



## **QAD Supplier Portal: Discrete/Spot Buy Purchase Orders**

## Course Overview

- Overview of POs
- Introduces the Orders view and its features
- Lists important Orders view columns
- Purchase Order Acknowledgment
- Describes how you create ASNs from the Orders view

This course starts with an overview of purchase orders as a general concept. We will then move to talk about the Orders view in QAD Supplier Portal, its most important columns, and how to create ASNs from the view. Finally, we will complete an exercise on purchase orders in the context of QAD Supplier Portal.

## Purchase Orders

- Discrete PO is a contract with a supplier to:
  - Purchase a **specific** quantity of items
  - Delivered at an **agreed** date
  - At a **set** price
- A PO should include:
  - Order quantity, description, price, discounts, payment terms, transportation terms, all other pertinent terms

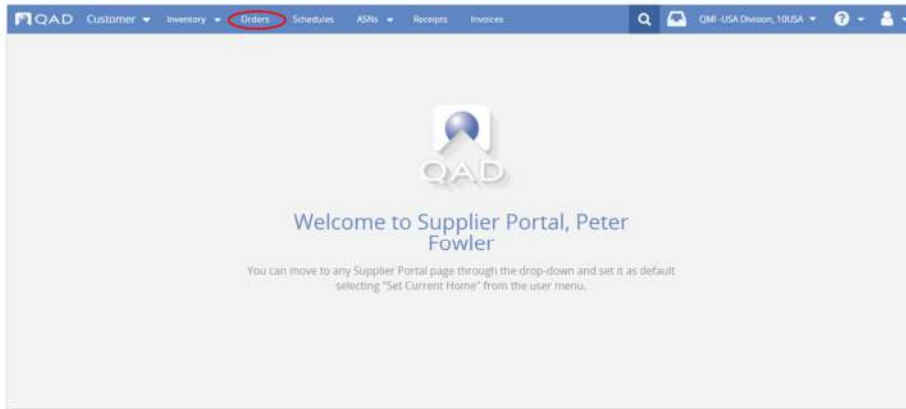
A discrete purchase order is contract with a supplier to purchase a specific quantity of items to be delivered at an agreed upon date for a set price. A purchase order should include order quantity, description, price, discounts, payment terms, transportation terms, and all other terms pertinent to the purchase and its execution. Some customers use discrete purchase orders as their primary inventory replenishment strategy, choosing this approach over schedule, min-max, or Kanban replenishment.

## Purchase Orders — Continued

- Manage POs using the Orders view
- POs visible in Supplier Portal originate in QAD ERP
- Orders view also shows POs (the contract) tied to Schedules and Kanban
- Functionality includes PO Acknowledgment

In QAD SP, you manage purchase orders using the Orders view. The orders displayed in the view originate from QAD ERP or from another ERP product. If you are using QAD ERP, a poller automatically transfers data between QAD Cloud ERP and QAD Supplier Portal. Whenever a purchase order is released or revised in QAD Cloud ERP, it is automatically displayed in QAD Supplier Portal.

## Accessing the Orders View



To open the Orders view in QAD SP, click the link at the top of the Supplier Portal screen as shown in the slide.

## Orders View

Order #	Line #	Status	Supplier Name	Item #	Ship-To	Site	Quantity Ordered	Quantity Received	In-Transit Quantity
P1010034	1	Open	QMI -USA Division	01040-002	10-100	10-100	125.0		125.0
P1010026	1	Open	QMI -USA Division	290578	10-100	10-100	200.0		400.0
P1010026	2	Open	QMI -USA Division	290578	10-100	10-100	300.0		0.0
P1010026	3	Open	QMI -USA Division	290578	10-100	10-100	1000.0		1000.0
P1010026	4	Open	QMI -USA Division	290578	10-100	10-100	800.0		0.0
KAN5001	1	Open	QMI -USA Division	Item_5d	10-100	10-100	100.0	20.0	420.0
jsdHRC	2	Open	QMI -USA Division	01012	10-100	10-100	23.0	23.0	128.0
PO_5401	12	Open	QMI -USA Division	memo56	10-100	10-100	23.0		
PO_5401	1	Open	QMI -USA Division	01010	10-100	10-100	29.0		
PO_5401	2	Open	QMI -USA Division	01012	10-100	10-100	52.0		
PO_5401	3	Open	QMI -USA Division	01011	10-100	10-100	25.0		
PO_5401	4	Open	QMI -USA Division	01040-001	10-100	10-100	854.0		

