

Purchase Orders

Training Session Outline

Description

Participants will be given a general overview and will learn the general functionality of the Purchase Order Module of Baseplan Enterprise. It will provide the participants with the competencies to manage and to use the Purchase Order Module.

What you will learn (Objectives)

- Functionality of Purchase Order Screen and Purchase Order Receipt Screen
- Functionality of Purchase Order Operations Menu and Purchase Order Operations View
- Manage and maintain purchase orders and purchase order receipts
- Reporting within the Purchase Order Module

What you need to know (Pre-requisites)

Before attending this session, users must have completed the Baseplan Enterprise - Orientation session and must be reasonably proficient with MS Windows. This includes confidence with use of the mouse and printing underneath Windows.

Session content

Introduction

- Presenter / Participants Introduction
- Learning Objectives
- General Housekeeping

Purchase Orders

- General Overview
- The Purchase Order Screen
- Purchase Order Limits
- Purchase Order Authorisation
- Creating and processing Purchase Orders
 - Purchase Orders for general expenses (line type "O")
 - Purchase Orders for Assets (line type "A" – serial number / non-serial number controlled)
 - Purchase Orders for Stock (line type "I" - serial number / non-serial number controlled)
 - Purchase Orders for service jobs
 - Purchase Orders for overseas purchases (line type "P")

Purchase Orders Operations Menu

- Functionality

Purchase Orders View

- Functionality

Purchase Order Receipts

- The Purchase Order Receipt Screen
- Processing Purchase Order Receipts

Purchase Order Reports

- Reporting within the Purchase Order Module

Conclusion

- Session Review
- Questions
- Training Evaluation Form

