish to assign an alternate for, then click **Use**.

3. In the **Available Alternate Buyers** section to the right, select one or more users to be alternate buyers.

> **Note:** Hold down the **Ctrl** key as you click on users to select more than one. Also, you can click a user, hold down the **Shift** key, and click another user to select both users and everyone in between.

4. Under **Effective Dates**, select a **Start** and **End** date for the alternate buyers.

5. Click **Assign Alternate** to complete the assignment.

Process Non-Stock, Capital, and Non-Catalog Item Requisitions

Approved non-stock, capital, and non-catalog item lines in requisitions created with Ormed Requisitioning are processed within Ormed Purchasing. When processed, these requisitions will generate new purchase orders.

> If using ORMED X, please note these automatically generated purchase orders are not sent to ORMED X immediately. They are displayed in your purchase order list and will have to be sent to ORMED X manually.

To process non-stock, capital, and non-catalog item requisitions:

1. Click **Incoming Requisitions** in the sidebar, or click **Requisitions** in the top menu bar, then **Incoming Requisitions**. The **Requisition Processing** window opens.

2. Examine the requisition lines:

   a. **Process** – Contains checkboxes that allow you to select what items to process. You'll be using these checkboxes in step **4** below.

   b. **Priority** – Priority set for this item by the requisitioner.

   c. **Dept Code** – Department where the charges for the item will be assigned.

   d. **Ship To** – Site that requisitioned items will be shipped to.

   e. **Req No** – Requisition ID that the item comes from.

   f. **Item No** – Item's catalog number as defined in YOUR item catalog.

   g. **Vendor** – Vendor the item will be ordered from.

   h. **Catalog No** – Item's catalog number according to the vendor.

   i. **Description** – Item description.

   j. **Order Qty** – Quantity requested by the requisitioner.

   k. **U of O** – Units of order for the item.

   l. **Unit Cost** – Cost of each individual unit of the item.

   m. **Total** – Total cost (quantity multiplied by unit cost).

   n. **Date Req** – Required date as set by the requisition's priority status.

   o. **Requested By** – The requisitioner that created the requisition.

   p. **Edit Item** – Opens an item line for editing. After editing item details, click **OK**.

   q. **Reject** – Marks the selected item lines as being rejected and sends the lines back to the requisitioner.

   r. **Item Notes** – Allows the viewing or editing of any notes entered for the item.

   s. **Requisition Notes** – Opens the notes listing for the requisition that the item belongs to. These notes can be added to and edited as necessary.

> **Note:** These are the same notes that appear in the **Notes Listing** window within Ormed Requisitioning. Refer to the **Ormed Requisitioning User Guide** or the **Ormed Requisition Management Training Guide** for further information.

   t. **Show Requisition** – Shows the requisition that the item belongs to.

3. For each line you want to process, check its respective checkbox under **Process**.

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4. Click **Next**.

5. Change the **PO Date** field if necessary.

6. Click **PO Info**, review or modify shipping and purchase order details, and click **OK**.

7. Click a vendor and then **View Items** and review the list of items you are purchasing from that vendor. The **Selected Items For** window opens with the following options you can use to tailor the purchase order:

    a. **Edit Item** – Opens an item line for editing. After editing the item details, click **OK**.

    b. **Vendor Order** – Allows you to choose whether stock or non-stock items will be included.

    c. **Next Vendor** – Opens the next vendor's items for edits.

    d. **Import Sys PO** – Allows you to import an order recommendation's items into the purchase order.

> **Note:** Use this option with care, for after importing an order recommendation's items, that order recommendation is effectively deleted. For more information on order recommendations/system POs, refer to Procedures – Order Recommendations (System POs).

8. Click **OK**.

9. Repeat steps **8** and **9** for each vendor.

10. To print the purchase order for one or more vendors once you're finished, check the corresponding checkbox in the **Print** column.

11. Click **Finish**. If you opted to print at least one purchase order, the **Print** window opens. Otherwise, you're finished.

12. In the **Print** window, select your printer from the **Name** field or check the **Print to File** checkbox, then click **OK**.

Procedures – Order Recommendations (System POs)

An order recommendation (also called a system PO) is a record that contains items recommended for purchase or that can recommend items that should be purchased based on inventory thresholds.

Vendor Groups

Vendor groups, used in tandem with order recommendations, are lists of vendors grouped together based on your needs. For instance, you can create a vendor group for every day of the work week, or a vendor group for ordering specific types of items.

Add a New Vendor Group

To add a new vendor group:

1. Click **Vendor Group** in the sidebar, or click **PO** in the top menu bar, then **Vendor Group**. The **Vendor Group File** window opens.

