



OFFICECENTRAL

USER MANUAL – PROCUREMENT

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1 - PENGENALAN

OfficeCentral is a cloud-based solution focusing on enterprise management which consists of Human Resources Management, Payroll, Accounting, Finance, Customer Relationship Management, Point of Sale, Procurement and Distribution.

OfficeCentral has been designed specially for SMEs to assist them in managing their company more systematically and effectively.

Online Help

We have a few online help channels to help you to learn OfficeCentral at your own pace from where ever you are. Please go to the following websites:

eLearning: <http://academy.ICTForGrowth.com>

Help Center:

<http://bantuan.OfficeCentralCloud.com> (Malay Language)

<http://help.OfficeCentralCloud.com> (English Language)

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2 - PROCUREMENT

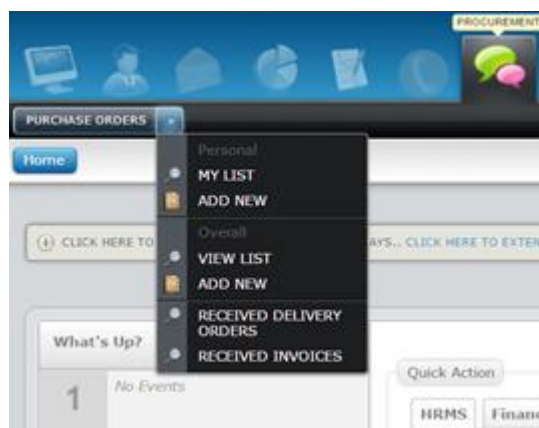
2.1 INTRODUCTION

Procurement module is used to manage procurement information and to generate Purchase Orders by an organization to purchase goods and services from supplier. In this module, you can generate Purchase Orders to be given to your supplier. For each purchases, you can generate “Received Delivery Order” and “Received Invoices” so that you can track the stages of your procurement.

The process of the procurement module is as below::



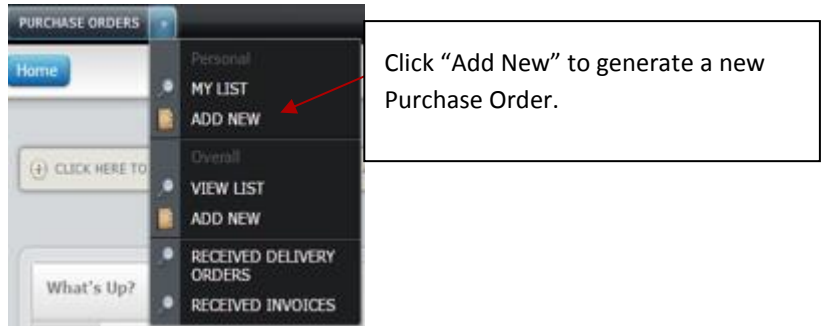
To access this module, click on the “Procurement” module and you will reach to the following screen:



Picture 2.1.1: Menu available under Procurement module

2.2 CREATE NEW PURCHASE ORDER

To create a new Purchase Order, click “Add New” as shown in the picture below:



Picture 2.2.1: Menu under Purchase Orders in Procurement module

When you clicked on “Add New”, you will reach to the following screen where you need to put in the supplier information and also the procurement information:

A screenshot of a web application showing the 'Issue Purchase Order' form. The form is divided into two main sections: 'Basic Information' and 'Procurement Information'. The 'Basic Information' section includes fields for 'Reference No' (PO/2017/1), 'Quotation Reference No', 'Purchase From' (a dropdown menu), 'Full Name', 'Street Address 1', 'Street Address 2', 'City', 'Postcode', 'State', 'Country', 'Phone', 'Fax', and 'Email'. The 'Procurement Information' section includes fields for 'Date Issued' (1 Mar 2017), 'Required Date', 'Person in Charge', 'Project' (a dropdown menu), 'Ship Via', and 'FOB Port'. Red arrows point to various fields: arrow 1 points to 'Reference No', arrow 2 points to 'Purchase From', arrow 3 points to 'Subject' (at the bottom), arrow 4 points to 'Date Issued', arrow 5 points to 'Person in Charge', arrow 6 points to 'Project', and arrow 7 points to 'Ship Via'. The form has a 'Back To List' button at the top left and a 'Save' button at the top right. A 'Mobile View' button is at the bottom left, and a 'Chat with us' button is at the bottom right.

