

USER MANUAL FOR PROCUREMENT MODULE OF ERP SYSTEM FOR POWER SECTOR (RFP No: 27.71.0000.002.07.023.17-154)

Developed By:



in collaboration with:

Microsoft, Technohaven Co Ltd and Computer Services Ltd



Executive Summary

Techvision in collaboration with Microsoft Bangladesh, Technohaven Co. Ltd. and Computer Services Ltd. has completed customization and configuration of Procurement Module of Microsoft Navision 2018 ERP System under the contract agreement dated 11th October 2018 against RFP No 27.71.0000.002.07.023.17-154 dated February 08, 2018.

According to the signed agreement, we, the joint venture company, will customize, configure and deploy an ERP System to 15 power companies / organizations (legal entities) under Power Cell. The deliverable modules are –

- HR Management System
- Fixed Asset Management System
- Procurement System
- Accounts and Finance System

Users of the ERP System are from 15 legal entities / power companies under Power Cell namely

1. Power Cell
2. Power Division
3. BPDB
4. DPDC
5. PGCB
6. BREB
7. DESCO
8. APSCL
9. CPGCBL
10. RPCL
11. NWPGCL
12. WZPGCL
13. SREDA
14. NESCO
15. EGCB

B-R PowerGen Ltd. was added later on request of Power Cell.

This document has been prepared as User Manual outlining the usages and operational learning of Procurement Module of ERP System for Power Sector.

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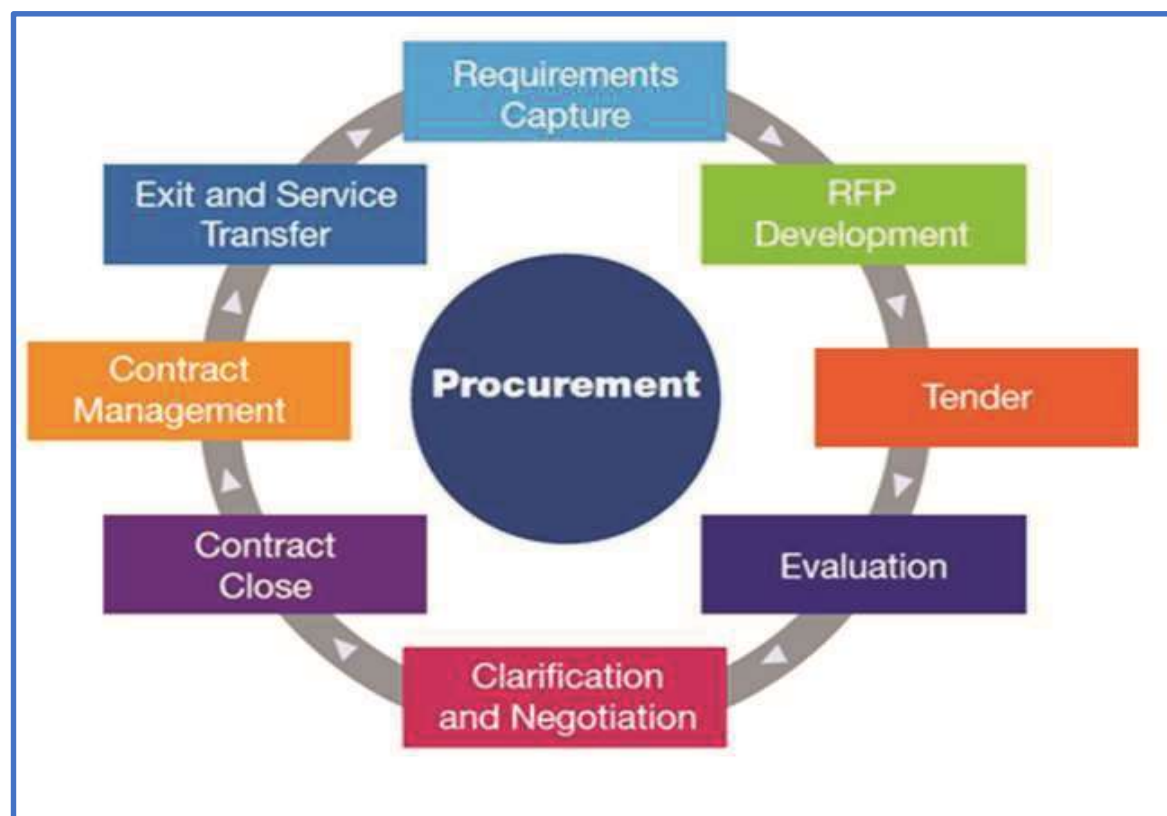
Introduction

Procurement is a common task for every organization. Before making a purchase decision, normally organization collect price quotations from different sources and management choses the best one. After creating a purchase order, appropriate department will receive the product and process invoices and finally accounts department will make the payments.

The following list describes a sequence of tasks which are generally performed in Procurement Management:

1. Seek Quotations
2. Prepare Comparative Statement (CS)
3. Issue Purchase Order / Contract Agreement
4. Receive Goods / Service
5. Receive Invoice
6. Make Payment

Followings are the basic work flow of Procurement Management.



Minimum Requirement

Before you access Navision 2018 ERP System for Power Sector, we recommend that you verify that your computer or mobile device and internet connection meets or exceeds the minimum system requirements for the product. This section lists the requirements.

Browsers

Chrome for Windows and Firefox for Windows: Dynamics NAV is designed to work with the current version of these desktop browsers.

Safari: Dynamics NAV is designed to work with the current version of Safari on OSX.

Microsoft Edge: Dynamics NAV is designed to work with the current version of Microsoft Edge.

Internet Explorer: Dynamics NAV is designed to work with Internet Explorer 11 (build 11.0.9600.17239) for Windows 10 and for Windows 8.1 (32-bit and 64-bit versions). We recommend that you upgrade to the latest version of Internet Explorer supported for your version of Windows.

Mobile devices

Windows: Dynamics NAV for Windows can be installed on devices with at least 1GB of RAM and Windows 10 Phone, Home, Pro, Enterprise, or Education (32-bit and 64-bit editions).

iOS: Dynamics NAV for iPad and iPhone requires iOS 9.0 or later.

Android: Dynamics NAV for Android tablet and Android phone can be installed on devices with at least 1GB of RAM and Android 5.0 or higher.

Device size: Dynamics NAV is supported on smartphones with a minimum screen size of 4" and tablets with a minimum screen size of 7".

Internet Connection

Standard bandwidth (3 Mbps downlink) of internet connection will require to run the ERP System.

Get Started

Introduction

This is a general instruction section to show

- Log In to the ERP System
- Log Out from the ERP System
- Navigation Process

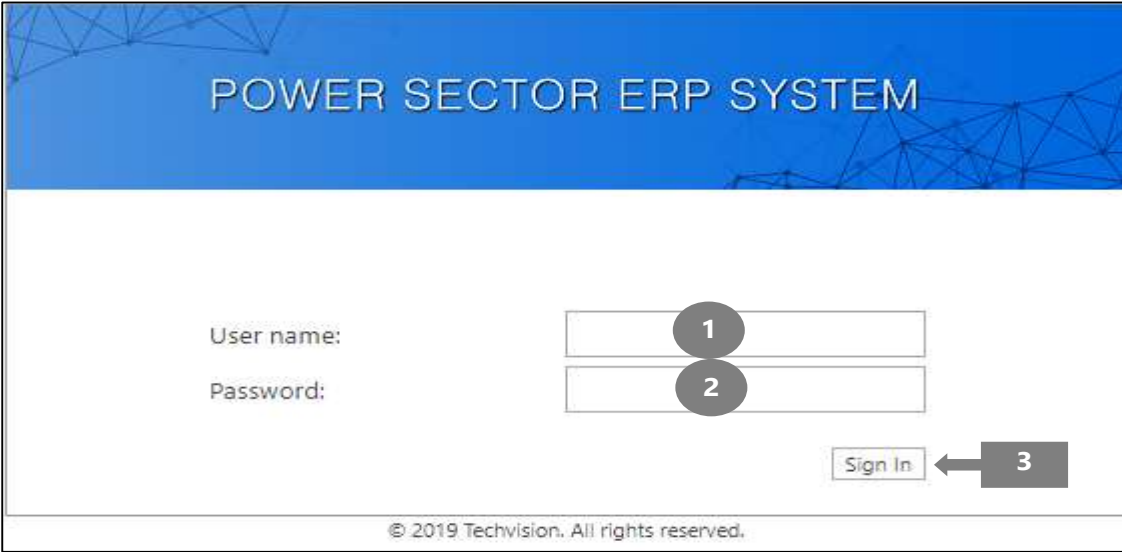
Prerequisite

- Meeting minimum requirement
- ERP Credentials – Username and Password

How to Log In / Start

Steps

- A. Open browser (Chrome / Internet Explorer / Mozilla Firefox)
- B. Enter the URL address in address bar of the browser
(<https://bdpowersectorerp.com/powerdiverpservice>)
- C. Press Enter. Login page will be appeared as below.



D. Enter your Username and Password in box 1 and 2 respectively.



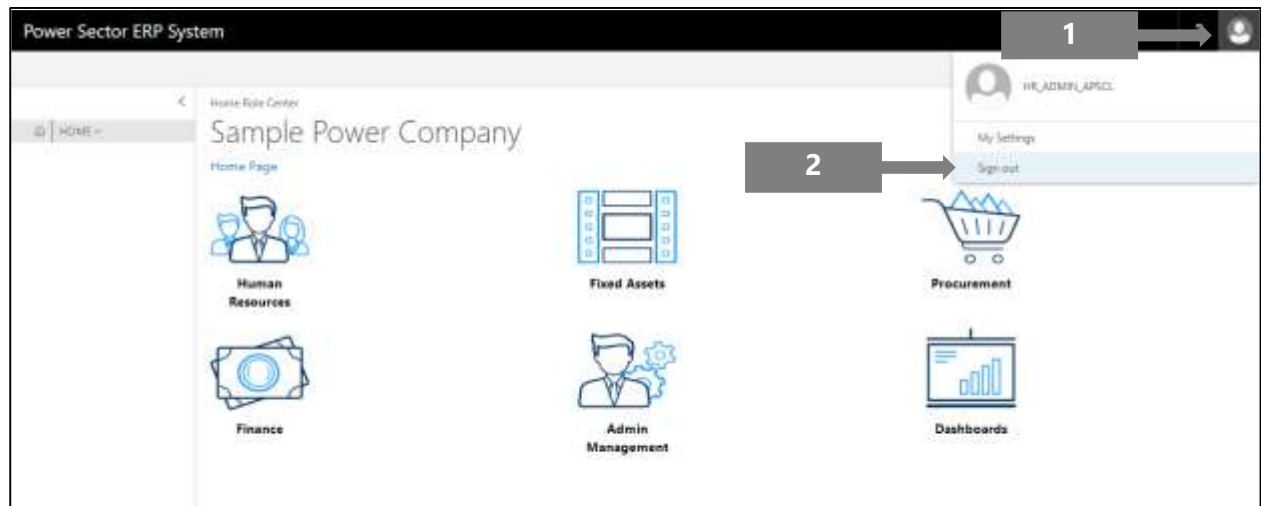
E. Select on "Sign In" button or press ENTER to load ERP Home Page. Following screen will be appeared



How to Log Out

Steps

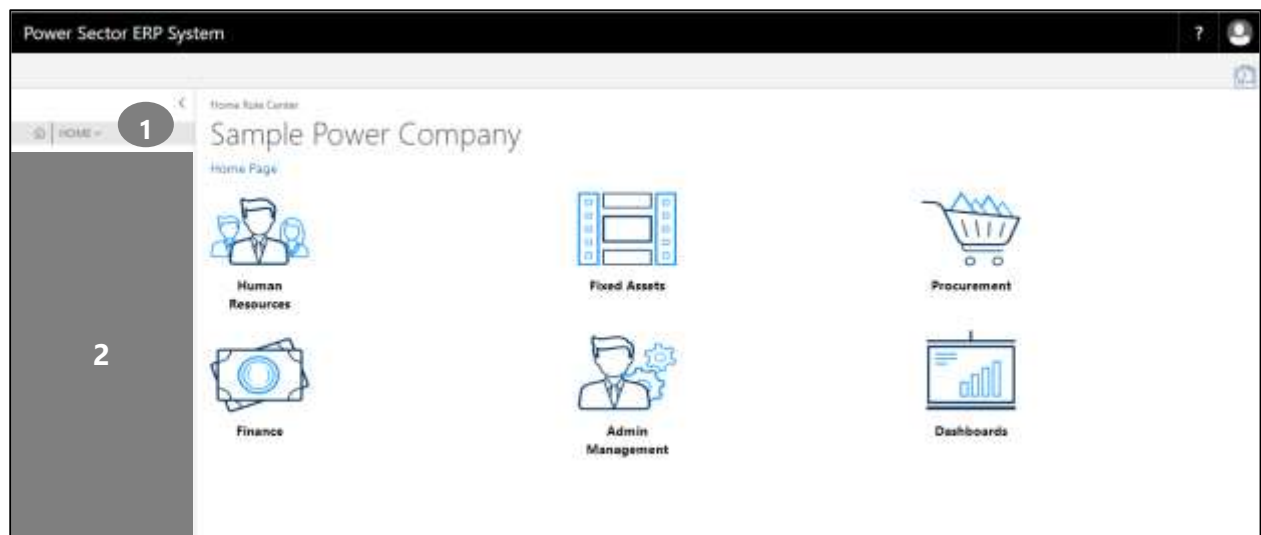
Follow the below steps as serialized in following figure in any forms



1. Click on right most top icon
2. Click on Sign Out to exit the system

How to Navigate Form / Page

1. Click on "Home" from any form to return to ERP Home Page. Refer to figure below.
2. Click on blank left panel, as shown in above figure, from any form to return to previous form. Refer to figure below.



PR-100 General Setup

Introduction

This section shows how to configure the setup options to run and operate different PR functions in the module. General Setup contains –

PR-101	Posting Setup
PR-102	Purchase & Payable Setup
PR-103	Vendor Setup
PR-104	Item Setup
PR-105	Mushok Info Setup
PR-106	Terms & Conditions
PR-107	Item Setup

Role

- Module Admin

Prerequisite

- Module Admin credentials – username and password

PR-101 How to: Posting Setup

Introduction

This process demonstrates how to setup Posting of an organization. This setup is all about Posting Process setup for an organization. The Posting Setup process of an organization is divided into 6 major activities-

PR-101.1	General Posting Setup
PR-101.2	VAT Posting Setup
PR-101.3	AIT Posting Setup
PR-101.4	AIT Slabs Setup
PR-101.5	INV Posting Grp Setup
PR-101.6	VEN Posting Grp Setup

Roles

- Module Admin

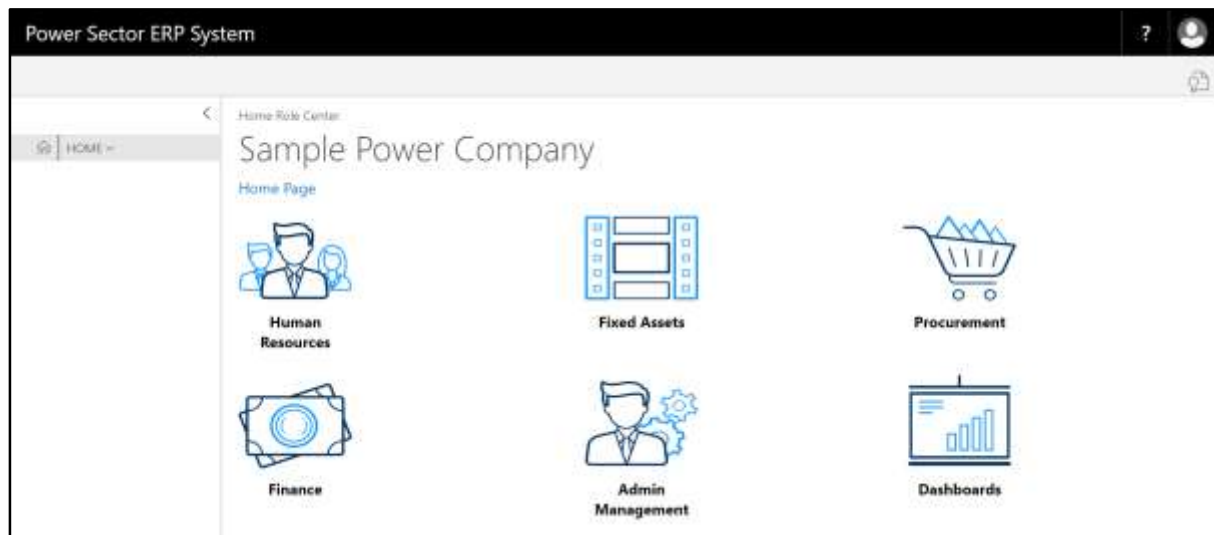
Prerequisite

- Chart of Account

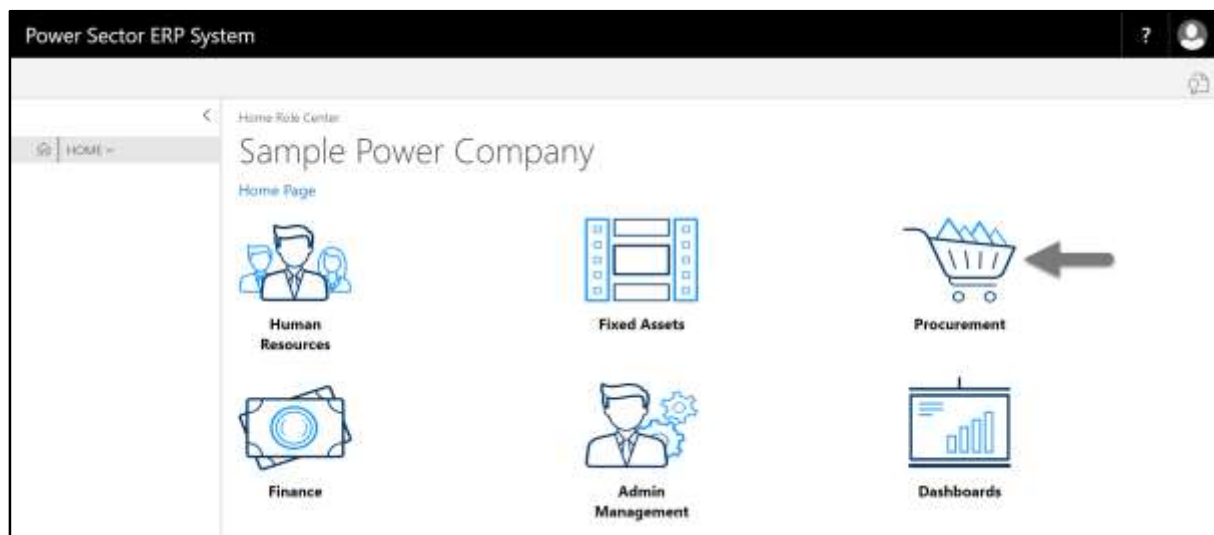
Access Posting Setup

To initiate, follow the steps below.

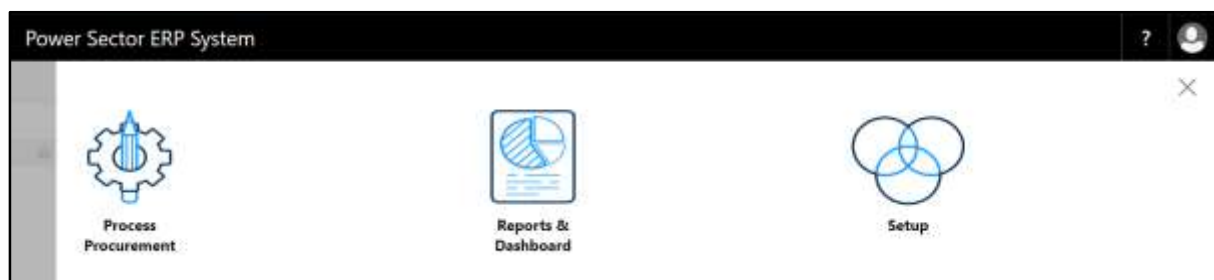
- A. Login with your respective **PR Admin credentials**. ERP Landing Page, as below, will be appeared on successful login.



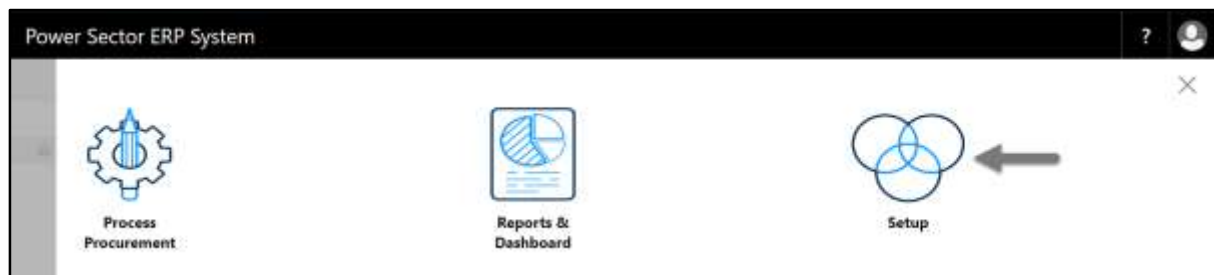
- B. Choose the “**Procurement**” icon.



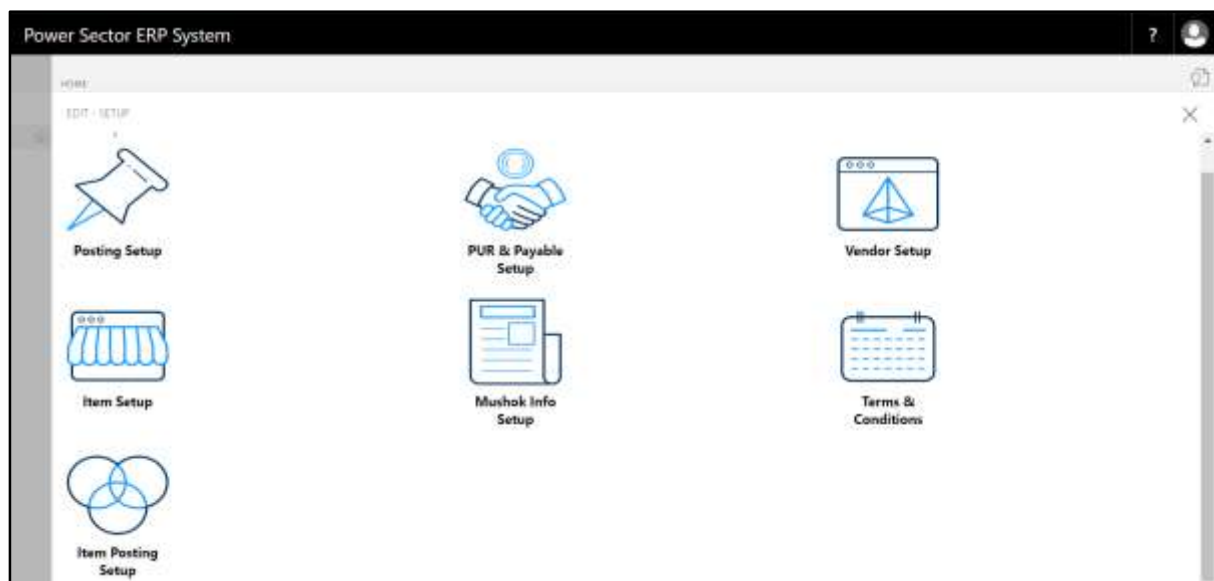
PR Landing Page will be appeared as below



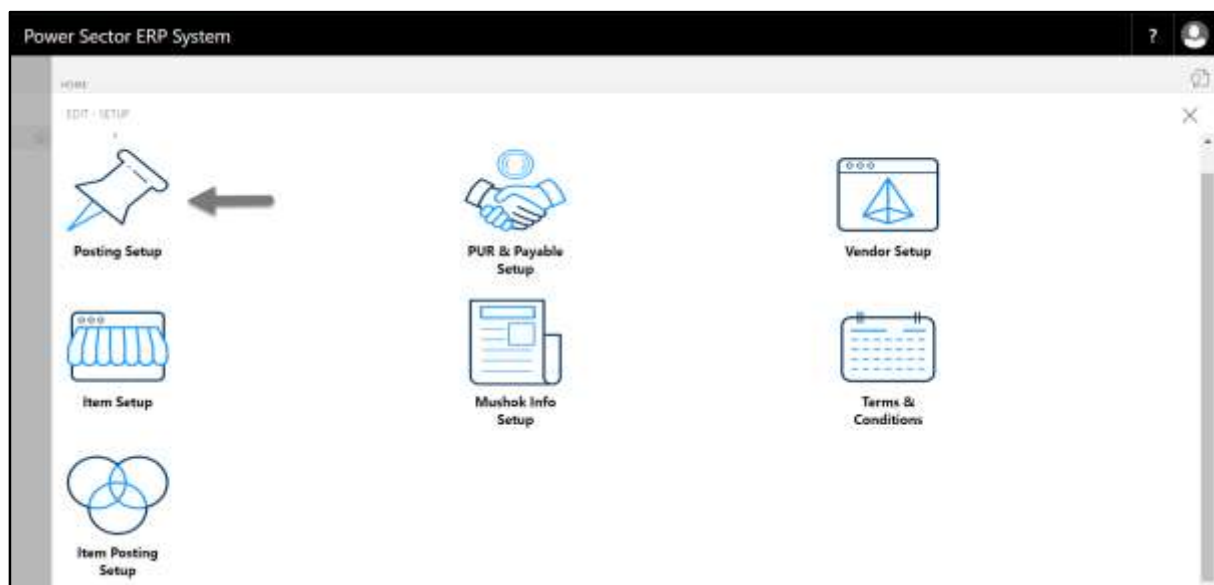
C. Choose the “**Setup**” in PR Landing Page.



PR Setup landing page will be appeared as below



D. Choose the **"Posting Setup"** in PR Setup Landing Page.



The following Posting Setup page will be appeared.



General Posting Setup

To initiate, follow the steps below.

A. Access Posting Setup by Procurement Admin.



B. Choose the **“General Posting Setup”** icon on the Posting Setup page, as indicated in figure below.



The following list page will be appeared.

Power Sector ERP System							
VIEW - GENERAL POSTING SETUP + new							
Dom. Bus. Posting Group	Dom. Prod. Posting Group	Description	Party Account	Party Proprietary Account	Direct Cost Applied Account	Purchase Reversal Account	Used in Ledger Setup
DOMESTIC	OFFICE EQUIPMENT	DOMESTIC OFFICE EQUIPMENT	2030420016	1010116001	2030420015	2030420014	

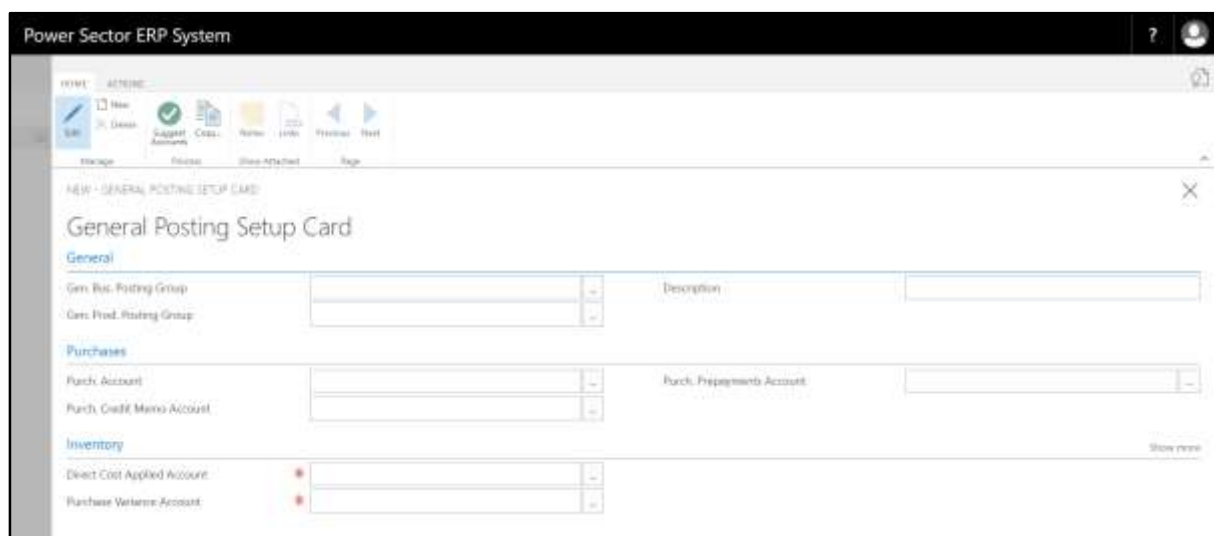
Note

On first time load, page will be blank and will show existing data as new setup data will be entered.

C. Choose “**New**” icon on the General Posting page, as indicated in figure below.



General Posting Setup Card page will be appeared as below.



D. Provide below **General Posting Setup Card** information to proceed.

1. Choose **General Bus. Posting Group** from the dropdown by clicking on button.
 - **General Bus. Posting Group: Domestic**
2. Choose **General Prod Posting Group** from the dropdown by clicking on button.
 - **General Prod Posting Group: Advertising**
3. Provide **Description**.
 - **Description: Test description.**
4. Choose **Purchase Account** from the dropdown by clicking on button.
 - **Purchase Account: 1020402001**

5. Choose **Purchase Credit Memo Account** from the dropdown by clicking on



button.

- **Purchase Credit Memo Account: 1020402001**

6. Choose **Purchase Prepayments Account** from the dropdown by clicking on



button.

- **Purchase Prepayments Account: 1020402001**

7. Choose **Direct Cost Applied Account** from the dropdown by clicking on



button.

- **Direct Cost Applied Account: 1020402001**

8. Choose **Purchase Variance Account** from the dropdown by clicking on



button.

- **Purchase Variance Account: 1020402001**

Power Sector ERP System

HOME ACTING

NEW - GENERAL POSTING SETUP CARD - DOMESTIC - ADVERTISING

DOMESTIC - ADVERTISING

General

Gen. Bus. Posting Group	DOMESTIC	1	Description	Test description	3
Gen. Prod. Posting Group	ADVERTISING	2			

Purchases

Purch. Account	1020402001	4	Purch. Prepayments Account	1020402001	5
Purch. Credit Memo Account	1020402001	5			

Inventory

Direct Cost Applied Account	1020402001	7			
Purchase Variance Account	1020402001	8			

VAT Posting Setup

To initiate, follow the steps below.

- A. Access Posting Setup by Procurement Admin.



B. Choose the **“VAT Posting Setup”** icon on the Posting Setup page, as indicated in figure below.



The following list page will be appeared.

Power Sector ERP System							
VIEW - VAT POSTING SETUP							
VAT Bus. Posting Group	VAT Prod. Posting Group	Description	VAT Identifier	VAT %	VAT Calculation Type	Purchase VAT Account	Used in Ledger Entries
DOMESTIC	15%	Test description	10_VAT_15	15	Normal VAT	2010401001	

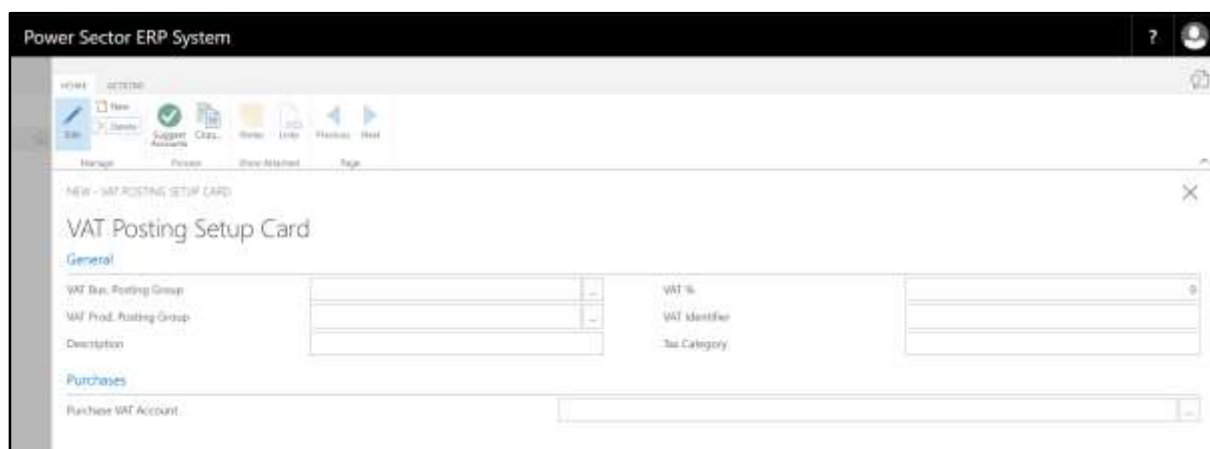
Note

On first time load, page will be blank and will show existing data as new setup data will be entered.

C. Choose **"New"** icon on the VAT Posting page, as indicated in figure below.




VAT Posting Setup Card page will be appeared as below.



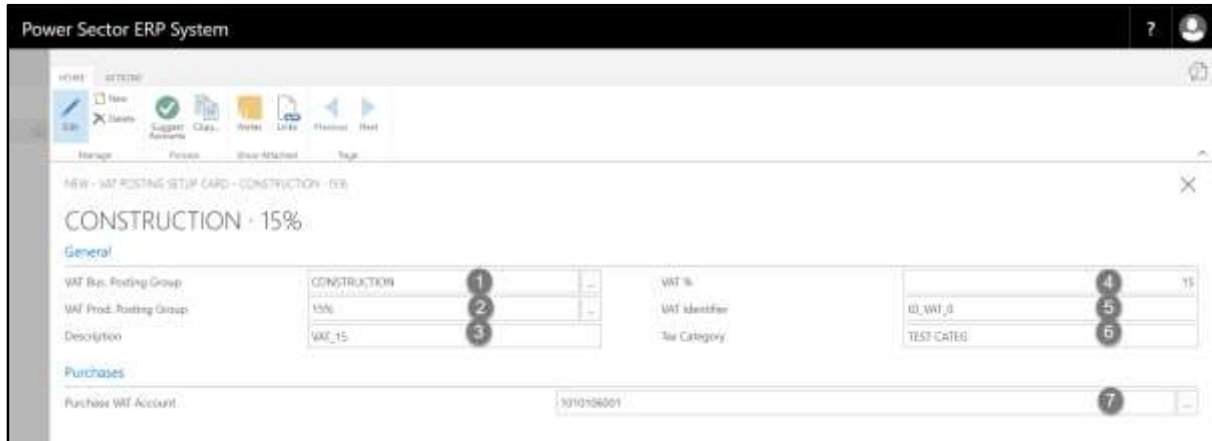
D. Provide below **VAT Posting Setup Card** information to proceed.

1. Choose **VAT Bus. Posting Group** from the dropdown by clicking on button.
 - **VAT Bus. Posting Group: CONSTRUCTION**
2. Choose **VAT Prod Posting Group** from the dropdown by clicking on button.
 - **VAT Prod Posting Group: 15%**
3. Provide **Description**.
 - **Description: VAT_15.**
4. Provide **VAT %**.
 - **VAT %: 15.**
5. Provide **VAT Identifier**.
 - **VAT Identifier: ID_VAT_0.**
6. Provide **Tax Category**.

- **Tax Category: TEST CATEG.**

7. Choose **Purchase VAT Account** from the dropdown by clicking on  button.

- **Purchase VAT Account: 1010106001**



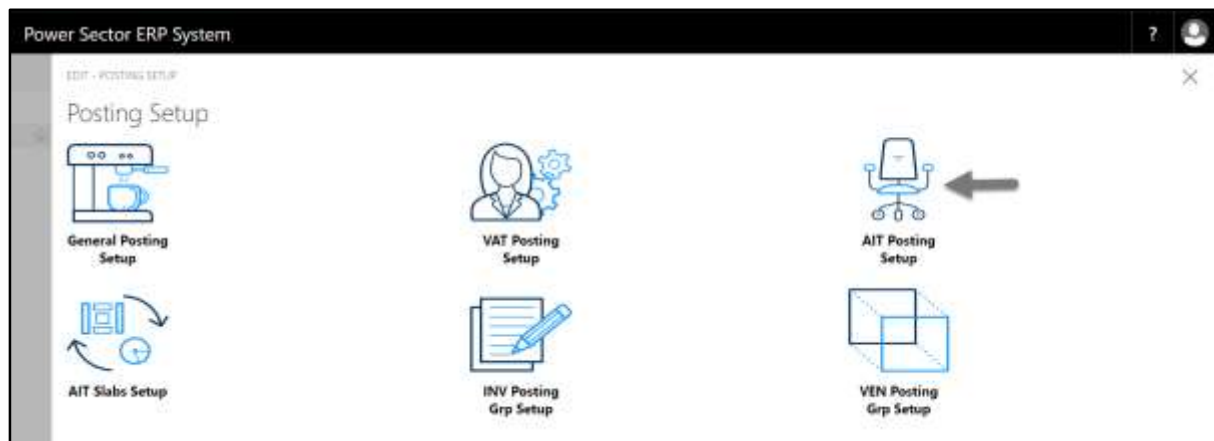
AIT Posting Setup

To initiate, follow the steps below.

A. Access Posting Setup by Procurement Admin.



- B. Choose the **“AIT Posting Setup”** icon on the Posting Setup page, as indicated in figure below.



The following list page will be appeared.



Note

On first time load, page will be blank and will show existing data as new setup data will be entered.


- C. Choose **“New”** icon on the AIT Posting Setup page, as indicated in figure below.




AIT Posting Setup Card page will be appeared as below.

The screenshot shows the 'AIT Posting Setup Card' window in the 'Power Sector ERP System'. The window has a title bar and a menu bar with options: 'New', 'Data', 'Submit', 'Copy', 'Print', 'Find', 'Previous', 'Next'. The main content area is titled 'AIT Posting Setup Card' and has tabs for 'General', 'Purchases', and 'Usage'. The 'General' tab is active, showing fields for 'AIT Bus. Posting Group', 'AIT Prod. Posting Group', 'Description', 'AIT %', 'AIT Identifier', 'Purchase AIT Account', and 'Used in Ledger Entries'.

D. Provide below **AIT Posting Setup Card** information to proceed.

1. Choose **AIT Bus. Posting Group** from the dropdown by clicking on  button.

- **AIT Bus. Posting Group: CONSTRUCTION**

2. Choose **AIT Prod. Posting Group** from the dropdown by clicking on  button.

- **AIT Prod. Posting Group: AIT10**

3. Provide **Description**.

- **Description: AIT_10**

4. Provide **AIT %**.

- **AIT %: 10.**

5. Provide **AIT Identifier**.

- **AIT Identifier: ID_VAT_10.**

6. Provide **Purchase AIT Account**.

- **Purchase AIT Account: 1010102004**

7. **Used in ledger Entries** will be automatically filled up.

Power Sector ERP System

NEW - AIT POSTING SETUP CARD - CONSTRUCTION - AIT10

CONSTRUCTION - AIT10

General

AIT Bus Posting Group: CONSTRUCTION (1)

AIT Prod. Posting Group: AIT10 (2)

Description: AIT_10 (3)

AIT %: 10 (4)

AIT Identifier: ID_AIT_10 (5)

Purchases

Purchase AIT Account: 1010102004 (6)

Usage

Used in Ledger Entries (7)

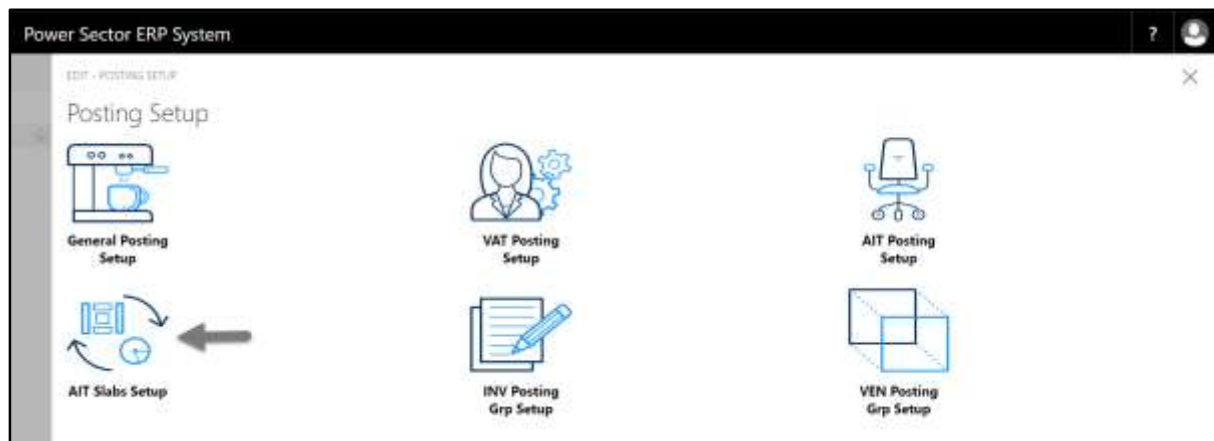
AIT Slabs Setup

To initiate, follow the steps below.

A. Access Posting Setup by Procurement Admin.



- B. Choose the **"AIT Slabs Setup"** icon on the Posting Setup page, as indicated in figure below.



The following list page will be appeared.

The screenshot shows the 'AIT Slabs' page in the Power Sector ERP System. It displays a table with the following data:

AIT Type	Material	Max Amount	Rate %
Construction	100	10,00,000.00	10.00
General	1000	10,00,000.00	10.00

Note


On first time load, page will be blank and will show existing data as new setup data will be entered.

- C. Choose **"New"** icon on the AIT Slabs page, as indicated in figure below.



AIT Slabs Card page will be appeared as below.

D. Provide below **AIT Slab Card** information to proceed.

1. Choose **Tax Type** from the dropdown by clicking on  button.
 - **Tax Type: Service**
2. Provide **Minimum** here.
 - **Minimum: 10**
3. Provide **Maximum** here.
 - **Maximum: 100000**
4. Provide **Rate %**.
 - **Rate %: 10**

INV Posting Grp Setup

To initiate, follow the steps below.

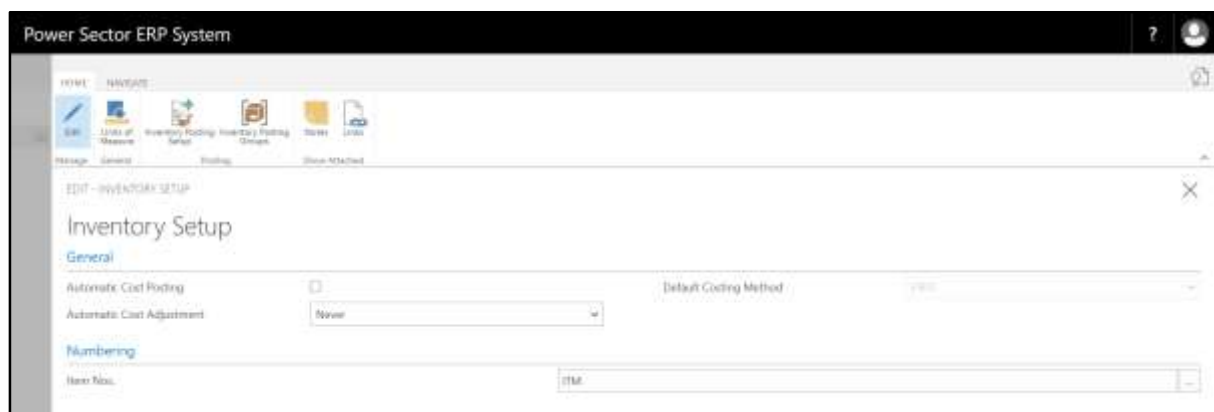
A. Access Posting Setup by Procurement Admin.