2. Click **New** in the main toolbar, or click **File**, then **New**.

3. Type a code for the vendor group in the **Group Code** field.

> **Tip:** Use a code that easily identifies the vendor group (e.g., if you want to make a vendor group for orders that need to be made on Friday, use **FRI**).

> **Note:** You cannot modify the **Group Code** field after a new vendor group is successfully created and saved.

4. Type a description for the vendor group in the **Description** field.

5. Click the **Add** button to add a vendor. The **Vendor Selection** window opens. Search for and select the vendor you wish to use, then click **Use**. Repeat for every vendor you need to add.

> **Tip:** If you need to remove a vendor from the list, click the vendor you want to remove, then click the **Remove** button.

6. Click the **Save** icon in the main toolbar, or click **File**, then **Save**.

Modify an Existing Vendor Group

To modify an existing vendor group:

1. Click **Vendor Group** in the sidebar, or click **PO** in the top menu bar, then **Vendor Group**. The **Vendor Group File** window opens.

2. Search for and select the vendor group you wish to modify.

> **Note:** You cannot modify the **Group Code** field after a new vendor group is successfully created and saved.

3. Modify the description for the vendor group in the **Description** field as necessary.

4. Click the **Add** button to add a vendor. The **Vendor Selection** window opens. Search for and select the vendor you wish to use, then click **Use**. Repeat for every vendor you want to add.

> **Tip:** If you need to remove a vendor from the list, click the vendor you want to remove, then click the **Remove** button.

5. Click the **Save** 💾 icon in the main toolbar, or click **File**, then **Save**.

Delete an Existing Vendor Group

To delete an existing vendor group:

1. Click **Vendor Group** in the sidebar, or click **PO** in the top menu bar, then **Vendor Group**. The **Vendor Group File** window opens.

2. Search for and select the vendor group you wish to delete.

3. Click the **Delete** 🗑 icon. You are prompted for confirmation.

> **Note:** Deleting a vendor group is an action that CANNOT be undone. Be certain you want to delete the vendor group before proceeding!

4. Click **Yes**.

Create a New Order Recommendation (System PO)

There are two ways to create new order recommendations. The first allows ORMED MIS to suggest an order recommendation for you based on a selected inventory, commodity, vendor group, and vendor. The second involves creating a custom order with parameters that you specify manually.

Regardless of which method you use to create an order recommendation, you can still add, edit, and remove items from the recommendation as you see fit while creating it.

To create a new order recommendation:

1. Click **System PO** in the sidebar, or click **PO** in the top menu bar, then **System Purchase Order**. The **System Purchase Order** window opens.

2. Click **New** ⬜ in the main toolbar, or click **File**, then **New**. The **Order Recommendation** window opens.

3. If creating a custom order recommendation, check the **Custom Order** checkbox and skip to step **5**. Otherwise, continue to step **4**.

4. Select your inventory, commodity, vendor group, and vendor:

   a. Click ⬓ in the **Inventory** field, search for and select the inventory you wish to use, then click **Use**.

   b. Click ⬓ in the **Commodity** field, search for and select the commodity you wish to use, then click **Use**.

   c. Click ⬓ in the **Group Code** field, search for and select the vendor group you wish to use, then click **Use**.

   d. Click ⬓ in the **Vendor** field, search for and select the vendor you wish to use, then click **Use**.

> **Note:** If the combination of inventory, commodity, vendor group, and vendor you entered as described in step **4** would result in an empty order recommendation, a notice stating so is displayed after you click **OK**. If this occurs, the order recommendation process will end and you will have to start over.

5. Click **OK**. You return to the **System Purchase Order** window, and a list of recommended items to order displays.

6. For every new item you need to add to the order recommendation:

   a. Click the **Add** button. The **Custom Order** window opens.

   b. For catalog items, ensure that the **Catalog Item** checkbox is checked. For non-catalog items, ensure that the **Catalog Item** checkbox is NOT checked.

   c. For catalog items, click the ⬓ button in the **Item #** field, search for and select the item number you wish to use, then click **Use**.

   d. Optionally, for recognized stock items, you may remove the checkmark from the **Stock Item** checkbox to specify that the item in the order recommendation is not to be treated as a stock item.

   e. Enter the quantity of the item you wish to purchase in the **Order Qty** field.

   f. Review and modify the rest of the fields and options in the **Custom Order** window as necessary.

   g. Click **OK**.

7. For every existing item line you need to edit in the order recommendation:

   a. Click the **Edit** button. The **Custom Order** window opens.

   b. Review and modify the fields and options in the **Custom Order** window as necessary.

   c. Optionally, for recognized stock items, you may remove the checkmark from the **Stock Item** checkbox to specify that the item in the order recommendation is not to be treated as a stock item.

d. Click **OK**.