The Orders view in QAD SP displays purchase order (PO) information for open, closed, and canceled POs. This data is for item-sites in the vendor managed inventory (VMI) working and kanban working data sets.

The Orders displays the customer's purchase order information with all relevant details. The screen includes an option that lets you create an ASN against a purchase order, and also includes other links and color-coding that display additional detail and help you to prioritize the data.

The Orders view allows the supplier to view detailed information on orders from the customer's ERP system, which removes the need for additional clarification steps such as calls, faxes, or emails; eliminating waste and reducing errors. This real-time communication of demand with automatic alerts improves the speed and quality of communication between trading partners.

Planners can review all the open purchase orders to see the acknowledgement and in-transit quantities; optionally, using sort and filter options to select just the information they need. For example, you can select just orders for a certain period, or by supplier or item. You might also filter orders due today for use at the receiving dock, showing you your expected workload.

## Orders View, Visual Indicators

The screenshot shows the 'Orders' view in the QAD Supplier Portal. The table displays purchase order lines with columns for Order ID, Line ID, Status, Supplier Name, Item, Ship Date, SI, Quantity Ordered, Quantity Received, In Transit Quantity, and Due Date. Visual indicators are used to highlight specific information:

- Status Icons:** A blank green circle indicates an 'Open' order, a green circle with a checkmark indicates a 'Closed' order, and a red circle with an 'X' indicates a 'Canceled' order.
- Quantity Highlighting:** The 'Quantity Ordered' and 'Quantity Received' columns are highlighted in red when the quantity received is smaller than the quantity ordered.
- Due Date Highlighting:** The 'Due Date' column is highlighted in red when the due date has passed.

Order	Line	Stat	Supplier Name	Item	Ship	SI	Quantity Ordered	Quantity Received	In Transit Quant	Due Date
P1010003	1	Open	QMI-USA Division	60090	10-100	10-100	10.0	3.0		2/7/2018
P1010003	2	Open	QMI-USA Division	60092	10-100	10-100	50.0			2/7/2018
P1010005	1	Open	QMI-USA Division	item-04	10-100	10-100	10.0			10/16/2017
PO0112...	1	Closed	Mexico City Chemicals	60060	10-300	10-100	160.0	160.0		1/10/2012
PO0112...	2	Closed	Mexico City Chemicals	80020	10-300	10-300	600.0	600.0		1/10/2012
PO0112...	3	Closed	Mexico City Chemicals	80021	10-300	10-300	125.0	125.0		1/10/2012

Legend:

- Open
- Closed
- Canceled

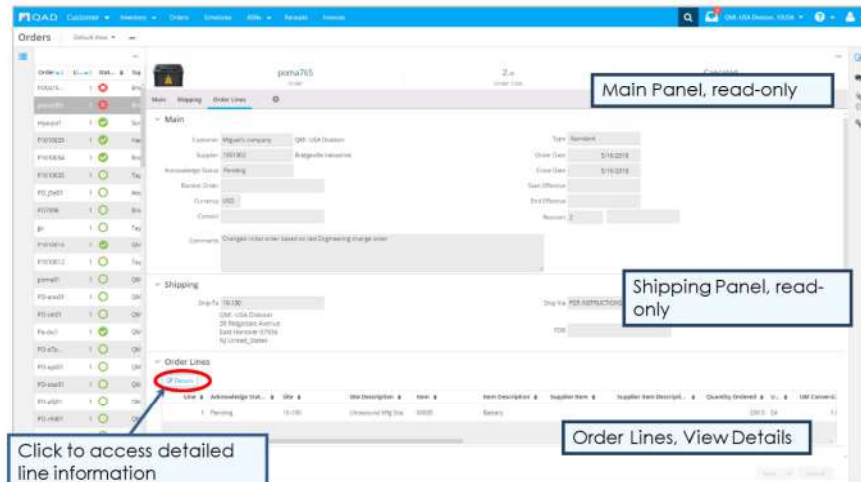
The **Orders** view includes visual indicators to highlight fields that require particular attention.

The **Status** column displays different icons, depending on the status of the purchase order line. A blank green circle indicates that the purchase order line is open. A green circle with a check mark indicates that the purchase order line is closed. A red circle with an X indicates that the order is canceled.

Additional highlighted fields help suppliers to identify cases that need particular attention.

For example, when the **Quantity Received** is smaller than the **Quantity Ordered** or if the **Due Date** has passed, these fields are highlighted in red to warn the supplier that something is wrong with the purchase order.

## Orders, Form View



In the Orders form view, detailed information about any particular purchase order is grouped by panels. To access the form view, double-click a line in the Orders view or click Edit.

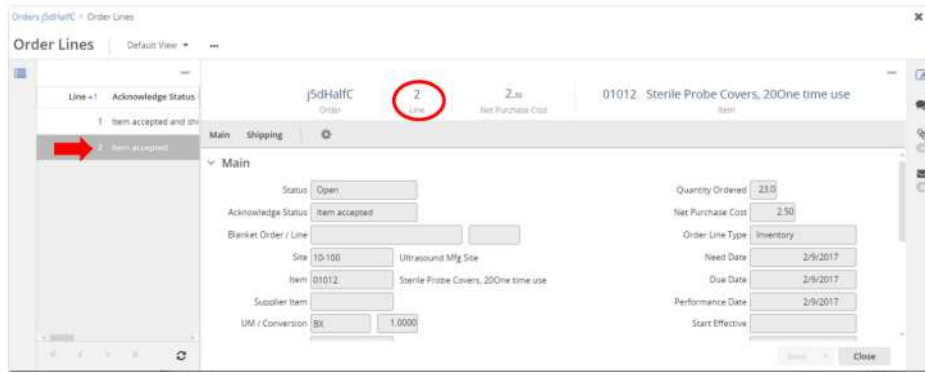
The form view includes a header and three panels:

- Main
- Shipping
- Order Lines

In the form view, if you want to access detailed information on an order line, click the Details button in the Order Lines panel.



## Orders Lines Detailed View



If you select an ASN order line and click the Details button, the Order Lines view opens with detailed information on each order line.

## Orders View, Drill-Down Links

The screenshot displays the 'Drill-Down Links' sidebar on the left, which includes sections for 'Browses' (PO Acknowledge Audit Trail, Order, Line, Items, Item, Sites, Site) and 'Reports' (Purchase Order Print, Order). A callout box points to the 'Items' link, which opens the 'Orders - Item Master' table. Another callout box points to a row in the 'Items' table, with a text box stating: 'Double-click a row that you want to view in more detail.' Below the 'Items' table, the 'Orders - Site Master' table is visible, showing columns for Site, Description, Full Address, Postal Code, City, County, State, Country, Web Address, and Region.

