Secure Purchasing

Overview:

The Secure Purchasing feature enables employees to raise purchase orders but only an authorised employee can approve the purchase orders. Once the purchase order has been authorised via an internal employee password only then can it be printed and/or emailed to the supplier.

From the OPTO Ribbon, select the 'Resources' tab and then **click** on 'New/Edit Employee' to open the 'Employee Details' window. Enter the employee number of the employee to be given the permission in the *Emp No* field or **press** <**F2**> and select required employee from the pop-up list then **click** <u>OK</u>.

- 1. The selected employee must have an internal employee password for this feature. This password is different from the password used to log-on to OPTO. Enter a unique password in the red **Password** field (1) for the employee, this password unique to the employee. Employees cannot share an internal employee password and no two passwords can be the same.
- 2. The selected employee must have an email address entered in the *Email Office* field (2).

File	HOME CONTACTS R Copy Cut Save Clipboard	/Edit enter	INVENTORY	QUOTE iciency s city	ES PURCH	ASING OF	RDERS ee Manage ock Times ployee Tim Emp	JOBS/SCH ment OS I S Ines	IEDULING Show Empl Job Batch	INVOICING	QUALITY Batch our
	Employee Emp No: Employee Nar JONES Details More Info Security Group Pos: 10 • Emp Start Date: Position: 1001 N Acting Possword: ••	me or Surma y Emp Sch ADMINI 26/02/10 Managing D Div:	ime: Internet Pictures N STRATION D 10037 irector 1 - C	Given Nar Robert Jotes QMS Sales Tr OMPANY O	ne: Mi B eam:	ddle Name:	Initial: SIS SIS R R R	Curren Shift 1 Active unch - Auto moko - Auto Multi On On ounding ound 15 M	t Shift: o to hly / Multi (in · > 10	0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	
	N Day 1 MONDAY 2 TUESDAY 3 WEDNESDAY 4 THURSDAY 5 FRIDAY 6 SATURDAY 7 SUNDAY Address 1 1 Bellbird Court Mt Cotton, QLD, 4165	< 5 5 5 5 0 0	Early Start \$ 00:00:00 (00:00 (00:00:00:00 (00:00:00:00 (00:00:00 (00:00:00 (00:00:00:00 (00:00:00 (00:00:00:00 (00:00:00 (00:00:00:00:00 (00:00:00:00 (00:00:00:00)	Std Start 07:00:00 07:00:00 07:00:00 07:00:00 07:00:00 00:00:00 00:00:00 Other Email P Email P Pho	Std Finish 15:06:00 15:06:00 15:06:00 15:06:00 15:06:00 15:06:00 00:00:00 00:00:00 Details Office: rjones P PW:	Late Finish 00:00:00 00:00:00 00:00:00 00:00:00 00:00:	->>- E 5 5 5 5 5 5 5 5 0 0 0	87eak Nc .50 .50 .50 .50 .50 .50 .00 .00 .00	prm Time 7.60 7.60 7.60 7.60 7.60 0.00 00	Over Time 3.00 3.00 3.00 3.00 .00 .00	

For All Other Employees

Open their Employee record and on the 'Security' tab, **click** on the *Purchase Restrict* box to tick. These employees can still create purchase orders and save them as normal, but they cannot print or email the purchase order until the authorised employee has release it by entering their internal employee password.

Update - Parts (Utility)	[3] Show Order/Invoice Total, plu	s Cost	Supervising:	.0000	.00
✓ Update - Material (Utility) ✓ Add NCR or ECR	Ose Div for selected Reports Point Of Sale Access	Change Pick	Charge:	1.0000	60.00
QA - NCR/ECR (Complete)	Change Due Date in Order Book	Boss Rating	1 👻	Qualificatio	ons apply
[3] Quote Fast Markup (Override)	Purchase Restrict	Show Callup Amt	Budget:		
Release Client Orders	Stock Take Restrict				

Open the 'More Info' tab and enter a zero in the *Max Purchase Amount* field then press <F9> to save.

💷 Employee						• ×		
Emp No: Employee Nam	e or Surname:	Given Name:	Middle Name:	Initial:	Current Shift:			
1 JONES		Robert	В		Shift 1	• 1		
Details More Info Security	Emp Sched Pictures No	tes QMS						
Comments:								
Employee 1 More Info						^		
– File Attachments						×		
Descriptio	in		Filename					
1								
Limit Purchasing to these	Accounts	Limit Work to t	hese Workcenters		Current Job			
Acc Code A	ccount Description	wc	Workcenter Descriptio	in				
					Last Job/Date			
					1125-7*1			
		7						
3	Start Time: 12:12:56	Current Jobs M	ulti					
			Jobs		WC Nesting No	Step		
Max Purchas	e Amount: \$.00							

Parameter Setting – From the OPTO ribbon **Click** on the 'Purchasing' tab then the drop-down icon below 'Sub Contract Purchase'. **Click** on the 'Print' tab and **click** on the **[3]** *Signature Check, Signature Emp, Signature Password* box two times to enable. The box must be solid. (*See below*) **Press** <**F9**> to save.