8. Click **Vendor and Posting Info** 🗘 in the toolbar, or double-click one of the vendor IDs under the **Vendor** column in the item line list. The **System Purchase Order Information for Vendor** window opens.

9. Search for and select the vendor whose information you want to review or modify. Ensure that you are looking at the **Shipping Info** tab.

10. In the **Shipping Amount** field, enter the shipping charge for the order.

11. Under **FOB**, select **Facility** or **Vendor**. **Facility** indicates that the shipping facility will pay shipping charges, whereas **Vendor** indicates that the vendor will pay the shipping charges.

12. Under **Bill**, select **Prepaid** or **Collect**. **Prepaid** indicates that the shipping charges have been already paid, whereas **Collect** indicates that the shipping charges will be due on delivery.

13. Under **Freight**, select **Actual** or **Estimated**. **Actual** indicates that the shipping charge is definitive, whereas **Estimated** indicates that the shipping charges are estimated.

14. In the **Date Required** field, select the date that the items will be required by.

15. Check the **GST on Freight** checkbox if GST will be due on the shipping amount.

16. Check or uncheck the **Confirmation** checkbox accordingly:

    a. For normal orders, ensure that the **Confirmation** checkbox is NOT checked. The **Confirmation** checkbox is unchecked by default.

    b. Check **Confirmation** only if an order has already been placed with a vendor, and the vendor needs a copy of the order.

> **Note:** An order marked as **Confirmation** cannot be electronically updated; it exists purely to create a copy of an order already made.
>
> An order marked as **Confirmation** will, when emailed or printed, display the words **Confirmation Only** instead of **Original Order**.

17. Click the **Shipping Notes** tab and enter shipping notes. These notes are for internal use and are NOT displayed on printed or emailed purchase orders.

18. Click the **PO Notes** tab and enter notes. These notes are displayed on printed or emailed purchase orders.

19. Click the **Posting Info** tab and, in **PO Type**, select either **Print Master** or **Print Site**.

> Step **20** applies only if using ORMED X.

20. Check the **Email to Vendor via ORMED X** checkbox to send orders to the vendor via ORMED X. If you do, fill in the **Email To**, **BCC To**, and **Email Notes** fields.

21. Check the **Print Report** checkbox to print a report for the order when it is posted.

22. Check the **Save to File** checkbox to save a report for the order to a file when the order is posted. If you do, click the **...** (ellipsis) button in the **Save As** field and select the location where you want to save the report.

23. Click **Save** 💾 in the **System Purchase Order Information for Vendor** window's toolbar.

> **Note:** This **Save** icon is NOT the same as the **Save** icon in the main toolbar.

24. Repeat steps **8** to **23** for each vendor whose information you want to review/modify.

25. Click the **Save** 💾 icon in the main toolbar, or click **File**, then **Save**.

Modify an Existing Order Recommendation (System PO)

> **Note:** While edits to purchase orders are recorded by ORMED MIS, edits to order recommendations are NOT. Therefore, it is very strongly recommended that order recommendations are checked for accuracy before posting.

To modify an existing order recommendation:

1. Click **System PO** in the sidebar, or click **PO** in the top menu bar, then **System Purchase Order**. The **System Purchase Order** window opens.

2. Search for and select the order recommendation you want to modify.

3. For every new item you need to add to the order recommendation:

   a. Click the **Add** button. The **Custom Order** window opens.

   b. For catalog items, ensure that the **Catalog Item** checkbox is checked. For non-catalog items, ensure that the **Catalog Item** checkbox is NOT checked.

   c. For catalog items, click the ⊡ button in the **Item #** field, search for and select the item number you wish to use, then click **Use**.

   d. Optionally, for recognized stock items, you may remove the checkmark from the **Stock Item** checkbox to specify that the item in the order recommendation is not to be treated as a stock item.

   e. Enter the quantity of the item you wish to purchase in the **Order Qty** field.

   f. Review and modify the rest of the fields and options in the **Custom Order** window as necessary.

   g. Click **OK**.

4. For every existing item line you need to edit in the order recommendation:

   a. Click the **Edit** button. The **Custom Order** window opens.

b. Review and modify the fields and options in the **Custom Order** window as necessary.

c. Optionally, for recognized stock items, you may remove the checkmark from the **Stock Item** checkbox to specify that the item in the order recommendation is not to be treated as a stock item.

d. Click **OK**.

5. Click **Vendor and Posting Info** ⓘ in the toolbar, or double-click one of the vendor IDs under the **Vendor** column in the item line list. The **System Purchase Order Information for Vendor** window opens.

6. Search for and select the vendor whose information you want to review or modify. Ensure that you are looking at the **Shipping Info** tab.