B. Choose the “**INV Posting Grp Setup**” icon on the Posting Setup page, as indicated in figure below.

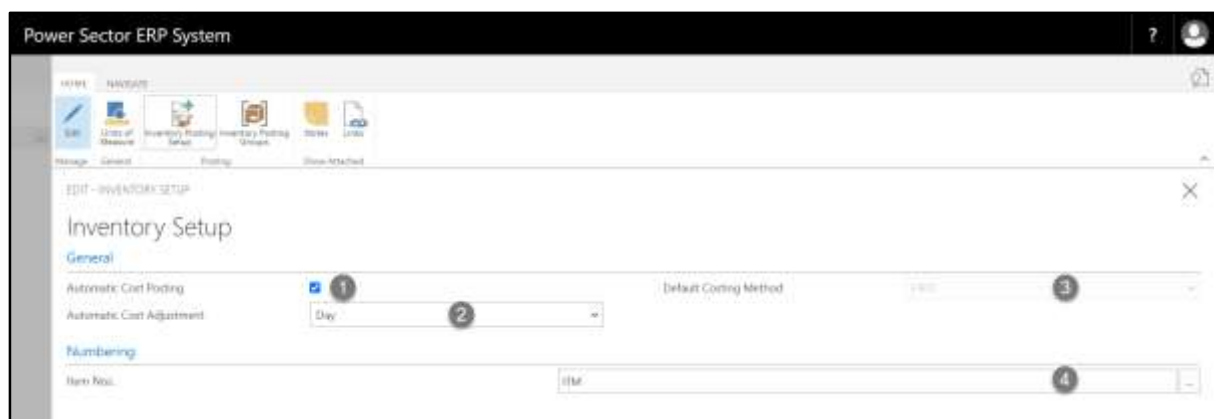


The following list page will be appeared.



C. Provide below **INV Posting Grp Setup** information to proceed.

1. Select **Automatic Cost Posting** checkbox, if applicable.
2. Choose **Automatic Cost Adjustment** from the dropdown by clicking on  button.
 - **Automatic Cost Adjustment: Day**
3. **Default Costing Method** will be automatically chosen.
 - **Default Costing Method: FIFO**
4. Choose **Item Nos.** from the dropdown by clicking on  button.
 - **Item Nos.: ITM**



VEN Posting Grp Setup

To initiate, follow the steps below.

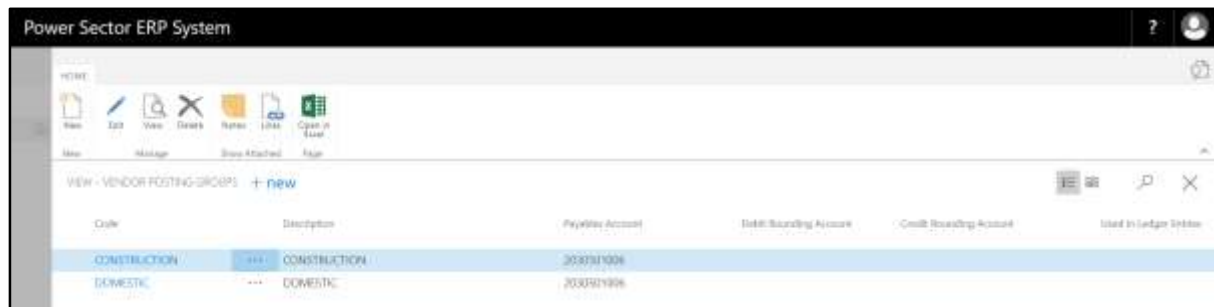
A. Access Posting Setup by Procurement Admin.



- B. Choose the **“VEN Posting Grp Setup”** icon on the Posting Setup page, as indicated in figure below.



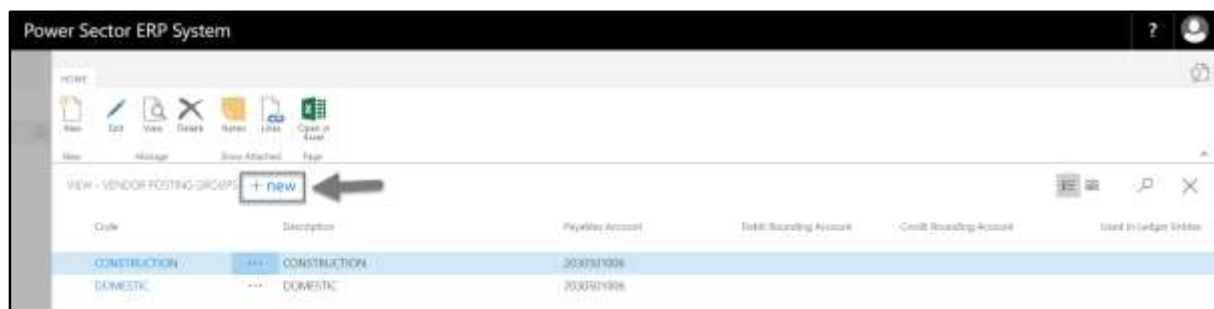
The following list page will be appeared.



Note

On first time load, page will be blank and will show existing data as new setup data will be entered.


- C. Choose **“New”** icon on the Vendor Posting Groups page, as indicated in figure below.



Vendor Posting Group Card page will be appeared as below.

The screenshot shows the 'Vendor Posting Group Card' form in the 'Power Sector ERP System'. The form has a title bar 'NEW - VENDOR POSTING GROUP CARD' and a close button. Below the title, there is a 'General' tab. The form contains three main fields: 'Code', 'Description', and 'Payables Account'. The 'Code' field is empty, the 'Description' field is empty, and the 'Payables Account' field is empty. There are also 'New', 'Delete', 'Print', 'Preview', and 'Next' buttons at the top of the form.

D. Provide below **Vendor Posting Group Card** information to proceed.

1. Provide **Code** in Vendor Posting Group Card.
 - **Code: VEN00001**
2. Provide **Description**.
 - **Description: Test description**
3. Choose **Payable Account** from the dropdown by clicking on  button.
 - **Payable Account: 2030501006**

The screenshot shows the 'Vendor Posting Group Card' form with data entered. The 'Code' field is filled with 'VEN00001' (labeled 1), the 'Description' field is filled with 'Test description' (labeled 2), and the 'Payables Account' dropdown is set to '2030501006' (labeled 3). The form also shows the 'New', 'Delete', 'Print', 'Preview', and 'Next' buttons at the top.

PR-102 How to: Purchase & Payable Setup

Introduction

This process demonstrates how to setup Purchase and Payable of an organization. This setup is all about Purchase and Payable setup for an organization.

Roles

- Module Admin

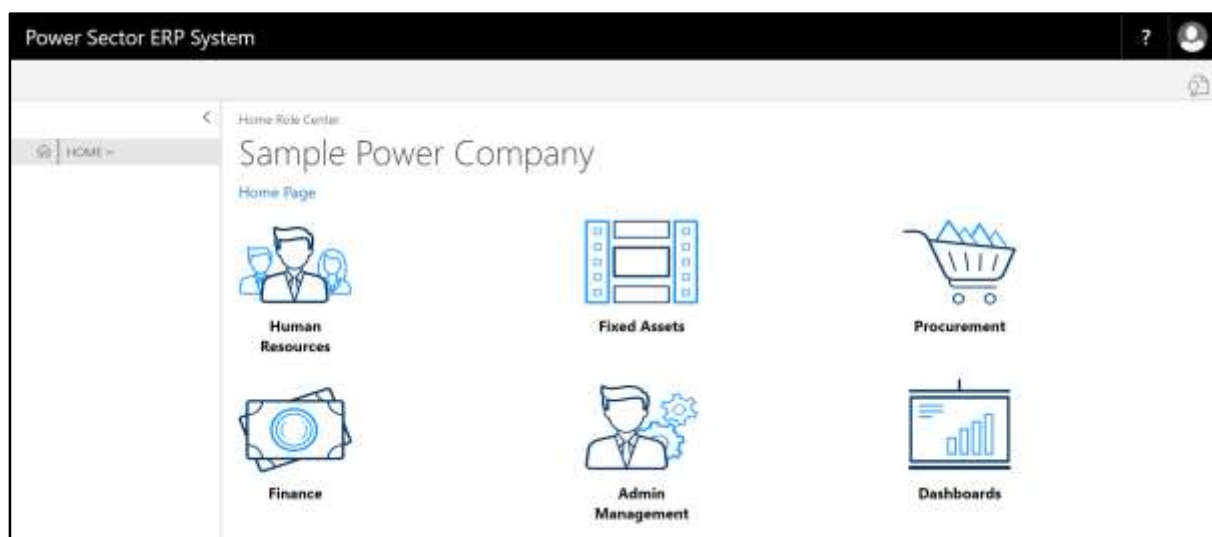
Prerequisite

- Chart of Account

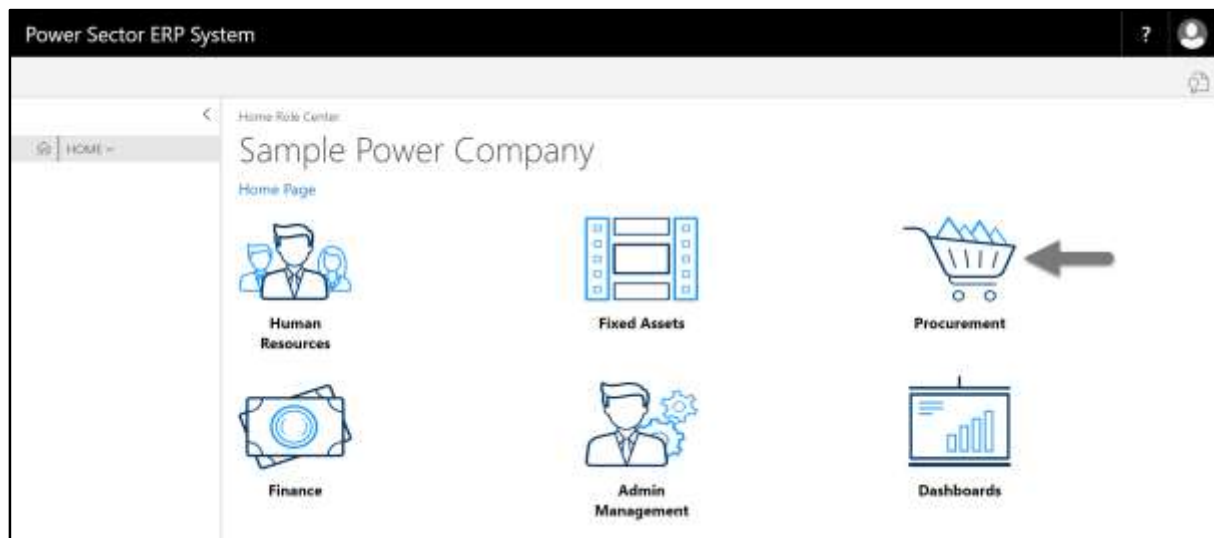
Access Purchase & Payable Setup

To initiate, follow the steps below.

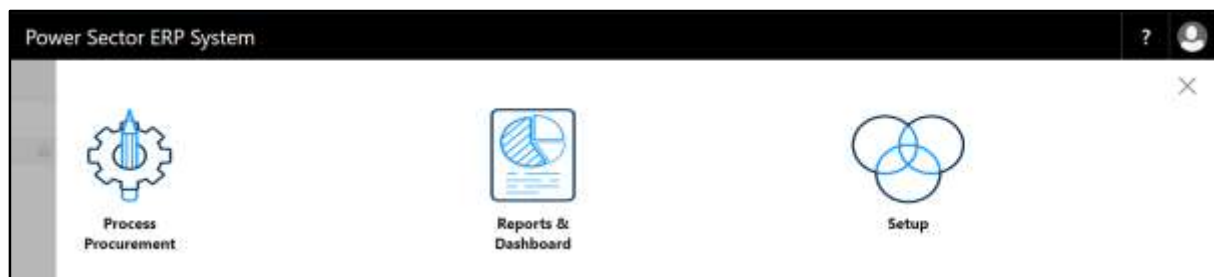
- A. Login with your respective **PR Admin credentials**. ERP Landing Page, as below, will be appeared on successful login.



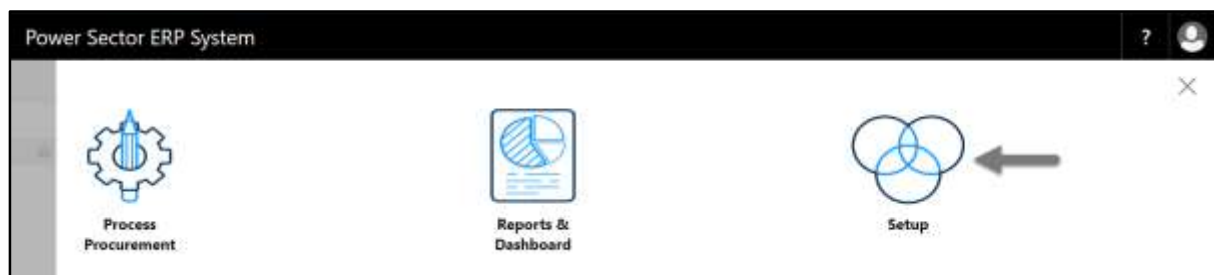
B. Choose the “**Procurement**” icon.



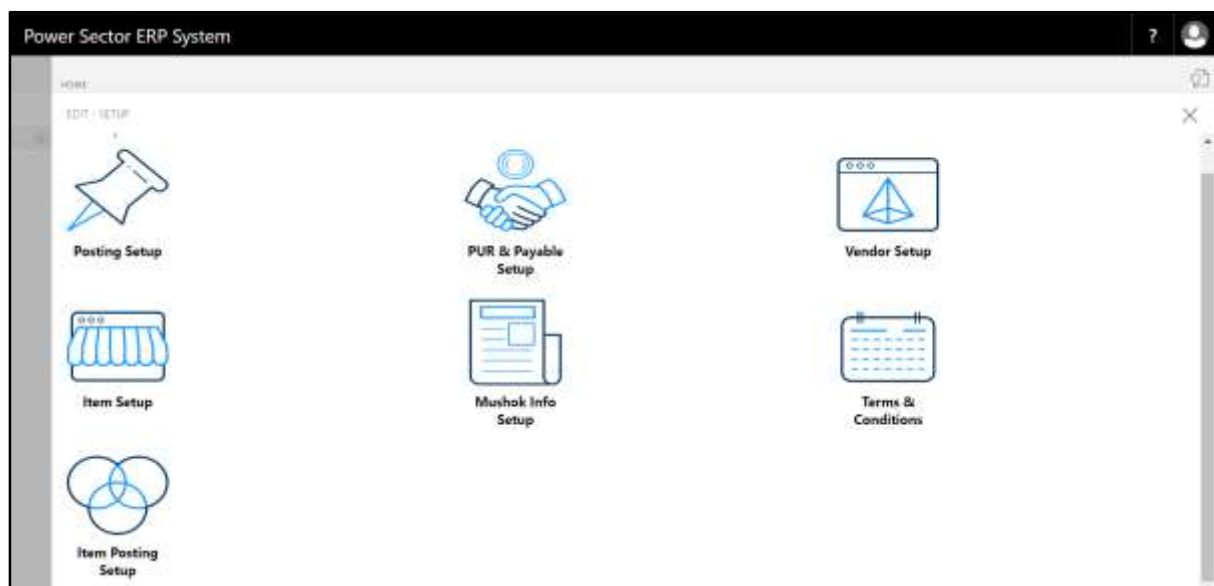
PR Landing Page will be appeared as below



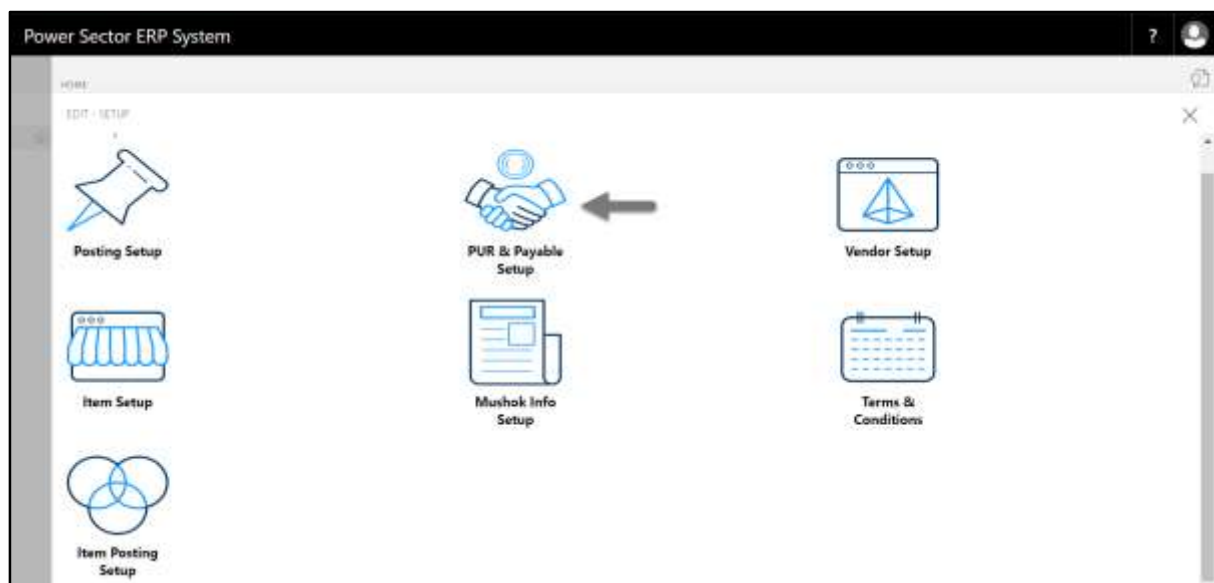
C. Choose the “**Setup**” in PR Landing Page.



PR Setup landing page will be appeared as below



D. Choose the “**Purchase & Payable Setup**” in PR Setup Landing Page.



The following Purchase & Payable Setup page will be appeared.

The screenshot shows the 'Purchases & Payables Setup' window in the Power Sector ERP System. The window is titled 'EDIT - PURCHASES & PAYABLES SETUP' and has a 'Show Help' button. It is divided into two main sections: 'General' and 'Number Series'. The 'General' section contains the following settings:

- Receipt on Invoice: ☒
- Invoice Rounding: ☐
- Ext. Doc. No. Mandatory: ☐
- Allow VAT Difference: ☐
- Copy Comments Order to Invoice: ☒
- Copy Comments Order to Receipt: ☒
- Archive Quotes and Orders: ☒
- Default Posting Date: Work Date (dropdown)
- Default Qty. to Receive: Remainder (dropdown)
- Allow Document Deletion Before: (dropdown)

The 'Number Series' section contains the following settings:

- Vendor Nos.: VEND (dropdown)
- Vendor Auth. Nos.: VAUTH (dropdown)
- Receipt Nos.: RN (dropdown)
- Quote Nos.: QN (dropdown)
- Order Nos.: ON (dropdown)
- Invoice Nos.: IN (dropdown)
- Posted Invoice Nos.: PIN (dropdown)
- Cash Payment Nos.: CP (dropdown)
- Posted Receipt Nos.: PRN (dropdown)
- Posted Payment Inv. Nos.: PPI (dropdown)
- PI: PI (dropdown)
- RPI: RPI (dropdown)
- CP: CP (dropdown)
- RPI: RPI (dropdown)

E. Provide below **Purchase and Payable Setup** information to proceed.

1. Select **Receipt on Invoice** checkbox, if applicable.
2. Select **Invoice Rounding** checkbox, if applicable.
3. Select **Ext. Doc. No. Mandatory** checkbox, if applicable.
4. Select **Allow VAT Difference** checkbox, if applicable.
5. Select **Copy Comments Order to Invoice** checkbox, if applicable.
6. Select **Copy Comments Order to Receipt** checkbox, if applicable.
7. Select **Archive Quotes and Orders** checkbox, if applicable.
8. Choose **Default Posting Date** from the dropdown by clicking on button.
 - **Default Posting Date: Work Date**
9. Choose **Default Qty. to Receive** from the dropdown by clicking on button.
 - **Default Qty. to Receive: Remainder**
10. Choose **Allow Document Deletion Before** from the dropdown by clicking on button.
 - **Allow Document Deletion Before: 7/1/2020**
11. Choose **Vendor Nos.** from the dropdown by clicking on button.
 - **Vendor Nos: VEND**
12. Choose **Vendor Auth. Nos.** from the dropdown by clicking on button.

- **Vendor Auth. Nos: VAUTH**

13. Choose **Request Nos.** from the dropdown by clicking on button.

- **Request Nos: PR**

14. Choose **Quote Nos.** from the dropdown by clicking on button.

- **Quote Nos: PQ**

15. Choose **Order Nos.** from the dropdown by clicking on button.

- **Order Nos: PO**

16. Choose **Invoice Nos.** from the dropdown by clicking on button.

- **Invoice Nos: PI**

17. Choose **Posted Invoice Nos.** from the dropdown by clicking on button.

- **Posted Invoice Nos: PPI**

18. Choose **Cash Payment Nos.** from the dropdown by clicking on button.

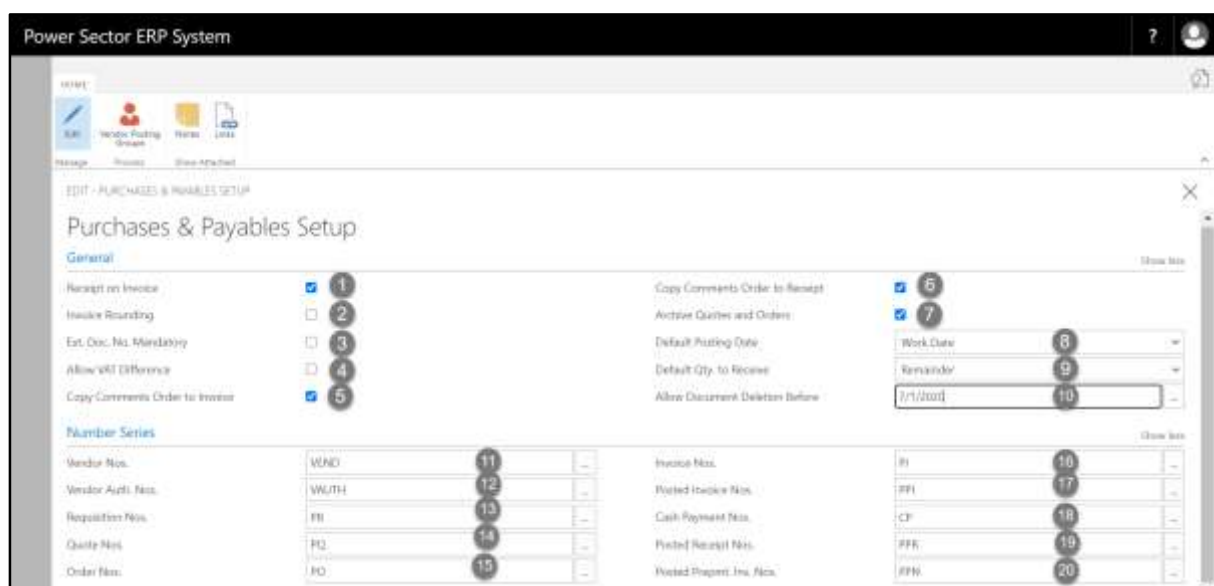
- **Cash Payment Nos: CP**

19. Choose **Posted Receipt Nos.** from the dropdown by clicking on button.

- **Posted Receipt Nos: PPR**

20. Choose **Posted Permt. Inv. Nos.** from the dropdown by clicking on button.

- **Posted Permt. Inv.: PPN**



PR-103 How to: Vendor Setup

Introduction

This process demonstrates how to setup Vendor of an organization. This setup is all about Vendor setup for an organization.

Roles

- Module Admin

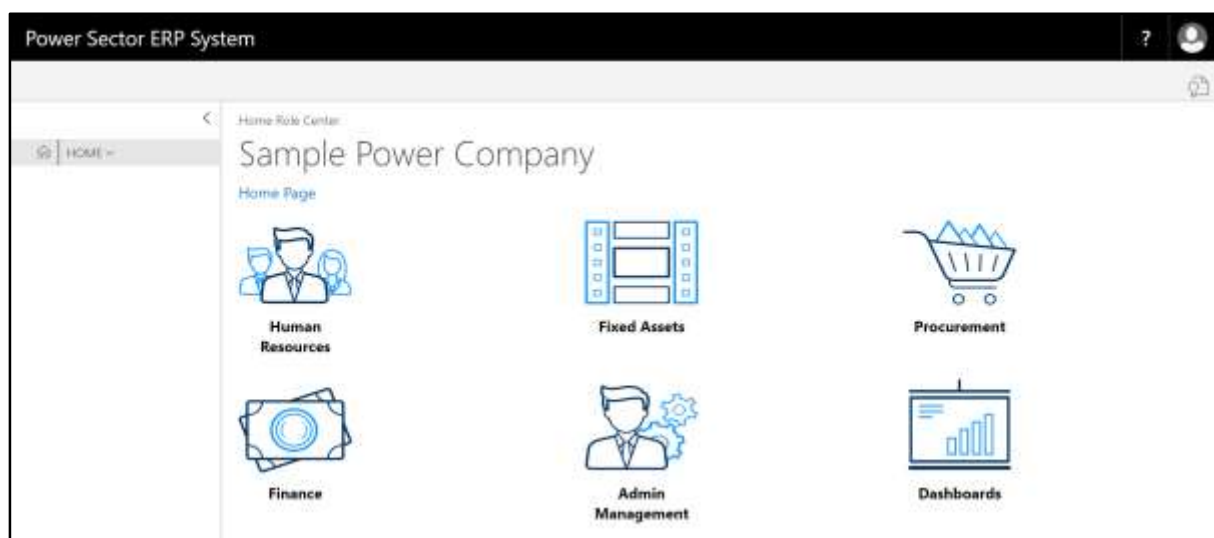
Prerequisite

- Chart of Account

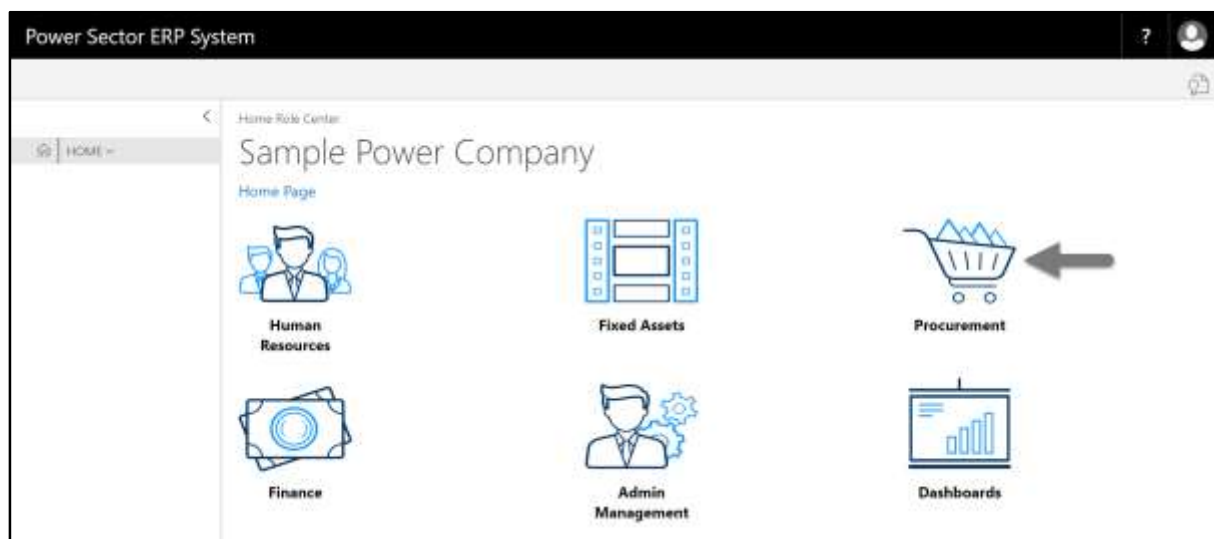
Access Vendor Setup

To initiate, follow the steps below.

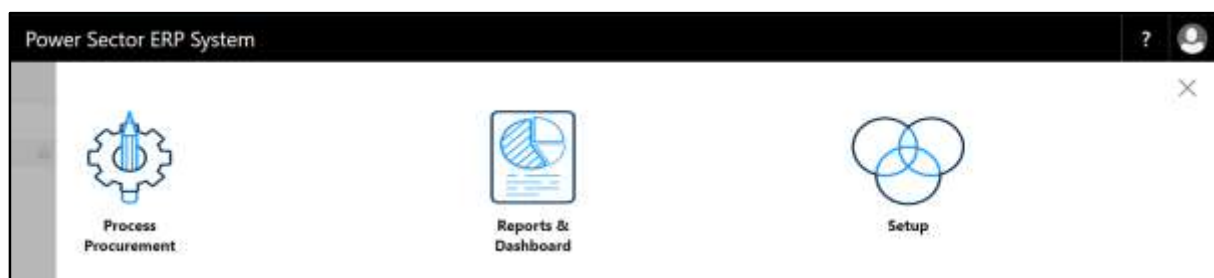
- A. Login with your respective **PR Admin credentials**. ERP Landing Page, as below, will be appeared on successful login.



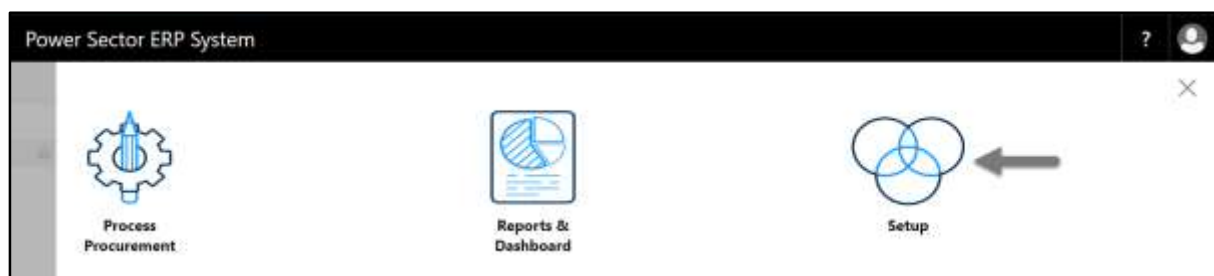
B. Choose the “**Procurement**” icon.



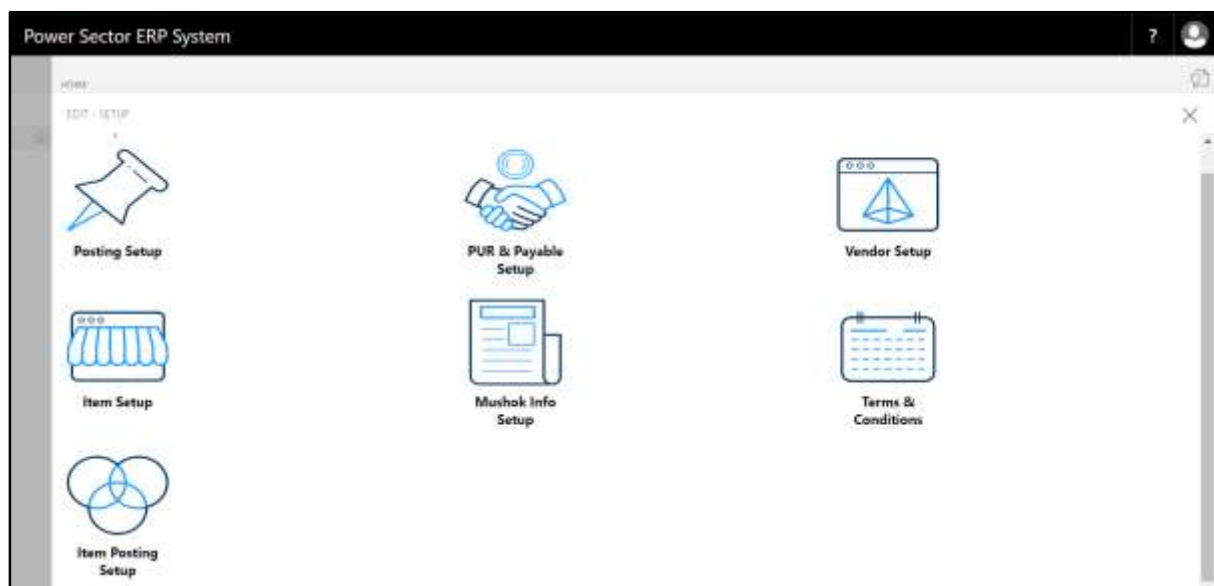
PR Landing Page will be appeared as below



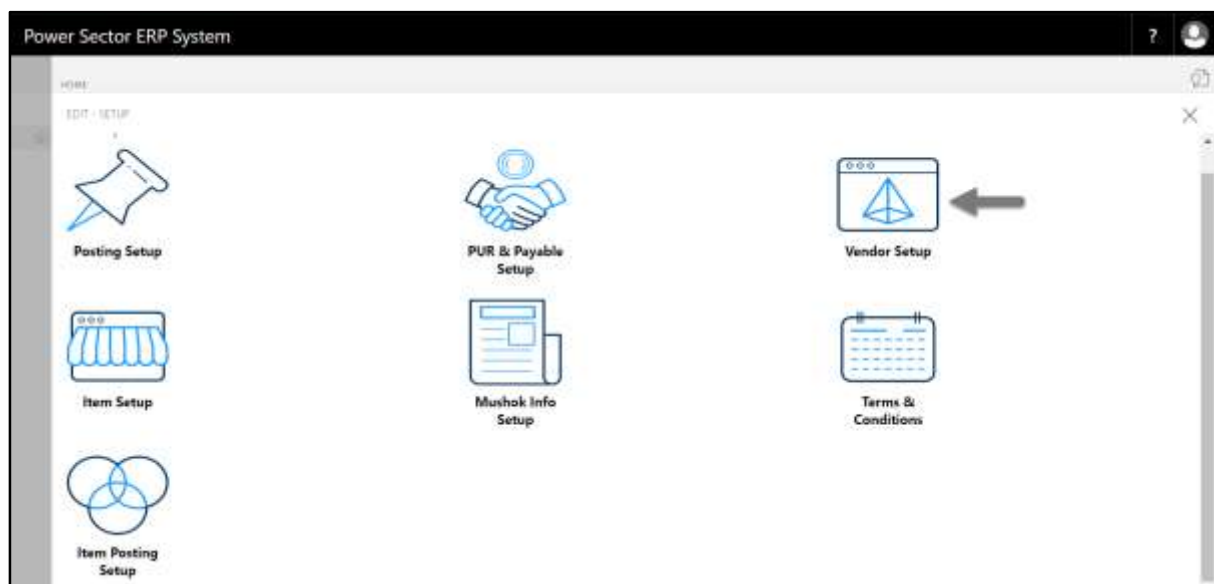
C. Choose the “**Setup**” in PR Landing Page.



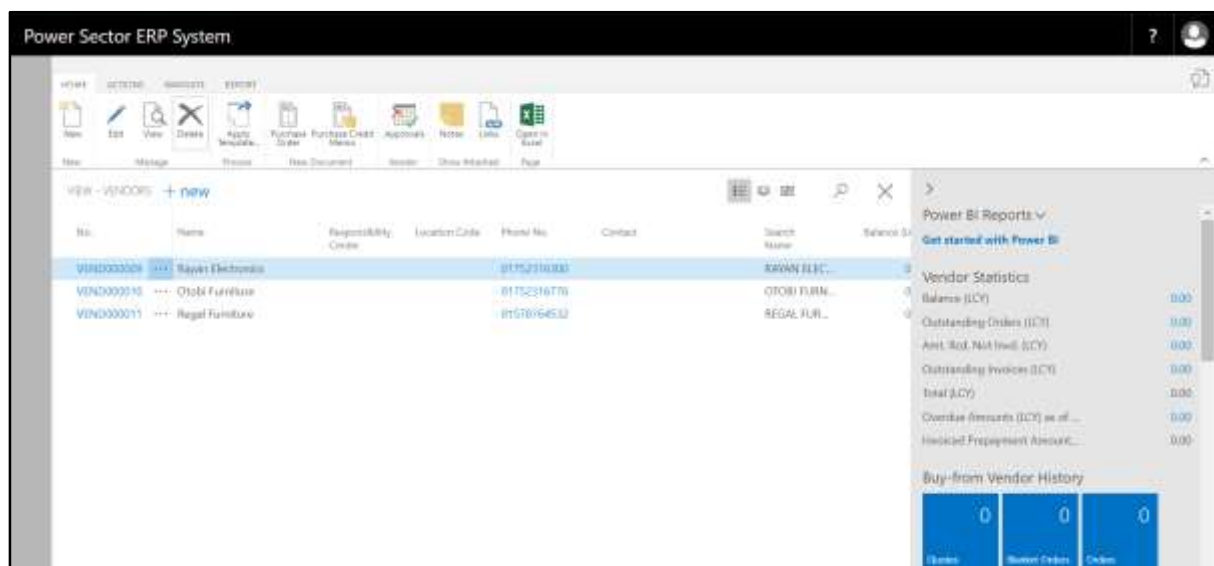
PR Setup landing page will be appeared as below



D. Choose the “**Vendor Setup**” in PR Setup Landing Page.



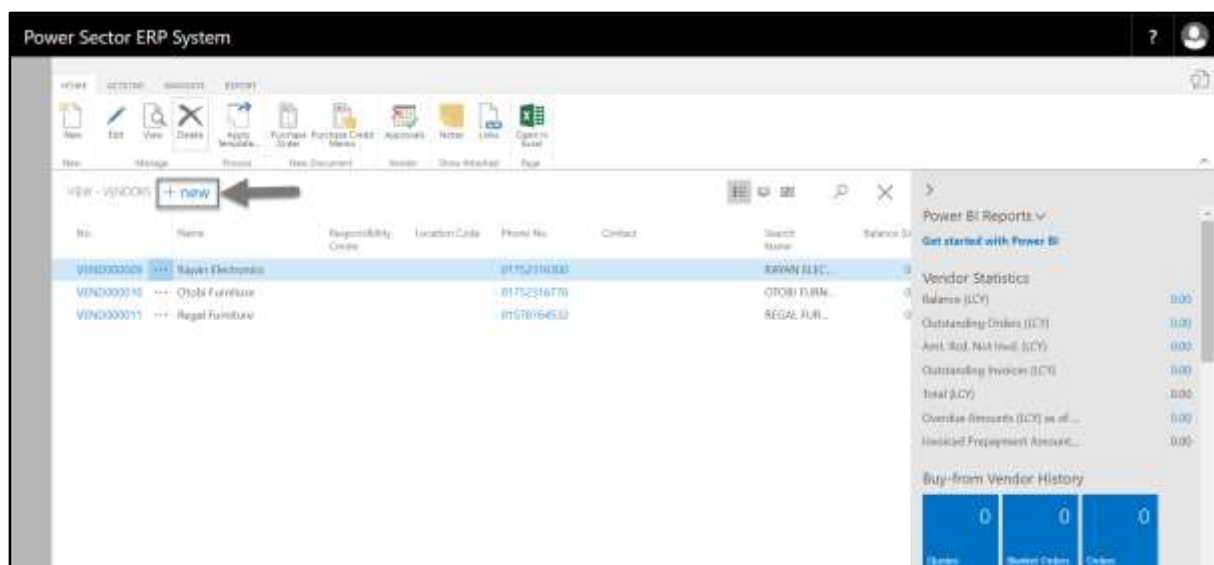
The following Vendor Setup page will be appeared.



Note

On first time load, page will be blank and will show existing data as new setup data will be entered.

E. Choose **"New"** icon on the Vendors page, as indicated in figure below.




The following Vendor Card page will be appeared.

F. Provide below **Vendor Card** information to proceed.

1. Choose **No.** from the dropdown by clicking on button.
 - **No.: VEND00002**
2. Choose **Name** from the dropdown by clicking on button.
 - **Name: Matador Stationary**
3. **Last Date Modified** will be automatically filled up.
4. **Balance (LCY) [BDT]** will be automatically filled up.
5. Choose **Balance Due (LCY) [BDT]** will be automatically filled up.
6. Provide **Address**.
 - **Address: 236, Syedabad, Dhaka**
7. Provide **Address 2**.
 - **Address 2: Purana Paltan, Dhaka**
8. Choose **Post code** from the dropdown by clicking on button.
 - **Post code: 001**
9. Choose **City** from the dropdown by clicking on button.
 - **City: Dhaka**
10. Choose **Country/Region code** from the dropdown by clicking on button.

- **Country/Region code: +880**

11. Choose **Primary Contact code** from the dropdown by clicking on  button.

- **Primary Contact code: Blank**

12. Choose **Contact** from the dropdown by clicking on  button.

- **Contact: Blank**

13. Provide **Phone No.**

- **Phone No.: 01987865643**

14. Provide **Email.**

- **Email: matador@gmail.com**

15. Provide **Fax No.**


- **Fax No.: 7658875**

16. Provide **Home Page.**


- **Home Page: www.matadorsta.com**

17. Provide **Our Account No.**

- **Our Account No.: 999-89-7655651**

18. Choose **Language code** from the dropdown by clicking on  button.

- **Language code: 001**

19. Choose **VAT Registration** from the dropdown by clicking on  button.

- **VAT Registration: Unregistered**

20. **VAT Registration No.** will be automatically filled up.

21. **VAT Group** will be automatically filled up.

Power Sector ERP System

Home - Vendor DMS - Vendor Detail - Vendor Detail

VEND000012 - Matador Stationary

General

Name: VEND000012 **1** | Balance (LCY) (BOT) **4** | 0.00 **21**
 Name: Matador Stationary **2** | Balance Due (LCY) (BOT) **5** | 0.00
 Last Date Modified: 05/25/18 **3**

Address & Contact

Address: 216 Sayre Road, Okla **6**
 Address 2: Purnima Pijay, Okla **7**
 Postal Code: 807 **8**
 City: Okla **9**
 Country/Region Code: +880 **10**

CONTACT

Primary Contact Code: **11**
 Contact: **12**
 Phone No: 01807000000 **13**
 Email: matadorstation@gmail.com **14**
 Fax No: 7634875 **15**
 Home Page: www.matadorstation.com **16**
 Our Account No: 100-00-0000001 **17**
 Language Code: 001 **18**

Banking

WAT Registration: Unregistered **19**
 WAT Registration No: **20**

DETAILS

WAT Group: 00000000 **21**

Vendor Statistics

Balance (LCY) 0.00
 Outstanding Orders (LCY) 0.00
 A/R Not Invoiced (LCY) 0.00
 Outstanding Invoices (LCY) 0.00
 Total (LCY) 0.00
 Overdue Amount (LCY) as of: 0.00
 Vendor's Prepayment Amount: 0.00

VAT Registration Picture

Buy from Vendor History

PR-104 How to: Item Setup

Introduction

This process demonstrates how to setup Item of an organization. This setup is all about Item setup for an organization.

