Category 3

3.1   Description Purchase Orders

Opens window to view or create a purchase orders with only one large description field.

Account Name
The Account Name is your Company Name. The Account Name has the facility to allow up to five (5) different companies listed under the one operating company. Therefore if your Company is trading under another name, it can be listed here.   (Refer Section 8 : Miscellaneous Menu - Preferences)

To complete a Purchase Order – click "New".

Supplier Number
All Suppliers' are given a unique number when entered into Kontrol Pro. To enter a supplier right click and a Suppliers' Information window will appear – select Supplier and click 'Close'. Tab to the next field and the Suppliers' Information will appear in all fields. The cursor will now be located in the Cost Centre field.

(Refer to Module 20 : Suppliers for more information on setting up Suppliers' Information).

Cost Centre

All Cost Centres are given a unique number when entered into Kontrol Pro. To enter a Cost Centre right click and the Cost Centres window will appear – select the Cost Centre required and it will automatically place the Cost Centre number in the field. Tab to the next field.

(Refer to Module 23 : Task Breakup for more information on setting up Cost Centre Information).

Date of Origin

The system automatically places today's date into the 'Date of Origin' field. Tab to the next field.

Delivery By

The system automatically places a date one month ahead into the 'Delivery By' field. Tab to the next field.

Date Complete

This field is left blank until the Order has been completed.

Authorised By

Enter the Authorised Persons Name. Tab to the next field.

Status

There are four (4) 'Status' levels; **B**udget, **F**ixed, **C**omplete, **U**ncomplete. Select the relevant status for the Purchase Order.

Budget:

Allows for an amount to be budgeted for, however, is not a fixed cost and can be varied at a later date. For example, the cost of crane hire – we are unsure if we will need the crane for 4 or 6 hours and we budget for an amount per hour. However, at the end of the day we have needed the crane for a full day and not for the budgeted amount we have allowed.

Fixed:

Is a fixed amount. The cost of supply is known to the Company from a previous quote.

Complete:

Once the item has been supplied the Purchase Order can be changed to Complete to finalise the transaction.

Uncomplete

Should only part of the order be received, then the status of the Purchase Order would be uncomplete. This way the system can highlight what is still left to be supplied, ie on back order, etc.

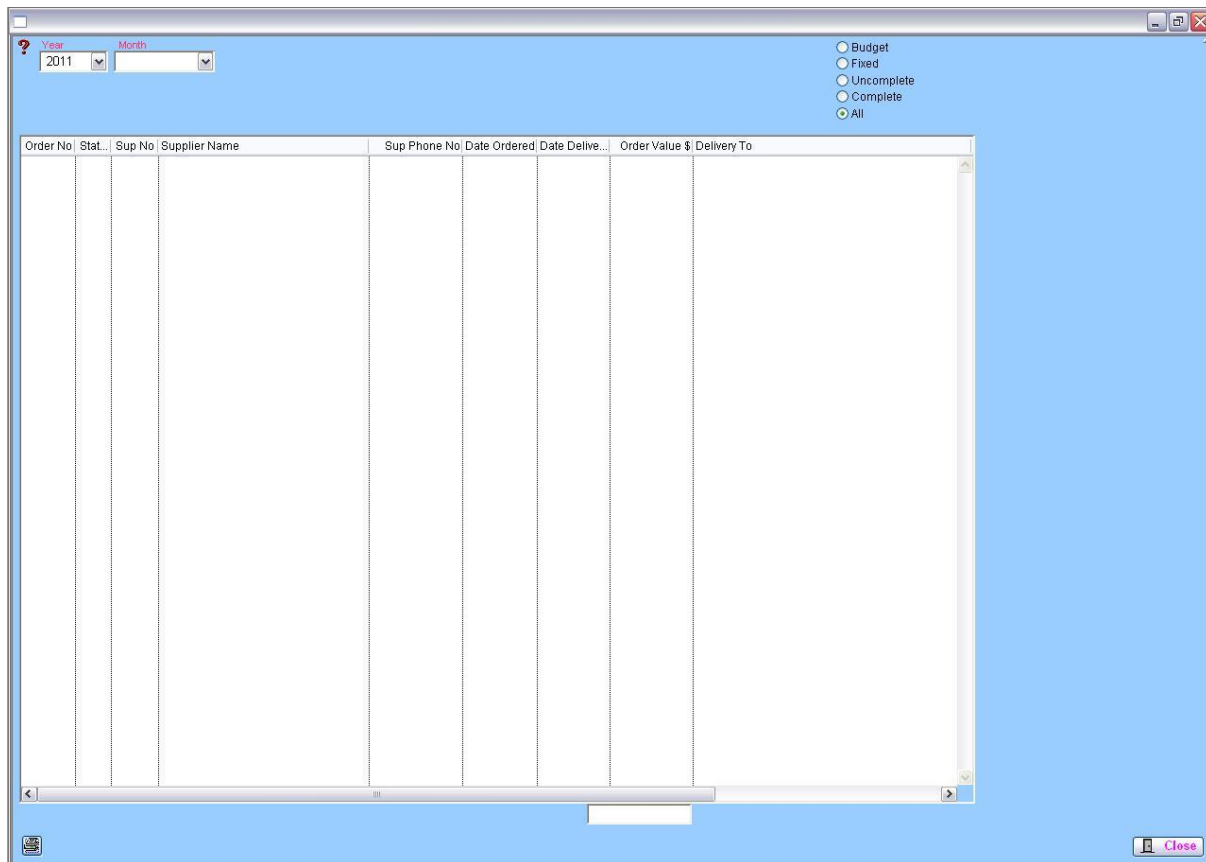**Delivery Instruction / Address**

Enter the 'Delivery Instruction' details, ie: Deliver to Head Office, Onsite, etc. Then complete the actual address for the delivery of goods.

These details can be automatically inserted if the 'Project Details' have been completed. (Refer Module 2 – Company Default Project – Project Details Tab).

Printing Purchase Order - Letterhead can be placed on Purchase Order. The letterhead needs to be .jpeg format and will need to be located in the same folder as the "De Office" on the network.

Order Review

The Order Review screen allows you to see the status of all orders in your system. You can select the Year and Month and check the status of any order to see at what stage the order has progressed as follows: **B**udget, **F**ixed, **C**omplete, **U**ncomplete or **A**ll.

The total at the bottom of the screen indicates the value of the status of those orders.

Duplicate Order

Should you need to duplicate an order for a Customer on a regular basis you can find the order that is required and instead of re-entering all the information for the Order you can copy the entire order by simply clicking on the 'Duplicate Order' button. Make any minor adjustments by using the 'EDIT' function and when you click "OK" the order will be provided with a unique order number.