7. In the **Shipping Amount** field, enter the shipping charge for the order.

8. Under **FOB**, select **Facility** or **Vendor**. **Facility** indicates that the shipping facility will pay shipping charges, whereas **Vendor** indicates that the vendor will pay the shipping charges.

9. Under **Bill**, select **Prepaid** or **Collect**. **Prepaid** indicates that the shipping charges have been already paid, whereas **Collect** indicates that the shipping charges will be due on delivery.

10. Under **Freight**, select **Actual** or **Estimated**. **Actual** indicates that the shipping charge is definitive, whereas **Estimated** indicates that the shipping charges are estimated.

11. In the **Date Required** field, select the date that the items will be required by.

12. Check the **GST on Freight** checkbox if GST will be due on the shipping amount.

13. Check or uncheck the **Confirmation** checkbox accordingly:

a. For normal orders, ensure that the **Confirmation** checkbox is NOT checked. The **Confirmation** checkbox is unchecked by default.

b. Check **Confirmation** only if an order has already been placed with a vendor, and the vendor needs a copy of the order.

> **Note:** An order marked as **Confirmation** cannot be electronically updated; it exists purely to create a copy of an order already made.
>
> An order marked as **Confirmation** will, when emailed or printed, display the words **Confirmation Only** instead of **Original Order**.

14. Click the **Shipping Notes** tab and enter shipping notes. These notes are for internal use and will NOT appear on printed or emailed purchase orders.

15. Click the **PO Notes** tab and enter notes. These notes will appear on printed or emailed purchase orders.

16. Click the **Posting Info** tab and, in **PO Type**, select either **Print Master** or **Print Site**.

17. Check the **Email to Vendor via ORMED X** checkbox to send orders to the vendor via ORMED X. If you do, fill in the **Email To**, **BCC To**, and **Email Notes** fields.

18. Check the **Print Report** checkbox to print a report for the order when it is posted.

19. Check the **Save to File** checkbox to save a report for the order to a file when the order is posted. If you do, click the **...** (ellipsis) button in the **Save As** field and select the location where you want to save the report.

20. Click **Save** 💾 in the **System Purchase Order Information for Vendor** window's toolbar.

Note: This **Save** icon is NOT the same as the **Save** icon in the main toolbar.

21. Repeat steps **5** to **20** for each vendor whose information you want to review/modify.

22. Click the **Save** 💾 icon in the main toolbar, or click **File**, then **Save**.

Delete an Existing Order Recommendation (System PO)

To delete an existing order recommendation:

1. Click **System PO** in the sidebar, or click **PO** in the top menu bar, then **System Purchase Order**. The **System Purchase Order** window opens.

2. Search for and select the order recommendation you want to delete.

3. Click the **Delete** 🗑 icon. You are prompted for confirmation.

Note: Deleting an order recommendation is an action that CANNOT be undone. Be certain you want to delete the order recommendation before proceeding!

4. Click **Yes**.

Merge Order Recommendations (System POs)

Two order recommendations can be merged, combining the item lines into a single unified order recommendation.

To merge order recommendations:

1. Click **System PO** in the sidebar, or click **PO** in the top menu bar, then **System Purchase Order**. The **System Purchase Order** window opens.

2. Search for and select one of the two the order recommendations you want to merge.

3. Click the **Merge System POs** 🔶 icon. The **Merge Order Recommendations** window opens.

4. In the **Merge Batch** field, select the second order recommendation to merge.

> **Note:** Merging order recommendations is an action that CANNOT be undone and does NOT prompt you for confirmation. Be certain you want to merge the order recommendations before proceeding!

5. Click **OK**.

Post Order Recommendation (System PO)

Posting an order recommendation automatically creates purchase orders for the items in the order recommendation.

> For ORMED X vendors, posting an order recommendation automatically sends the newly created purchase orders to vendors via ORMED X.

> **Note:** While edits to purchase orders are recorded by ORMED MIS, edits to order recommendations are NOT. Therefore, it is very strongly recommended that order recommendations are checked for accuracy before posting.

To post an order recommendation:

1. Click **System PO** in the sidebar, or click **PO** in the top menu bar, then **System Purchase Order**. The **System Purchase Order** window opens.

2. Search for and select the order recommendation you want to post, then click the **Post System PO** icon. The **PO Batch Posting** window opens.

3. In the **Vendor** field, select which vendor's items to post, or select **All Vendors** to post all items in the order recommendation.

4. Click **Post**.

Contact Us

Questions and Support

If you have any questions or concerns about this document, please e-mail scms_support@ormed.com. We will be pleased to assist you.

What Are Your Thoughts?

If you have any suggestions for how we can improve this document, please send them to feedback@ormed.com with the subject line **Feedback – Ormed Purchasing User Guide**. Your feedback assists us in better serving you.