Roles

- Module Admin

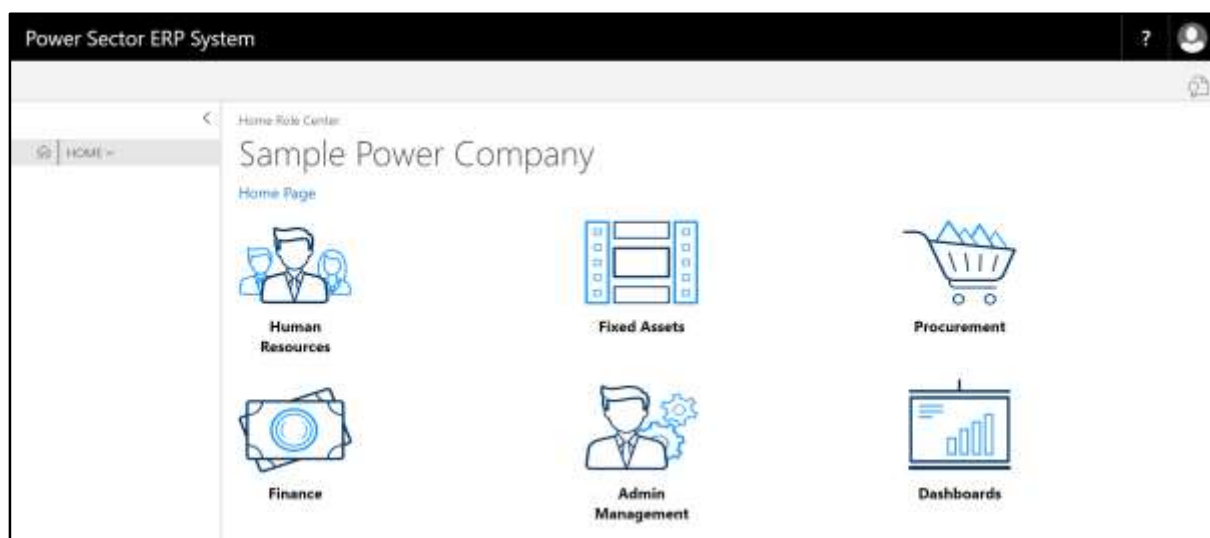
Prerequisite

- Chart of Account

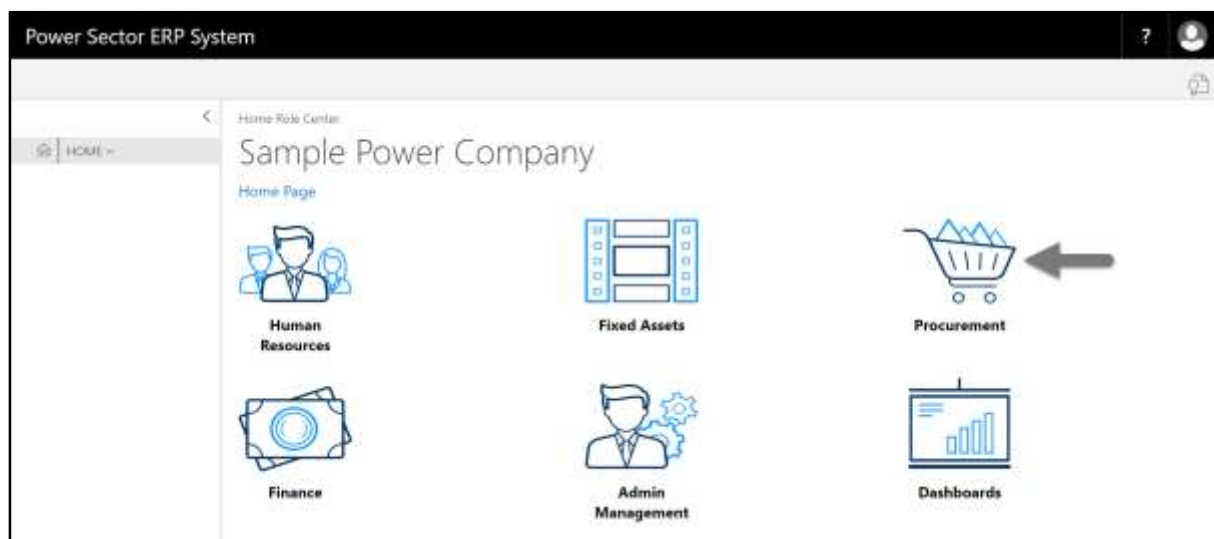
Access Item Setup

To initiate, follow the steps below.

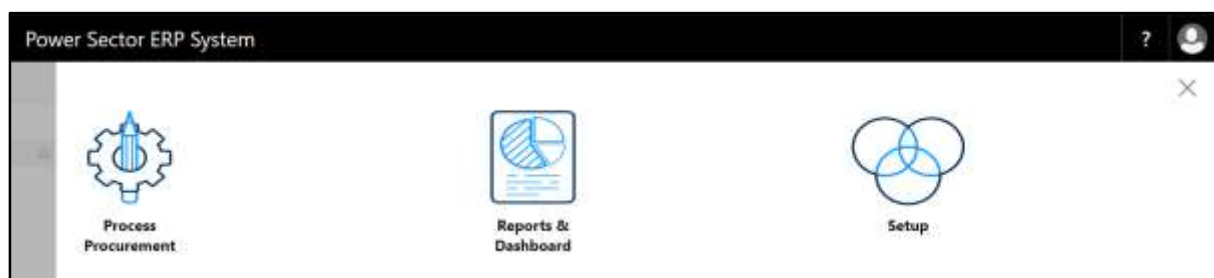
- A. Login with your respective **PR Admin credentials**. ERP Landing Page, as below, will be appeared on successful login.



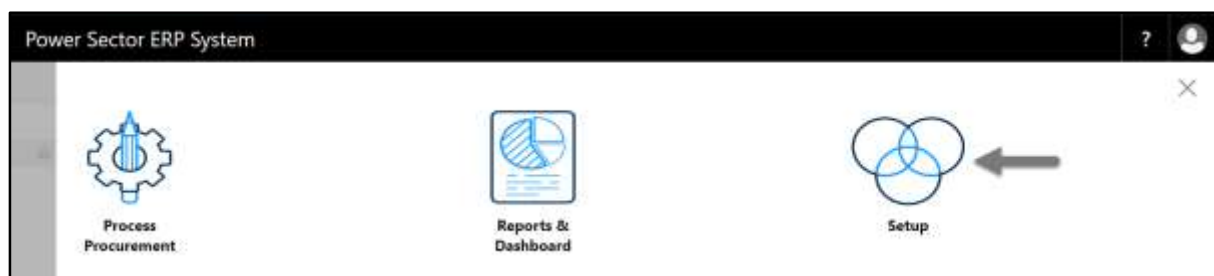
B. Choose the “**Procurement**” icon.



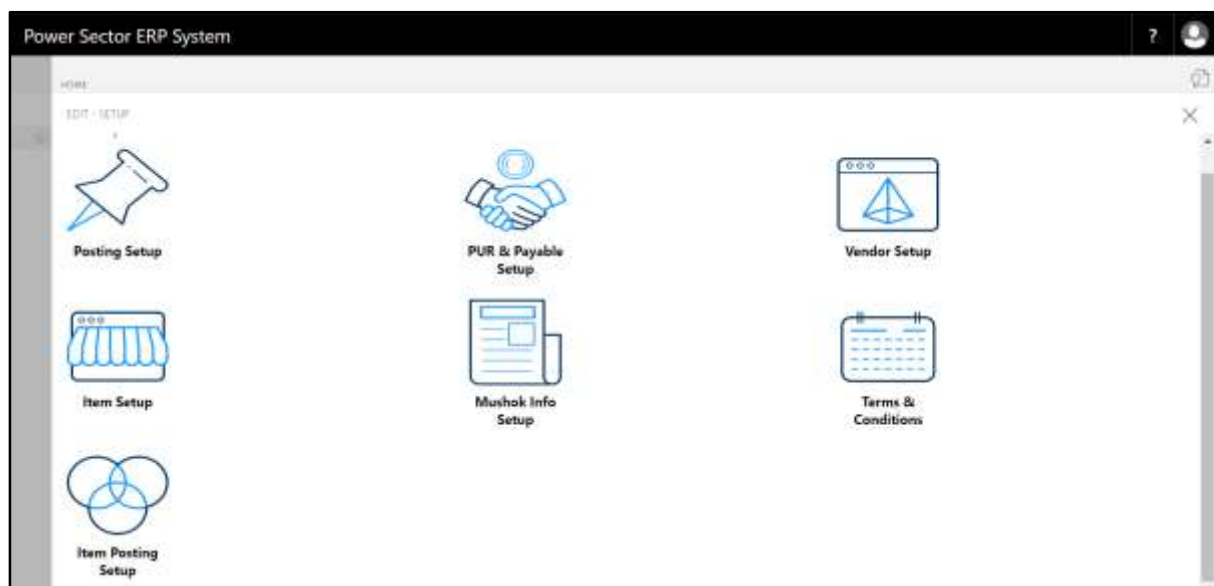
PR Landing Page will be appeared as below



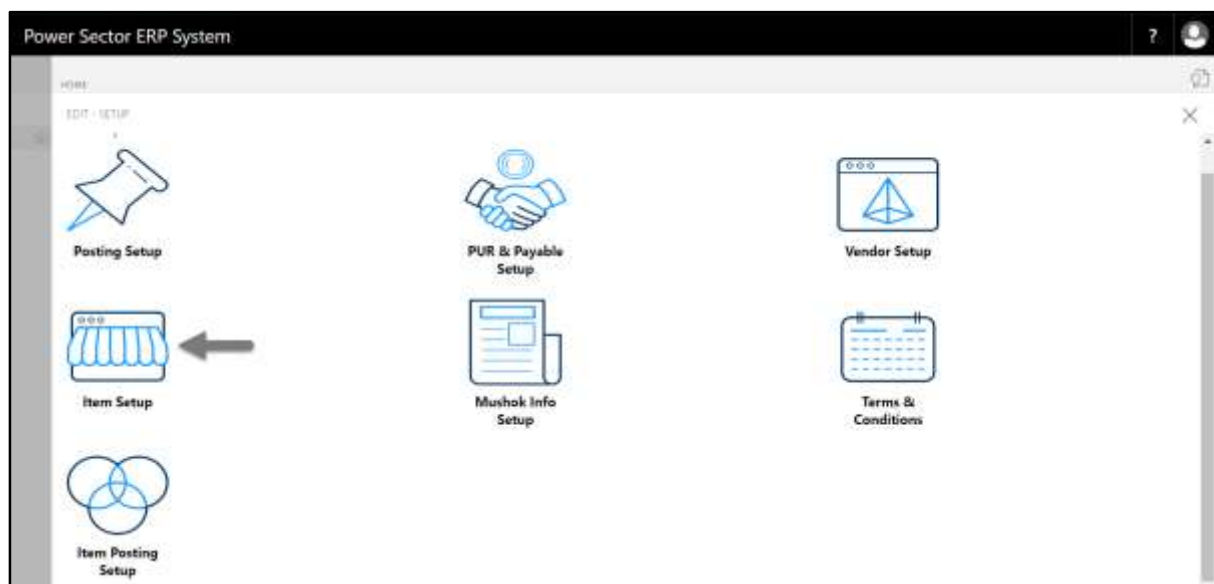
C. Choose the “**Setup**” in PR Landing Page.



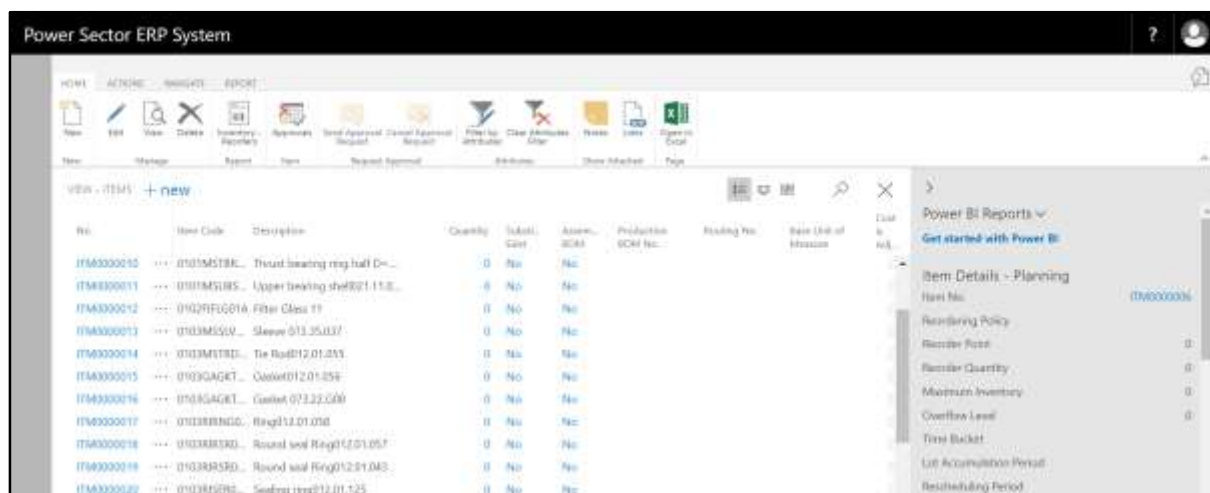
PR Setup landing page will be appeared as below



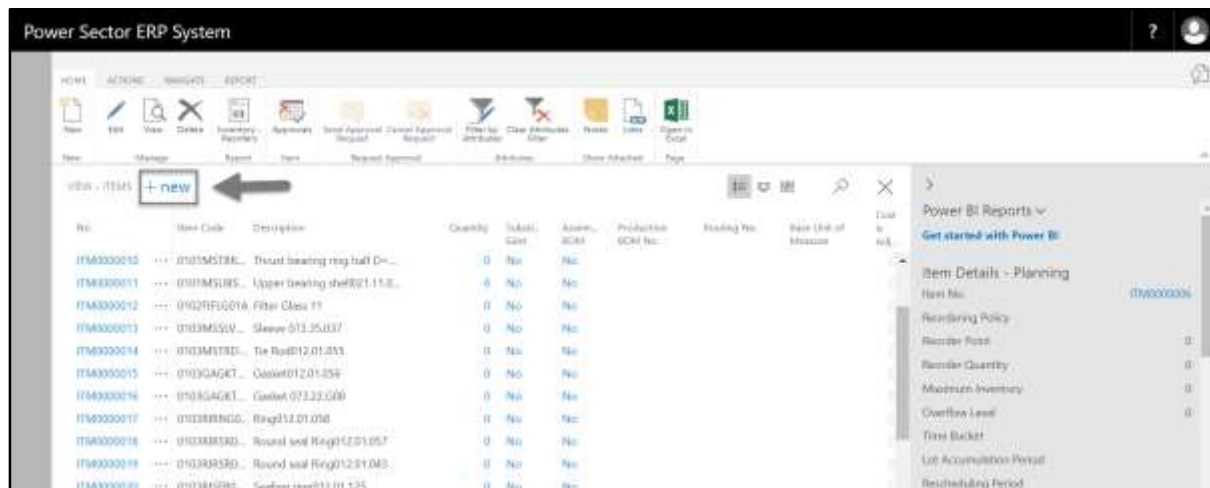
D. Choose the “**Item Setup**” in PR Setup Landing Page.



The following Item Setup page will be appeared.



E. Choose “**New**” icon on the Items page, as indicated in figure below.



The following Item Card page will be appeared.

The screenshot displays the 'Item Card' page in the Power Sector ERP System. The page is divided into several sections. At the top, there's a navigation bar with icons for Home, Actions, and Navigation. Below this, a toolbar contains icons for New, Delete, Attributes, Special Prices & Discounts, Special Prices & Discounts Overview, Request Approval, Cancel Approval, Approval, Notes, Links, Previous, and Next. The main content area is titled 'Item Card' and has a 'Show Info' button. It contains a form with the following fields: 'No.' (a dropdown menu), 'Item Code' (a text input), 'Description' (a text input), 'Type' (a dropdown menu), 'Base Unit of Measure' (a dropdown menu), 'Last Date Modified' (a text input), 'Item Value Zero' (a checkbox), 'Unit Cost' (a text input), 'Last Purchase Cost' (a text input), 'Gen. Prod. Posting Group' (a dropdown menu), 'WATS' (a dropdown menu), 'Item Posting Group' (a dropdown menu), and 'ACCTS' (a dropdown menu). On the right side, there's a sidebar with three sections: 'Item Attributes' (a dropdown menu), 'Links' (a section with a plus icon and a message '(There is nothing to show in this view)'), and 'Notes' (a section with a plus icon and a message '(There is nothing to show in this view)').

F. Provide below **Item Card** information to proceed.

1. Choose **No.** from the dropdown by clicking on button.

- **No.: ITM0000109**

2. Provide **Item Code** here.

- **Item Code: ITEM001**

3. Provide **Description** here.

- **Description: HP Printer.**

4. Choose **Type** from the dropdown by clicking on button.

- **Type: Inventory**

5. Choose **Base Unit of Measure** from the dropdown by clicking on button.

- **Base Unit of Measure: PCS.**

6. **Last Date Modified** will be automatically filled up.

7. Select **Item Value Zero** checkbox, if applicable.

8. Provide **Unit Cost** here.

- **Unit Cost: 4,500.00**

9. **Last Purchase Cost** will be automatically filled up.

10. Choose **Gen. Prod. Posting Group** from the dropdown by clicking on button.

- **Gen. Prod. Posting Group: PRINTER**

11. Choose **VAT %** from the dropdown by clicking on button.

- **VAT %: 15%**

12. Choose **Item Posting Group** from the dropdown by clicking on button.

- **Item Posting Group: OFFICE EQUIPMENT**

13. Choose **AIT%** from the dropdown by clicking on button.

- **AIT%: AITO**

Power Sector ERP System

HOME ACTIONS NAVIGATE

NEW - ITEM CARD - ITM000109 - HP PRINTER

ITM000109 - HP Printer

Item

No.	ITM000109	1
Item Code	ITM001	2
Description	HP Printer	3
Type	Inventory	4

Base Unit of Measure: PCS 5

Last Date Modified: 7/5/2020 6

Item Value Zero: ☐ 7

Costs & Posting

Unit Cost	4,500.00	8
Last Purchase Cost	0.00	9

Posting Details

Gen. Prod. Posting Group	PRINTER	10
VAT%	15%	11
Item Posting Group	OFFICE EQUIPMENT	12
AIT%	AITO	13

Item Attributes

Links

Notes

PR-105 How to: Mushok Info Setup

Introduction

This process demonstrates how to setup Mushok Information of an organization. This setup is all about Mushok Information setup for an organization.

Roles

- Module Admin

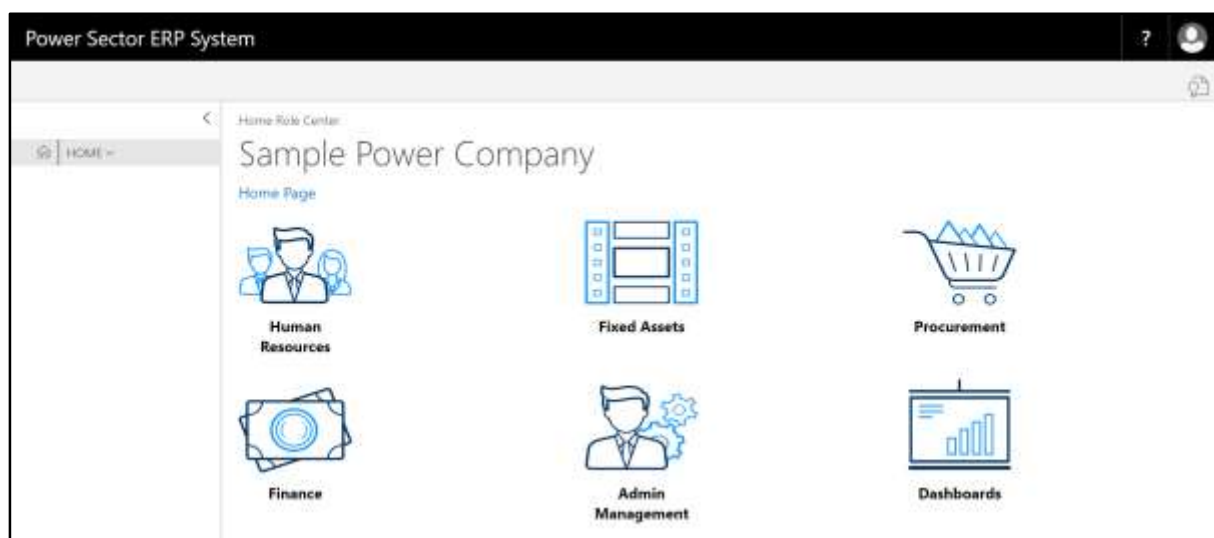
Prerequisite

- Chart of Account

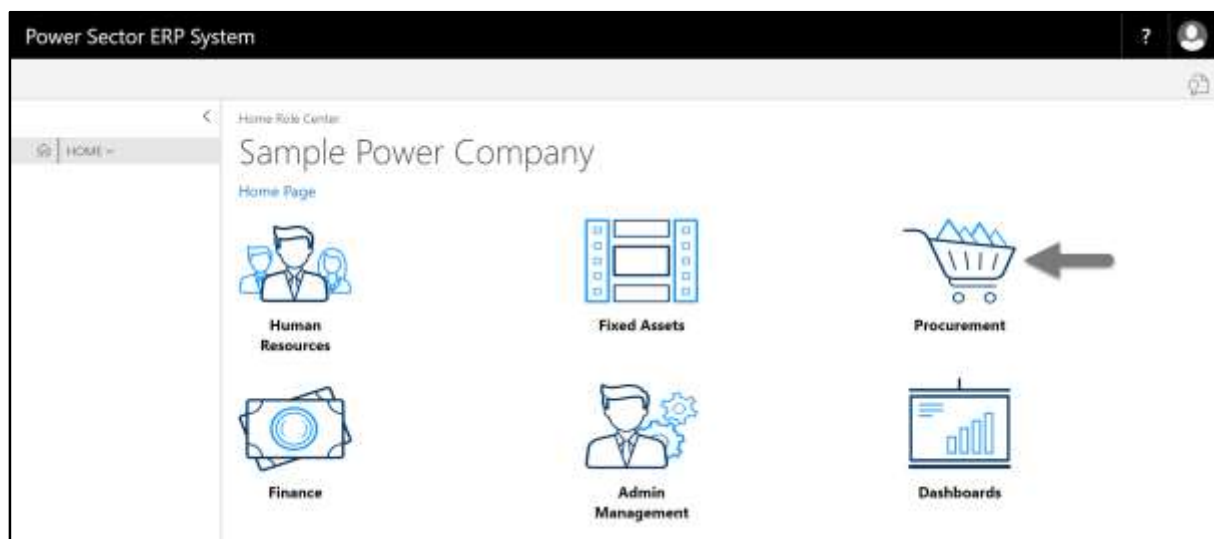
Access Mushok Info Setup

To initiate, follow the steps below.

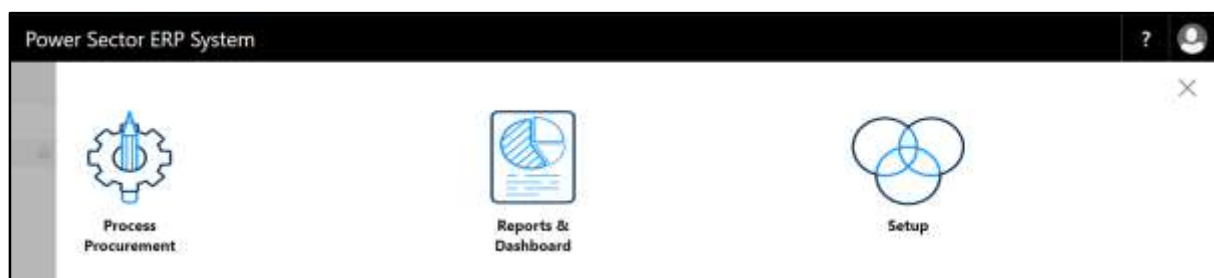
- A. Login with your respective **PR Admin credentials**. ERP Landing Page, as below, will be appeared on successful login.



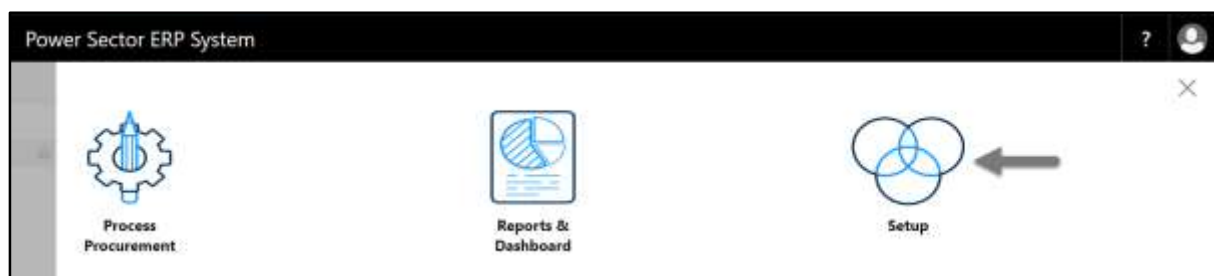
B. Choose the “**Procurement**” icon.



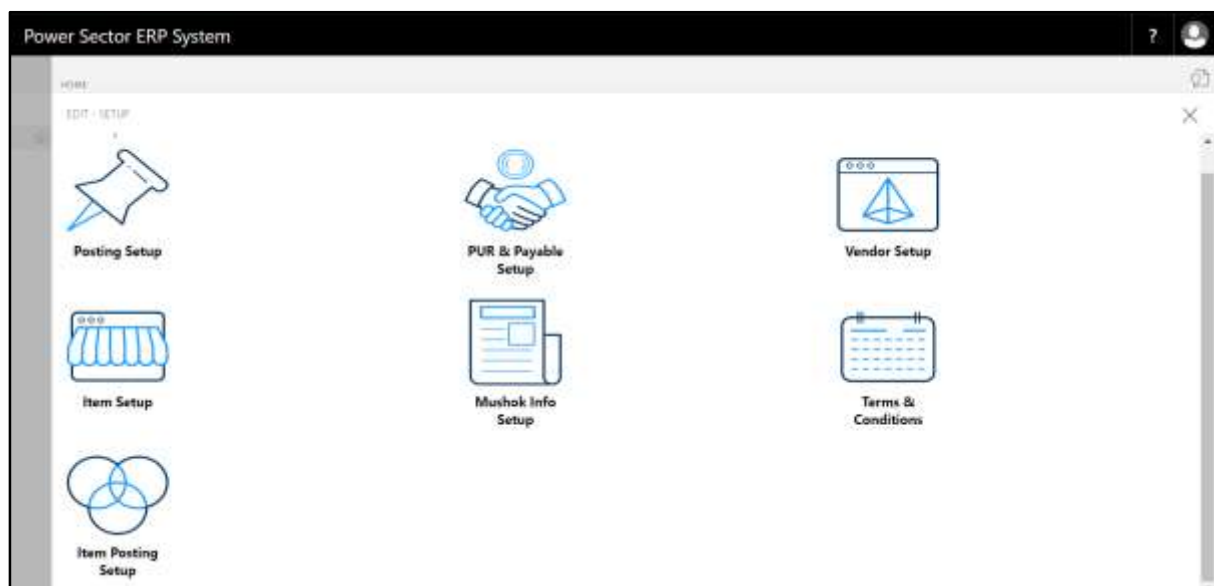
PR Landing Page will be appeared as below



C. Choose the “**Setup**” in PR Landing Page.



PR Setup landing page will be appeared as below



D. Choose the “**Mushok Info Setup**” in PR Setup Landing Page.



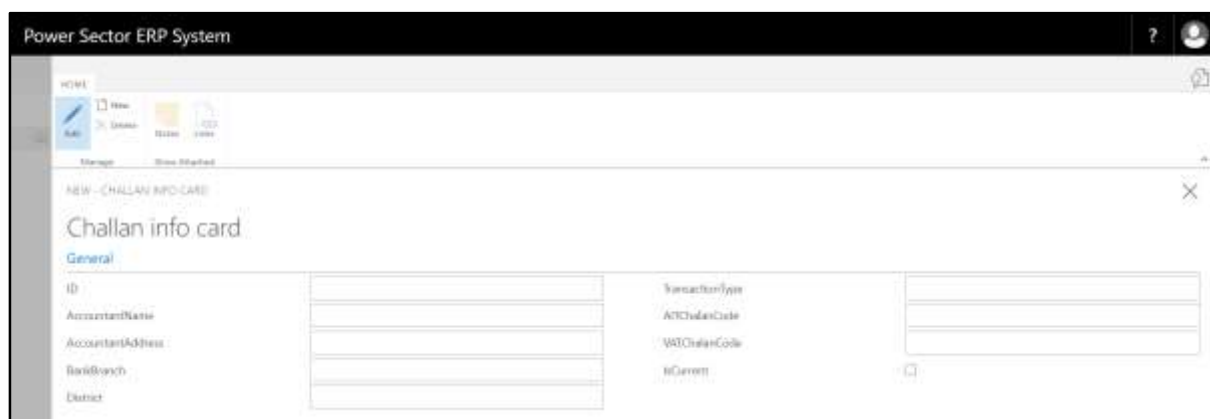
The following Mushok Info Setup page will be appeared.



E. Choose “**New**” icon on the Mushok Info List page, as indicated in figure below.



The following Item Card page will be appeared.



F. Provide below **Challan Info Card** information to proceed.

1. Provide **ID** here.
 - **ID: CHALAN001**
2. Provide **Accountant Name** here.
 - **Accountant Name: Almas Hossain**
3. Provide **Accountant Address** here.
 - **Accountant Address: Chamelibagh, Dhaka**
4. Provide **Bank Branch** here.
 - **Bank Branch: Shantinagar**
5. Provide **District** here.
 - **District: Dhaka**
6. Provide **Transaction Type** here.
 - **Transaction Type: Regular**
7. Provide **AIT Chalan Code** here.
 - **AIT Chalan Code: 77890**
8. Provide **VAT Chalan Code** here.

- **VAT Chalan Code: 66340**

9. Select **Is Current** checkbox, if applicable.

Power Sector ERP System

HOME

NEW - CHALLAN INFO CARD

Challan info card

General

ID	CHALAN001	TransactionType	Regular
AccountantName	Almas Hossain	ACChalanCode	77000
AccountantAddress	Chandbagh, Dhaka	VATChalanCode	66340
Branch	Syamt Nagar	IsCurrent	<input checked="" type="checkbox"/>
District	Dhaka		

PR-106 How to: Terms & Condition

Introduction

This process demonstrates how to update Terms & Condition of an organization. This setup is all about Terms & Condition for an organization.

Roles

- Module Admin

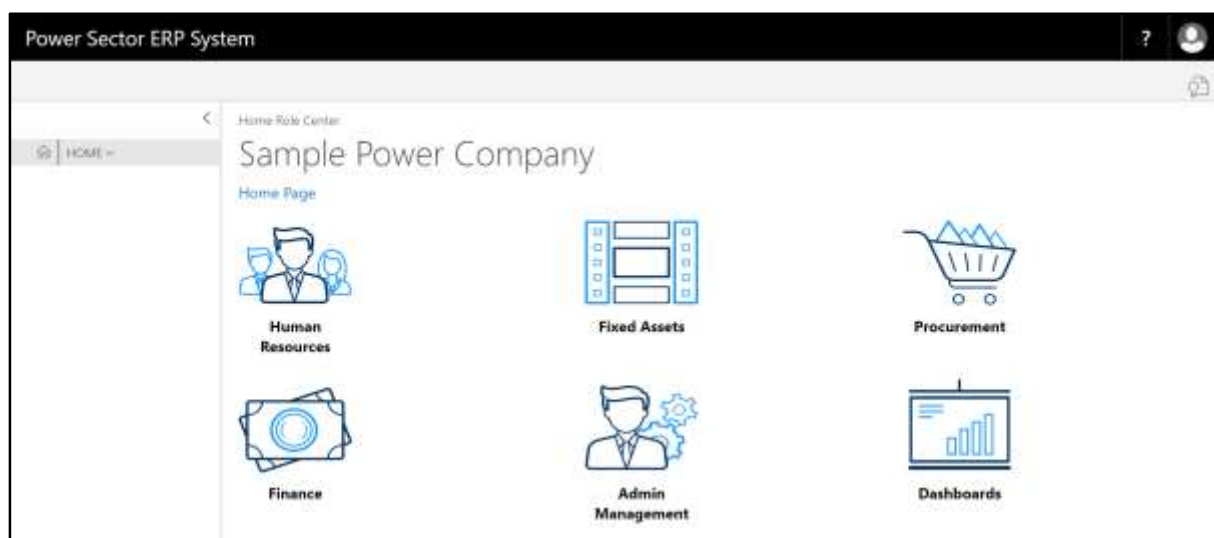
Prerequisite

- Chart of Account

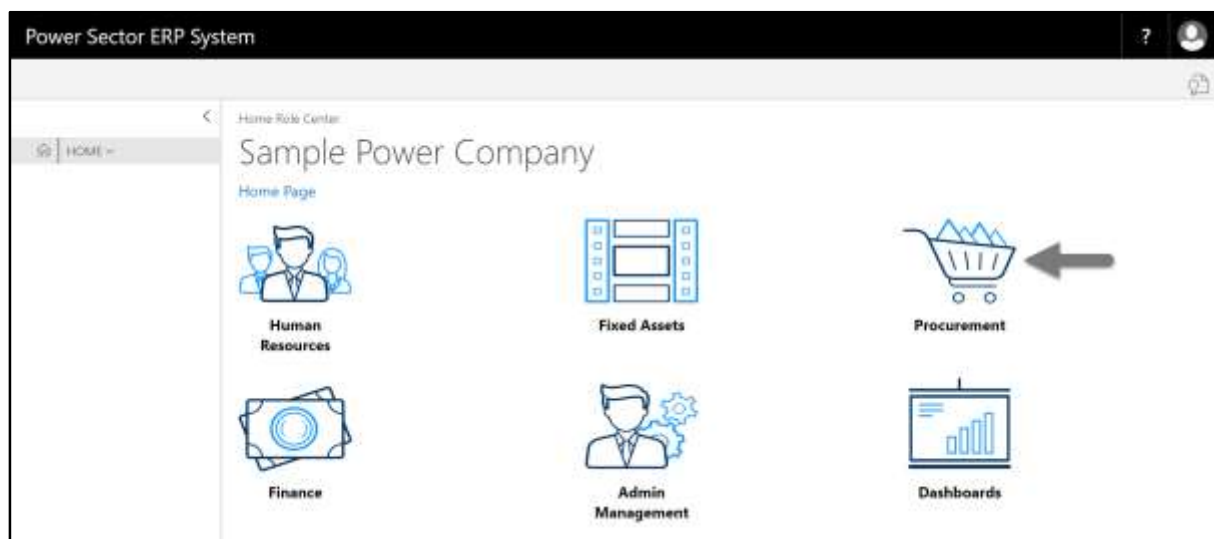
Access Terms & Condition

To initiate, follow the steps below.

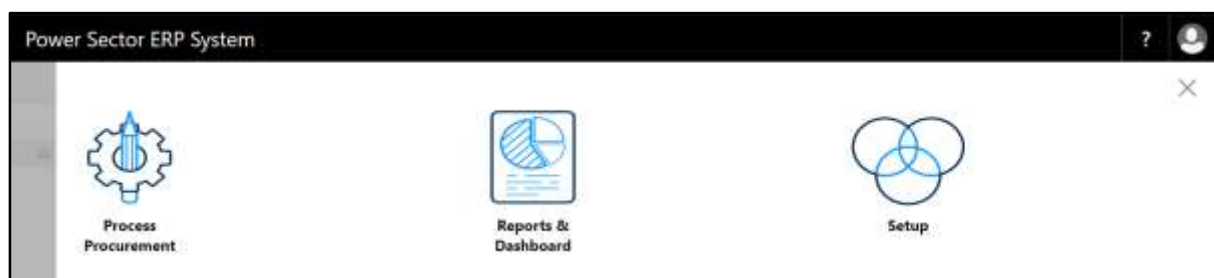
- A. Login with your respective **PR Admin credentials**. ERP Landing Page, as below, will be appeared on successful login.



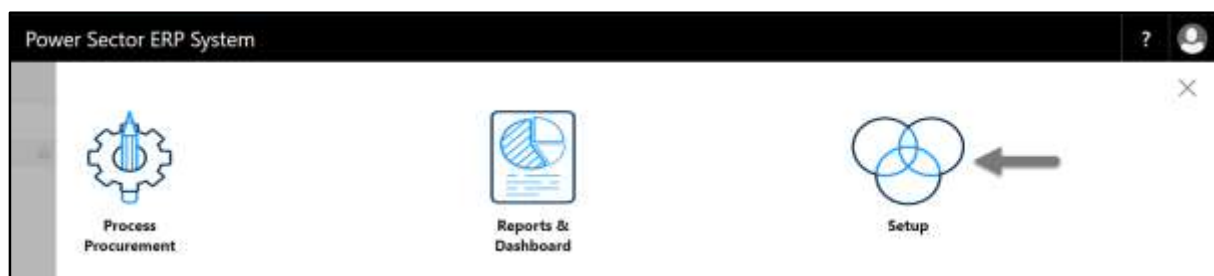
B. Choose the “**Procurement**” icon.



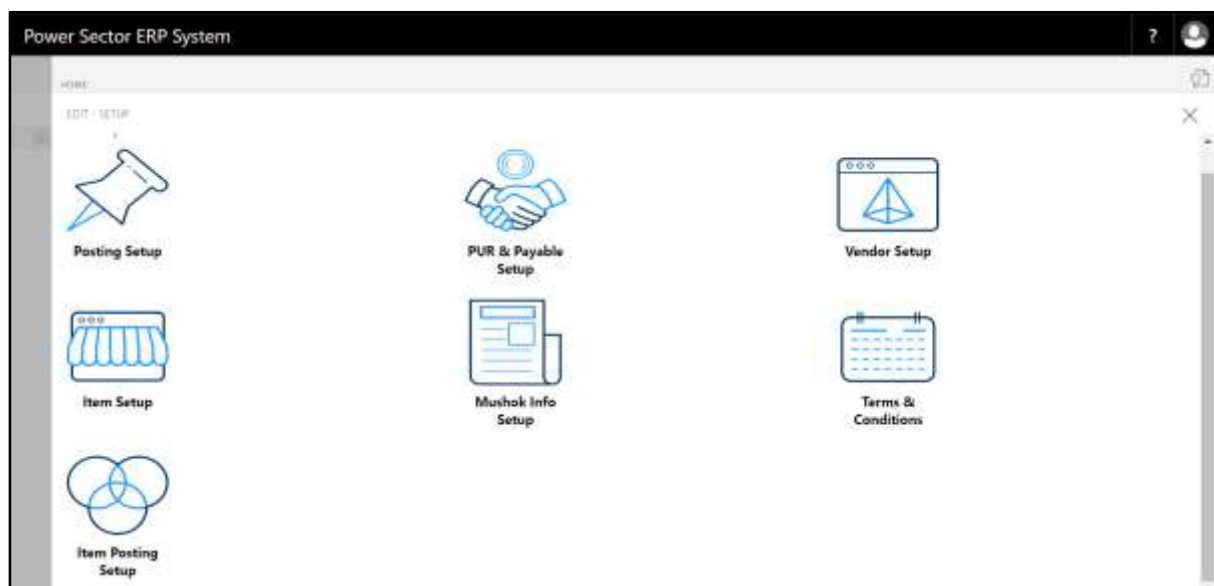
PR Landing Page will be appeared as below



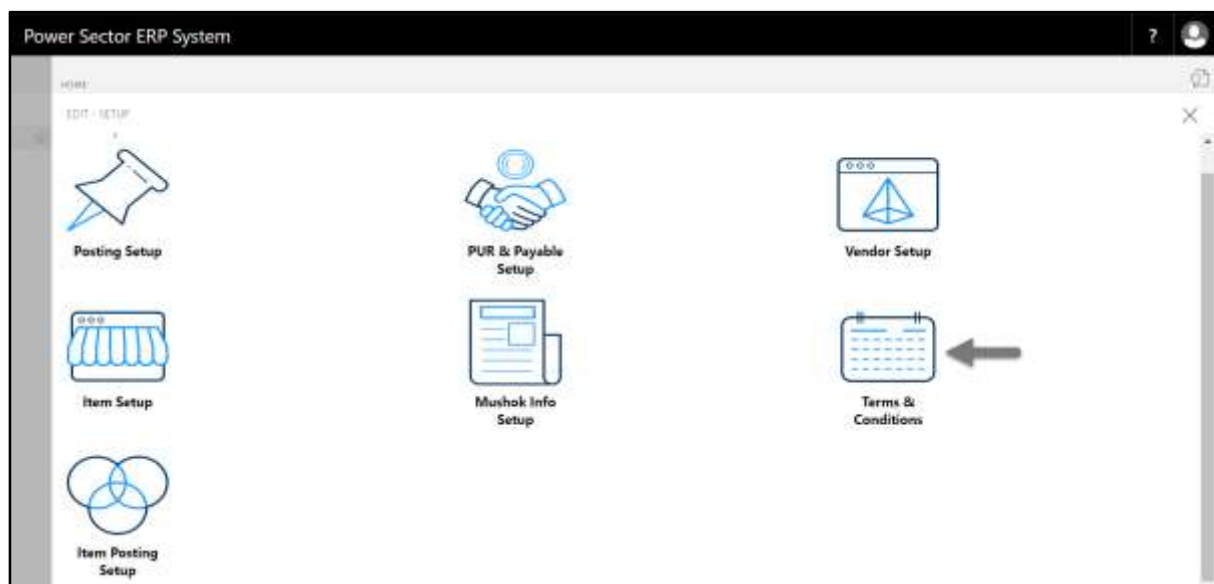
C. Choose the “**Setup**” in PR Landing Page.



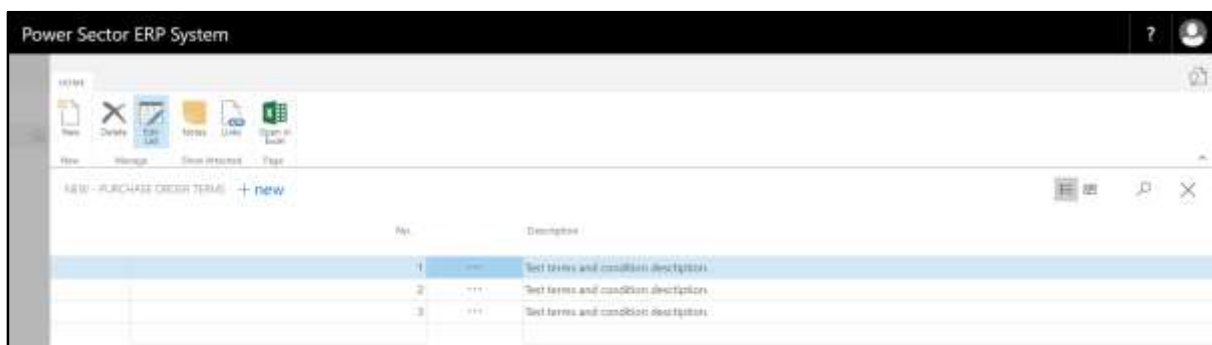
PR Setup landing page will be appeared as below



D. Choose the **“Terms & Conditions”** in PR Setup Landing Page.



The following **Terms & Condition** page will be appeared.



