How to add a Purchase Order

In this option you can add the SAP Purchase Order via the Add-on System and once you have added the PO in the Add-on it automatically adds into the SAP and synchronizes with both system.

To easily add the PO, you should have prior knowledge about the SAP's Business Partner Data and Item Master Data.

In the BP Master data you must know the Vendor Name, Vendor Code, Vendor Type(Foreign vendor or Local Vendor), BP Currency, Payment Term and Advance Payment Options.

Under the Item Master data, you must know what are the Item Types (RM, FG and Service Items), Item Codes, Item Groups, Item Name, Item UoM, Item Price and Warehouse Code.

Mainly, all the records are captured through the Project Code and you have been aware about the Project Code.

To get above details, please liaises with Merchandising Team.

To generate the Purchase Order, you should have a confirmation of the Master Data such as BP(Vendor Creation) and Item Master (RM Code, Price etc.)

1st you must have an Add-on system access with user name and password. To create a create a user name and password, please contact IT Team.

Once you have the username and password, log into the Add-on live system
http://192.168.1.55:1212/Home/Index

Now you can see the home scree and available modules under your user account.
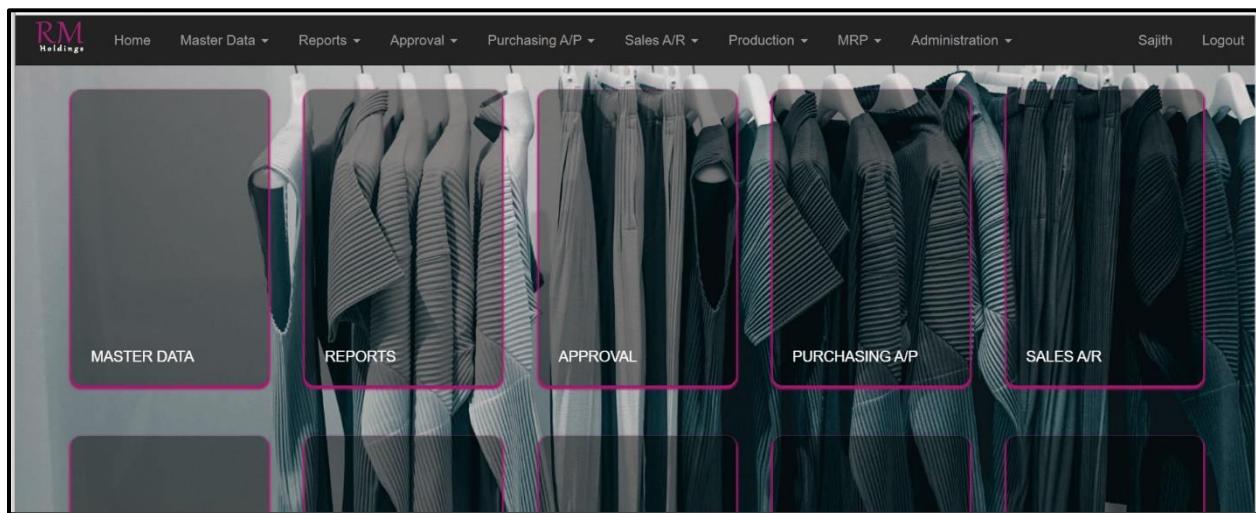
2ⁿᵈ Go to the relevant module, for Purchase Order creation you have to go for Purchase A/P

Under the Purchasing A/P you can see the "Purchase Order" and select to open the Purchase Order Adding Window.

3ʳᵈ Here you can see the available fields to enter data. It is quite similar to the Purchase Order window in SAP Business One.

To raise the Purchase Order you must know about the Vendor, Project Code, Delivery Date and Item Details. You can check the availability of these data by referring to the Master Data Section in this Add-on system.

4th After referring to the Master Data, please note down required details and remember.

Now you are ready to enter the details in the PO.

1. Starting from the header level details such as vendor.

Type the part of vendor name in the Search Field E.g. Luen then move to the next field and select the relevant vendor code and name.