Picture 2.2.2: The screenshot of the page “Issue New Purchase Order” after clicking on “Add New”

Explanation:

1	Key in the reference number of the quotation submitted by your supplier for this purchase.
2	Choose the supplier's account name. If this is a new supplier, you need to add a new supplier under the CRM module (Accounts).
3	Please insert the subject of the Purchase Order.
4	Please put in the name of the Person In Charge of this Purchase Order.
5	Please choose the project association with this Purchase Order (if any).
6	Please choose the delivery method of the purchase.
7	If this purchase involves import/export, please key in the FOB port name.

After you have completed filling up the information as per the previous picture, you will need to put in the billing information and shipping information. For billing information, it is the information that the supplier will use in order to prepare and submit their invoice, while the shipping information is the information to be used by the supplier for delivery of the goods/services purchased.

The screenshot displays the 'OfficeCentral - Create' form for a Purchase Order. The form is divided into two main sections: 'Billing Information' and 'Shipping Information'. The 'Billing Information' section includes fields for 'Staff In Charge', 'Person in Charge', 'Bill To', 'Street Address 1', 'Street Address 2', 'City', 'Postcode', 'State', 'Country', 'Phone', 'Fax', and 'Email'. The 'Shipping Information' section includes fields for 'Staff In Charge', 'Person in Charge', 'Ship To', 'Street Address 1', 'Street Address 2', 'City', 'Postcode', 'State', 'Country', 'Phone', 'Fax', and 'Email'. Numbered callouts 1 through 6 are placed over the form to indicate specific fields: 1 points to the 'Subject' field, 2 points to the 'Person in Charge' field in the Billing section, 3 points to the 'Bill To' field in the Billing section, 4 points to the 'Person in Charge' field in the Shipping section, 5 points to the 'Ship To' field in the Shipping section, and 6 points to the 'Street Address 1' field in the Shipping section.

Picture 2.2.3: Putting in the billing and shipping information.

Explanation:

1	Please select your staff's name that is in charge of thie procurement for billing matters.
2	Please enter the name of the person who is in charge of payment purposes if you select "Others".
3	Please enter the name of the company that will pay for the procurement. It normally is the name of your company. The supplier will generate their invoice using the information here.
4	Please select the name of your staff in charge to accept the delivery of the goods/services ordered.
5	Please enter the name of the person in charge of accepting the goods/services ordered if you select "Others".
6	Please enter the name of the company that will accept/receive the goods/services ordered. It normally is your company's name.

After you have completed all the information required, you need to add the items that you would like to purchase. You can scroll down and see the following screen:

Qty	Item	Price Per Unit	Tax	Discount	Amount (Exc. Tax)	Amount
<div>+ Add New Item</div>						
Discount				<input type="text" value="0.00"/>		
Subtotal (Exc. Tax)				<input type="text" value="0.00"/>		
Tax				<input type="text" value="0.00"/>		
Subtotal						<input type="text" value="0.00"/>
Shipping						<input type="text" value="0.00"/>
Total						<input type="text" value="0.00"/>

Terms & Remarks

Terms

Remarks

Picture 2.2.4: Adding new items

Click the button "Add New Item" to add new items in your Purchase Order.

After you have clicked on the “Add New Item” button, you will see the following screen where you can insert the quantity of the goods/services, items information, prices and more.

Qty	Item	Price Per Unit	Tax	Discount	Amount (Exc. Tax)	Amount
1	<div>Custom Product</div> <div>Code</div> <div>Name</div> <div>Description</div>	0	N/A (0%)	0	0	0
+ Add New Item						
					Discount	0.00
					Subtotal (Exc. Tax)	0.00
					Tax	0.00
					Subtotal	0.00
					Shipping	0.00
					Total	0.00