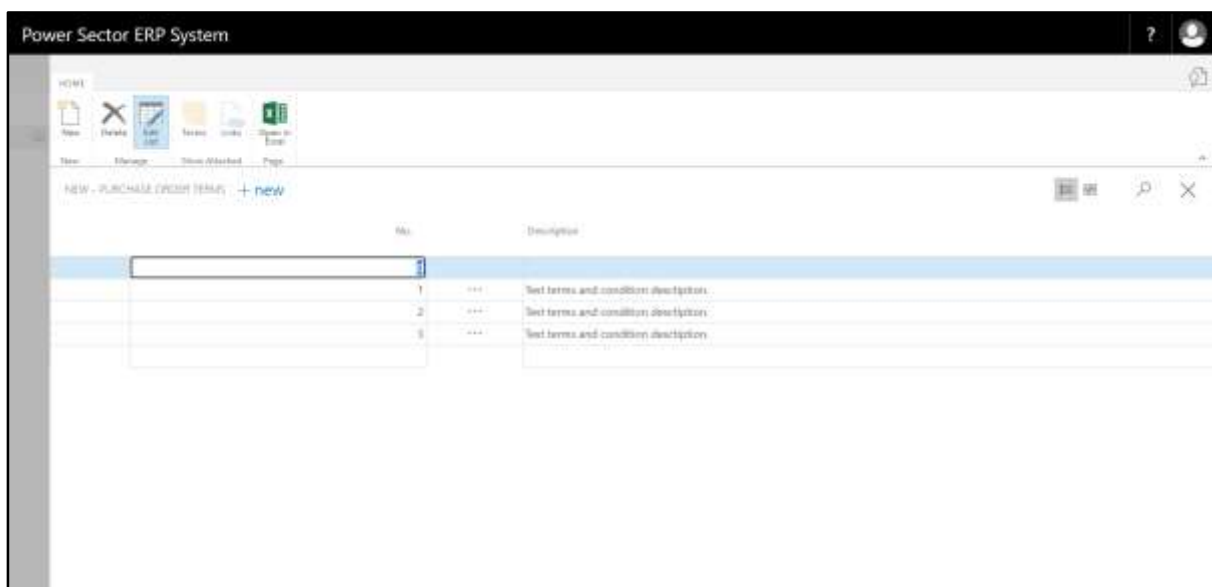
Note

On first time load, page will be blank and will show existing data as new setup data will be entered.

E. Choose **"New"** icon on the Purchase Order Terms page, as indicated in figure below.



New row will be appeared in the Purchase Order Terms page.



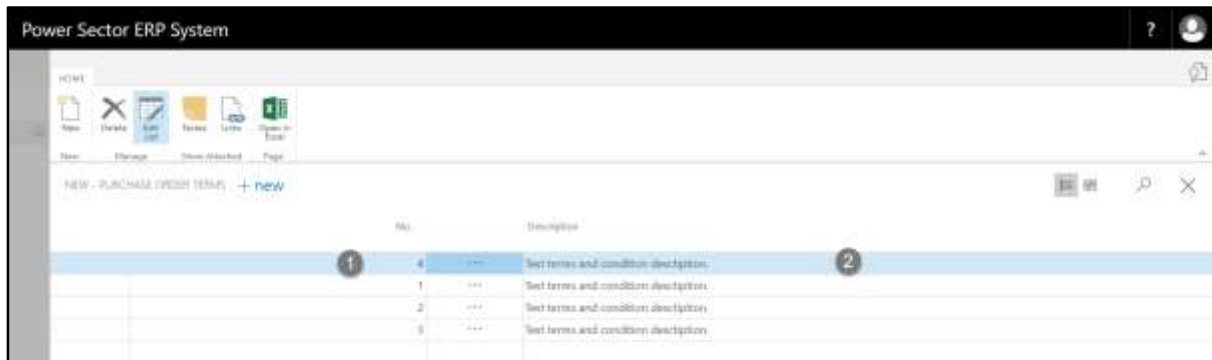
F. Provide below **Purchase Order Terms** information to proceed.

1. Provide **No.**

- **No: 4**

2. Provide **Description.**

- **Description: Test terms and condition description.**



PR-107 How to: Item Posting Setup

Introduction

This process demonstrates how to setup Item Posting of an organization. This setup is all about Item Posting for an organization.

Roles

- Module Admin

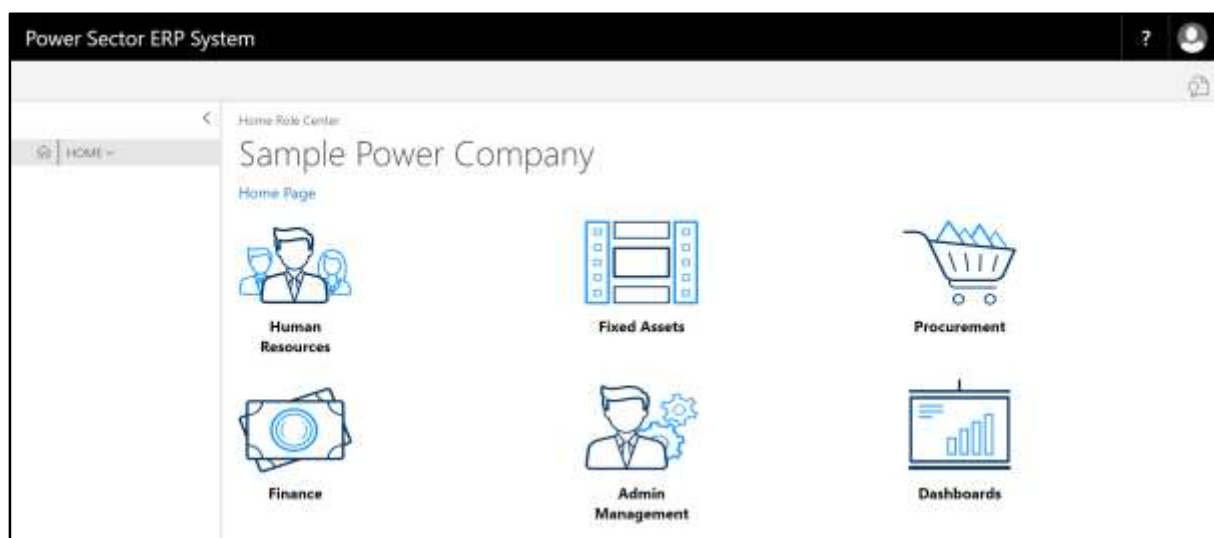
Prerequisite

- Chart of Account

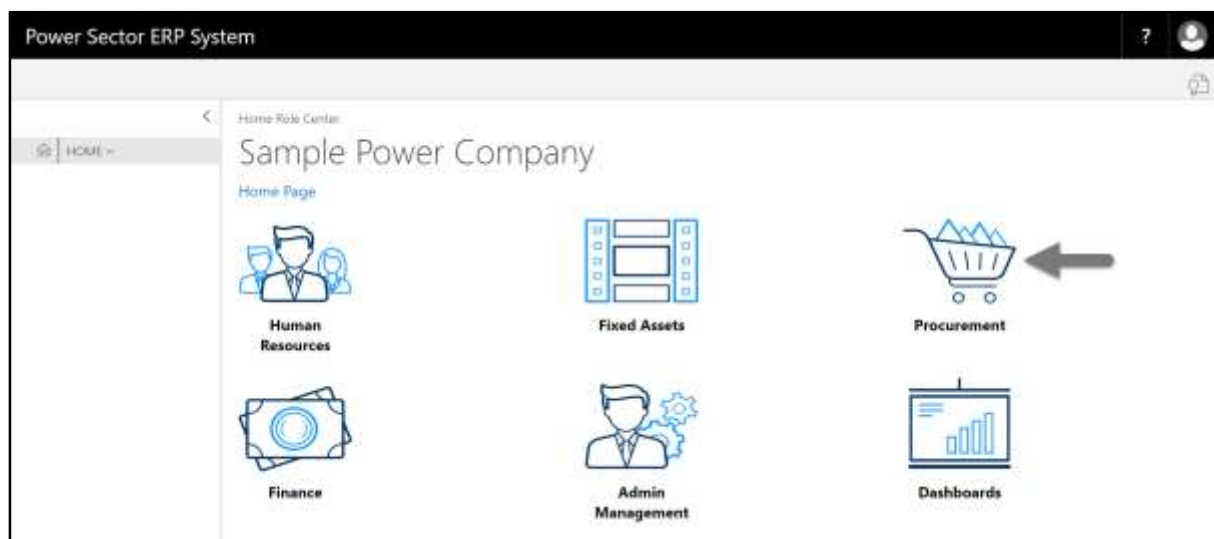
Access Item Posting Setup

To initiate, follow the steps below.

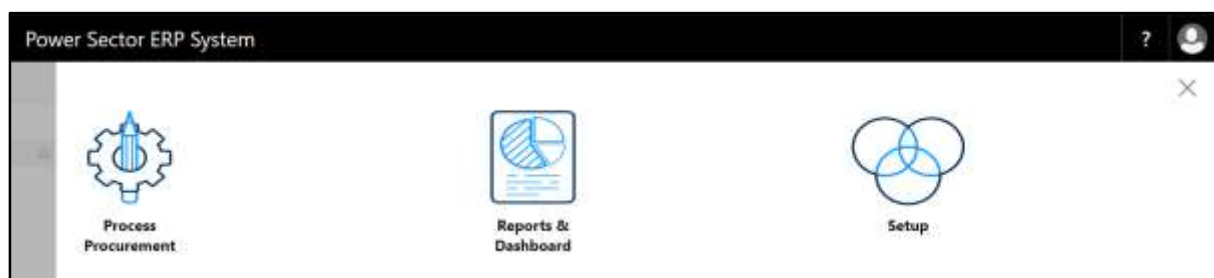
- A. Login with your respective **PR Admin credentials**. ERP Landing Page, as below, will be appeared on successful login.



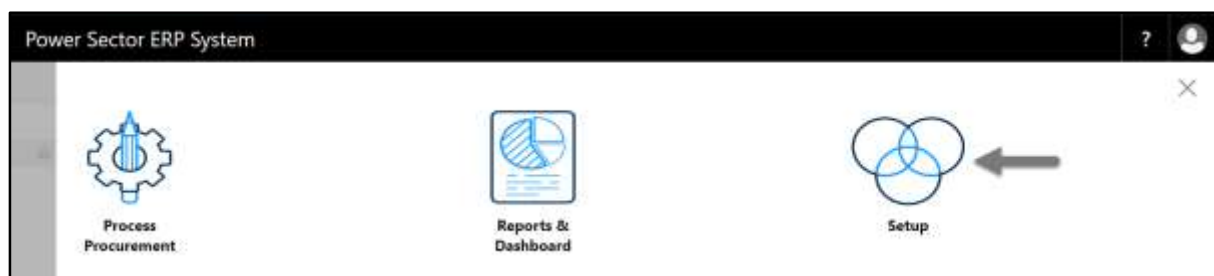
B. Choose the “**Procurement**” icon.



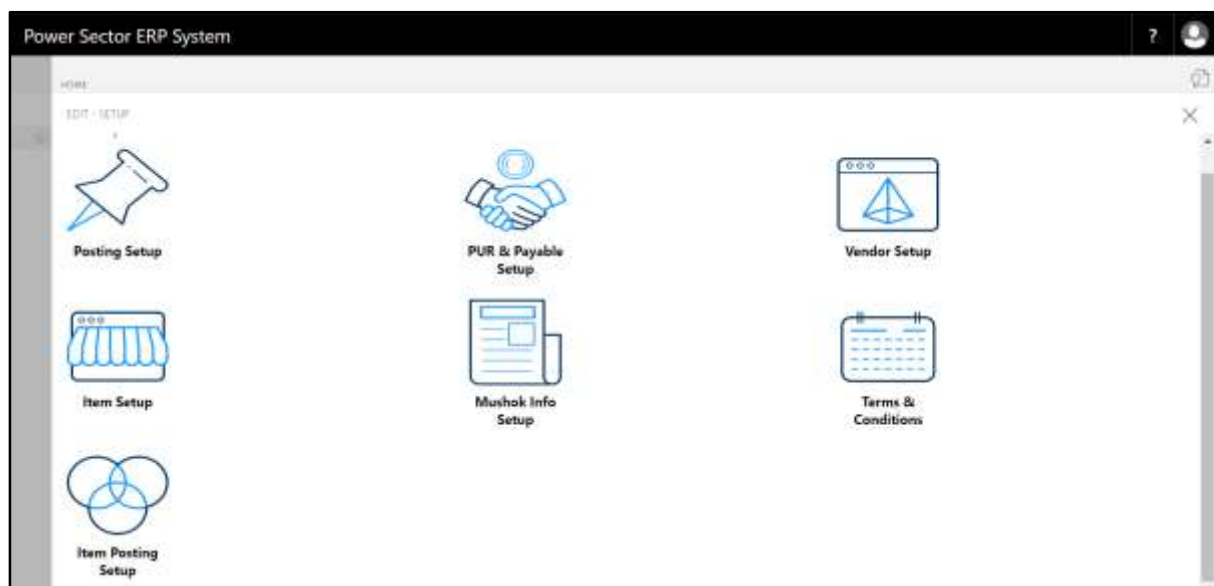
PR Landing Page will be appeared as below



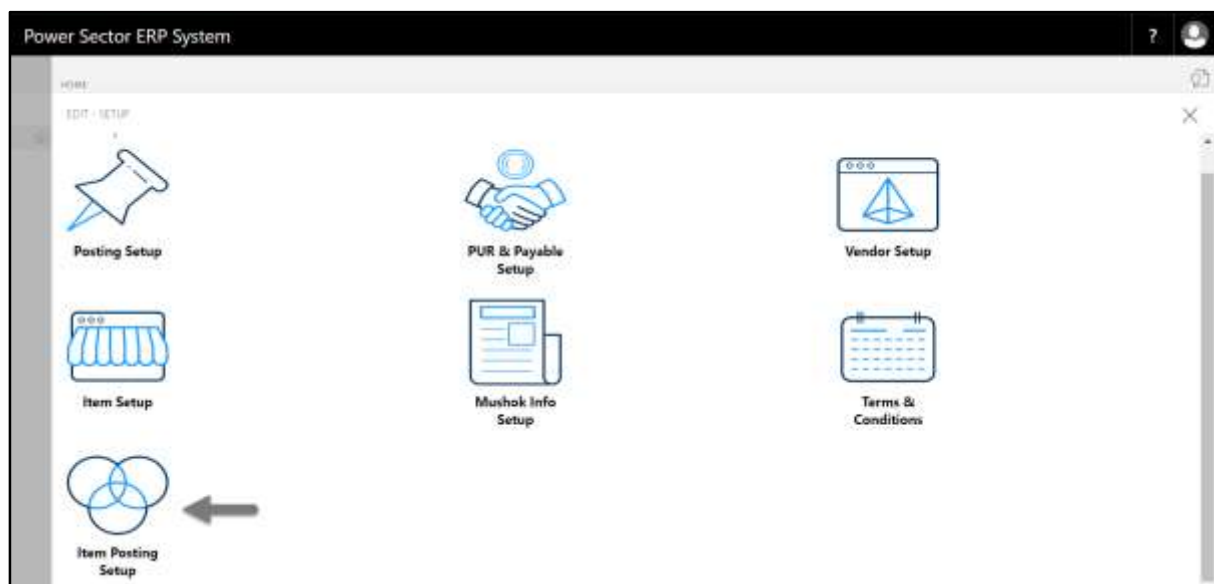
C. Choose the “**Setup**” in PR Landing Page.



PR Setup landing page will be appeared as below



D. Choose the “**Item Posting Setup**” in PR Setup Landing Page.



The following **Item Posting Setup** page will be appeared.

Location Code	Item Posting Group Code	Description	Inventory Account	Inventory Account (Interim)	WIP Account	Material Variance Account	Capacity Variance Account	Subcontracted Variance Account	Cap. Overhead Variance Account	Mfg. Overhead Variance Account	Used in Ledger Entries
...	PETERS	PURCH	1010105001		1010105000	1010105000	1010105001	1010105003	1010103301	1010103005	
...	OFFICE EQUIPM.	OFFICE EQUIPMENT	1010105001		1010000000	1010100000	1010101001	1010101001	1010102002	1010102001	

Note










On first time load, page will be blank and will show existing data as new setup data will be entered.

E. Choose **"New"** icon on the Purchase Order Terms page, as indicated in figure below.

Inventory Posting Setup Card will be appeared, as indicated in figure below.

F. Provide below **Inventory Posting Setup Card** information to proceed.

1. Choose **Location Code** from the dropdown by clicking on button.

- **Location Code: Blank**
2. Choose **Inv. Posting Group Code** from the dropdown by clicking on  button.
 - **Inv. Posting Group Code: PUMP SPARE PARTS**
 3. Provide **Description**.
 - **Description: Pedrollo Pump**
 4. Choose **Inventory Account** from the dropdown by clicking on  button.
 - **Inventory Account: 1010105001**
 5. Choose **Inventory Account (Interim)** from the dropdown by clicking on  button.
 - **Inventory Account (Interim): 1010105001**
 6. Choose **WIP Account** from the dropdown by clicking on  button.
 - **WIP Account: 101000000**
 7. Choose **Material Variance Account** from the dropdown by clicking on  button.
 - **Material Variance Account: 1010100000**
 8. Choose **Capacity Variance Account** from the dropdown by clicking on  button.
 - **Capacity Variance Account: 1010101000**
 9. Choose **Mfg. Overhead Variance Account** from the dropdown by clicking on  button.
 - **Mfg. Overhead Variance Account: 1010101001**
 10. Choose **Capacity Overhead Variance Account** from the dropdown by clicking on  button.
 - **Capacity Overhead Variance Account: 1010102002**
 11. Choose **Subcontracted Variance Account** from the dropdown by clicking on  button.
 - **Subcontracted Variance Account: 1010106001**
 12. **Used in Ledger Entries** will be automatically filled up.

Power Sector ERP System

HOME

ACTIVED

NEW

DEALS

NOTES

PDF

PRINTOUT

HELP

Storage

Business

Page

EDIT - INVENTORY POSTING SET-UP CARD

X

PUMP SPARE PARTS

General

Show Info

Location Code

1

Inv. Posting Group Code

2

Description

3

Inventory Account

4

Inventory Account (Inherited)

5

MANUFACTURING

WIP Account

6

Material Variance Account

7

Capacity Variance Account

8

Mfg. Overhead Variance Account

9

Cap. Overhead Variance Account

10

Subcontracted Expense Account

11

USAGE

Used in Ledger Entries

12

PR-200 Process Procurement

Introduction

This section shows how to go through step by step in full procurement process.

PR-201	Demand Note
PR-202	Annual Procurement Plan (APP)
PR-203	Purchase Requisitions
PR-204	Purchase Quotes
PR-205	Comparative Statement
PR-206	Purchase Orders
PR-207	Purchase Receipts
PR-208	Purchase Invoices

Role

- Module Admin
- Module User

Prerequisite

- Module credentials – username and password

PR-201 How to: Make Demand Note

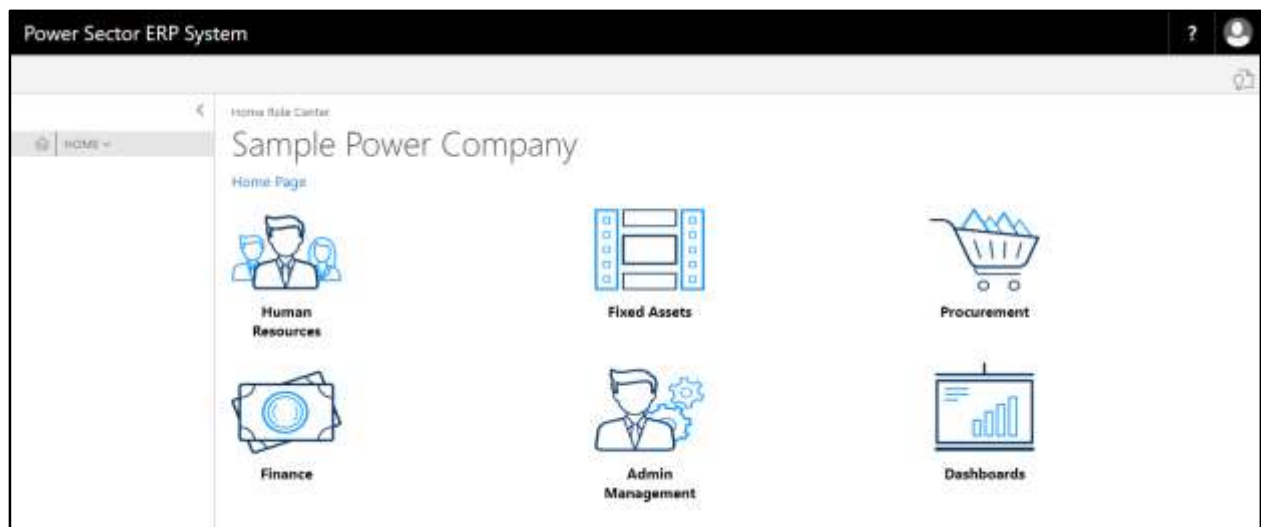
Introduction

This process demonstrates how to make a demand note.

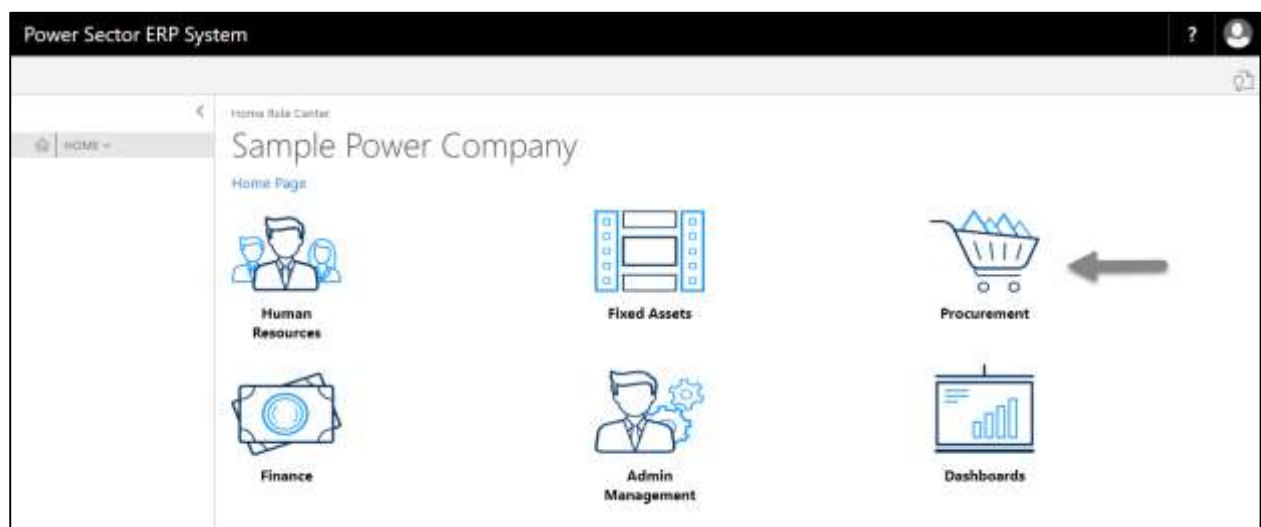
Make Demand Note

To initiate, follow the steps below.

- A. Login with your respective **PR credentials**. ERP Landing Page, as below, will be appeared on successful login.



- B. Choose the "**Procurement**" Icon.



PR Landing page will be appeared as bellow.



C. Choose the "**Process Procurement**" icon.



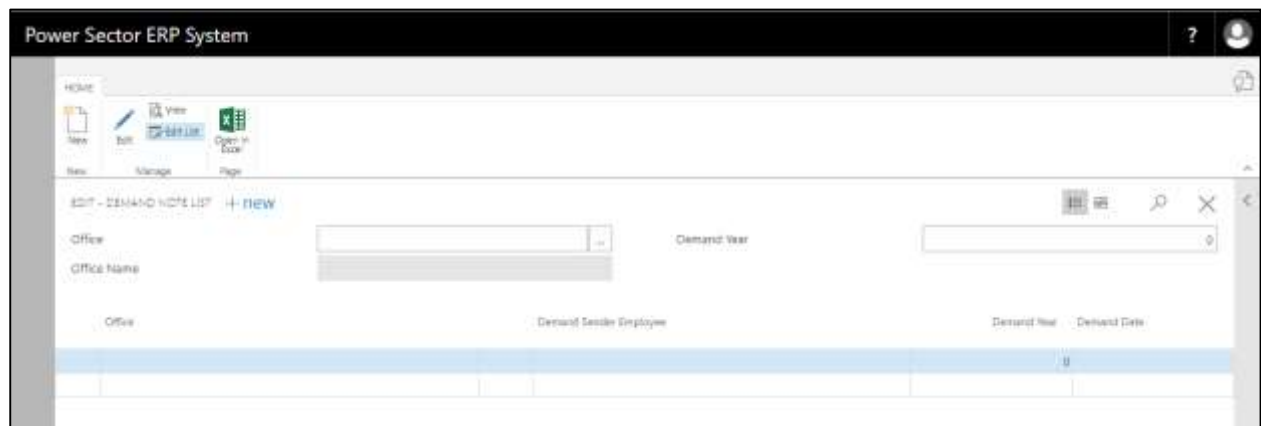
Process Procurement page will be appeared as bellow.



D. Choose the "**Demand Note**".



The following screen will be appeared.



E. Provide below information to process successfully.

1. Choose the **Office Code** from the dropdown by clicking on button.

- **Office Code: 103**

Office Name will be populated by the system.

2. Provide **Demand Year**

- **Demand Year: 2020**

3. Choose the **Item Code** from the dropdown by clicking on button.

- **Item Code: ITM0000009**

Item Name and Unit will be populated by the system.

4. Provide **Quantity**

- **Quantity: 10**

Price and Total Price will be populated by the system.

Power Sector ERP System

HOME MANAGE

Create New Edit Attach L/RC Previous Next

Edit - DEMAND NOTE CARD

7

General

Office 103 Demand Year 2020

Office Name Chief Engineer Demand Date 7/5/2020

Demand Sender Employee Name

Demand Item List

Item ID	Item Name	Unit	Unit Details	Quantity	Price	Total Price	Purpose
ITM0000009	Lower bearing shaft 021.11.003	PCS		10	500	5,000.00	

The screen will look like as below

Power Sector ERP System

HOME MANAGE

Create New Edit Attach L/RC Previous Next

Edit - DEMAND NOTE CARD

7

General

Office 103 Demand Year 2020

Office Name Chief Engineer Demand Date 7/5/2020

Demand Sender Employee Name

Demand Item List

Item ID	Item Name	Unit	Unit Details	Quantity	Price	Total Price	Purpose
ITM0000009	Lower bearing shaft 021.11.003	PCS		10	100	1,000.00	

F. Click the "X" button to save and close.

PR-202 How to: Make Annual Procurement Plan (APP)

Introduction

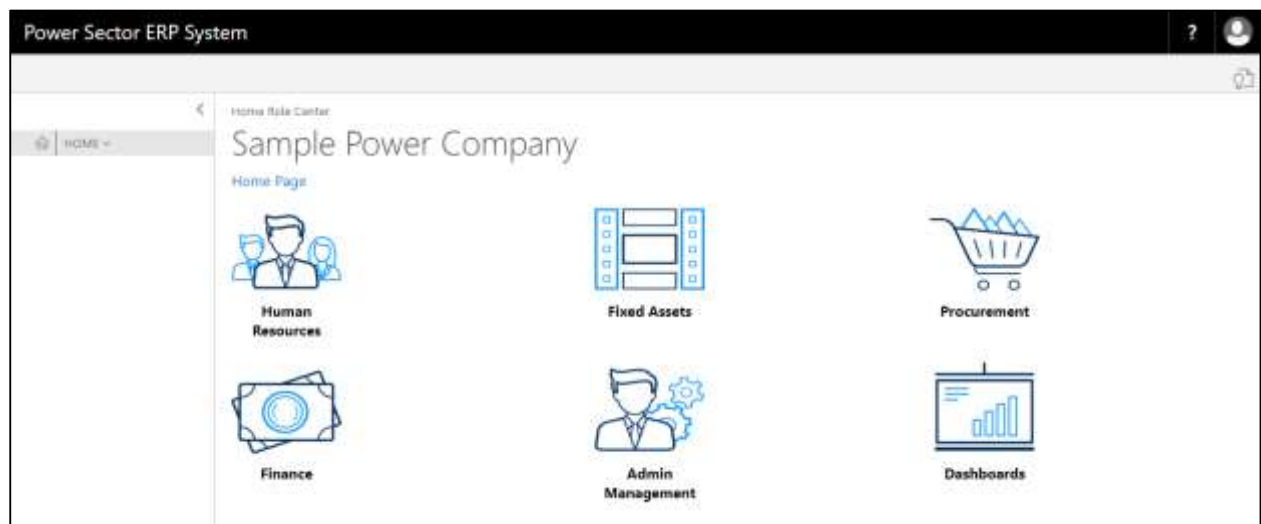
This process demonstrates how to make an Annual Procurement Plan (APP).

PR-202.1 Make Annual Procurement Plan (APP) For Approval

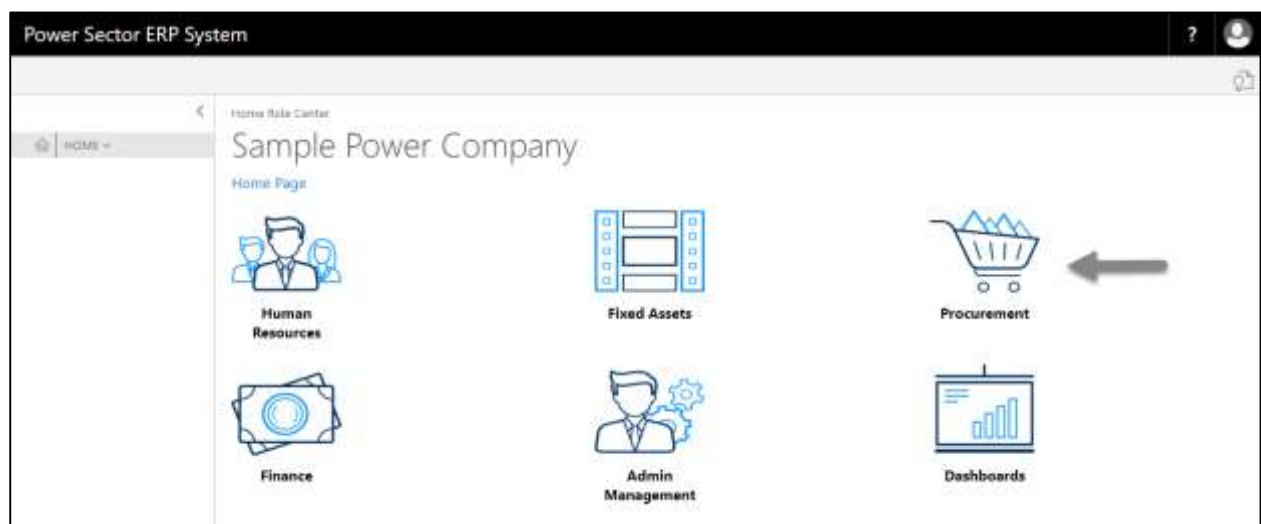
Make Annual Procurement Plan (APP) For Approval

To initiate, follow the steps below.

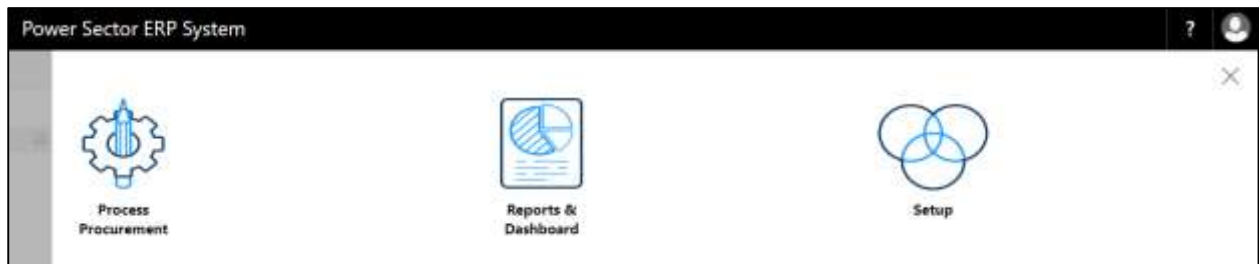
- A. Login with your respective **PR User credentials**. ERP Landing Page, as below, will be appeared on successful login.



- B. Choose the "**Procurement**" Icon.



PR Landing page will be appeared as bellow.



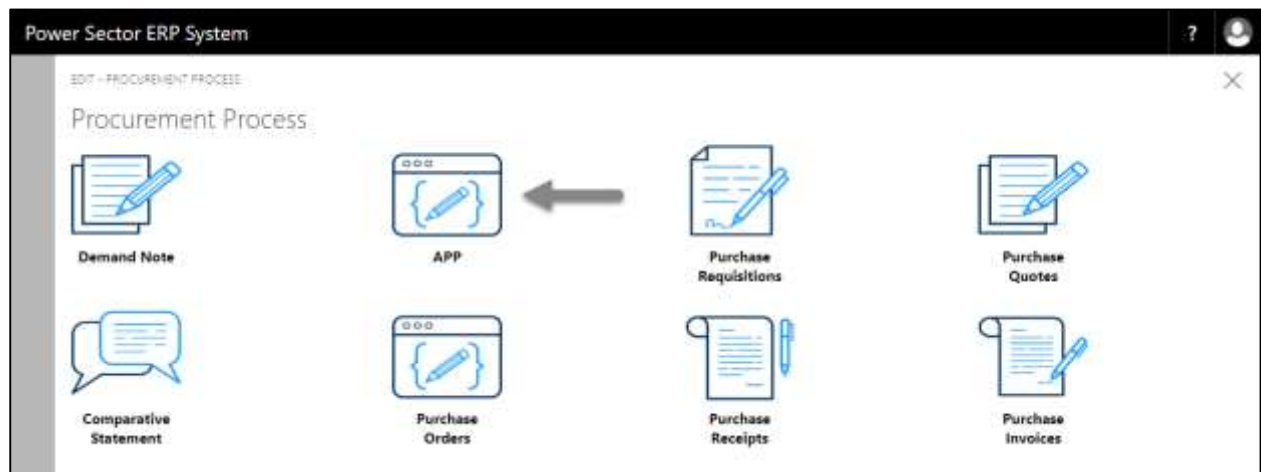
C. Choose the "**Process Procurement**" icon.



Process Procurement page will be appeared as bellow.



D. Choose the "APP".



The following screen will be appeared.

The screenshot shows the 'Annual Procurement Plan' form in the 'Power Sector ERP System'. The form has a header section with 'Office Code' and 'Office Name' fields, and an 'APP Year' dropdown set to '2020'. Below this is a table with columns: 'Tender Package No.', 'Sub Package No.', 'Item No.', 'Description of Procurement Package', 'Unit', 'Unit Details', 'Quantity', 'Total Cost', 'Procurement Method', 'Contract Approving Authority', and 'Source of Funds'. The table currently has one row with a red asterisk in the 'Sub Package No.' column.

E. Provide below information to process successfully.

1. Choose the **Tender Package Number** from the dropdown by clicking on button.
 - **Tender Package Number: PAC102**
2. Choose the **Sub Package Number** from the dropdown by clicking on button.
 - **Sub Package Number: SUBPAC002**
3. Choose the **Item Code** from the dropdown by clicking on button.
 - **Item Code: ITM0000009**

Description of Procurement Package will be populated by the system.
4. Provide **Quantity**

- **Quantity: 5**

Estimated Cost will be populated by the system.

5. Choose **Procurement Method** from the dropdown by clicking on button.

- **Procurement Method: e-GP**

6. Choose **Tender Opening Date** from calendar by clicking on button.


- **Expiration Date: 6/1/2020**

7. Choose **Tender Evaluation Date** from calendar by clicking on button.

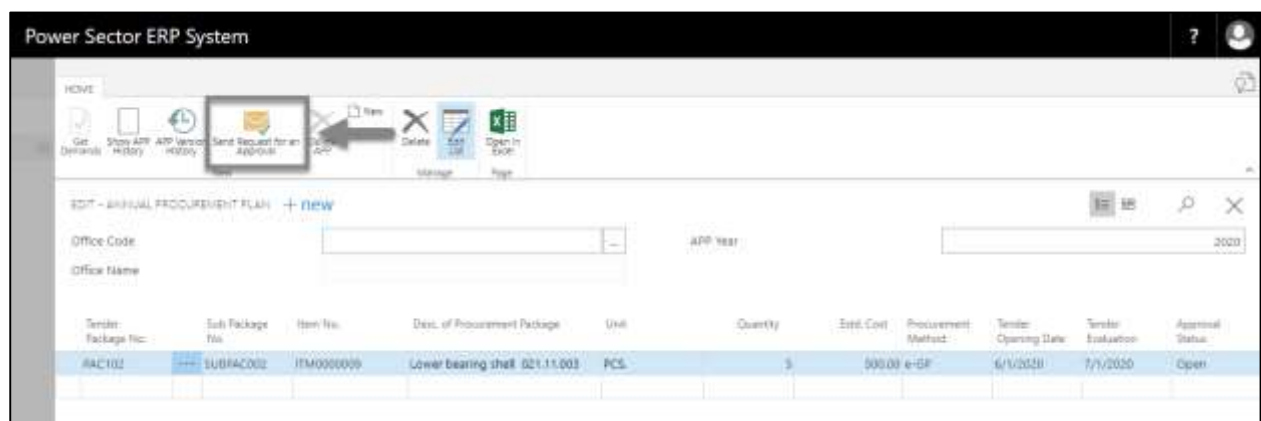
- **Expiration Date: 7/1/2020**

The screen will look like as below

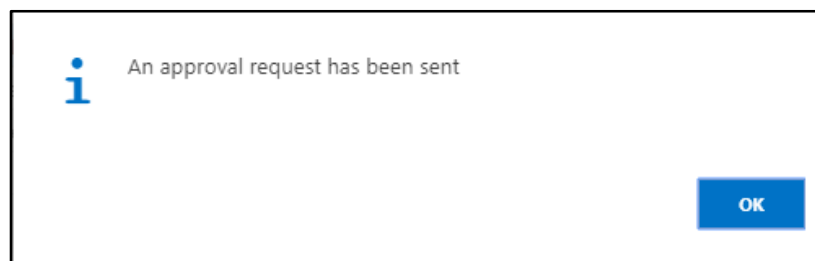
TIPS

Choose  icon to get previous Demand Notes.

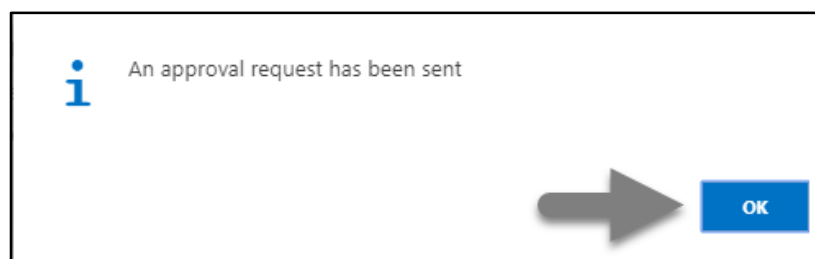
F. Choose the **Send Request for an Approval** icon.



The following pop up will be appeared.



G. Choose the **OK** icon to save and close.



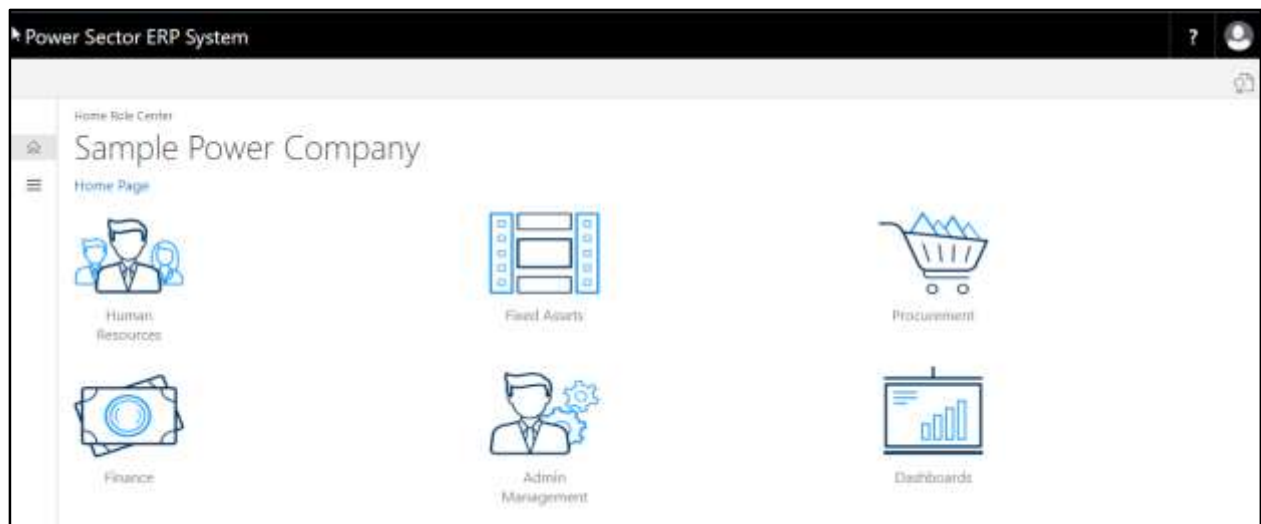
H. Click the "X" button to save and close.

PR-202.2 Approve or Reject Annual Procurement Plan (APP)

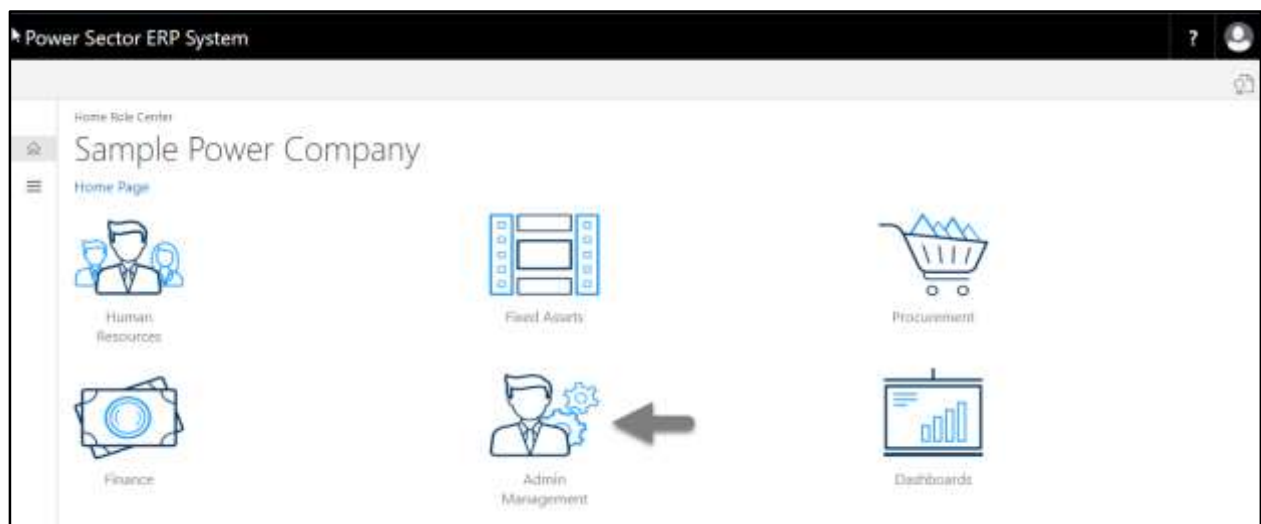
Approve or Reject Annual Procurement Plan (APP)

To Approve/Reject initiated APP follow the steps below.