Item #	Item Description	UM
00001	Durable Plastic H...	EA
60001	Durable Plastic H...	EA
60001	Durable Plastic H...	EA

Site	Description	Full Address	Postal Code	City	County	State	Country	Web Address	Region
10-1...	Ultrasound ...	30 Ridgedal...	07950	East...	NJ	United_...	NAmer		
10-1...	Ultrasound ...	30 Ridgedal...	07950	East...	NJ	United_...	NAmer		
10-1...	Ultrasound ...	30 Ridgedal...	07950	East...	NJ	United_...	NAmer		
10-1...	Ultrasound ...	30 Ridgedal...	07950	East...	NJ	United_...	NAmer		

The Orders view in QAD Supplier Portal includes drill-down links. By selecting the drill-down view you want and then clicking on the Link icon located on the right of the view, you can quickly access browses related to data in the currently selected record. For example, you can quickly open the Item Master browse for the ordered item.

**NOTE: this is not an Official Purchase Order copy, only a report out for reference**

# Purchase Order Print Report

**Purchase Order Report**

**Customer:** CAT  
15 Avenue of the Americas  
New York New York  
United\_States

**Supplier:** Aptiv - Delphi  
BRXS+QV HNSB 22101  
Naco Honduras

**Ship To:** 10-100  
30 Ridgedale Avenue  
East Hanover NJ 07936  
United\_States

Page: 1/1  
Order Number: GBBPO20  
Order Date: 12/27/2018  
Revision: 0  
**\* DUPLICATE \***

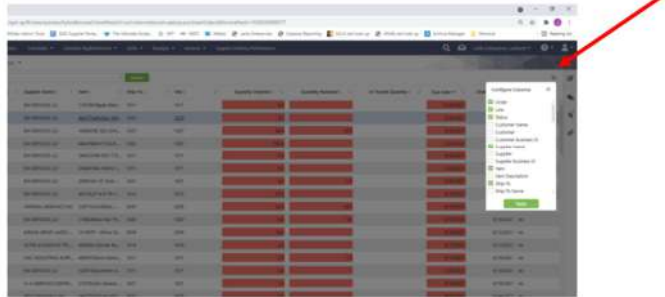
Line	Item	Description	Supplier Item	Due Date	Open Quantity	Site	UM	Rev	Unit Cost	Net Unit Cost	Extend Unit Cost
1	01010	Medical Ultrasound	01010	12/27/2018	33.0	10-100	EA	D	10.00	10.00	330.00
										Currency	USD
										Total Cost:	330.00

This report allows you to print all relevant PO-related information. The setting for the Closed POs policy determines whether closed POs are printed on the report.

You can run the purchase order print report from the menu or from the drill-down links on the Orders view or Orders form. If you run the Purchase Order Print report directly from an order record, the From Order Number and To Order Date fields are pre-populated with the order number.

## Orders View, Displaying Columns

- Columns you require depend on your business practices
- You can save a view you configure as a stored view

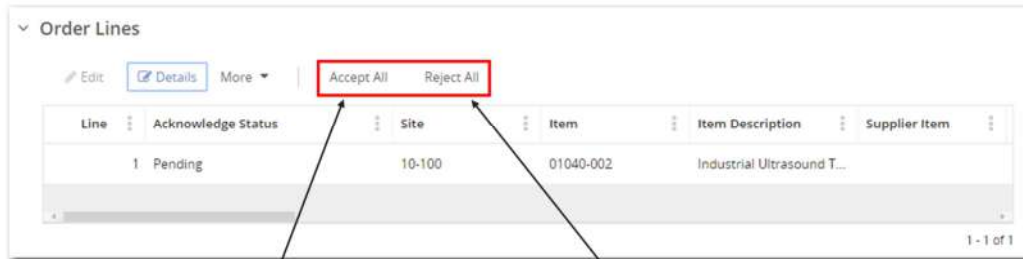


With so many columns to display, how do you decide which columns are the most useful to your business practices and then configure the order in which to display them? Primarily, the columns you require depend on your particular business processes and, often, customers have recommendations on how they would like a supplier to set up the Orders view.