2. Now enter the Delivery Date, it has a calendar field then you can select the required delivery date.

3. Next you can see the available fields in the header section. No need to select the "Currency" for most of the vendors and it picks the currency from the BP Master Data. However, if you have a multiple currency vendor then you have to select the appropriate currency such as LKR or USD.
4. In the other fields you can see the drop-down list to select the required data such as Del.Term, Port, Ship Mode and Payment Advance.

5. Now you can add the Item Details by selecting the "+" button

6. Once you click that button, a new line will add and you can select the relevant Item Group.
7. After that you can move to the item field and select the appropriate item based on the selected item group.
   Or else you can search the item by typing the part of the item name.

8. Next you can enter the required quantity and no need to define the UoM it automatically comes based on the Item Master Data. If it is a problem with the item details, please contact the Merchandising Team.

9. Next, item price field, if it is a repeating item and already purchased, it would automatically come. If it is a completely new item, then it comes with the master data and else you have to manually enter the price with the right currency.

****Please make sure the BP Currency and Price are similar.

10. After that you can select an appropriate Warehouse Code and Project Code to Finalize the Item Data.

As per your requirements, you can add any number of items. We recommend please keep 10 – 15 items per PO.

Final step, you can put a comment in 254 character length with alphanumeric.

Now You have finished the data entering part for the PO and now you can add the Purchase Order. Before adding the PO to the system please cross check all the fields are correct.

After adding the PO you can't change the data in the Add-on system, you must have access for the SAP Business One.
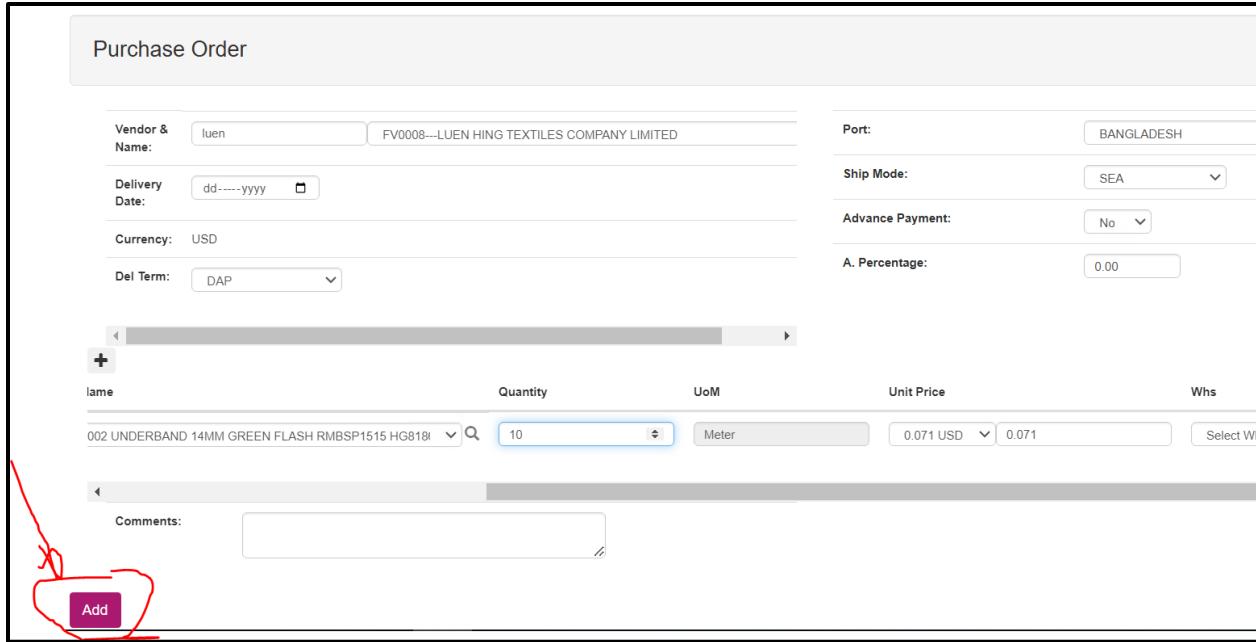
To check the added PO details and take print out or PDF of the Purchase Order, please refer to the Purchasing A/P module.

Under the Purchasing AP section, you can see "SAP POs"

Here you can see the icon, by clicking this icon you can take the print preview of the PO.

Press the "Layout" button to print or generate the PDF.

Now you can send the PO to the vendor.