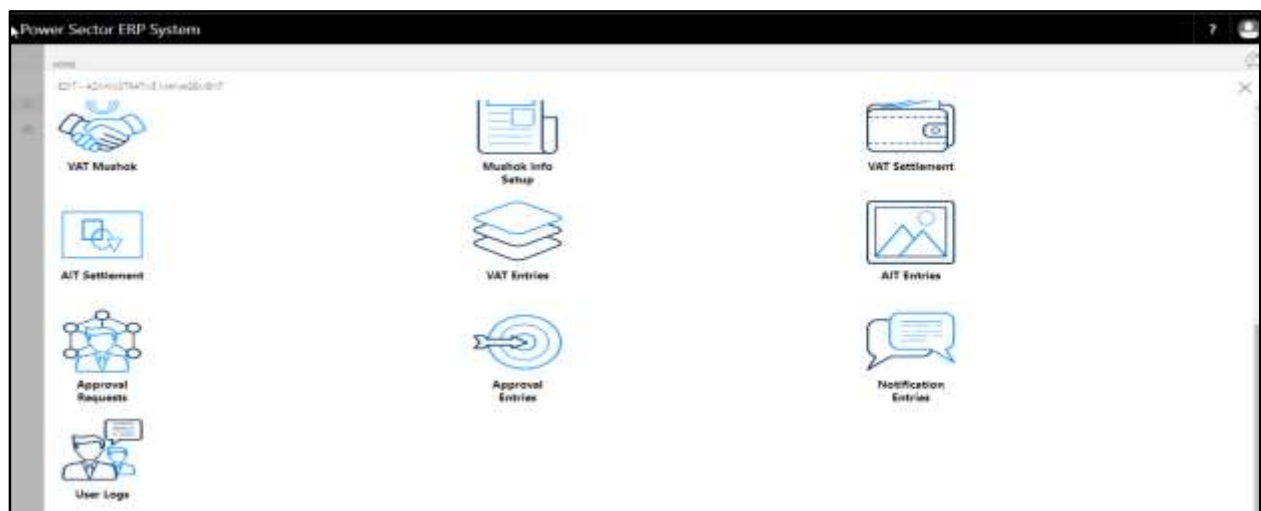
A. Login with your respective **PR Admin credentials**. ERP Landing Page, as below, will be appeared on successful login.



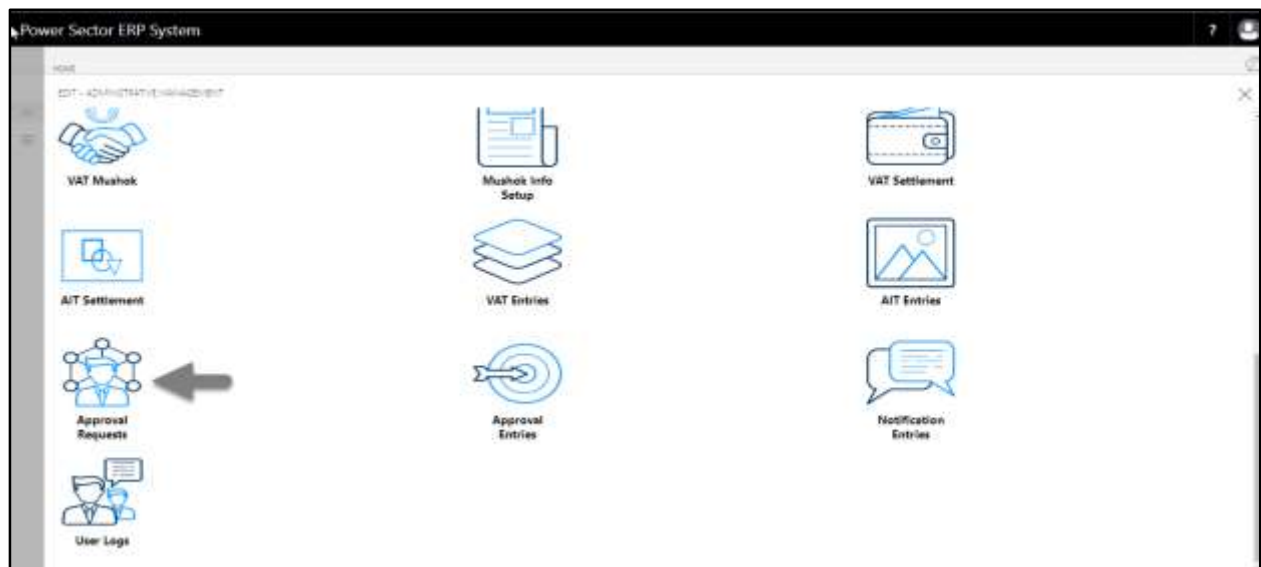
B. Choose the “**Admin Management**” icon to open the administrative page.



The Following **Admin Management** page will be appeared.



C. Choose the **“Approval Request”** icon to process initiated approval requests.



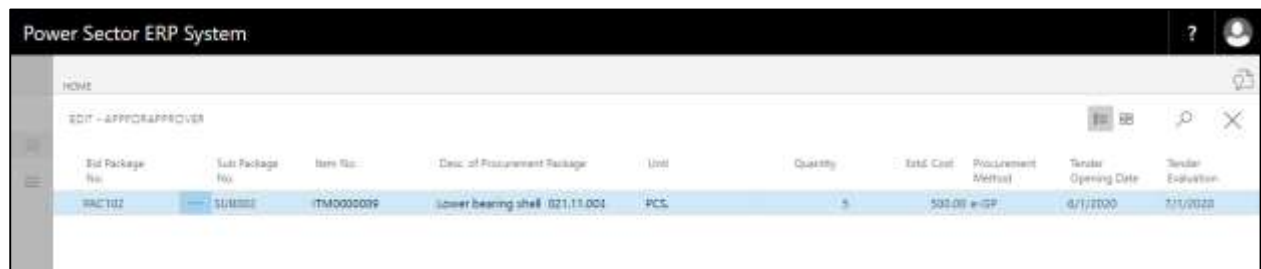
The following **Approval Request page** will be appeared.



D. Select the initiated records and choose the **“Open Record”** icon.




Detailed **APP** page will be appeared as below.

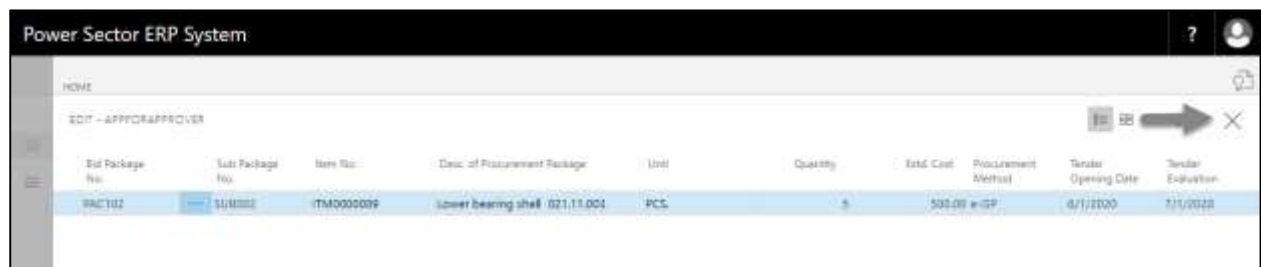


Bid Package No.	Sub Package No.	Item No.	Desc. of Procurement Package	Unit	Quantity	Total Cost	Procurement Method	Tender Opening Date	Tender Evaluation
WACT02	SUM002	ITM0000009	lower bearing shell (021.11.004	PCS	5	500.00 e-GP		6/1/2020	7/1/2020

TIPS

You can choose initiate record by clicking on the line.

E. Select the  icon to back to the previous page.



Bid Package No.	Sub Package No.	Item No.	Desc. of Procurement Package	Unit	Quantity	Total Cost	Procurement Method	Tender Opening Date	Tender Evaluation
WACT02	SUM002	ITM0000009	lower bearing shell (021.11.004	PCS	5	500.00 e-GP		6/1/2020	7/1/2020

The following **Request to Approve** page will be appeared.

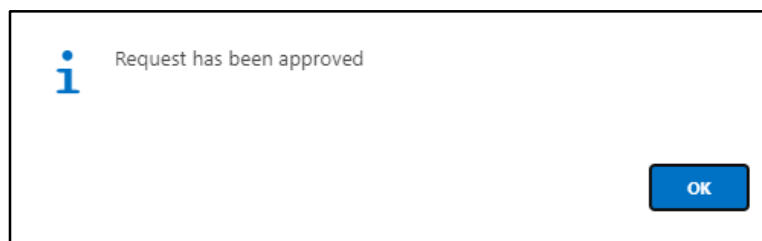


To Approve	Details	Comment	Sender ID	Due Date
APPForApprover	Annual Procurement Plan 5		PR_USER_SAMPLE	7/5/2020

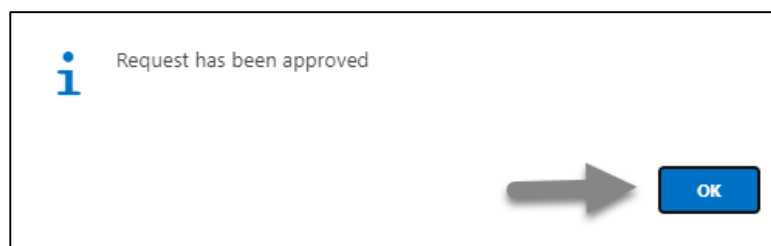
- F. Choose the **"Approve"** icon to approve the initiated process or select **"Reject"** (besides "Approve") to reject.




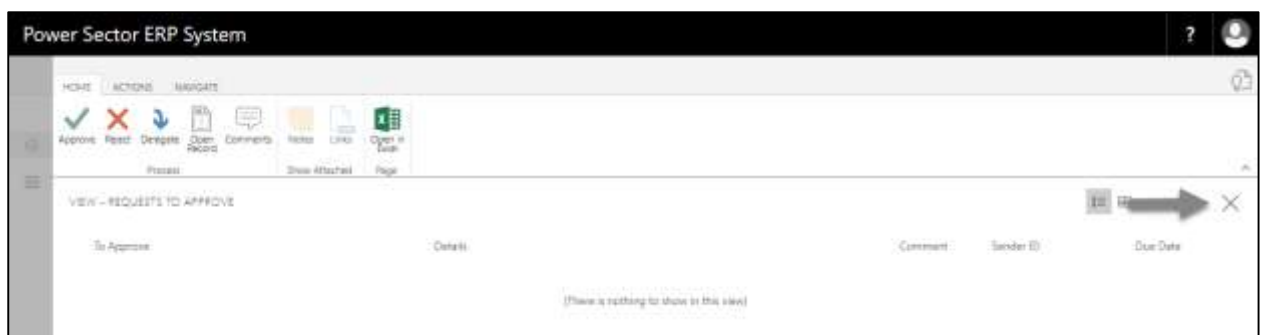
The following pop-up will be appeared.



- G. Choose the **"OK"** icon to save and close.



- H. Select the  icon to back to the previous page.



PR-203 How to: Make Purchase Requisitions

Introduction

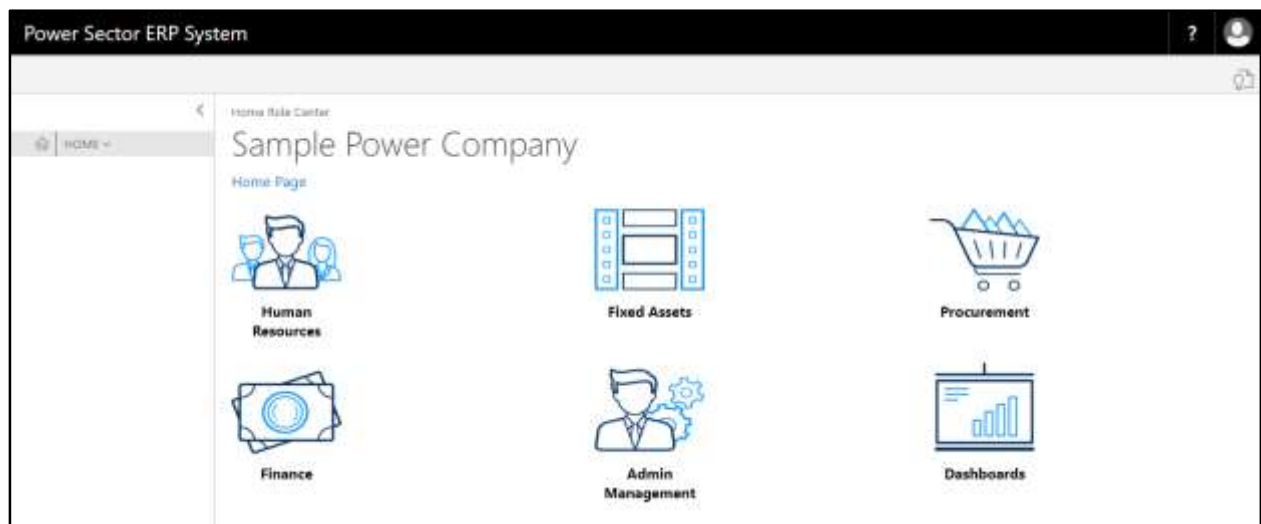
This process demonstrates how to make a Purchase Requisition.

PR-203.1 Make Purchase Requisition for Approval

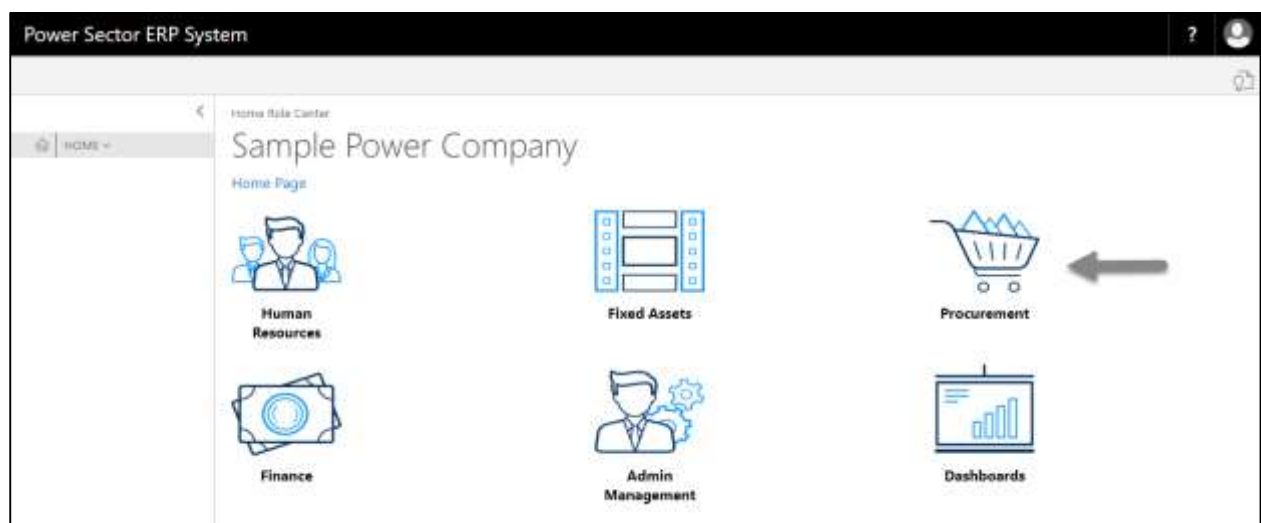
Make Purchase Requisitions for Approval

To initiate, follow the steps below.

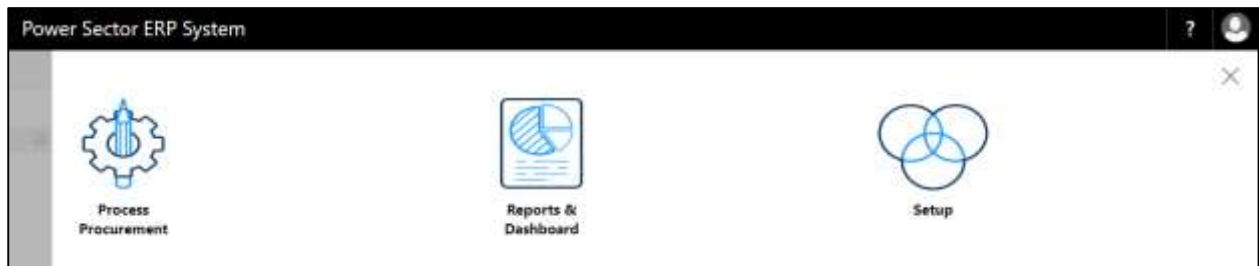
- A. Login with your respective **PR User credentials**. ERP Landing Page, as below, will be appeared on successful login.



- B. Choose the "**Procurement**" Icon.



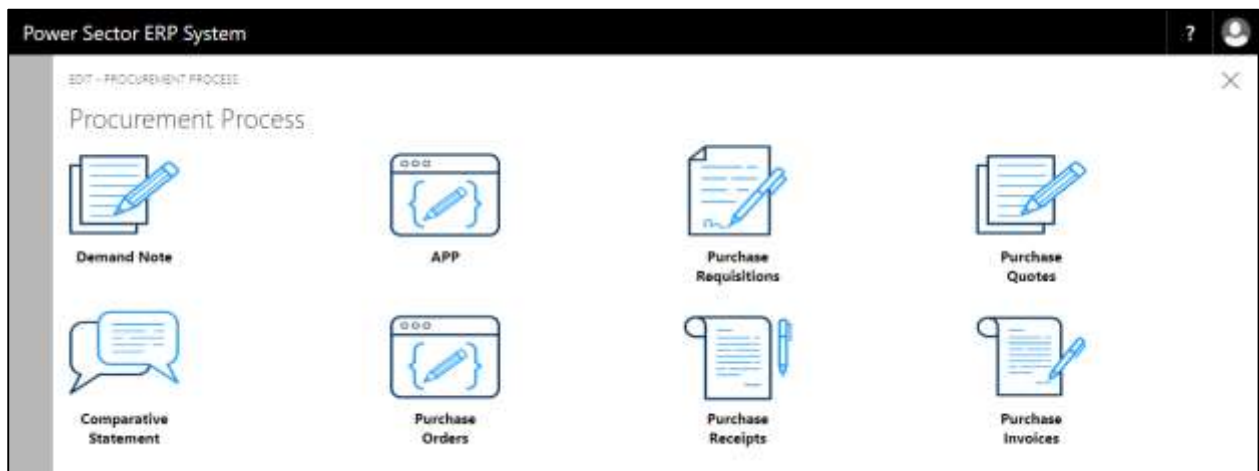
PR Landing page will be appeared as bellow.



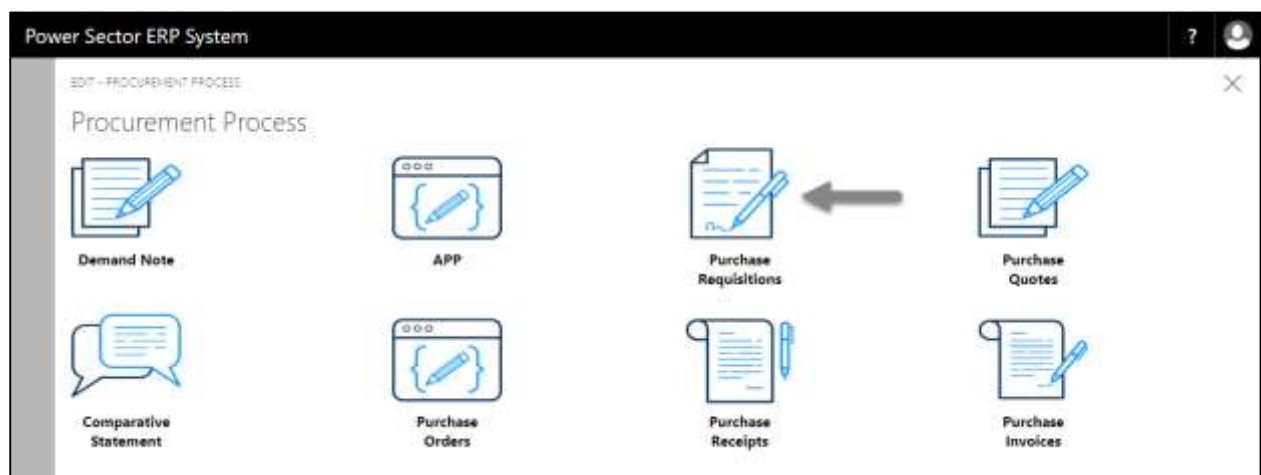
C. Choose the "Process Procurement" icon.



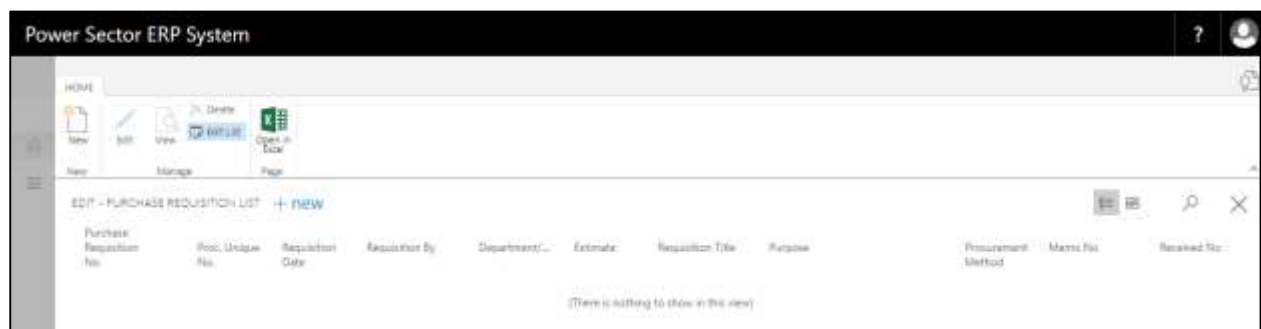
Process Procurement page will be appeared as bellow.



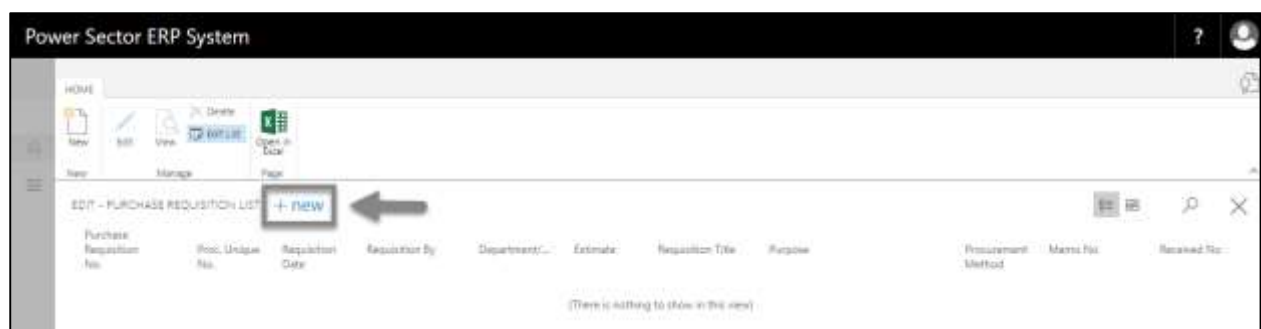
D. Choose the "**Purchase Requisitions**".



The following screen will be appeared.



E. Choose the "**NEW**" to create new Purchase requisition.



The following screen will be appeared.

The screenshot displays the 'Power Sector ERP System' interface. The main window is titled 'Purchase Requisition Card' and is divided into several sections. On the left, there is a sidebar with a 'General' tab selected. The main area contains a form with various fields for data entry. The fields are organized into two columns. The left column includes fields for 'Requisition Title', 'Proc. Unique No.', 'Requisition Date', 'Requisition By', 'Requisition User Details', 'APP Ref. No.', 'Estimate', 'Budget Details', and 'Purpose'. The right column includes fields for 'Procurement Method', 'Memo No.', 'D/F No.', 'D/F Date', 'Received No.', 'Received Date', 'Comments', and 'Status'. There are also several buttons and dropdown menus throughout the form, including a 'Save' button at the top left and a 'Clear' button at the bottom right.

F. Provide below information to process successfully.

1. Choose **Requisition Date** from calendar by clicking on button.
 - **Expiration Date: 7/7/2020**
2. Choose the **Requisition By** from the dropdown by clicking on button.
 - **Requisition By: 210011005**

Requisition User Details will be populated by the system.
3. Choose the **APP Ref. No.** from the dropdown by clicking on button.
 - **APP Ref. NO.: PAC102**

Quantity, price all details will be populated by the system.
4. Choose the **Estimated** from the dropdown by clicking on button.
 - **Estimated: Unbudgeted**
5. Provide **Memo No.**
 - **Memo No: Memo123**
6. Provide **Received No.**
 - **Received No.: Rec123**
7. Choose **Received Date** from calendar by clicking on button.
 - **Received Date: 7/5/2020**

Power Sector ERP System

NEW - PURCHASE REQUISITION CARD

Purchase Requisition Card

General

Requisition Title		Procurement Method	
Proc. Unique No.	PR00000012	Memo No.	Memo123
Requisition Date	7/5/2020	Dr/F No.	
Requisition By	210011005	Dr/F Date	
Requisition User Details	Md. Ali Haider	Received No.	Rec123
APP Ref. No.	PRC102	Received Date	7/5/2020
Estimate	Unbudgeted	Comments	
Budget Details		Status	Open
Purpose			

The screen will look like as below

Power Sector ERP System

EDIT - PURCHASE REQUISITION CARD

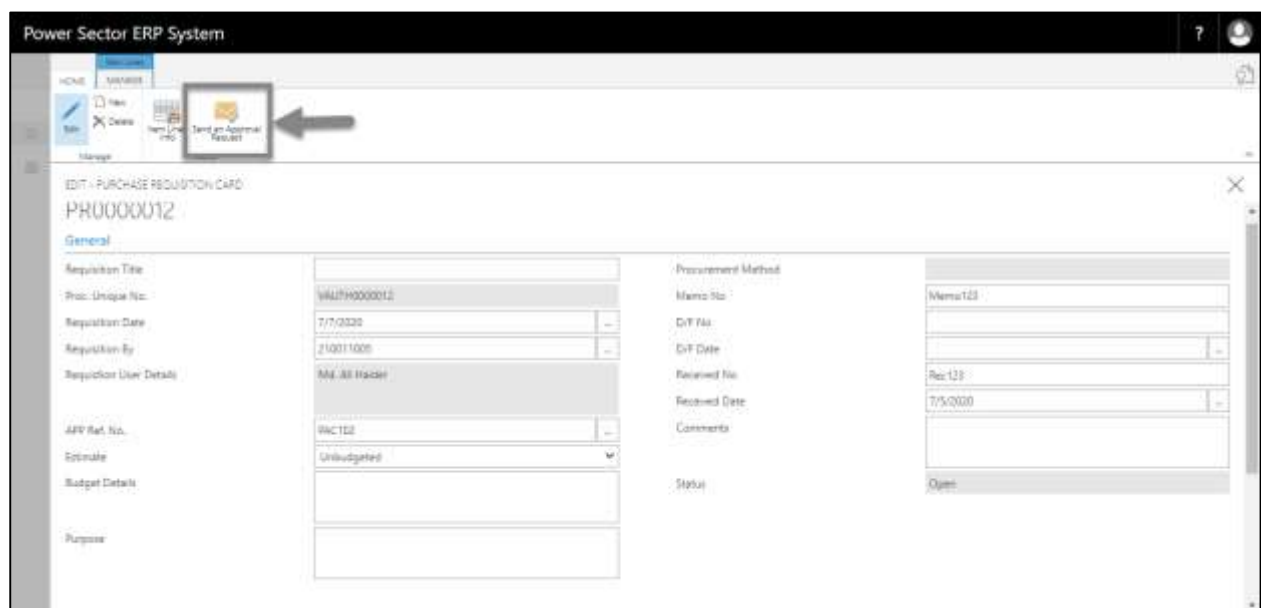
PR00000012

General

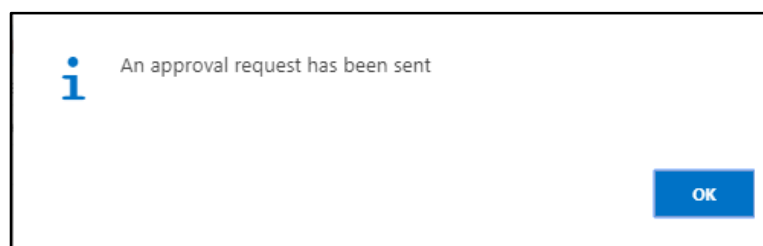
Requisition Title		Procurement Method	
Proc. Unique No.	PR00000012	Memo No.	Memo123
Requisition Date	7/7/2020	Dr/F No.	
Requisition By	210011005	Dr/F Date	
Requisition User Details	Md. Ali Haider	Received No.	Rec123
APP Ref. No.	PRC102	Received Date	7/5/2020
Estimate	Unbudgeted	Comments	
Budget Details		Status	Open
Purpose			

Item Lines						
Sub Package No.	Type	No.	Description	Unit Cost	Quantity	Unit of Measure
SLR002	Item	77M0000008	Lower bearing shell 52 L11.003	300.00	5.00	PCS
Sub-total						2,500.00
Overhead including VAT & Tax						529.00
Grand Total						3,029.00

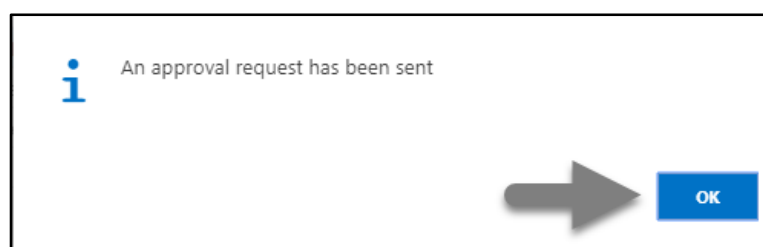
G. Choose the **Send Request for an Approval** icon.



The following pop up will be appeared.



H. Choose the **OK** icon to save and close.



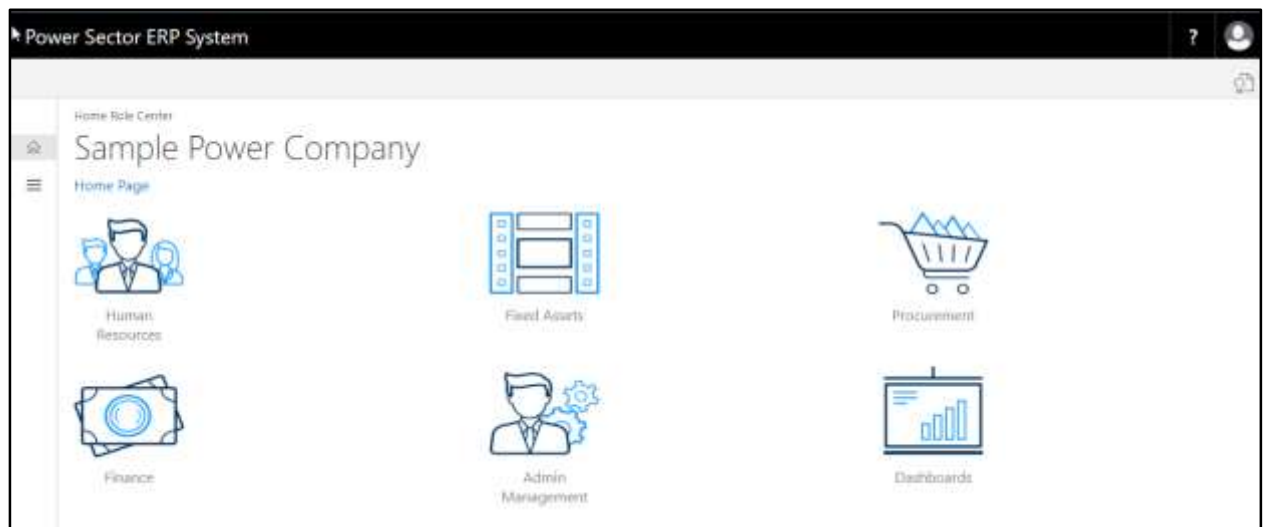
I. Click the "X" button to save and close.

PR-203.2 Approve or Reject Purchase Requisition

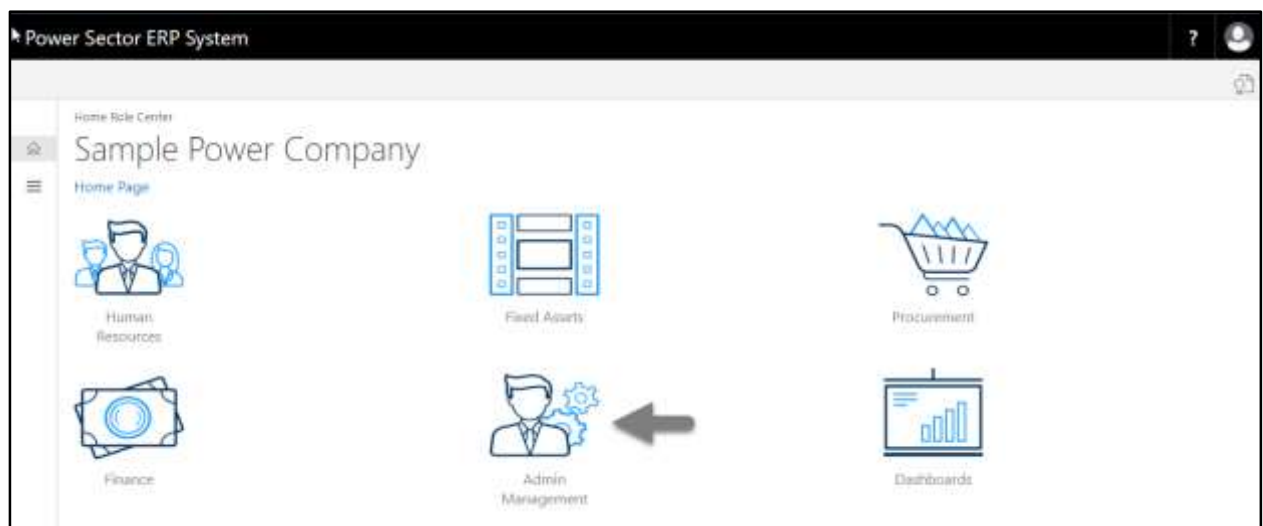
Approve or Reject Purchase Requisitions

To Approve/Reject initiated Purchase Requisition follow the steps below.

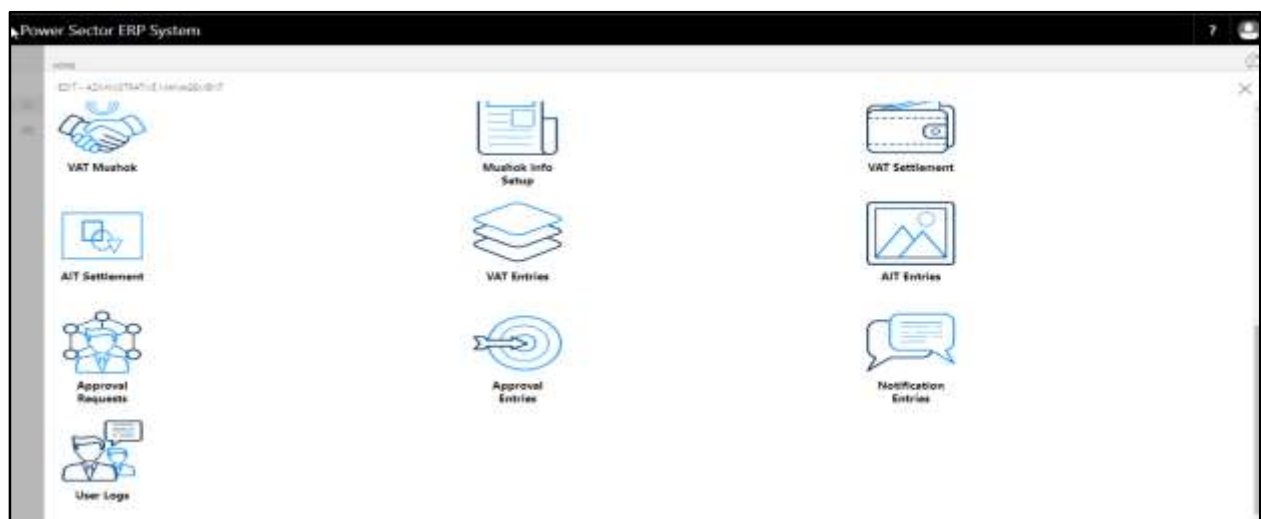
- A. Login with your respective **PR Admin credentials**. ERP Landing Page, as below, will be appeared on successful login.



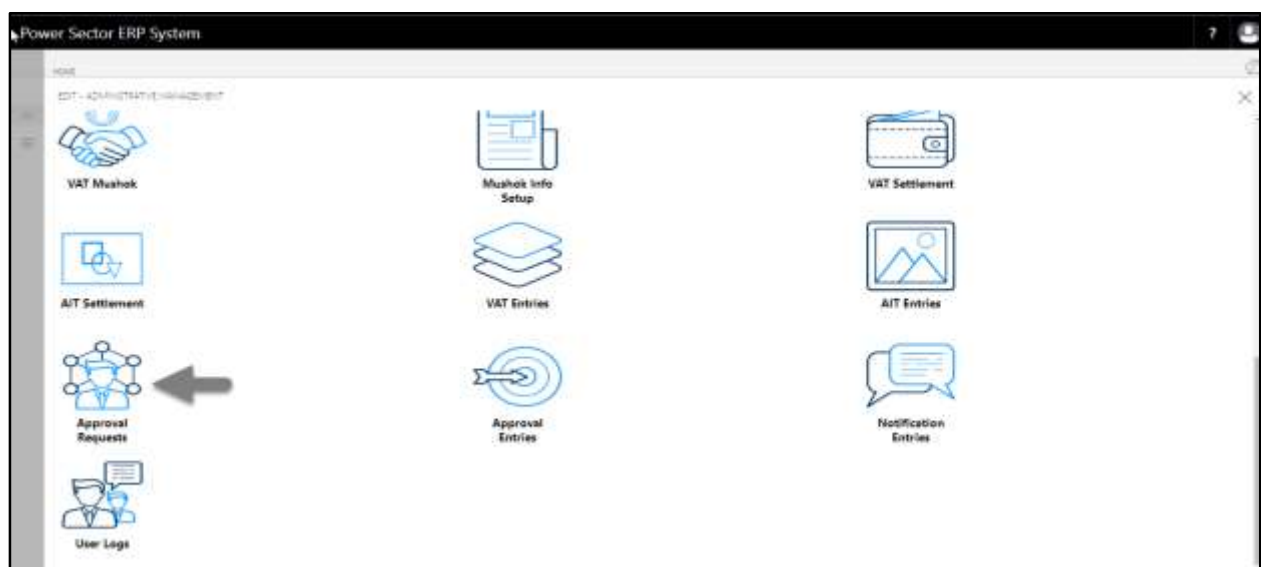
- B. Choose the **“Admin Management”** icon to open the administrative page.



The Following **Admin Management** page will be appeared.



C. Choose the **“Approval Request”** icon to process initiated approval requests.



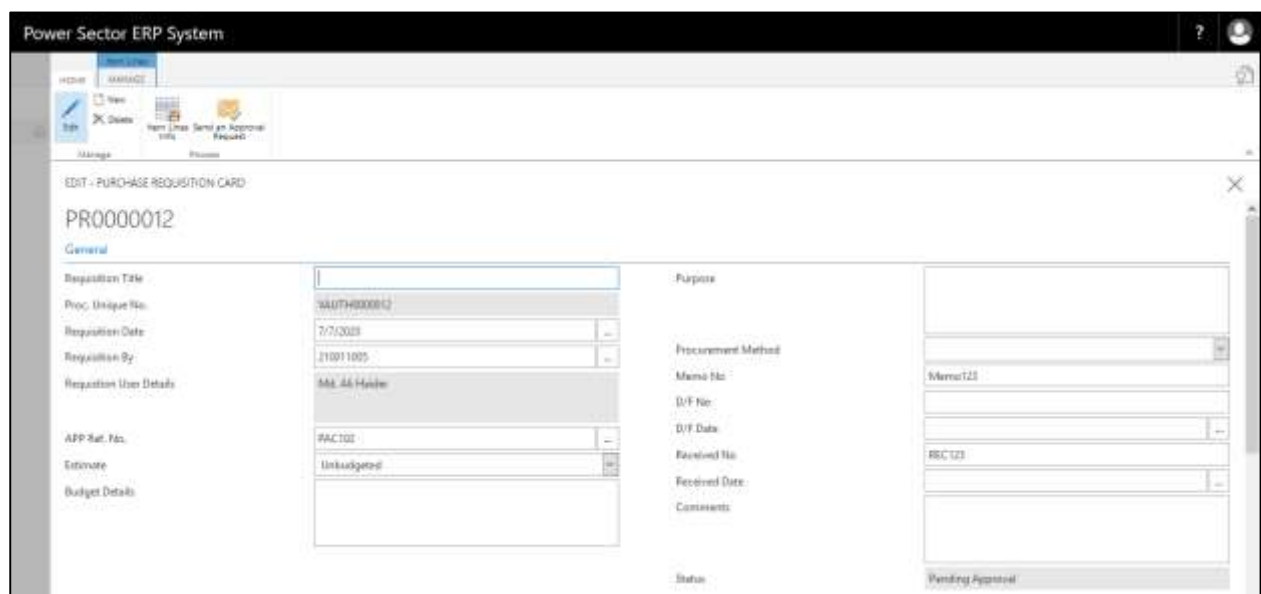
The following **Approval Request** page will be appeared.



D. Select the initiated records and choose the **“Open Record”** icon.




Detailed **Purchase Requisition** page will be appeared as below.



TIPS

You can choose initiate record by clicking on the line.

E. Select the  icon to back to the previous page.

Power Sector ERP System

EDIT - PURCHASE REQUISITION CARD

PR0000012

General

Requisition Title: [Empty Field]

Proc. Unique No.: 0A0TH0000012

Requisition Date: 7/7/2025

Requisition By: J10011005

Requisition User Details: Mkt. AA Header

APP-Rat. No.: #AC102

Estimate: Unbudgeted

Budget Details: [Empty Field]

Purpose: [Empty Field]

Procurement Method: [Empty Field]

Main No.: Memo123

D/F No.: [Empty Field]

D/F Date: [Empty Field]

Received No.: REC123

Received Date: [Empty Field]

Comments: [Empty Field]

Status: Pending Approval

The following **Request to Approve** page will be appeared.

Power Sector ERP System

VIEW - REQUESTS TO APPROVE

To Approve	Details	Comment	Sender ID	Due Date
Purchase Requisition Card PR0000012	Purchase Requisition Header PR0000012		PR_USER_SAMPLE	7/5/2025

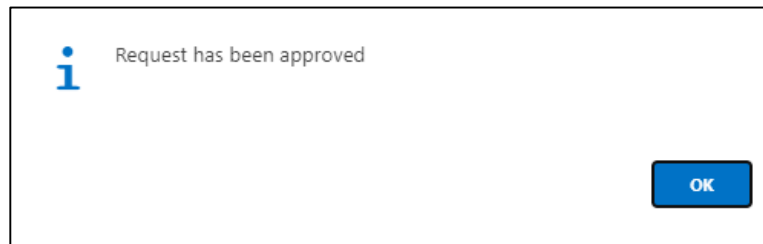
F. Choose the **"Approve"** icon to approve the initiated process or select **"Reject"** (besides "Approve") to reject.

