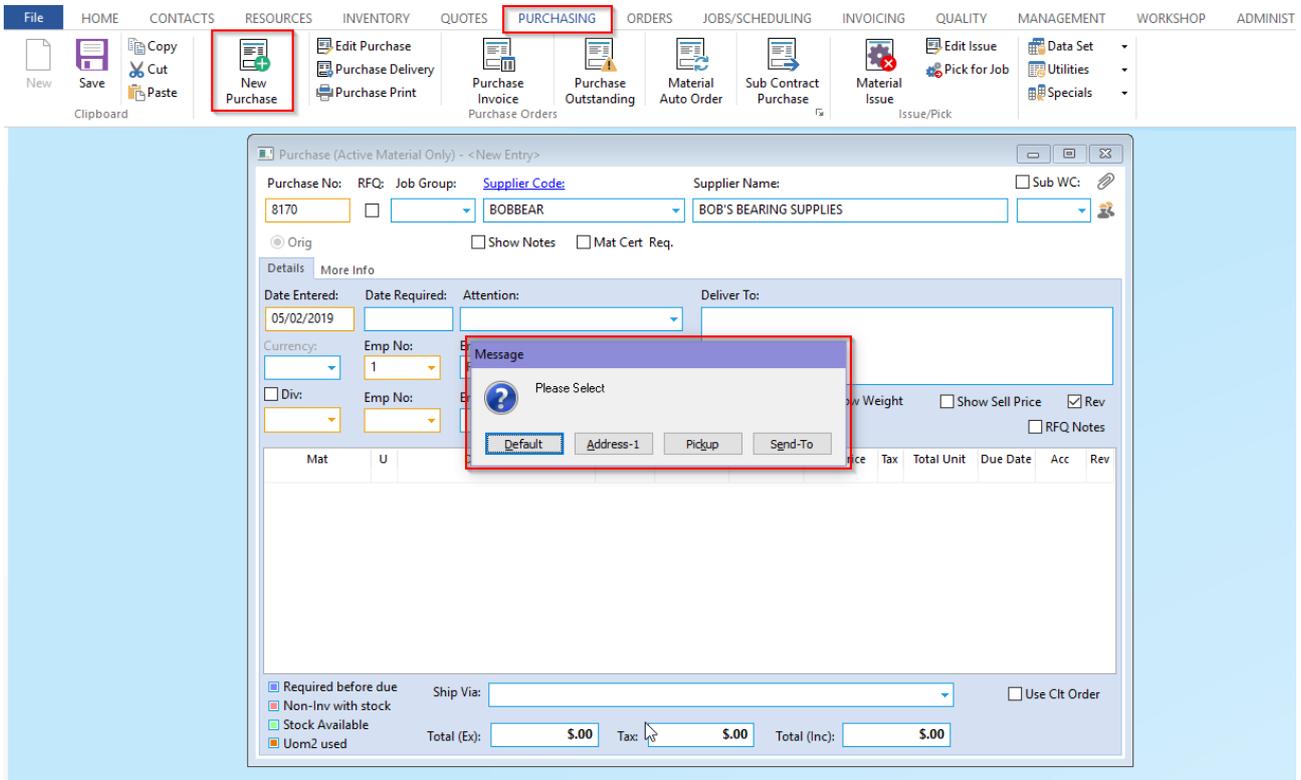


Create a New Opto Purchase Order

From the OPTO ribbon, select the 'Purchasing' tab and **click** on the 'New Purchase' icon. In the **Supplier Code** field **press <F2>** and select the supplier from the pop-up list then **click** on **OK**. **Press <TAB>** to generate the window, in the **Attention** field **press <F2>** and select a name from the pop-up list then **click** **OK**. **Click** in the **Deliver To** field and select an option from the pop-up message.



Click in the **Emp No** field, **press <F2>** and select the name of the person requesting the materials be ordered. The **Signed** field is controlled by a parameter setting which will require a user with permission and an internal employee password to release the purchase order. **Press <TAB>** to advance to the **Currency** field (if activated), **press <F2>** select from the pop-up list and **click** **OK**. **Press <TAB>** again to advance to the **Mat** column –

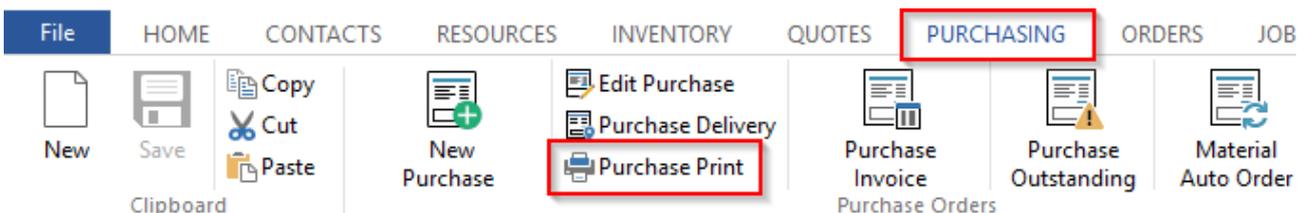
Materials Search in Purchase Orders: In the Material code field ("Mat") use the following search functions

1. **<F2>** will pop up list of all material in the Database – Care should be taken depending on the size of the material database as the list could be large
2. **ABC** to select materials beginning with Material Code "ABC" from 'Popup list'.
3. **>XYZ** to select materials with a Supplier Material Code containing "XYZ"
4. **>> Dexion** to search by the Supplier Material Description that contains the word 'Dexion'
5. **/Flat** to search the Material Description containing the word 'Flat'
6. **?10** to search for materials belonging to Material Group "10"
7. **//** to search for Materials classified as "Auto Order"
8. **??** to search for Parts to enter in purchase order
9. **>///ATLAS** to search for Materials where ATLAS is a supplier

Once materials have been selected, **press <TAB>** to move on to the **Job Tic** field. If purchasing directly to a job ticket, **press <F2>** and select relevant job ticket from the pop-up list and **click OK**. Add the job quantity and actual quantity to be ordered.

Mat	U	Description	Job Tic	Job Qty	Act Qty	Unit Price	Tax	Total Unit	Due Date	Acc
00-000-000	EAC	substitute material		.0000	1.0000	.0000	6	.00	08/02/19	5-1200

Add a transport method if necessary and **press <F9>** to save. The 'Print Purchase' window appears, tick the boxes as required and then **click** on the 'Print' button to print the Purchase Order or close the window if not required to print.



The "More Info" Tab

Allows for text to be added to print on purchase orders and requests for quotes. File can also be attached to the purchase via this tab. At the bottom is a field where text can be entered to create a pop-up Note message when a user attempts to create the purchase invoice.

The screenshot shows the 'Edit Purchase (Active Material Only)' window. The 'PURCHASING' tab is selected in the top ribbon. The 'More Info' sub-tab is active, showing several text input fields for adding information to purchase orders and invoices. The 'Supplier Code' is 'BOBBEAR' and the 'Supplier Name' is 'BOB'S BEARING SUPPLIES'. The 'External Info' field contains 'ADD TEXT TO APPEAR ON PURCHASE ORDER'. The 'Invoice Notes' field contains 'ADD TEXT TO APPEAR ON A POP-UP MESSAGE WHEN INVOICE IS CREATED'. There is also a 'File Attachments' table with columns for Description, Filename, and Email.

	Description	Filename	Email
1			
2			

The 'Received' Tab records deliveries, the delivery information, the job for the delivery information and any outstanding deliveries can be printed from this tab. There is also an information button that opens a screen where delivery information can be edited. The 'Delivery' Tab shows the goods that were delivered for the Purchase Order and the quantity.