## **PO Acknowledgment**

- Allows suppliers to acknowledge purchase orders sent by the customer, fully or with some variations
- A supplier can acknowledge at:
  - Purchase order line header level
  - Individual purchase order line level

## Supplier PO Acknowledgment — PO Line Header



**Accept All:** Updates status of all lines to **Accepted in Full**

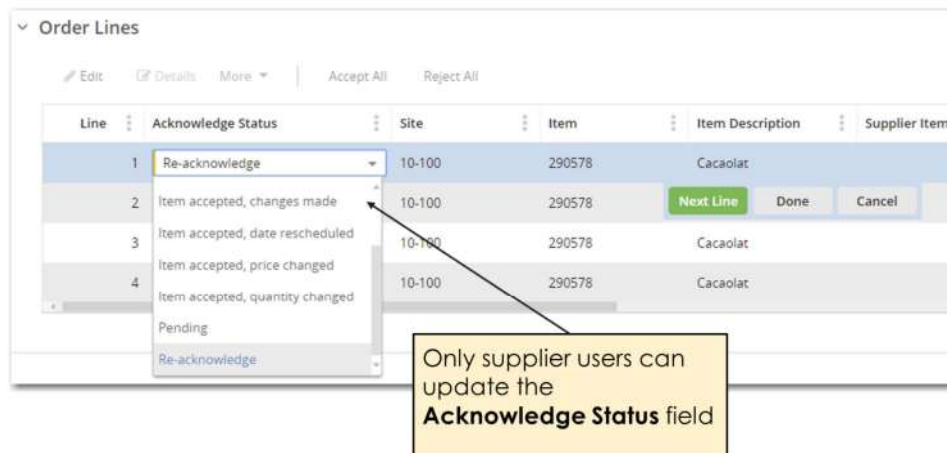
**Reject All:** Updates status of all lines to **Rejected**

A supplier can only click the Accept All button if the PO line header acknowledgment status is Re-Acknowledge or Pending. **Accept All:** Updates status of all lines to **Accepted in Full**.

A supplier can only click the Reject All button if the PO line header acknowledgment status is Re-Acknowledge or Pending

A supplier can only edit the Acknowledge Status column for a particular PO line if the line has a status of Pending or Re-acknowledge. **Reject All:** Updates status of all lines to **Rejected**.

## Supplier PO Acknowledgment — Individual PO Lines



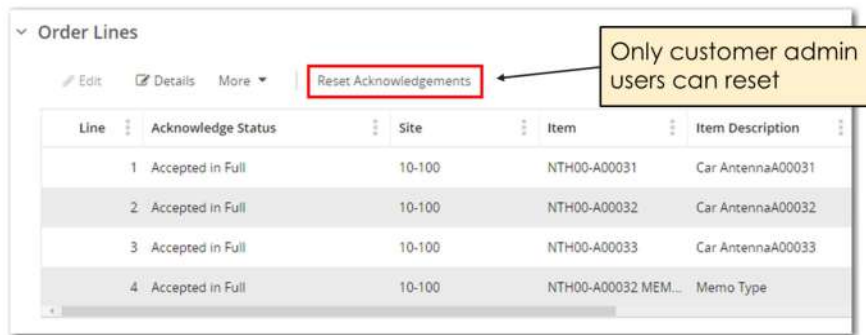
In the Order Lines panel of the Order screen, suppliers can set the acknowledge status of PO lines. The Acknowledge Status drop-down list contains the following options:

- 0–Pending
- 4–Item accepted and shipped
- 5–Item accepted, date rescheduled
- 6–Item accepted
- 7–Item accepted, changes made
- 8–Item deleted
- 9–Item accepted, price changed
- 10–Item accepted, quantity changed
- 11–Re-Acknowledge

Only supplier users can edit the Acknowledge Status field.

If a supplier updates any of the lines from Pending, the changes then update PO header acknowledge status to **Accepted with detail and change**.

