

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.

Amend Returned Proforma [2] (Save / Update : Active(ENG))

1 Main Parameters 2 Worksheet

Returned DDP Proforma (for further action)

Proforma #	137	Dept	100 PRIVATE LEDGERS
Purch No	DEF DEF	Currency	ZAR/Z
Authorizer	SA BULO Manager	Date Raised	05/01/2006
Current Operator	SA BULO Manager	Order Date	05/01/2006
Originator	SA BULO Manager	Auth Code	SA BULO Manager
Tax Type	05 MISC-Capital Goods (Input) Vat	Supplier	SA BULO Manager
Tax Rate %	10.00	For Attention Of	
Re-Charge To	SA BULO Manager	Delivery Note	DEF Main Warehouse
Period	05	Exp Delivery Date	05/01/2006

Item	Description	Unit	Tax Incl Price	Quantity	Actual	Value
1	Widgets	ea	10.00	10.00		100.00

CHARGE TO: -

- AP Debtors
- Job
- Costing
- Lease
- Ledger
- Gift
- Save

Re-Submit Delete Proforma View RETURN Notes re-Assign Authorizer

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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