File HOME CONTACTS RESOURCES I	IVENTORY QUOTES PURCHASING ORDERS JOBS/SCHEDULING INVOICING QUALITY MANAGE	MENT WORKSHOP ADMIN
New Save Purchase Processor	t Purchase chase Derivery Purchase Invoice Purchase Purch	ı Set ▼ ties ▼ cials ▼
	Parameters - PURCHASE General Print Export Setup Auto-Order	
	Print Company Name TMS Software - Help File System	
	Total Box Text	
	Signature Text	
	Quote Request Text	
	☑ [2] Print Nu Shading [2] Print Multiple of Material ☑ [2] Print No Shading [2] Print Phone Number ■ [3] Signature Check, Signature Emp, Signature Password [2] Print Material Code & Description ☑ [2] Emp Code = Signature Code [2] Print Drawing No [2] If save EDIT Purchase Order open print Purchase Order [2] Print Material Thickness ☑ [2] Standard Box, Box 1 [3] Print Material Thickness	
		Test Path

The 'New Purchase Order' window now has a red box that is used to enter the internal employee password to authorise the purchase order. The purchase order requires the password of the person who will approve the purchase.

Purchase (Active Materia	al Only) - <new entry=""></new>								
Purchase No: RFQ: Job 8172	Group: <u>Supplier Code:</u>	Supplier	Name:	🗌 Sub WC: 🖉					
Orig Details More Info	Show Notes	Mat Cert Req.							
Date Entered: Date Req	Date Entered: Date Required: Attention: Deliver To:								
Currency: Emp No:	Emp Name (entered):								
Div: Emp No:	Emp Name (signature):	Oric	J Due Show Weigh	t Show Sell Price Rev					
Mat U	Description	Job Tic Job Qty	Act Qty Unit Price Tax	Total Unit Due Date Acc Rev					
				ζ=					
 Required before due Non-Inv with stock 	Ship Via:			▼ Use Clt Order					
 Stock Available Uom2 used 	Total (Ex): \$.00	Tax: \$.0	0 Total (Inc):	\$.00					

A message appears when a supplier is selected. **Click** on <u>OK</u> on the message to continue.



The system will generate an email to be sent to the authorising employee whose employee number was entered on the purchase order in the *Emp Name (signature)* field (circled above).

🚘 🔙 🤊 🥴 🔶 💌 =	New Purchas
File Message	Insert Options Format Text
A new purchase orde Please release this Pu A new purchase orde Please release this Pu Required By: Joel JOH Thanks Date: 03/08/11 Time:	Insert Options Format lext $\begin{array}{c} & 11 \\ \hline & 11 \\ \hline & A^{*} \\ \hline & I \\ \hline \hline & I \\ \hline \hline & I \\ \hline & I \\ \hline \hline \hline & I \\ \hline \hline \hline \hline \hline & I \\ \hline \hline$

The employee in the *Emp Name (signature)* field receives the email and will then review the purchase order to be approved and then enters their password in the red field and **press** <**TAB**>, and then **press** <**F9**> to save.

Purchase (Activ	e Material Only]	- <new entry=""></new>					
Purchase No: R 8172 [FQ: Job Group	Supplier Code: BOBBEAR	•	Supplier Name: BOB'S BEARING SU	JPPLIES		🗌 Sub WC: 🖉
Orig Details More Inf	io	Show Notes	Mat Cert Req.	63			
Date Entered:	Date Required:	Attention:		Deliver To:			
05/02/2019		Robert Bear	•	iTMS Software -	Help File System		
Currency:	Emp No:	Emp Name (entered):		Unit 27 15 Main	Street		
1.0000 👻	1 🚽	Robert JONES		THORNLANDS	QLD 4163		
Div:	Emp No:	Emp Name (signature):	_	Orig Due	Show Weight	Sho	w Sell Price Rev
1 -	1 👻	Robert JONES	••	Not Confirmed	d Price		RFQ Notes
Mat	U	Description	Job Tic Job	Qty Act Qty	Unit Price Tax	Total Unit	Due Date Acc Rev
Required befor Non-low with s	e due Ship	o Via:				-	Use Clt Order
 Stock Available Uom2 used 	e Total	(Ex): \$.00	Tax:	\$.00 Tota	l (lnc):	\$.00	

The Purchase Order can now be printed and/or emailed.