## Customer PO Acknowledgment — Resetting Lines



The Order Lines panel of the Orders form contains a Reset Acknowledgments button. The button is only available if:

- The user is a customer admin user
- At least one PO line has an acknowledgment status other than Pending or Re-acknowledge

When a customer admin clicks Reset Acknowledgments, the PO line header acknowledgment status is set to Re-Acknowledge and the PO line acknowledgment status is set to Re-Acknowledge.



## PO Acknowledgment Audit Trail

Orders > PO Acknowledge Audit Trail

PO Acknowledge Audit Trail | Default View ▾ | More ▾

Order = "PO00005" ✕ | Line = "1" ✕

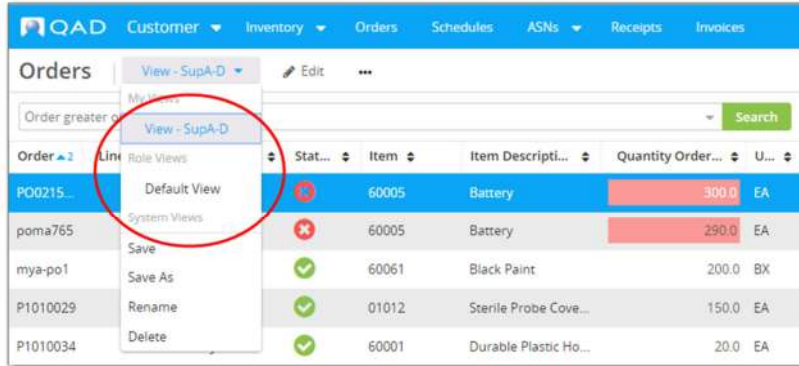
User ID ↕	Date ↕1	Order ↕2	Revision ↕4	Line ↕3	Order Acknowledge Status ↕	Line Acknowledge Status ↕
mgwmgw	10/16/2018 8:50 PM	PO00005	0	1	Accepted with detail and change	Pending

The PO Acknowledge Audit Trail Browse lets you view a history of actions performed in the PO acknowledgment cycle.

The browse tracks actions performed by both customers and suppliers, and records acknowledgment actions performed on both PO headers and PO lines.

## Stored Views

- **Stored views** allow you to create different aspects of the Orders view



Stored views in QAD Supplier Portal allow you to create different aspects of a view allowing you to define the display and filters, and then to name and save the setting for later use. After configuring a view, you can save it as a stored view from the drop-down located next to the view title. Once saved, a stored view is available from a pull-down menu located next to the view title. Your stored views are available to you alone.

**Important:** Customer admin users can make a stored view available system wide, that is, available to all users, including suppliers.

## Orders View, Creating ASNs

The screenshot shows the QAD Supplier Portal interface. At the top, there are navigation tabs for Supplier, Inventory, Orders, Schedules, and ASNs. The 'Orders' tab is active. Below the navigation, there is a search bar and a table of orders. The table has columns for Order, Li..., Stat..., Customer Na..., It..., Ship..., and SL... The first row shows Order P1010035 with a quantity of 1 and a status of 'QMI -USA Division'. The 'Actions' menu is open, and the 'Create a new ASN' option is highlighted with a red circle. A callout box points to this option with the text: 'Suppliers: The Create a new ASN option becomes visible under Actions whenever there is a quantity available to ship'. Another callout box at the bottom of the screenshot states: 'When you select Create a new ASN option, you open the ASN Maintenance screen, where you can create the shipment.'

Order	Li...	Stat...	Customer Na...	It...	Ship...	SL...
P1010035	1	○	QMI -USA Division	01010	10-100	10-100
jjx	1	○	QMI -USA Division	01010	10-100	10-100
P1010012	1	○	QMI -USA Division	01010	10-100	10-100

For suppliers, the ASN Creation option is visible under **Actions** in the Orders view whenever there is a quantity available to ship (according to the order). When you select **Create a new ASN** option, you open the ASN Maintenance screen, where you can create the shipment.



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