Power Sector ERP System

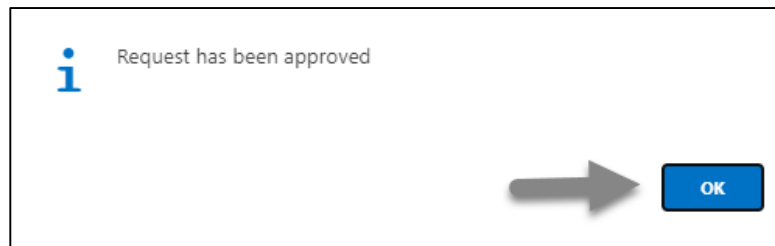
VIEW - REQUESTS TO APPROVE


To Approve	Details	Comment	Sender ID	Due Date
Purchase Requisition Card PR0000012	Purchase Requisition Header PR0000012		PR_USER_SAMPLE	7/5/2025

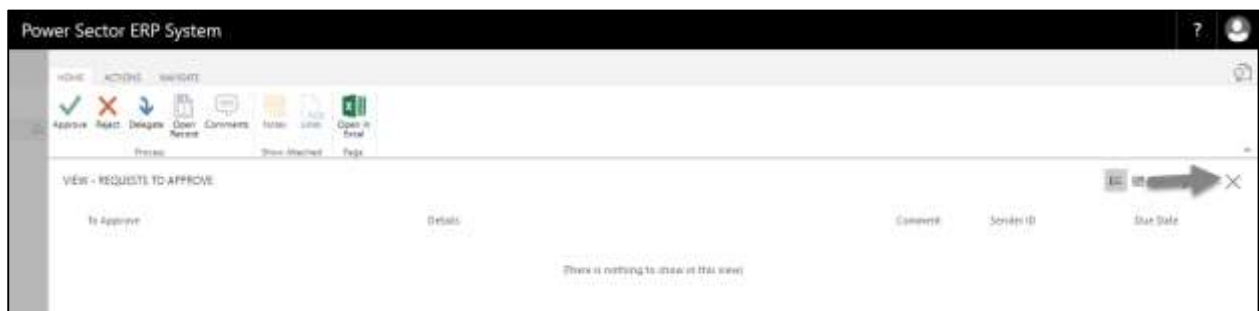
The following pop- up will be appeared.



G. Choose the **"OK"** icon to save and close.



H. Select the  icon to back to the previous page.



PR-204 How to: Make Purchase Quotes

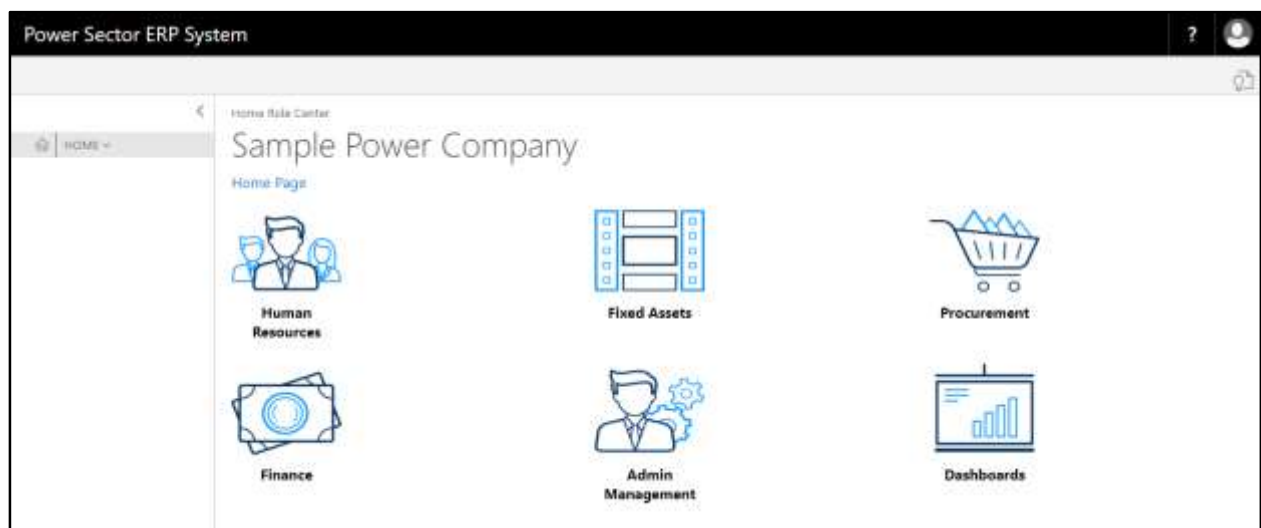
Introduction

This process demonstrates how to make a Purchase Quotes.

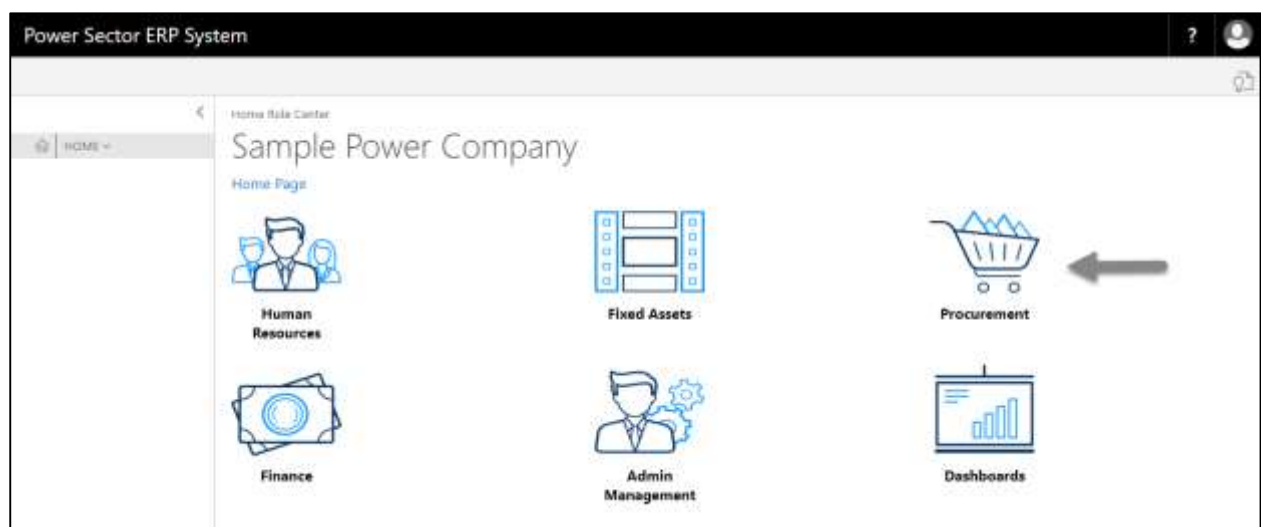
Make Purchase Quotes

To initiate, follow the steps below.

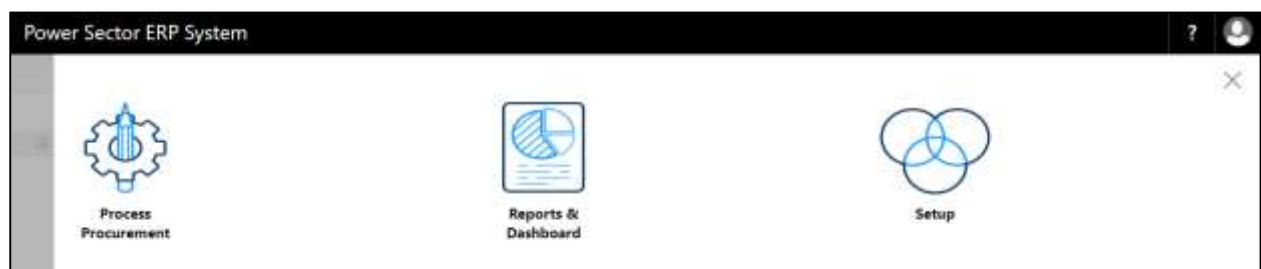
- A. Login with your respective **PR credentials**. ERP Landing Page, as below, will be appeared on successful login.



- B. Choose the "**Procurement**" Icon.



PR Landing page will be appeared as bellow.



C. Choose the "**Process Procurement**" icon.



Process Procurement page will be appeared as bellow.



D. Choose the **"Purchase Quotes"**.



The following screen will be appeared.



E. Choose the **"NEW"** to create new Purchase Quotes.



The following screen will be appeared.

Power Sector ERP System

HOME ?

Item Lines Info New Manage Process Request Approval

NEW - PURCHASE QUOTE

Purchase Quote

General

Requisition No. [Field] Comments [Field]

Unique Procurement ID [Field] Status [Open]

Vendor Name [Field]

Quote Date [Field]

Item Lines

Type	Item Name	Quantity	Unit of Measure	Unit Cost Excl. VAT & AIT	Amount Excl. VAT & AIT
(There is nothing to show in this view)					

F. Provide below information to process successfully.

1. Choose **Requisition No.** from the dropdown by clicking on button.
 - **Requisition No.:** PR000012
2. Choose the **Vendor Name** from the dropdown by clicking on button.
 - **Vendor Name:** Uttora Motors

Power Sector ERP System

HOME ?

Item Lines Info New Manage Process Request Approval

NEW - PURCHASE QUOTE - PQ0000012 - UTTORA MOTORS

PQ0000012 - Uttora Motors

General

Requisition No. 1 PR0000012 Comments [Field]

Unique Procurement ID WU/TH0000012

Vendor Name 2 Uttora Motors Status [Open]

Quote Date 7/6/2020

Item Lines

Type	Item Name	Quantity	Unit of Measure	Unit Cost Excl. VAT & AIT	Amount Excl. VAT & AIT
------	-----------	----------	-----------------	---------------------------	------------------------

The screen will look like as below

Power Sector ERP System

NEW - PURCHASE QUOTE - PQ000012 - Uttora Motors

PQ0000012 · Uttora Motors

General

Requestion No.: PQ000012
 Unique Procurement ID: SAUTH0000012
 Vendor Name: Uttora Motors
 Quote Date: 7/6/2020

Comments:
 Status: Open

Item Lines

Type	Item Name	Quantity	Unit of Measure	Unit Cost Incl. VAT & AIT	Amount Incl. VAT & AIT
Item	Lower bearing shell 02111.000	5		500.00	2,500.00

Total Incl. VAT and AIT: 2,500.00
 Total VAT: 375.00
 Total AIT: 0.00
 Total Incl. VAT and AIT: 2,875.00

G. Choose the **"Item Line Info"** to change item information.

Power Sector ERP System

NEW - PURCHASE QUOTE - PQ000012 - Uttora Motors

PQ0000012 · Uttora Motors

General

Requestion No.: PQ000012
 Unique Procurement ID: SAUTH0000012
 Vendor Name: Uttora Motors
 Quote Date: 7/6/2020

Comments:
 Status: Open

Item Lines

Type	Item Name	Quantity	Unit of Measure	Unit Cost Incl. VAT & AIT	Amount Incl. VAT & AIT
Item	Lower bearing shell 02111.000	5		500.00	2,500.00

The screen will look like as below

Power Sector ERP System

VIEW - PURCHASE QUOTE PAGE

Type	Item	Description	Unit of Measure Code	Quantity	Unit Cost Incl. VAT & AIT	Total Cost Incl. VAT & AIT	VAT %	VAT Amount	AIT %	AIT Amount
Item	ITM0000000	Lower bearing shell 02111.000	PCS	5	500.00	2,500.00	15	375.00	0	0.00

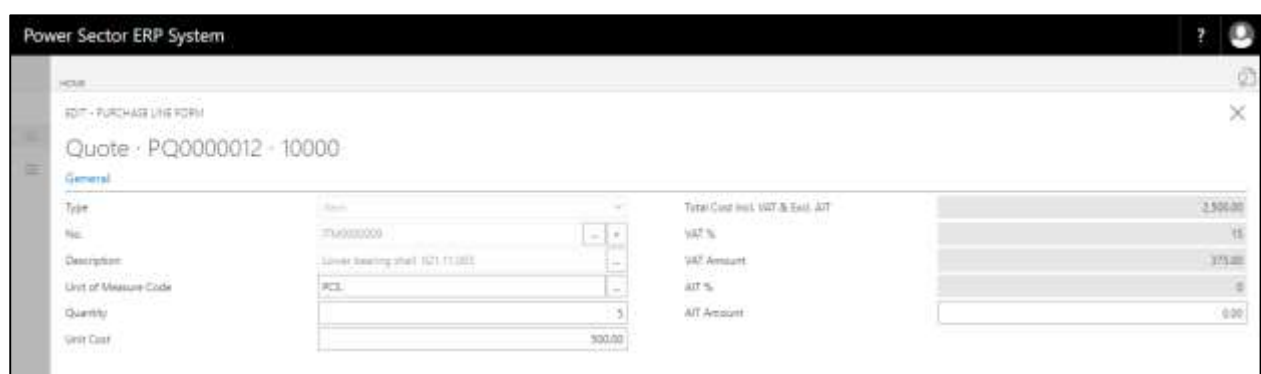
H. Choose the **"Edit"** to go purchase line form.



The screenshot shows the 'VIEW - PURCHASE LINE PAGE' in the Power Sector ERP System. It displays a table with columns: Type, No., Description, Unit of Measure Code, Quantity, Unit Cost Incl. VAT & Excl. AIT, Total Cost Incl. VAT & Excl. AIT, VAT %, VAT Amount, AIT %, and AIT Amount. A single line item is visible with the following details:

Type	No.	Description	Unit of Measure Code	Quantity	Unit Cost Incl. VAT & Excl. AIT	Total Cost Incl. VAT & Excl. AIT	VAT %	VAT Amount	AIT %	AIT Amount
Item	17140000008	Lower bearing shell 521.11.000	PCS	5	500.00	2,500.00	15	375.00	0	0.00

The screen will look like as below



The screenshot shows the 'EDIT - PURCHASE LINE FORM' in the Power Sector ERP System. It displays the 'General' tab for a purchase line with the following details:

Field	Value	Field	Value
Type	Item	Total Cost Incl. VAT & Excl. AIT	2,500.00
No.	17140000008	VAT %	15
Description	Lower bearing shell 521.11.000	VAT Amount	375.00
Unit of Measure Code	PCS	AIT %	0
Quantity	5	AIT Amount	0.00
Unit Cost	500.00		

I. Change below information to process as per your choice.

1. Provide **Unit Cost**.

- **Unit Cost:** 450.00

Also, can change measure unit and quantity as per your choice.



The screenshot shows the 'EDIT - PURCHASE LINE FORM' in the Power Sector ERP System with updated values for Unit Cost, Quantity, and Unit of Measure Code:

Field	Value	Field	Value
Type	Item	Total Cost Incl. VAT & Excl. AIT	2,500.00
No.	17140000008	VAT %	15
Description	Lower bearing shell 521.11.000	VAT Amount	375.00
Unit of Measure Code	PCS	AIT %	0
Quantity	5	AIT Amount	0.00
Unit Cost	450.00		

J. Click the **"X"** button to save and close.

Power Sector ERP System

HOME

EDIT - PURCHASE LINE ADMIN

Quote: PQ0000012 - 10000

General

Type: Item

Item: ITW00000009

Description: Lower bearing shell 021.11.305

Unit of Measure Code: PCS

Quantity: 5

Unit Cost: 440.00

Total Cost Inc. VAT & Exc. AIT: 2,500.00

VAT %: 15

VAT Amount: 375.00

AIT %: 0

AIT Amount: 0.00

The screen will look like as below

Power Sector ERP System

HOME

VIEW - PURCHASE LINE PAGE

Type	Item	Description	Unit of Measure Code	Quantity	Unit Cost Inc. VAT & Exc. AIT	Total Cost Inc. VAT & Exc. AIT	VAT %	VAT Amount	AIT %	AIT Amount
Item	ITW00000009	Lower bearing shell 021.11.305	PCS	5	440.00	2,500.00	15	375.00	0	0.00

K. Click the “” button to save and close.

Power Sector ERP System

HOME

VIEW - PURCHASE LINE PAGE

Type	Item	Description	Unit of Measure Code	Quantity	Unit Cost Inc. VAT & Exc. AIT	Total Cost Inc. VAT & Exc. AIT	VAT %	VAT Amount	AIT %	AIT Amount
Item	ITW00000009	Lower bearing shell 021.11.305	PCS	5	440.00	2,500.00	15	375.00	0	0.00

The screen will look like as below

Power Sector ERP System

NEW - PURCHASE QUOTE - PQ000012 - UTTORA MOTORS

PQ000012 - Uttora Motors

General

Requisition No.: PQ000012

Unique Procurement ID: MAUTH0000012

Vendor Name: Uttora Motors

Quote Date: 28/02/20

Comments:

Status: Open

Item Lines


Type	Item Name	Quantity	Unit of Measure	Unit Cost Excl. VAT & AIT	Amount Excl. VAT & AIT
Item	Lower bearing shell 021.11.000	5		443.60	2,200.00

Total Excl. VAT and AIT: 2,200.00

Total VAT: 330.00

Total AIT: 0.00

Total Incl. VAT and AIT: 2,538.00

L. Click the “” button to save and close.

Power Sector ERP System

EDIT - PURCHASE QUOTE - PQ000012 - UTTORA MOTORS

PQ000012 - Uttora Motors

General

Requisition No.: PQ000012

Unique Procurement ID: MAUTH0000012

Vendor Name: Uttora Motors

Quote Date: 06-07-20

Comments:

Status: Open

Item Lines

Type	Item Name	Quantity	Unit of Measure	Unit Cost Excl. VAT & AIT	Amount Excl. VAT & AIT
Item	Lower bearing shell 021.11.000	5		443.60	2,200.00

Total Excl. VAT and AIT: 2,200.00

Total VAT: 330.00

Total AIT: 0.00

Total Incl. VAT and AIT: 2,538.00

PR-205 How to: Make Comparative Statement

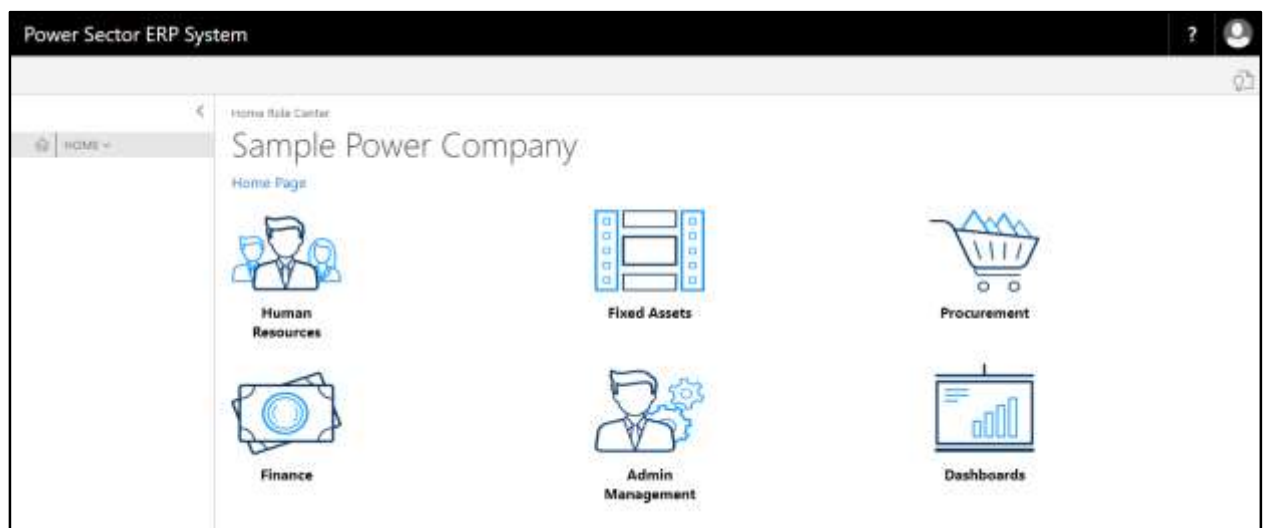
Introduction

This process demonstrates how to make a Comparative Statement.

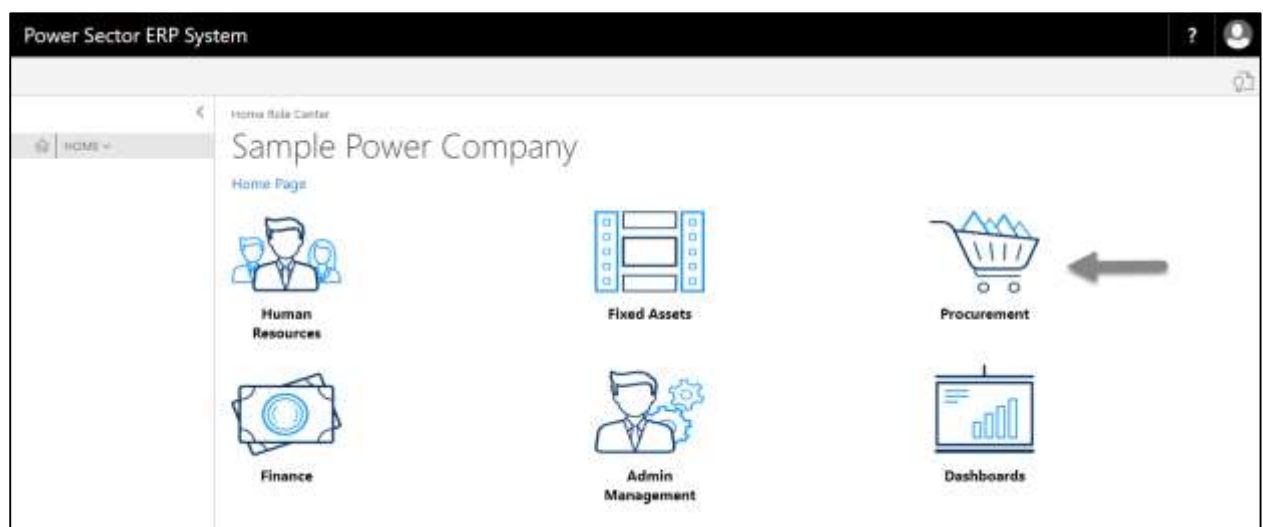
Make Comparative Statement

To initiate, follow the steps below.

- A. Login with your respective **PR credentials**. ERP Landing Page, as below, will be appeared on successful login.



- B. Choose the "**Procurement**" Icon.



PR Landing page will be appeared as bellow.



C. Choose the "Process Procurement" icon.



Process Procurement page will be appeared as bellow.



D. Choose the "**Comparative Statement**".



The following screen will be appeared.



PR-205.1 Make CMPR With TOT AMT Comparative Statement

Make CMPR With TOT AMT Comparative Statement

This process demonstrates how to make CMPR with TOT AMT comparative statement.


A. Choose the "**AMPR With TOT AMT**".



The following screen will be appeared.

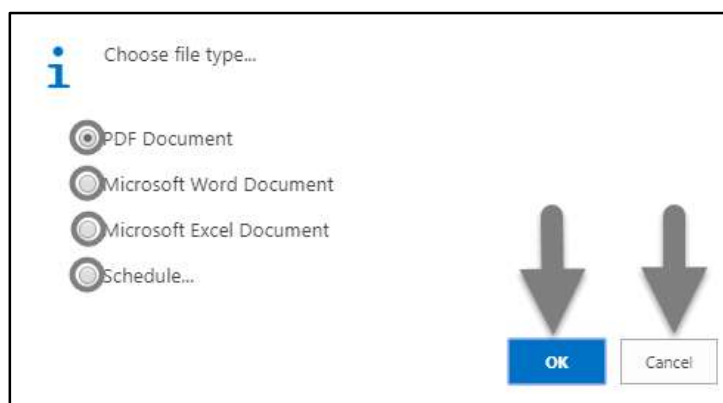


B. Provide below information to process successfully.


1. Choose **Requisition No.** from the dropdown by clicking on  button.

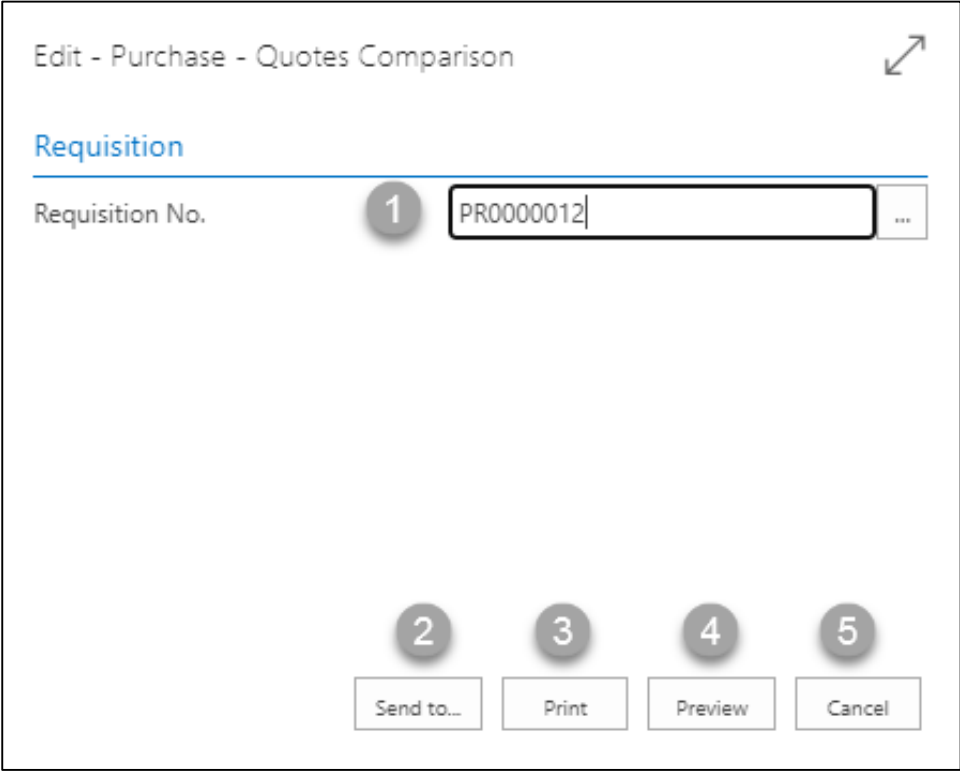
- **Requisition No.:** PR000012

2. Choose **Send to** take it on PDF, Excel And Word



- Click "OK" after select an option.
- Click "Cancel" to cancel this page

3. Choose **Print** to print the document.
4. Choose **Preview** to preview the document.
5. Choose **Cancel** to close this page.
6. Click on  button to make it full page.



The following Report will be appeared.

C. Report Action Bar will be appeared on the report as below initially -



Actions are chronologically organized as below

1. Previous Page
2. Next Page
3. Zoom Out
4. Zoom In
5. Fit page to window width

6. Fit full page in window
7. Select Text
8. Pan the document
9. Download to file
10. Print

PR-205.2 Make Compare Item Wise Comparative Statement

This process demonstrates how to Item Wise comparative statement.

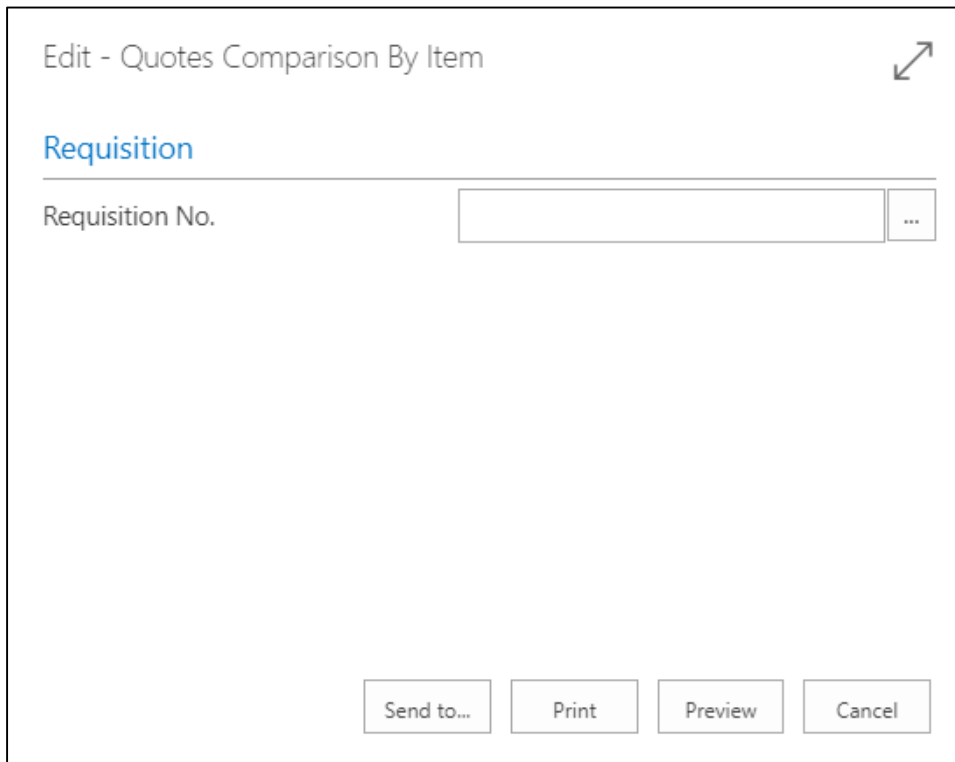
Make Compare Item Wise Comparative Statement

To initiate, follow the steps below.

- A. Choose the "**Comparative Item Wise**".

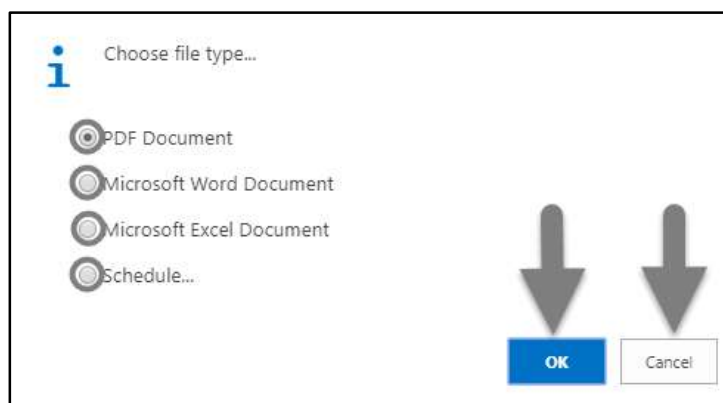


The following screen will be appeared.





B. Provide below information to process successfully.

1. Choose **Requisition No.** from the dropdown by clicking on button.
 - **Requisition No.:** PR000012
2. Choose **Send to** take it on PDF, Excel And Word



- Click "OK" after select an option.
- Click "Cancel" to cancel this page

3. Choose **Print** to print the document.
4. Choose **Preview** to preview the document.
5. Choose **Cancel** to close this page.
6. Click on  button to make it full page.

Edit - Quotes Comparison By Item


Requisition

Requisition No.

1

...

2
3
4
5


Send to...


Print

Preview

Cancel

The following Report will be appeared.





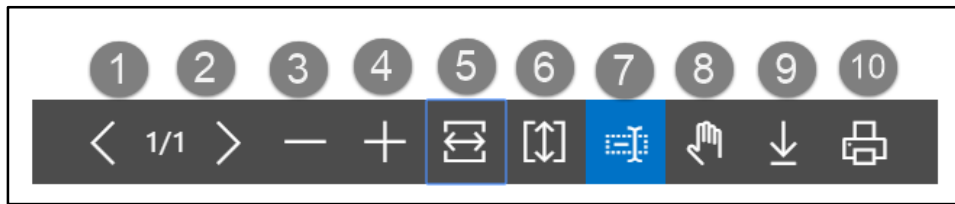
Date: 7/6/2020

Sample Power Company

Comparative Statement of Quotes by Item in Purchase Requisition No -

Item	Vendor Name	Quotation No	QTY.	Unit of Measure	Unit Cost	VAT %	AIT %	Total Amount Excluding VAT & AIT	Total Amount Including VAT & AIT	Comment
Lower bearing shell 021.11.003	Uttara Motors	PQ000001 2	5		440	15	0	2,200	2,530	
	Matador Stationary	PQ000001 3	5		500	15	0	2,500	2,875	

C. Report Action Bar will be appeared on the report as below initially -



Actions are chronologically organized as below

1. Previous Page
2. Next Page
3. Zoom Out
4. Zoom In
5. Fit page to window width
6. Fit full page in window
7. Select Text
8. Pan the document
9. Download to file
10. Print

PR-206 How to: Make Purchase Order

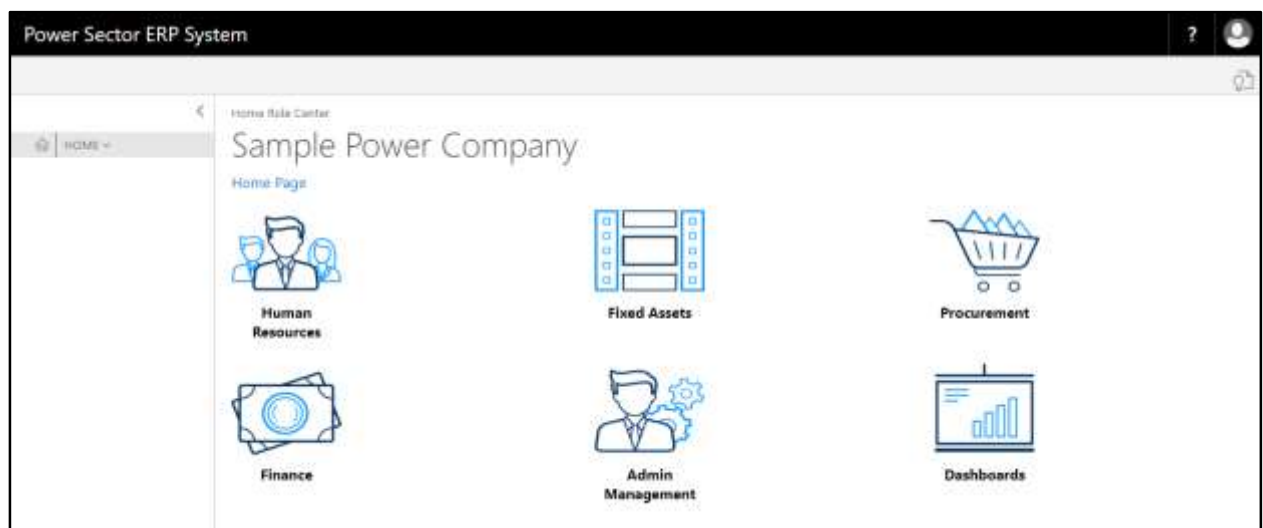
Introduction

This process demonstrates how to make a Purchase Order.

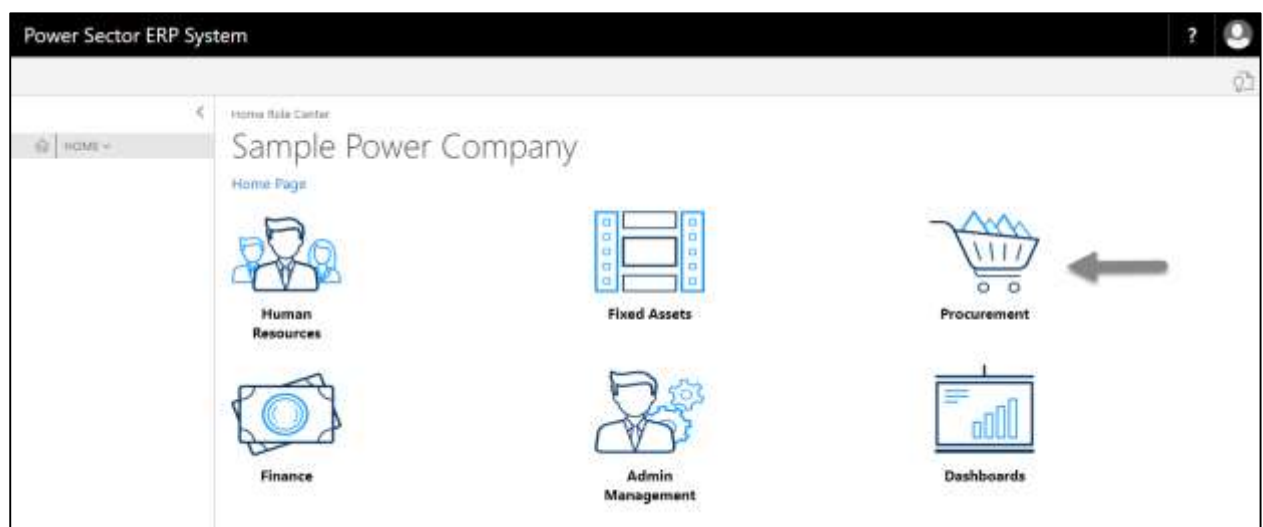
Make Purchase Order

To initiate, follow the steps below.

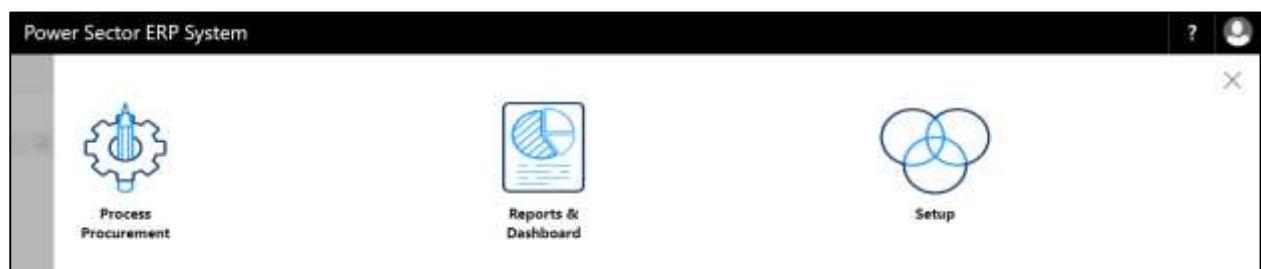
- A. Login with your respective **PR credentials**. ERP Landing Page, as below, will be appeared on successful login.



- B. Choose the "**Procurement**" Icon.



PR Landing page will be appeared as bellow.



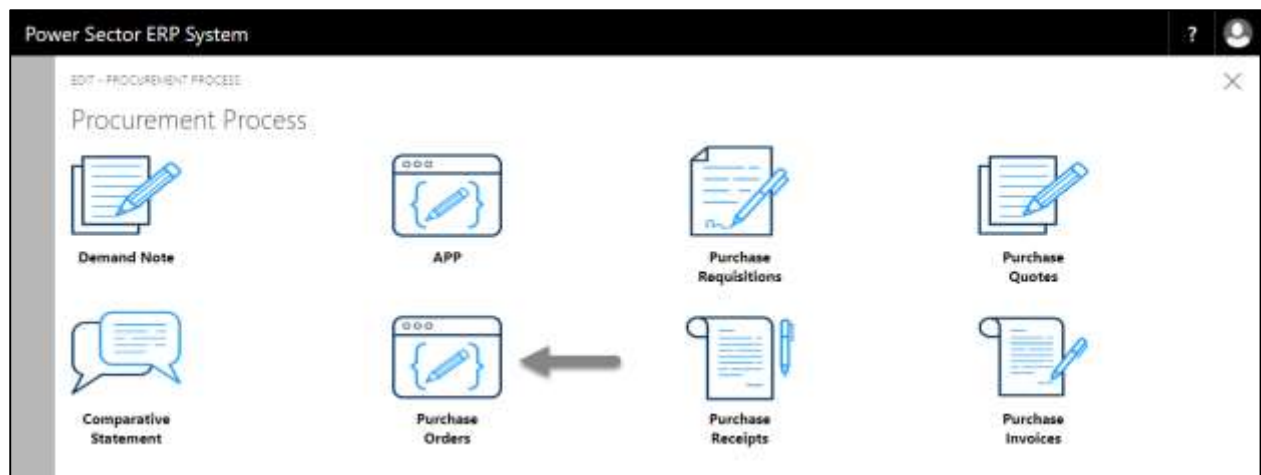
C. Choose the "**Process Procurement**" icon.



Process Procurement page will be appeared as bellow.



D. Choose the "**Purchase Order**".



The following screen will be appeared.

The screenshot shows the 'VIEW - PURCHASE ORDERS' screen in the Power Sector ERP System. It includes a toolbar with icons for New, Edit, View, Delete, Print, Notes, Links, and Open in Excel. Below the toolbar is a table with the following data:

Purchase Order No.	Unique Procurement ID	Quote No.	Vendor Name	Order Date	Amount including VAT & A/T
PO0000005	...		Rayan Mesinari	7/6/2020	0.00
PO0000006	...		Ultara Motors	7/6/2020	0.00

E. Choose the **"New"** to create purchase order.

The screenshot shows the 'VIEW - PURCHASE ORDERS' screen in the Power Sector ERP System. The 'New' button in the toolbar is highlighted with a red box and a red arrow pointing to it. The table below the toolbar contains the same data as the previous screenshot:

Purchase Order No.	Unique Procurement ID	Quote No.	Vendor Name	Order Date	Amount including VAT & A/T
PO0000005	...		Rayan Mesinari	7/6/2020	0.00
PO0000006	...		Ultara Motors	7/6/2020	0.00

The following screen will be appeared.

Power Sector ERP System

HOME ACTIONS NAVIGATE MANAGE MANAGE

SRP New Delete Generate Order Transfer Info Print Notes Links Forward Back

Manage Process Post Show Attached Page

NEW - PURCHASE ORDER

Purchase Order

General

Purchase Order No. Requisition No. Unique Procurement ID Vendor Name Order Date Order Placed By Order Place To Delivery Place To Memo Number Job Description Order Description

Invoice Details

COST CENTER CODE External parties Code

F. Provide below information to process successfully.

1. Choose **Requisition No.** from the dropdown by clicking on button.

- **Requisition No.:** PR000012

Purchase Order No, Unique Procurement ID, and Order Date this are automatically populated by the system.

2. Choose **Vendor Name** from the dropdown by clicking on button.

- **Vendor Name:** Uttora Motors

3. Choose **Order Place By** from the dropdown by clicking on button.

- **Order Place By:** Md. Shamim Ahamed

4. Provide **Order Place To.**

- **Order Place To:** Md. Parvez Hasan

5. Provide **Delivery Place To.**

- **Delivery Place To:** Nikunja, Khilkhet

6. Provide **Memo Number.**

- **Memo Number:** M123

7. Provide **Cost Center Code.**

- **Cost Center Code:** 001

8. Provide **Shortcut Dimension 2 Code**.

- **Shortcut Dimension 2 Code:** VEN01

Power Sector ERP System

NEW - PURCHASE ORDER - PO0000008 - UTTORA MOTORS

PO0000008 - Uttora Motors

General

Purchase Order No.	PO0000008	Delivery Place To	Nijunja, Khalkhet
Requisition No.	PR0000012	Memo Number	M123
Unique Procurement ID	VALTH0000012	Job Description	
Vendor Name	Uttora Motors	Order Description	
Order Date	7/6/2020		
Order Placed By	Md. Shamim Ahmed		
Order Place To	Md. Parvez Hasan		

Invoice Details

Cost center Code	
Shortcut Dimension 2 Code	

The screen will look like as below.