Picture 2.2.5: Adding new items information

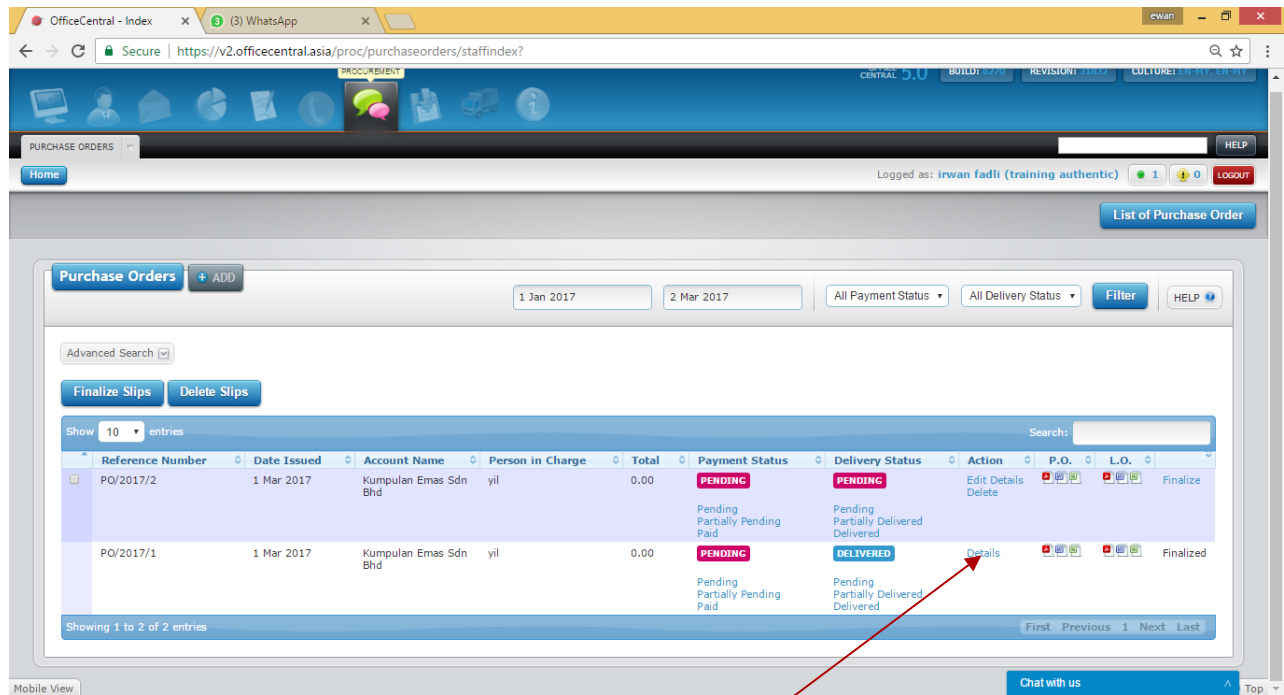
If you are purchasing the items that you have listed in Pricebook in CRM module, you can just type in and select the items using the drop down. This will automatically populates all the fields based on the information already available in the Pricebook, saving you time. Otherwise, select “Custom Product” and fill up the Code, Name and Description of the goods/services manually.

After you have completed the Purchase Order, you can download the Purchase Order in the format that you required by selecting the correct icons: “PDF”, “Word” or “Excel”. After you have printed out the Purchase Order, you can send the Purchase Order to your supplier.

2.3 RECEIVED DELIVERY ORDERS AND RECEIVED INVOICES

When your supplier delivers the goods/services to you, you can create “Received Delivery Order” and also record the invoice(s) submitted to you by the supplier using the “Received Invoice” functions.

To create “Received Delivery Order” and “Received Invoice”, you need to click on Details in the list of Purchase Orders.



Click Details to view details of Purchase Orders and to generate “Received Delivery Orders” and “Received Invoices”.

Picture 2.3.1: List of Purchase Orders

Once the Purchase Order is confirmed, you need to finalize the Purchase Order to disable any editing/changes made to the Purchase Order.

Please be informed that you are required to finalize the Purchase Order first before you are able to generate any “Received Delivery Order” and “Received Invoice”.

You can edit the Purchase Order by clicking the “Edit” button.

You can delete the Purchase Order by clicking the “Delete” button. However, you can only delete a Purchase Order if there is no “Received Delivery Order” or “Received Invoices” created for the selected Purchase Order.

After you have clicked the Details button, you will arrive to the following page:

The screenshot shows a web browser window with the URL <https://v2.officecentral.asia/proc/purchaseorders/StaffDetails/5646>. The page title is "OfficeCentral - Details". The user is logged in as "irwan fadli (training authentic)". The page displays the "Issue Purchase Order" details for Reference No. PO/2017/1. The details are organized into two columns: Basic Information and Delivery Status. The Basic Information column includes fields for Reference No, Quotation Reference No, Payment Status, Delivery Status, Purchase From, Full Name, Street Address 1, Street Address 2, City, Postcode, and State. The Delivery Status column includes fields for Date Issued, Required Date, Person in Charge, Project, Ship Via, and FOB Port. The values for these fields are: Reference No: PO/2017/1, Quotation Reference No: 5465, Payment Status: Pending, Delivery Status: Delivered, Purchase From: Kumpulan Emas Sdn Bhd, Full Name: Kumpulan Emas Sdn Bhd, Street Address 1: , Street Address 2: , City: , Postcode: , State: , Date Issued: 1 Mar 2017, Required Date: 2 Mar 2017, Person in Charge: yil, Project: , Ship Via: gfhgf, and FOB Port: . The page also includes a "Back to list" button, "Receive Invoice", "Receive Delivery Order", and "Copy Purchase Order" buttons. A "Chat with us" button is located at the bottom right.