Power Sector ERP System

NEW - PURCHASE ORDER - PO0000008 - UTTORA MOTORS

PO0000008 - Uttora Motors

General

Purchase Order No.	PO0000008	Delivery Place To	Nijunja, Khalkhet
Requisition No.	PR0000012	Memo Number	M123
Unique Procurement ID	VALTH0000012	Job Description	
Vendor Name	Uttora Motors	Order Description	
Order Date	7/6/2020		
Order Placed By	Md. Shamim Ahmed		
Order Place To	Md. Parvez Hasan		

Invoice Details

Cost center Code	
Shortcut Dimension 2 Code	

Item Lines

Type	Description	Unit of Measure Code	Quantity Ordered	Unit Cost Excl. VAT & AIT	Line Amount Excluding VAT & AIT	Quantity Received	Quantity Invoiced
Item	Lower bearing shaft 021.11.000	PCS.	2	500.00	2.500.00		
Total Excl. VAT and AIT							2.500.00
Total VAT							375.00
Total AIT							0.00
Total Incl. VAT and AIT							2.875.00

Invoice Details

Cost center Code	001	
Shortcut Dimension 2 Code	VEN01	

G. Choose the **"Generate Order"** to create purchase order.

The screenshot shows the 'Power Sector ERP System' interface. At the top, there are tabs for 'HOME', 'ACTIONS', 'MANAGE', and 'REPORTS'. Under the 'ACTIONS' tab, the 'Generate Order' button is highlighted with a red box and an arrow. Below the tabs, there is a search bar and a list of items. The main area displays a form for 'EDIT - PURCHASE ORDER - PO0000008 - UTTORA MOTORS'. The form includes fields for 'Requestion No.', 'Unique Procurement ID', 'Vendor Name', 'Order Date', 'Order Placed By', 'Order Place To', and 'Delivery Place To'. The 'Generate Order' button is located at the top right of the form.

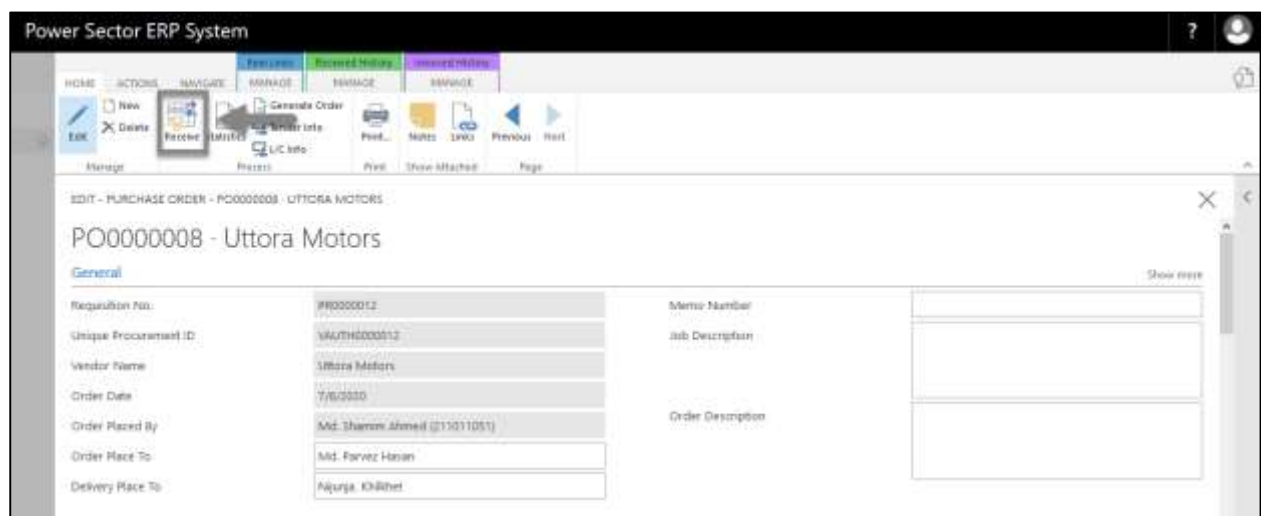
The following pop up will be appeared.

A confirmation dialog box with a blue question mark icon. The text inside reads: "If once order generated this document can not be editable further. Are you sure to generate?". At the bottom right, there are two buttons: "Yes" and "No".

H. Choose the **YES** icon to save and close.

The same confirmation dialog box as above, but with a large grey arrow pointing to the "Yes" button.

I. Choose the **"Receive"** after receiving order.



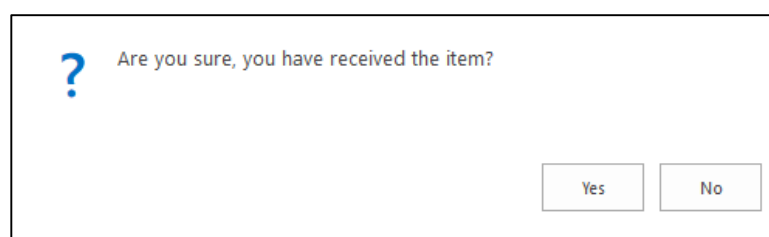
The following screen will be appeared.



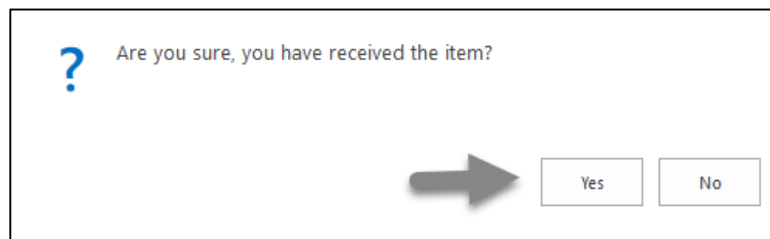
J. Click the **"X"** button to save and close.



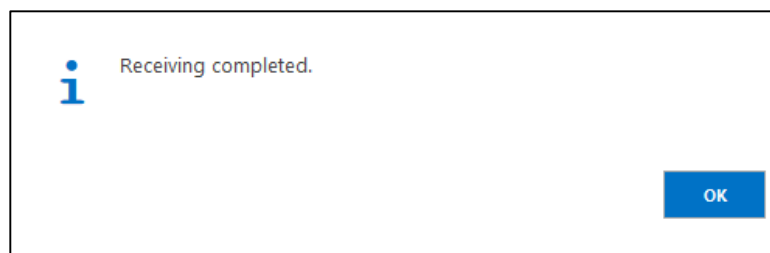
The following pop up will be appeared.



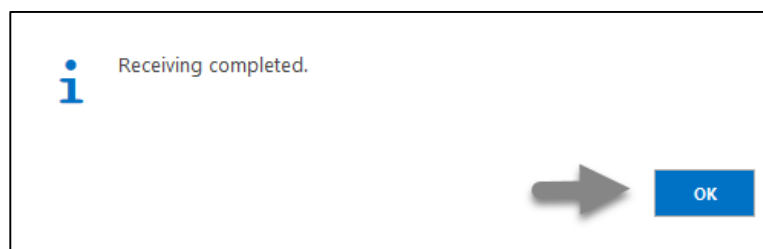
K. Choose the **YES** icon to save and close.



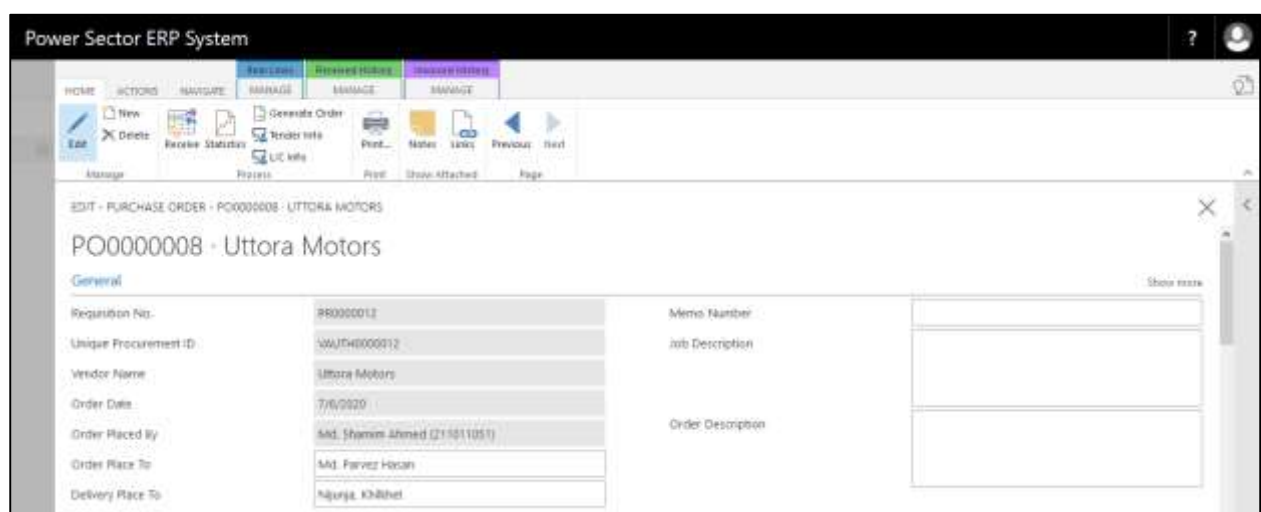
The following Screen will be appeared.



L. Choose the **OK** icon.



The following Screen will be appeared.



M. Click the “” button to save and close.

PR-207 How to: Make Purchase Receipts

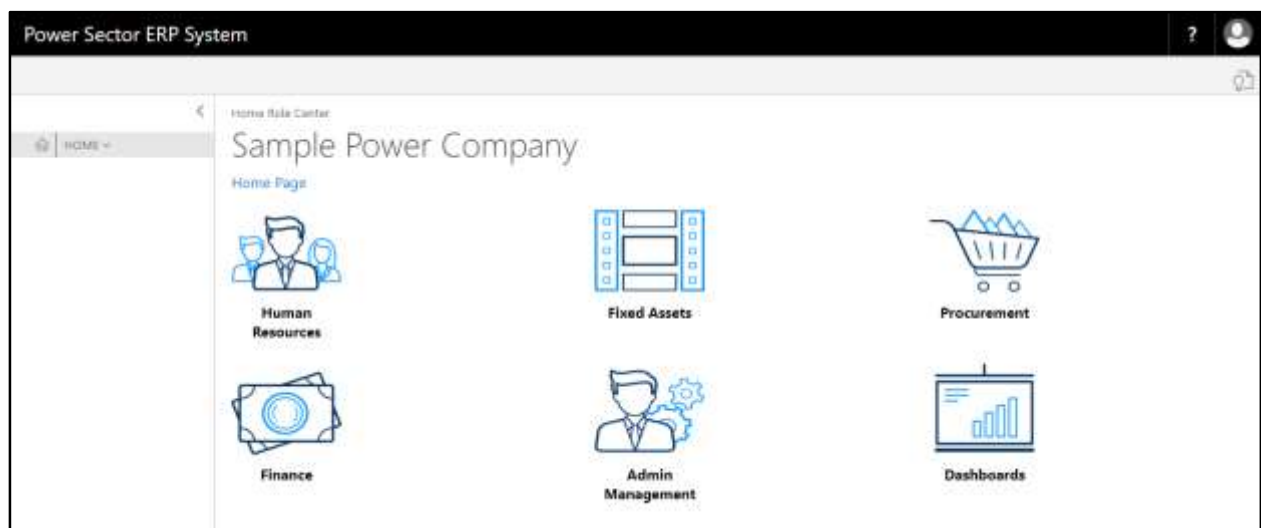
Introduction

This process demonstrates how to make a Purchase Receipts.

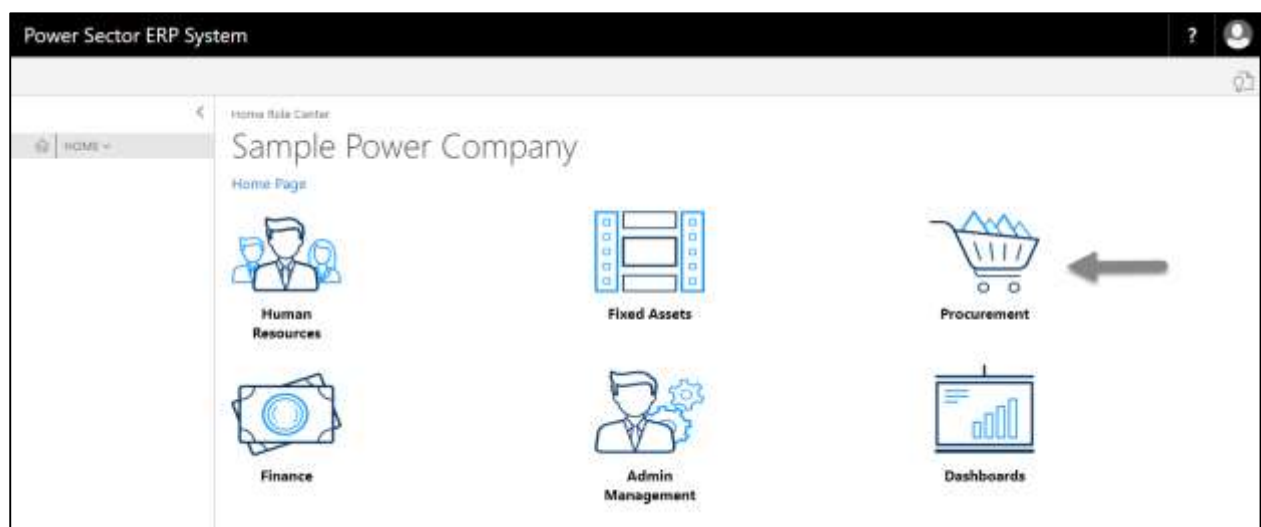
Make Purchase Receipts

To initiate, follow the steps below.

- A. Login with your respective **PR credentials**. ERP Landing Page, as below, will be appeared on successful login.



- B. Choose the "**Procurement**" Icon.



PR Landing page will be appeared as bellow.



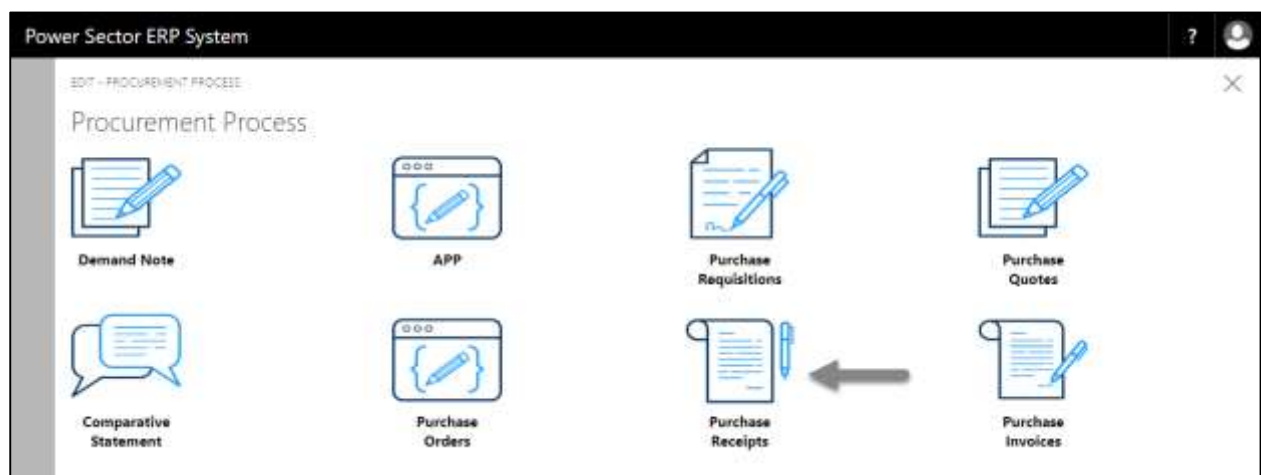
C. Choose the "Process Procurement" icon.



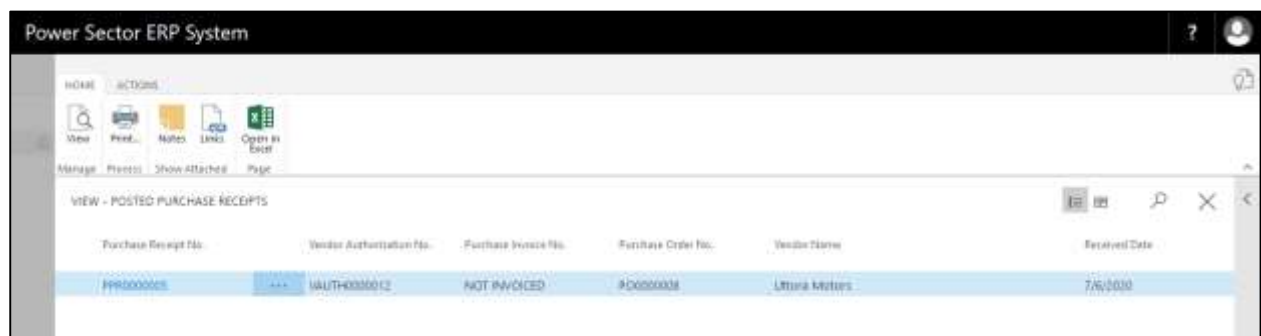
Process Procurement page will be appeared as bellow.



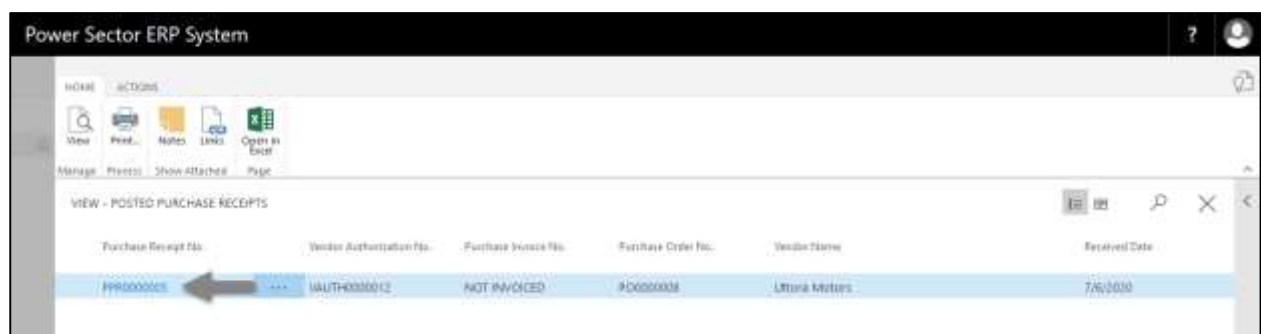
D. Choose the **"Purchase Receipts"**.



The following screen will be appeared.



E. Choose the **"Purchase Receipts No."** to view purchase receipts details.



The following screen will be appeared.

The screenshot displays the 'Power Sector ERP System' interface. The top navigation bar includes 'HOME', 'ACTIONS', 'NAVIGATE', 'MANAGE', 'FUNCTIONS', and 'LINE'. Below this, there are icons for 'View', 'Create Vendor Invoice', 'Print...', 'Materials', 'Notes', and 'Links'. The main content area is titled 'VIEW - POSTED PURCHASE RECEIPT - PPR0000005 - UTTORA MOTORS'. The 'General' tab is active, showing fields for 'Purchase Receipt No.' (PPR0000005), 'Purchase Invoice No.' (blank), 'Unique Procurement ID' (VALTH0000012), 'Vendor No.' (VEND0000012), 'Purchase Quote No.' (blank), 'Vendor Name' (Uttora Motors), 'Purchase Order No.' (PO0000008), and 'Received Date' (08-07-20). The 'Lines' section shows a table with columns: Type, Description, Quantity, Unit of Measure Code, and Quantity Invoiced. The table contains one row: 'Item' with description 'Lower bearing shell 021.11.008', quantity '1', and unit of measure 'PCS'.

Type	Description	Quantity	Unit of Measure Code	Quantity Invoiced
Item	Lower bearing shell 021.11.008	1	PCS	

F. Choose the **"Create Voucher Invoice"** to invoice voucher.

This screenshot is identical to the previous one, showing the 'VIEW - POSTED PURCHASE RECEIPT' screen for PPR0000005 - Uttora Motors. The 'Create Vendor Invoice' button in the top navigation bar is highlighted with a red box, and a red arrow points to it from the text 'Choose the "Create Voucher Invoice" to invoice voucher.'

The following screen will be appeared.

Power Sector ERP System

HOME ACTIONS NAVIGATE MANAGE FUNCTIONS USER

Delete Edit Print... Statistics Notes Links

Manage Process Show Attached

EDIT - INVOICE ENTRY - PPR0000005 - UTTORA MOTORS

PPR0000005 - Uttora Motors

General

Vendor Invoice Serial No. [] Purchase Order No. P00000006

Purchase Receipt No. PPR0000005 Vendor No. VEND000013

Unique Procurement ID VALUTH0000012 Vendor Name Uttora Motors

Purchase Quote No. [] Received Date 06-07-20

Lines

Type	Description	Quantity	Unit of Measure Code	Quantity Invoiced
Item	Lower bearing shell 021.11.003	3	PCS	3

G. Provide below information to process successfully.

1. Provide **Vendor Invoice Serial Number**.

- **Vendor Invoice Serial Number: INV123**

Power Sector ERP System

HOME ACTIONS NAVIGATE MANAGE FUNCTIONS USER

Delete Edit Print... Statistics Notes Links

Manage Process Show Attached

EDIT - INVOICE ENTRY - PPR0000005 - UTTORA MOTORS

PPR0000005 - Uttora Motors

General

Vendor Invoice Serial No. 1 INV123 Purchase Order No. P00000006

Purchase Receipt No. PPR0000005 Vendor No. VEND000013

Unique Procurement ID VALUTH0000012 Vendor Name Uttora Motors

Purchase Quote No. [] Received Date 06-07-20

Lines

Type	Description	Quantity	Unit of Measure Code	Quantity Invoiced
Item	Lower bearing shell 021.11.003	3	PCS	3

The following screen will be appeared.

Power Sector ERP System

EDIT - INVOICE ENTRY - PPR000005 - UTTORA MOTORS

PPR0000005 - Uttora Motors

General

Vendor Invoice Serial No	INV123	Purchase Order No.	PO0000008
Purchase Receipt No.	PPR0000005	Vendor No.	YEND000013
Unique Procurement ID	VMJTH0000012	Vendor Name	Uttara Motors
Purchase Quote No.		Received Date	08-07-20

Lines

Type	Description	Quantity	Unit of Measure Code	Quantity Invoiced
Item	Lower Bearing shell Q21.11.008	1	PCS	

H. Click the “” button to save and close.

Power Sector ERP System

EDIT - INVOICE ENTRY - PPR000005 - UTTORA MOTORS

PPR0000005 - Uttora Motors

General

Vendor Invoice Serial No	INV123	Purchase Order No.	PO0000008
Purchase Receipt No.	PPR0000005	Vendor No.	YEND000013
Unique Procurement ID	VMJTH0000012	Vendor Name	Uttara Motors
Purchase Quote No.		Received Date	08-07-20

Lines

Type	Description	Quantity	Unit of Measure Code	Quantity Invoiced
Item	Lower Bearing shell Q21.11.008	1	PCS	

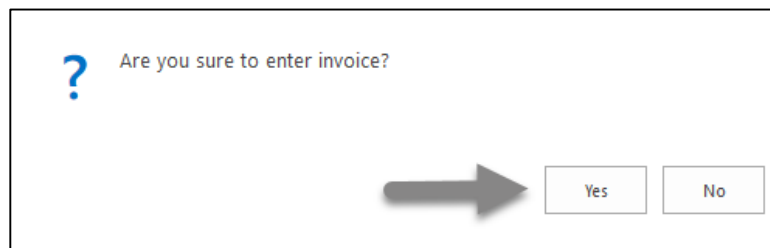
The following pop up will be appeared.

?

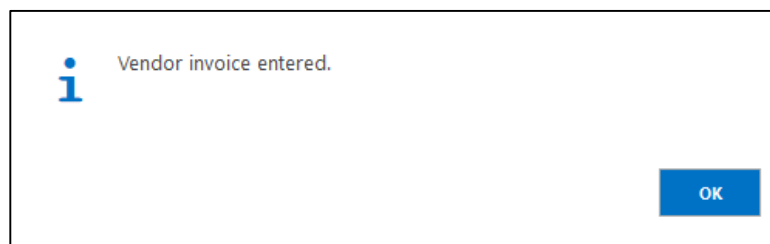
Are you sure to enter invoice?

Yes No

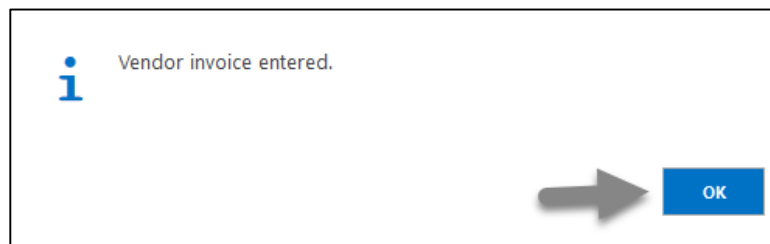
I. Choose the **YES** icon to save and close.



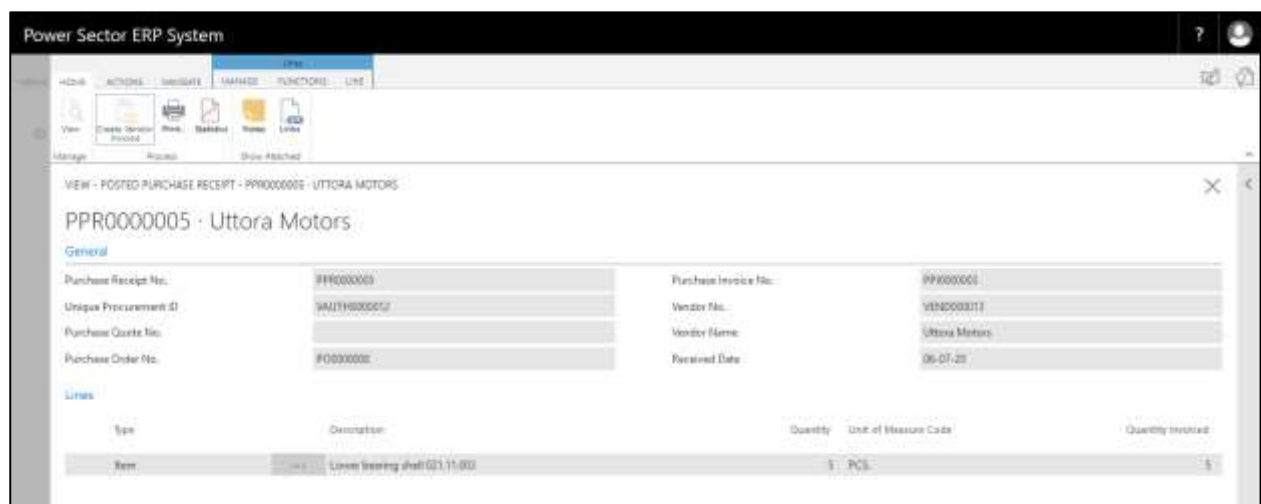
The following pop up will be appeared.



J. Choose the **OK** icon.



The following screen will be appeared.



K. Choose the **"Print"** to Print purchase Receipts.

The screenshot shows the 'Power Sector ERP System' interface. The top navigation bar includes 'HOME', 'ACTIONS', 'NAVIGATE', 'MANAGE', 'FUNCTIONS', and 'LINE'. The 'ACTIONS' menu is open, showing options like 'View', 'Create Vendor Invoice', 'Print', 'History', and 'Links'. The 'Print' button is highlighted. Below the navigation bar, the main content area displays 'VIEW - POSTED PURCHASE RECEIPT - PPR0000005 - UTTORA MOTORS'. The receipt details are as follows:

General	
Purchase Receipt No.	PPR0000005
Unique Procurement ID	VALTH0000012
Purchase Quote No.	
Purchase Order No.	PO0000008
Purchase Invoice No.	
Vendor No.	VEND0000018
Vendor Name	Uttora Motors
Received Date	08-07-20

Below the receipt details, there is a table for 'Lines' with columns: Type, Description, Quantity, Unit of Measure Code, and Quantity Invoiced. The table contains one row:

Type	Description	Quantity	Unit of Measure Code	Quantity Invoiced
Item	Lower bearing shell 021.11.008	1	PCS	

The following screen will be appeared.

The screenshot shows the 'Edit - Purchase - Receipt' screen. The title bar indicates 'Edit - Purchase - Receipt'. Below the title bar, there is a section for 'Options' with the following fields:

- No. of Copies:
- Show Internal Information: ☐
- Log Interaction: ☐
- Show Correction Lines: ☐

Below the 'Options' section, there is a section for 'Posted Purchase Receipt' with the following fields:

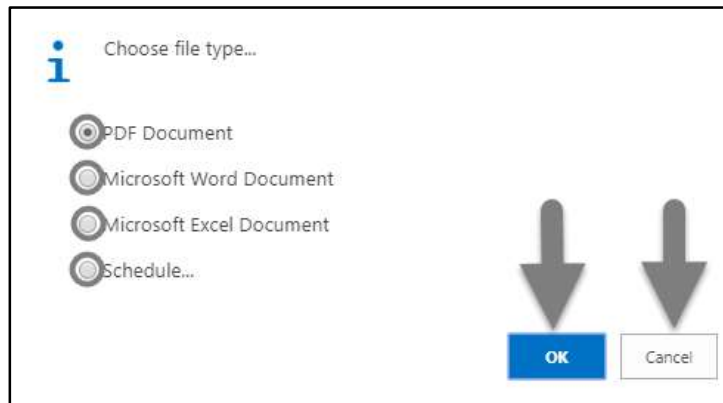
Show results:


- Where: is:
- And: is:
- And: is:
- And: is:

At the bottom of the screen, there are four buttons: 'Send to...', 'Print', 'Preview', and 'Cancel'.

L. Provide below information to process successfully.

1. Provide **No. of Copies**.
 - **No. of Copies: 1**
2. Choose **Send to** take it on PDF, Excel And Word



- Click "OK" after select an option.
 - Click "Cancel" to cancel this page
3. Choose **Print** to print the document.
 4. Choose **Preview** to preview the document.
 5. Choose **Cancel** to close this page.
 6. Click on  button to make it full page.

Edit - Purchase - Receipt

Options

1

No. of Copies

1

Show Internal Information

☐

Log Interaction

☐

Show Correction Lines

☐

Posted Purchase Receipt

Show results:

Where:

No.

is:

PPR0000005

And:

Buy-from Vendor No.

is:

And:

No. Printed

is:

And:

Order No.

is:

2

3

4

5

Send to...

Print

Preview

Cancel

The following Receipt will be appeared.

Purchase - Receipt

PPR0000005

Vendor Authorization No.

VAUTH0000012

Vendor No.

VEND000013

Purchase Quote No.

Vendor Name

Uttora Motors

Purchase Order No.

PO0000008

Received Date

06-07-2020

Purchase Invoice No.

Department

Vendor Invoice Serial

Item No.	Description	QTY.	Unit of Measure	Unit Cost	Amount Exc. VAT & AIT	VAT %	AIT %	Amount Inc. VAT & AIT
ITM0000009	Lower bearing shell 021.11.003	5	PCS.	500	2500	15	0	2875.00
								2875.00

PR-208 How to: Make Purchase Invoice

Introduction

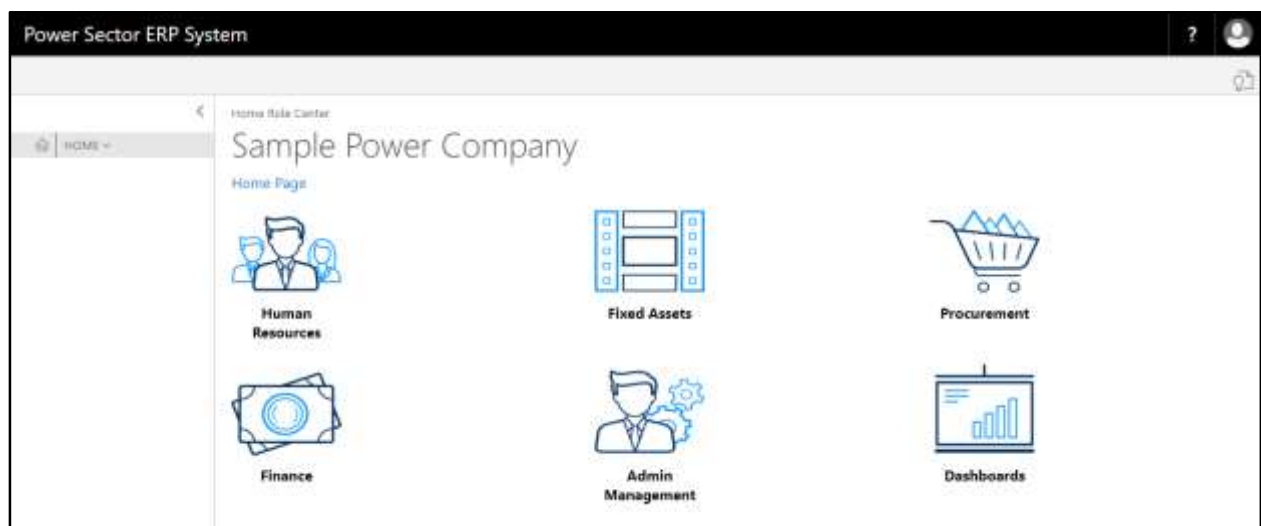
This process demonstrates how to make a Purchase Invoice.

PR-208.1 Make Purchase Invoice for Approval

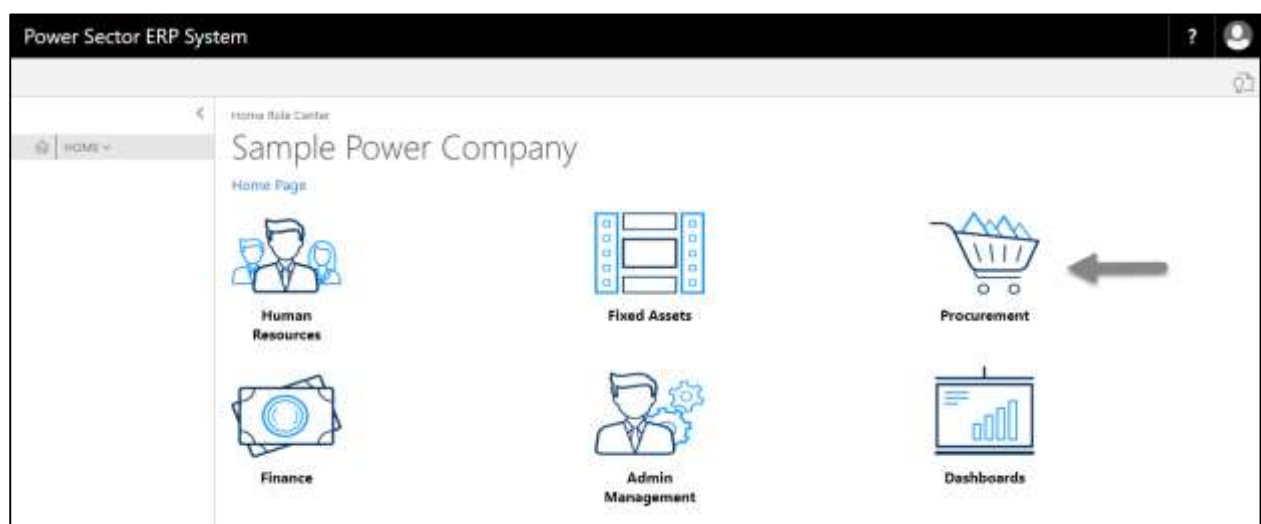
Make Purchase Invoice for Approval

To initiate, follow the steps below.

- A. Login with your respective **Finance User credentials**. ERP Landing Page, as below, will be appeared on successful login.



- B. Choose the "**Procurement**" Icon.



PR Landing page will be appeared as bellow.



C. Choose the "Process Procurement" icon.



Process Procurement page will be appeared as bellow.



D. Choose the **"Purchase Invoices"**.



The following screen will be appeared.

The screenshot shows the 'VIEW - POSTED PURCHASE INVOICES' screen. It displays a table with the following data:

Purchase Invoice No.	Vendor Invoice Serial	Purchase Receipt No.	Vendor Name	Amount	Amount including VAT & Tax	Remaining Amount	Closed
PP000000	INV123	PP000000	Utrava Motors	2,900.00	2,875.00	2,900.00	No

E. Choose the **"Purchase Invoice No."** to view purchase receipts details.

The screenshot shows the same 'VIEW - POSTED PURCHASE INVOICES' screen as before. A grey arrow points to the 'Purchase Invoice No.' column header, indicating the selection of this column to view purchase receipts details.

Purchase Invoice No.	Vendor Invoice Serial	Purchase Receipt No.	Vendor Name	Amount	Amount including VAT & Tax	Remaining Amount	Closed
PP000000	INV123	PP000000	Utrava Motors	2,900.00	2,875.00	2,900.00	No

The following screen will be appeared.

Power Sector ERP System

HOME ACTIONS SUBORDS MANAGE LINE MANAGE

Delete Edit Print Statistics Notes Links

Manage Process Show Attached

EDIT - POSTED PURCHASE INVOICE - PPI0000003 - UTTORA MOTORS

PPI0000003 - Uttora Motors

General

Vendor Invoice Serial: INV123 Vendor Name: Uttora Motors

Purchase Receipt No.: PPR0000005 Closed: No

Unique Procurement ID: VALUTH0000012 Department:

Vendor No.: VEND0000113 Status: Open

Item Lines

Type	Description	Quantity	Unit of Measure Code	Unit Cost Excl. VAT & A/T	Line Amount Excl. VAT & A/T
Rest	Lower bearing shell 321.11.020	5	PCS	300.00	2,500.00
Total Excl. VAT and A/T					2,500.00
Total VAT					375.00
Total A/T					0.00
Total Incl. VAT and A/T					2,875.00

Payment History

Posting Date	Document No.	Amount
		0.00

Invoice Payment Details

Payment Method Code: Amount to pay: 2,500.00

Instrument No.: Check issue Date:

Bank Account: VAT Challan No.:

F. Provide below information to process successfully.

1. Provide **Payment Method Code** from the dropdown by clicking on button.

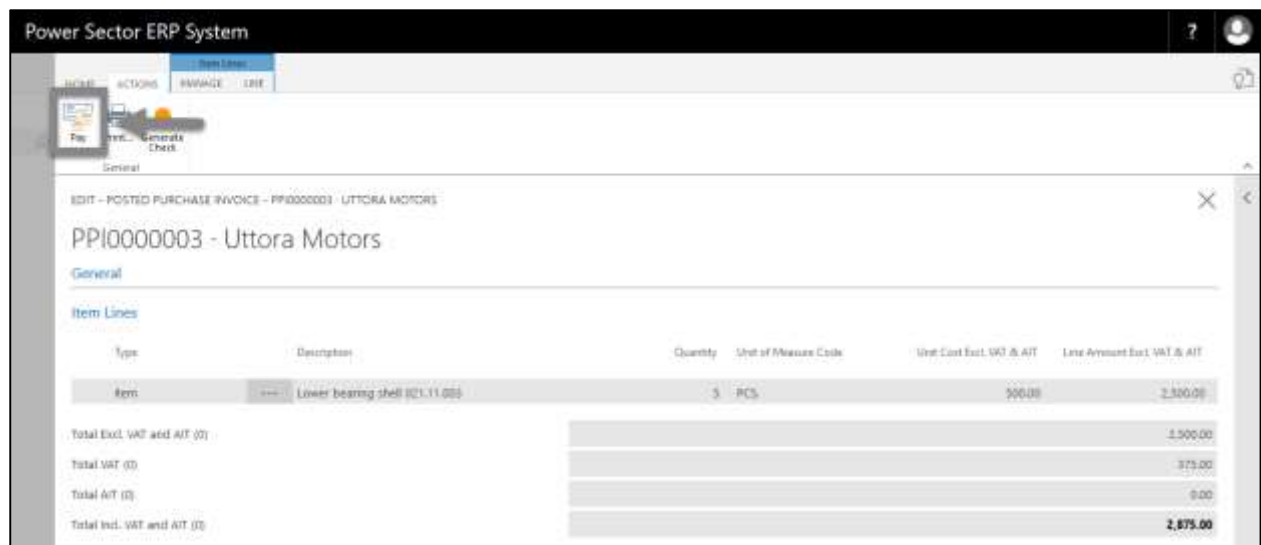
- **Provide Method Code:** Cash

The screenshot displays the 'Power Sector ERP System' interface. The top navigation bar includes 'HOME', 'ACTIONS', 'NAVIGATE', 'MANAGE', 'LINE', and 'MANAGE'. The 'ACTIONS' tab is active, showing icons for 'Delete', 'Edit', 'Print...', 'Statistics', 'Notes', and 'Links'. Below the navigation bar, the main content area is titled 'EDIT - POSTED PURCHASE INVOICE - PPI0000003 - UTTORA MOTORS'. The 'Payment History' tab is selected, showing a table with columns 'Posting Date', 'Document No.', and 'Amount'. The table contains one row with a value of '0.00'. Below the table, the 'Invoice Payment Details' section is visible, showing fields for 'Payment Method Code' (CASH), 'Amount to pay' (2,500.00), 'Instrument No.', 'Check Issue Date', 'Bank Account', and 'VAT Challan No.'.

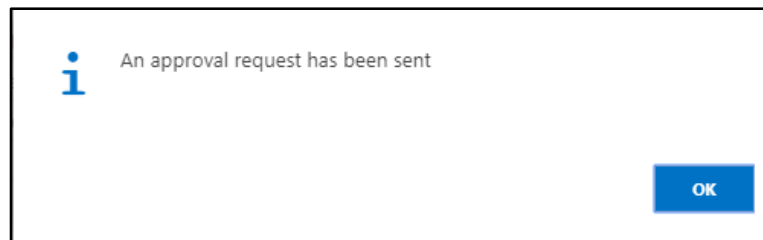
The following screen will be appeared.

This screenshot is identical to the one above, showing the 'Power Sector ERP System' interface with the 'Payment History' tab selected. It displays the same navigation bar, main content area with the invoice details, and the 'Invoice Payment Details' section.

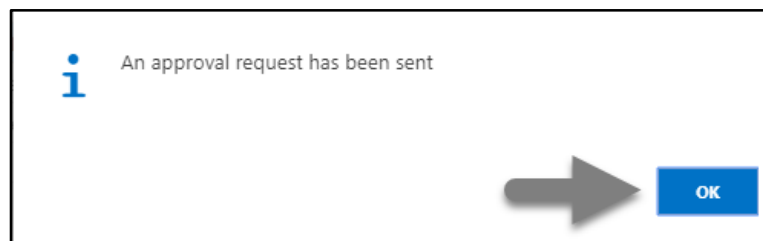
G. Choose the **"Action"** tab and Click **"Pay"** to pay invoice amount,



The following pop up will be appeared.