Basic Information	
Reference No	PO/2017/1
Quotation Reference No	5465
Payment Status	Pending
Delivery Status	Delivered
Purchase From	Kumpulan Emas Sdn Bhd
Full Name	Kumpulan Emas Sdn Bhd
Street Address 1	
Street Address 2	
City	
Postcode	
State	

Delivery Status	
Date Issued	1 Mar 2017
Required Date	2 Mar 2017
Person in Charge	yil
Project	
Ship Via	gfhgf
FOB Port	

Picture 2.3.2: Purchase Order Details Page

HOW TO CREATE "RECEIVED DELIVERY ORDERS"

To create a new "Received Delivery Orders", you need to click on the button "Receive Delivery Order" on the top right hand side of the Picture 2.3.2. You will see the following screen:

The screenshot shows the "Receive Delivery Order" page. The page has a "Back to Purchase Order" button on the top left and a "Save" button on the top right. The main form is titled "Receive Delivery Order" and contains a "Basic Information" section. This section has two fields: "Reference No" and "Location". The "Reference No" field is empty, and the "Location" field is set to "cleaner". Below the "Basic Information" section is a table with two columns: "Qty" and "Item". The table contains three rows of data:

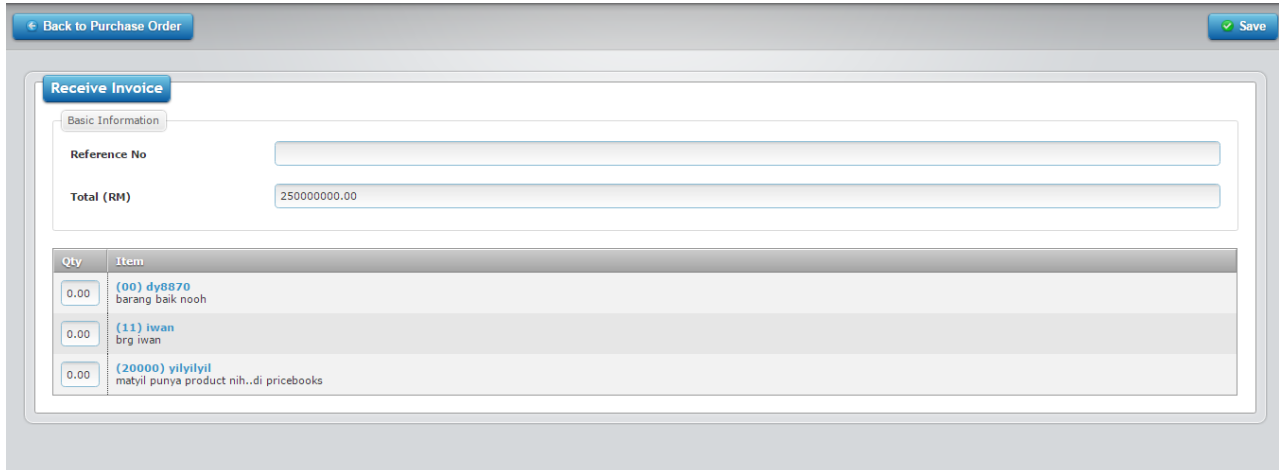
Qty	Item
0.00	(00) dy8870 barang baik nooh
0.00	(11) iwan brg iwan
0.00	(20000) yilyiyil matyil punya product nih...di pricebooks

Picture 2.3.3: Creating New "Received Delivery Order"

You only need to enter the reference number of the "Delivery Order" given by the supplier for the goods/services that they deliver. Then, you can insert the quantity of items that you have received in the list of items. Click the "Save" button to save.

HOW TO GENERATE RECEIVED INVOICE

In order to generate Received Invoice, just click on the button “Receive Invoice” on the top right hand corner in Picture 2.3.2. You will reach to the following screen:



Qty	Item
0.00	(00) dy8870 barang baik nooh
0.00	(11) iwan brg iwan
0.00	(20000) yilyiyil matyil punya product nih...di pricebooks

Picture 2.3.4: Generate Receive Invoice screen.

Here, you need to enter the invoice’s reference number which you received from the supplier and the invoice amount, together with the quantity of the goods/services that is charged in the particular invoice. Click “Save” to submit the information to the system.