H. Choose the **OK** icon to save and close.

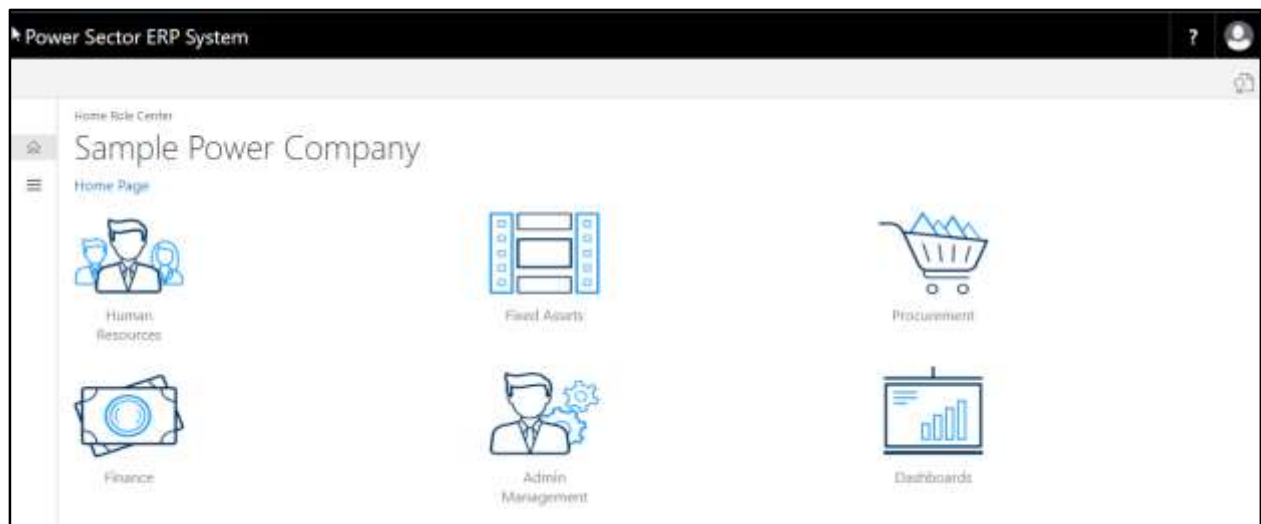


PR-208.2 Approve or Reject Purchase Invoices

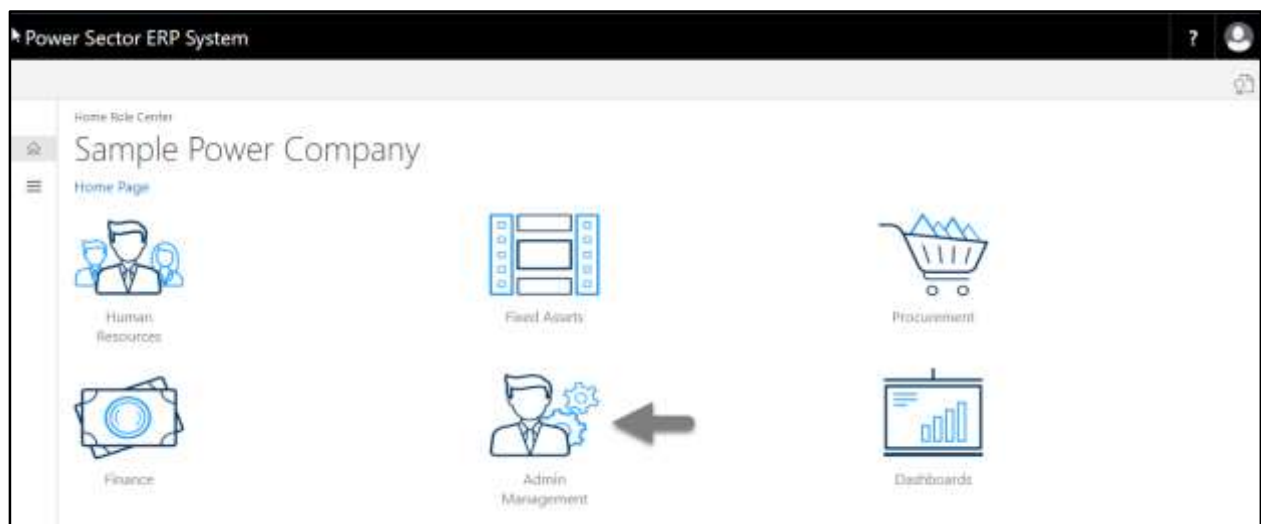
Approve or Reject Purchase Invoices

To Approve/Reject initiated Purchase Invoices follow the steps below.

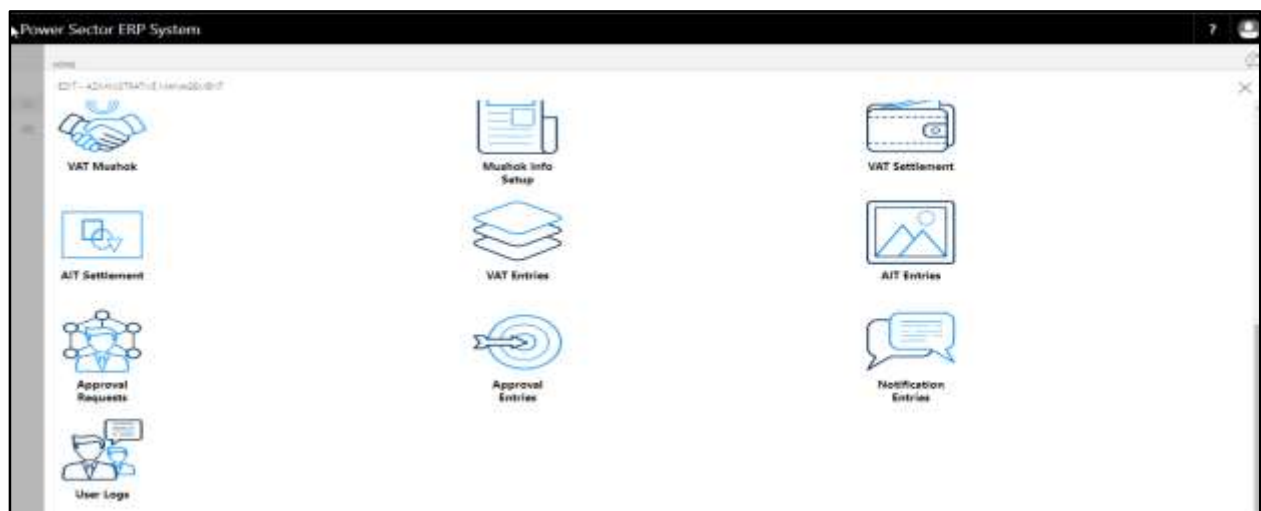
- A. Login with your respective **Finance Admin credentials**. ERP Landing Page, as below, will be appeared on successful login.



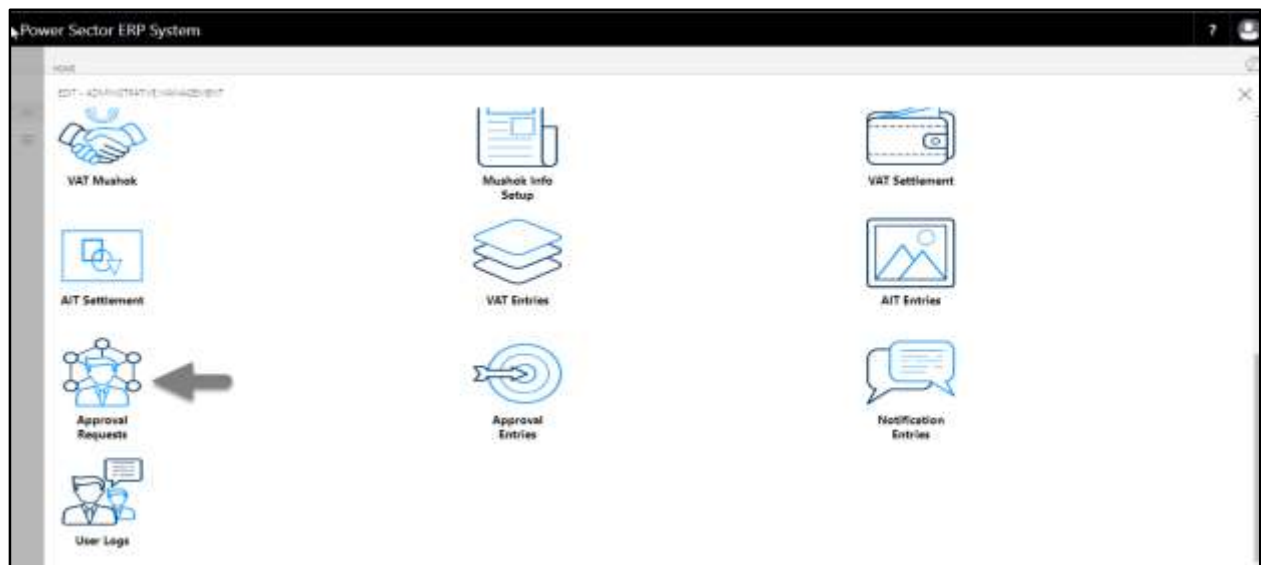
B. Choose the “**Admin Management**” icon to open the administrative page.



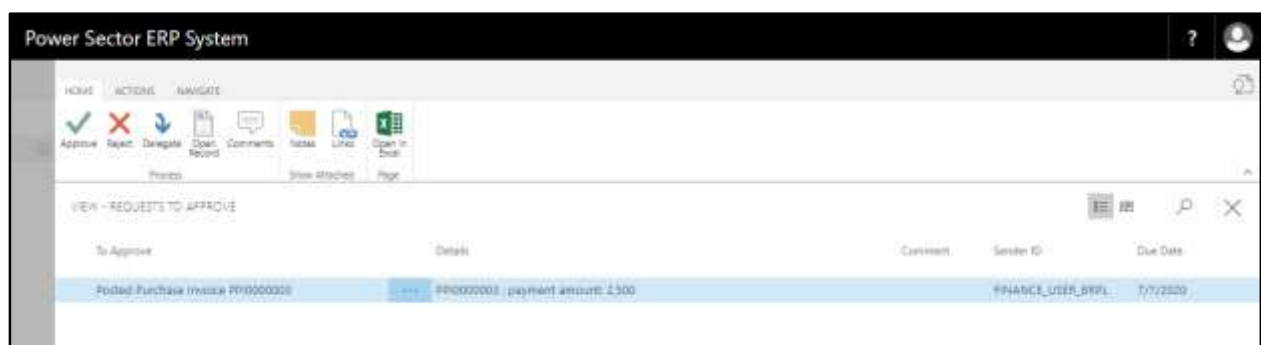
The Following **Admin Management** page will be appeared.



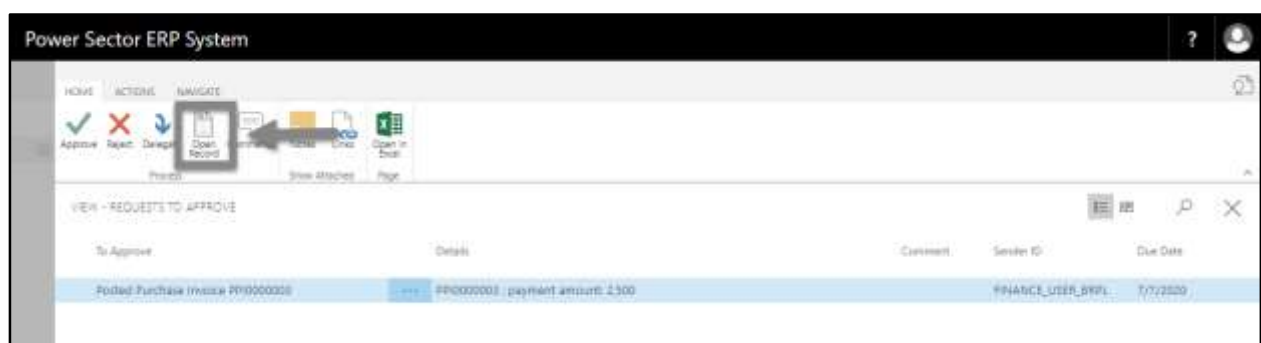
C. Choose the **“Approval Request”** icon to process initiated approval requests.



The following **Approval Request page** will be appeared.



D. Select the initiated records and choose the **“Open Record”** icon.




Detailed **Purchase Requisition** page will be appeared as below.

The screenshot displays the 'Power Sector ERP System' interface. At the top, there's a navigation bar with 'HOME', 'ACTIONS', 'MANAGE', and 'LIFE' tabs. Below this is a toolbar with icons for 'Delete', 'Edit', 'Print...', 'Notes', and 'Link'. The main content area is titled 'EDIT - POSTED PURCHASE INVOICE - PPI0000003 - UTTORA MOTORS'. Below the title, there's a 'General' tab with a 'Show more' link. The 'General' tab contains several fields: 'Vendor Invoice Serial' (INV123), 'Purchase Receipt No.' (PPR0000005), 'Unique Procurement ID' (VALTH0000012), 'Vendor No.' (VEND000013), 'Vendor Name' (Uttora Motors), 'Closed' (No), 'Department', and 'Status' (Pending Approval). Below the 'General' tab is the 'Item Lines' section, which is a table with columns: 'Type', 'Description', 'Quantity', 'Unit of Measure Code', 'Unit Cost Excl. VAT & AIT', and 'Line Amount Excl. VAT & AIT'. The table has one row with the following data: 'Item', 'Lower bearing shell 021.11.003', '5', 'PCL', '900.00', and '2,500.00'.

Type	Description	Quantity	Unit of Measure Code	Unit Cost Excl. VAT & AIT	Line Amount Excl. VAT & AIT
Item	Lower bearing shell 021.11.003	5	PCL	900.00	2,500.00

TIPS

You can choose initiate record by clicking on the line.

E. Select the  icon to back to the previous page.

This screenshot is identical to the one above, but with a red arrow pointing to the close icon (X in a square box) in the top right corner of the window.

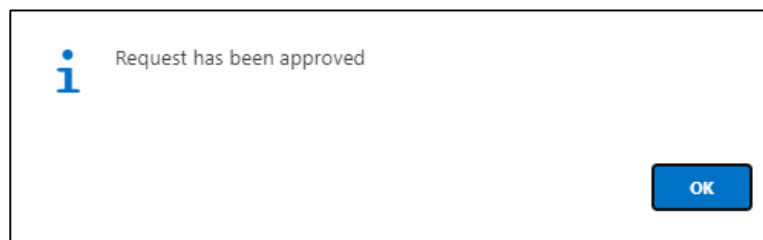
The following **Request to Approve** page will be appeared.



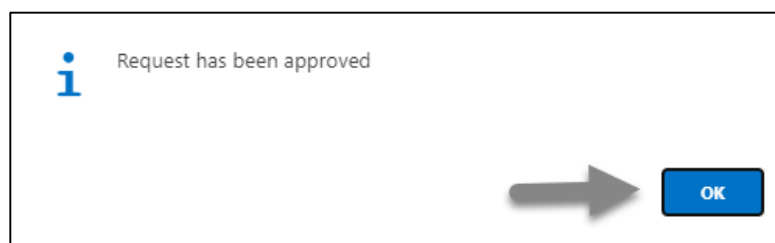
- F. Choose the **"Approve"** icon to approve the initiated process or select **"Reject"** (besides "Approve") to reject.




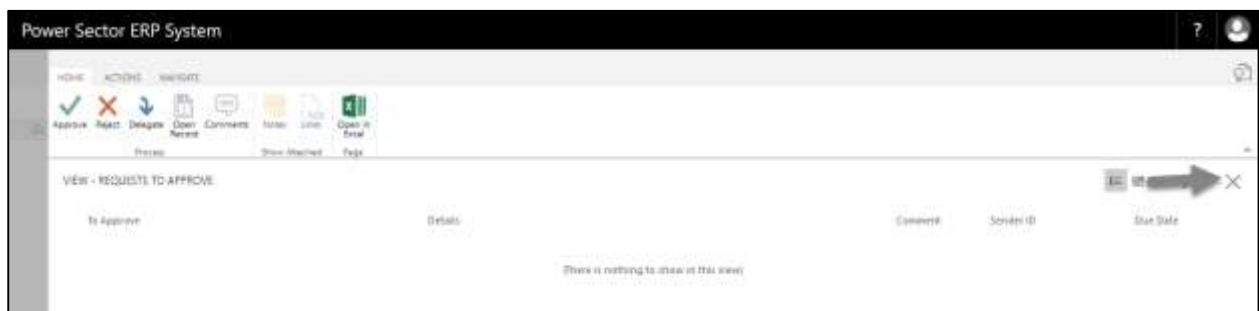
The following pop- up will be appeared.




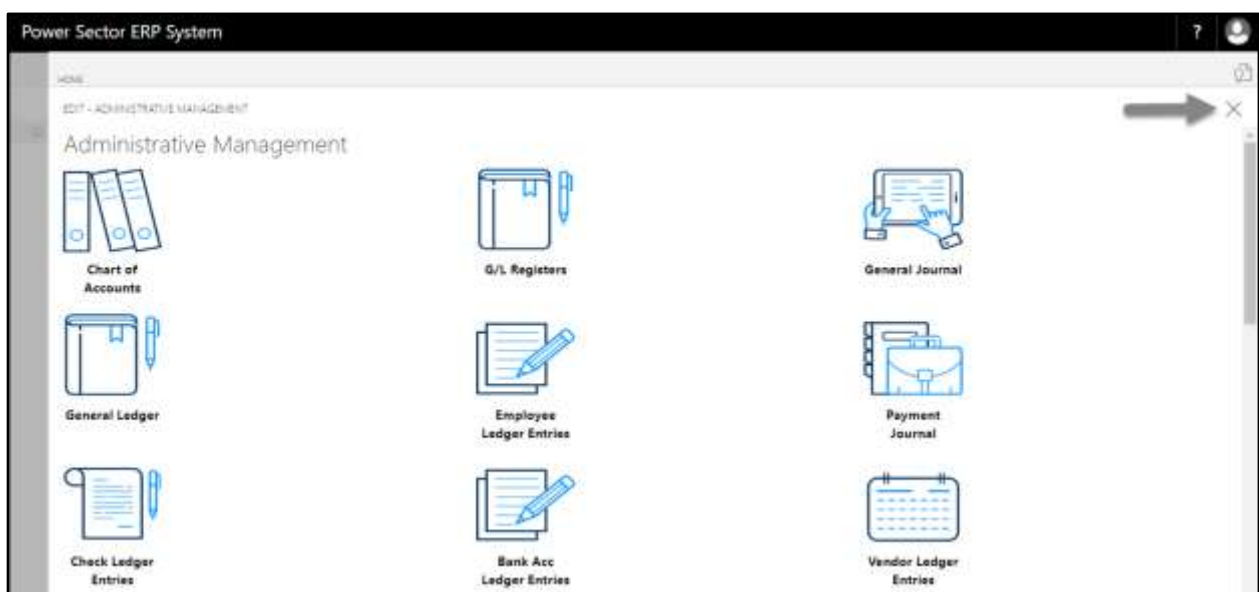
- G. Choose the **"OK"** icon to save and close.



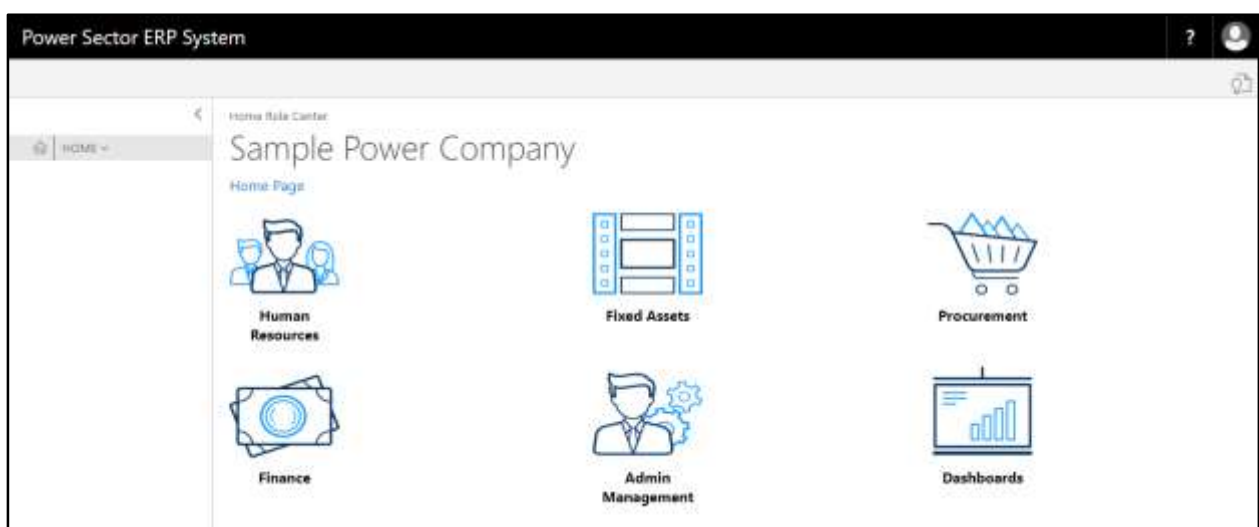
H. Select the  icon to back to the previous page.



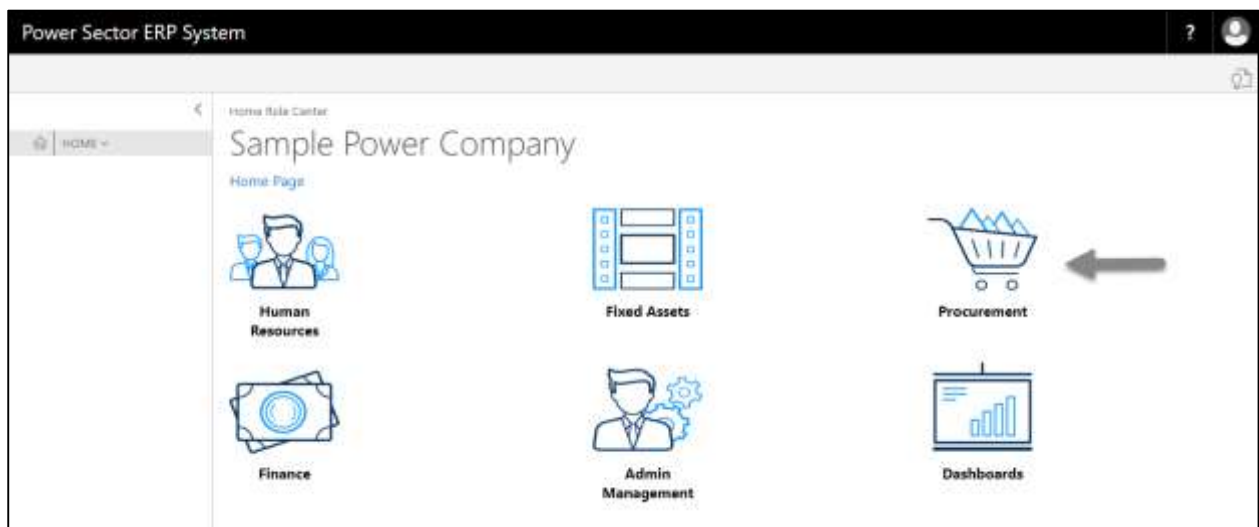
I. Select the  icon to back to the previous page.



ERP Landing Page, will be appeared as bellow.



Choose the "**Procurement**" Icon.



PR Landing page will be appeared as bellow.



J. Choose the "**Process Procurement**" icon.



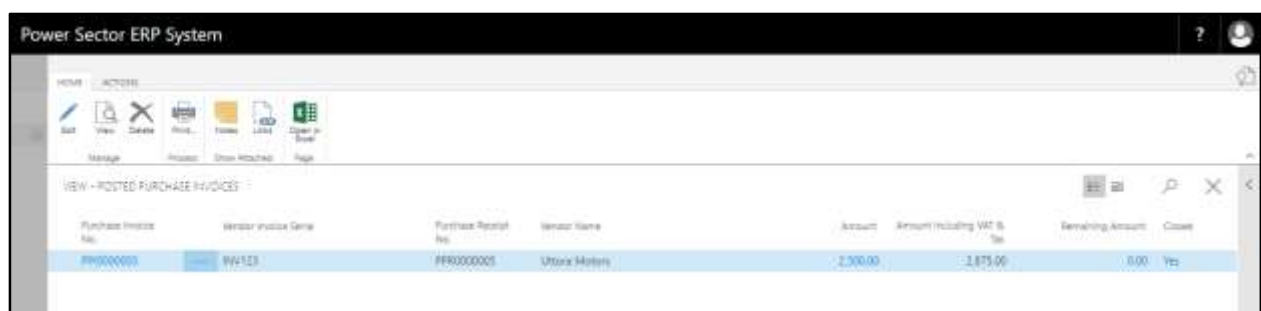
Process Procurement page will be appeared as bellow.



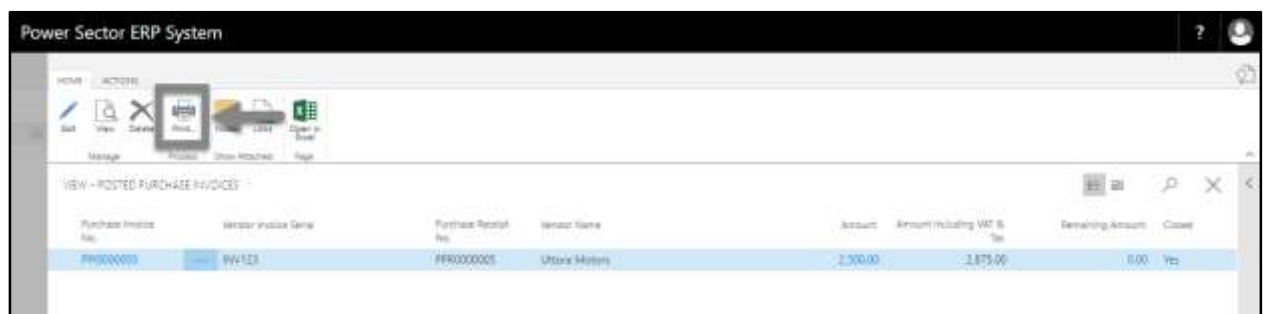
K. Choose the "Purchase Invoices".



The following screen will be appeared.



L. Choose the **"Print"** to print purchase invoice.



The following screen will be appeared.

Edit - Purchase - Invoice

Options

No. of Copies

Show Internal Information
☐

Log Interaction
☐

Posted Purchase Invoice

Show results:

Where:
is:
...

And:
is:
...

And:
is:

And:
is:

M. Provide below information to process successfully.

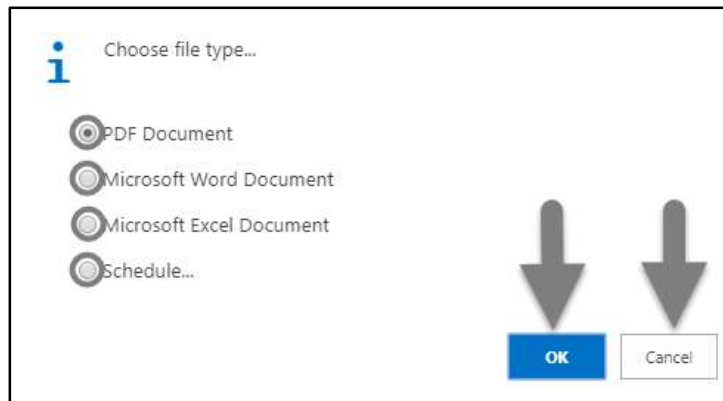
1. Provide **No. of Copies**.


- No. of Copies: 1**

2. Choose the **Buy-from Vendor No.** from the dropdown by clicking on button.

- is: VEND000013**

3. Choose **Send to** take it on PDF, Excel And Word



- Click "OK" after select an option.
 - Click "Cancel" to cancel this page
4. Choose **Print** to print the document.
 5. Choose **Preview** to preview the document.
 6. Choose **Cancel** to close this page.
 7. Click on  button to make it full page.

Edit - Purchase - Invoice

↗

Saved Settings

Name

Last used options and filters

...

Options

No. of Copies

1

1

Show Internal Information

☐

Log Interaction

☐

Posted Purchase Invoice

Show results:

Where:

No.

▼

is:

PPI0000003

...

And:

Buy-from Vendor No.

▼

is:

VEND000013

...

And:

No. Printed

▼

is:

And:

Order No.

▼

is:

3

4

5

6

Send to...

Print

Preview

Cancel

The following Invoice will be appeared.

Purchase - Invoice								
PPI0000003								
Vendor Invoice Serial	INV123	Vendor No.	VEND000013					
Purchase Receipt No.	PPR0000005	Vendor Name	Uttora Motors					
Vendor Authorization No.	PR0000012	Department						
Purchase Order No.	PO0000008	Invoiced Date	06-07-2020					
Purchase Quote No.		Status	Released					

Item No.	Description	QTY.	Unit of Measure	Unit Cost	Amount Exc. VAT & AIT	VAT %	AIT %	Amount Inc. VAT & AIT
ITM0000009	Lower bearing shell 021.11.003	5	PCS.	500	2500	15	0	2875.00

Total Exc. VAT & AIT (BDT)	2500.00
Total VAT (BDT)	375.00
Total AIT (BDT)	0
Total Inc. VAT & AIT (BDT)	2875.00

PR-300 Generating Reports

Introduction

This section shows how to generate different reports related to Procurement functions. This section contains the following –

PR-301	Purchase Quotes Report
PR-302	Purchase Order Report
PR-303	Purchase Invoices Report
PR-304	Purchased Items Report
PR-305	Purchase receipts Report
PR-306	Purchase Requisition Report
PR-307	Department Wise Costing Report
PR-306	Item Wise Purchase report

Role

- Module User
- Module Admin

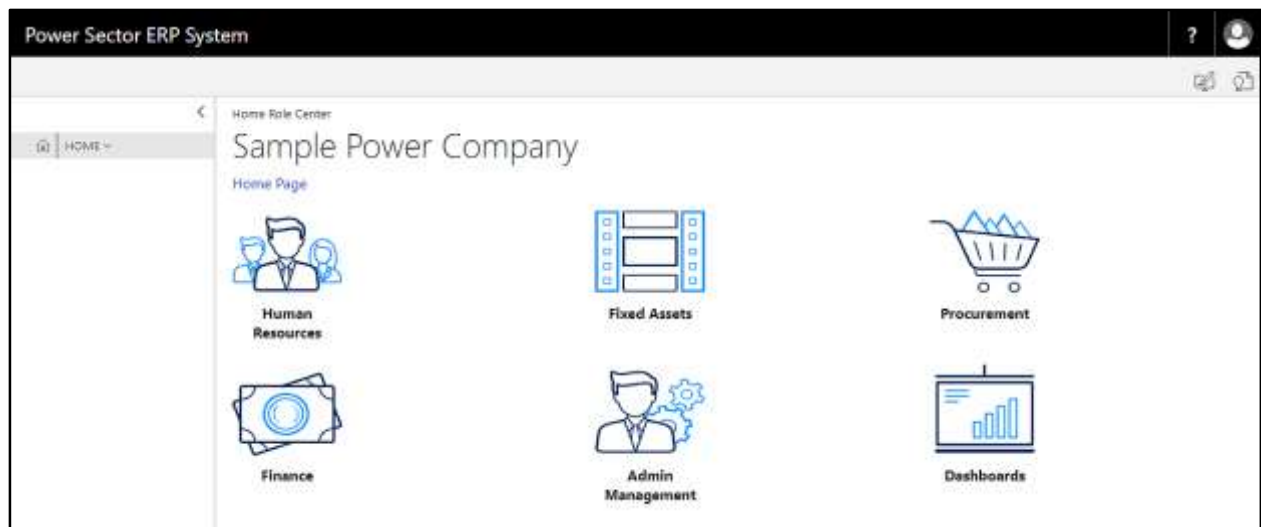
Prerequisite

- Module Admin credentials – username and password

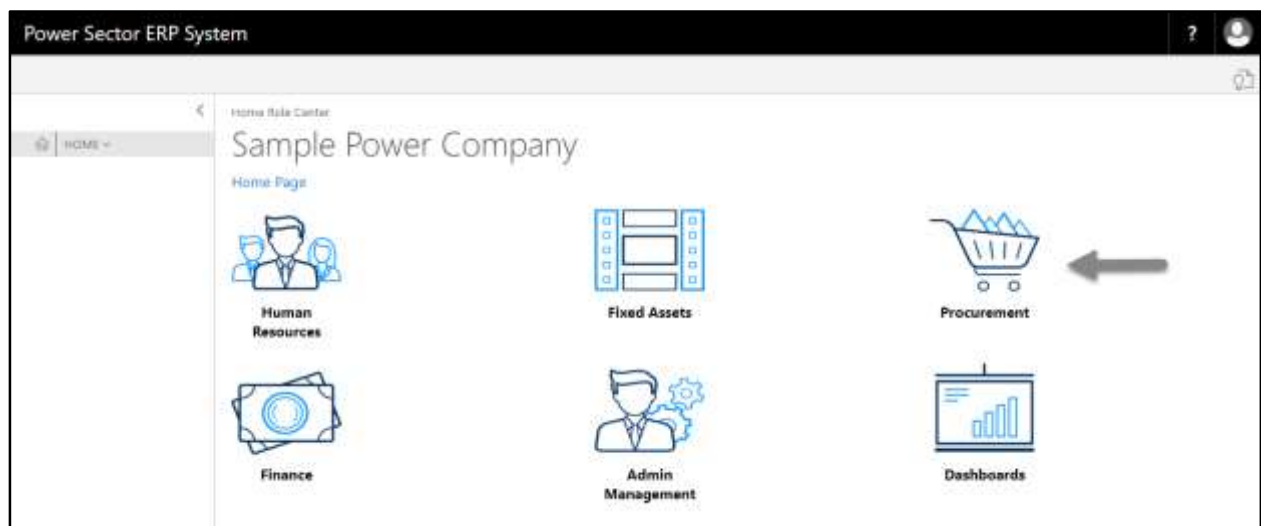
Access to Report Tab

Follow the steps below.

- A. Login with your respective **Procurement credentials**. ERP Landing Page, as below, will be appeared on successful login.



B. Choose the “**Procurement**” icon.



Procurement Landing Page will be appeared as below



C. Choose the **"Reports & Dashboard"** in Procurement Landing Page.



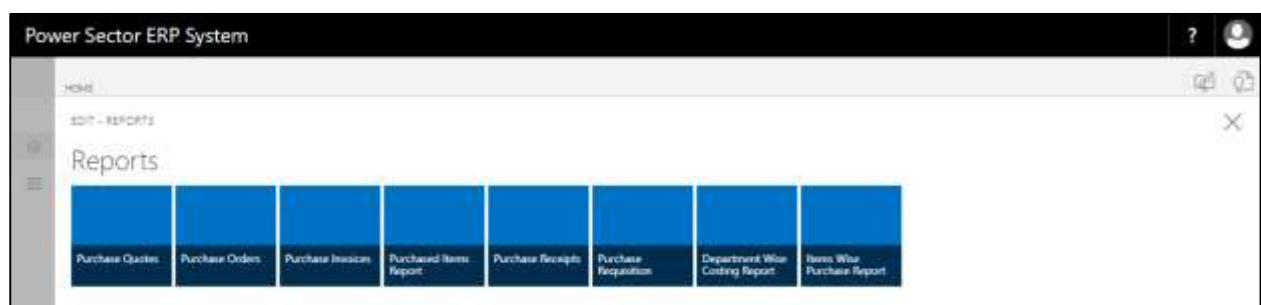
The following **Procurement Reports & Dashboard landing** page will be appeared.



D. Choose the **"Reports"** in Procurement Landing Page.



The following **Procurement Reports landing** page will be appeared.



PR-301 How To: Generate Purchase Quotes Reports

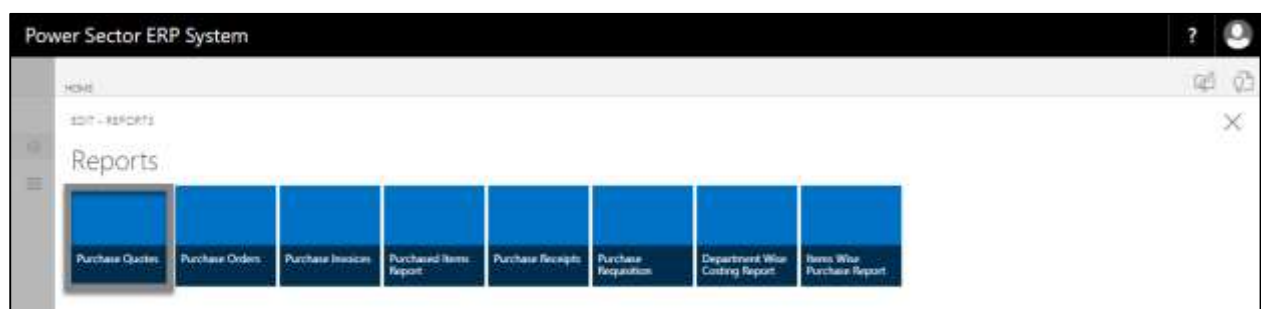
Introduction

This process demonstrates how to generate Purchase Quotes Reports.

PR-301 Purchase Quotes Report

To generate Purchase Quotes Report, please follow the steps below

- A. Open "Procurement Report Landing Page" through "Access to Report Tab"
- B. Choose "Purchase Quotes Report" from Procurement Report Page.



The following **Report Calling Page** will be appeared.

Edit - Purchase Quotes Report

Date Filter

Date Filter Category

Quote Date

▼

Start Date

1

07-01-20

...

End Date

2

07-06-20

...

Purchase Quote

Quote No.

3

PQ0000012

...

Department

...

4

5

6

7




Send to...

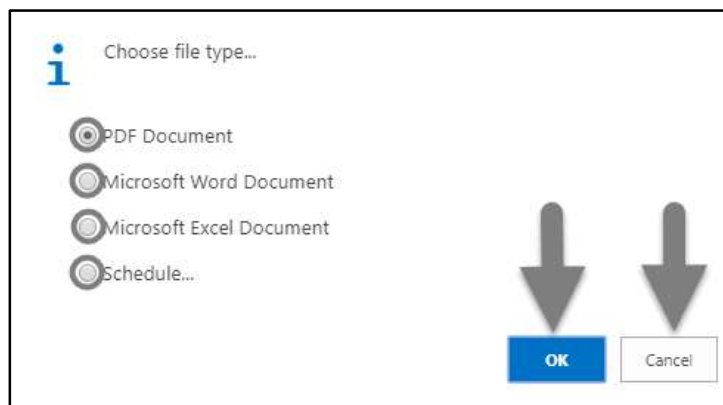
Print


Preview

Cancel


C. Choose the above Actions to view report successfully.

1. Choose **Start Date** by clicking on  button.
 - **Start Date: 07-01-20**
2. Choose **End Date** by clicking on  button.
 - **End Date: 07-06-20**
3. Choose **Quote No.** by clicking on  button.
 - **Quote No: PQ000012**
4. Choose **Send to** take it on PDF, Excel And Word



- Click "OK" after select an option.
 - Click "Cancel" to cancel this page
5. Choose **Print** to print the document.
 6. Choose **Preview** to preview the document.
 7. Choose **Cancel** to close this page.
 8. Click on  button to make it full page.

The following Report will be appeared.



Sample Power Company

Date: 06-07-2020

Purchase Quotes Report

Purchase Quote - PQ0000012

Requisition No :	PR0000012		
Vendor Authorization No :	VAUTH0000012		
Vendor No :	VEND0000013		
Vendor Name :	Uttora Motors	Total Amount Exc. VAT & AIT:	2,200
Quote Date :	06-07-2020	VAT Amount:	330
IssuedBy :		TAX Amount:	0
Department :		Total Amount Inc. VAT & AIT:	2,530

Item	QTY.	Unit of Measure	Unit Cost	Amount Exc. VAT & AIT	VAT%	AIT%	Amount Inc. VAT & AIT
Lower bearing shell 021.11.003	5	PCS.	440	2,200	15	0	2,530

D. Report Action Bar will be appeared on the report as below initially -



Actions are chronologically organized as below

11. Previous Page
12. Next Page
13. Zoom Out
14. Zoom In
15. Fit page to window width
16. Fit full page in window
17. Select Text
18. Pan the document
19. Download to file
20. Print

PR-302 How To: Generate Purchase Orders Reports

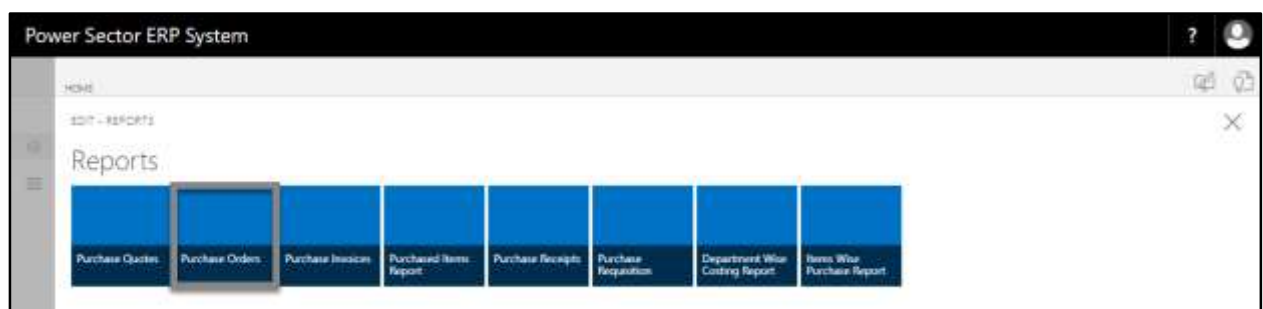
Introduction

This process demonstrates how to generate Purchase Orders Reports.

PR-302 Purchase Orders Report

To generate Purchase Order Report, please follow the steps below

- A. Open "Procurement Report Landing Page" through "Access to Report Tab"
- B. Choose "Purchase Order Report" from Procurement Report Page.



The following **Report Calling Page** will be appeared.

Edit - Purchase Orders Report

Date Filter

Date Filter Category

Order Date

Start Date

17/1/2020

End Date

27/6/2020

Purchase Order

No.

3PO0000006

Department




4Send to...

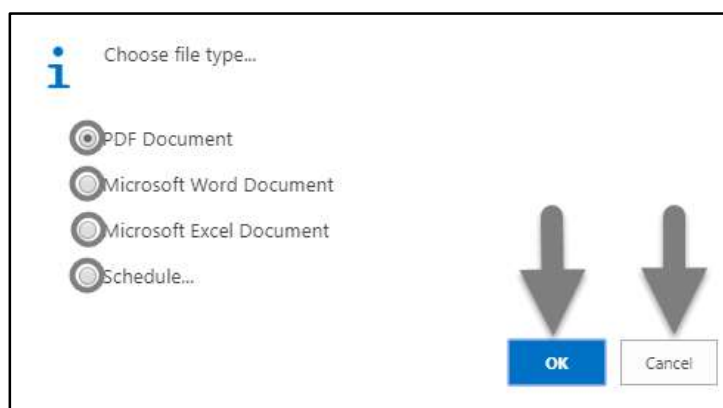
5Print


6Preview

7Cancel


C. Choose the above Actions to view report successfully.

1. Choose **Start Date** by clicking on  **button**.
 - **Start Date: 07-01-20**
2. Choose **End Date** by clicking on  **button**.
 - **End Date: 07-06-20**
3. Choose **Purchase Order No.** by clicking on  **button**.
 - **No: P0000006**
4. Choose **Send to** take it on PDF, Excel And Word




- Click "OK" after select an option.
 - Click "Cancel" to cancel this page
5. Choose **Print** to print the document.
 6. Choose **Preview** to preview the document.
 7. Choose **Cancel** to close this page.
 8. Click on  button to make it full page.

The following Report will be appeared.



Sample Power Company



Date: 06-07-2020

Purchase Orders Report

Purchase Order - PO0000006							
Requisition No :		PR0000012					
Requisition Title:							
Vendor Authorization No :		VAUTH0000012					
Quote No :							
Vendor No :		VEND000013					
Vendor Name :		Uttora Motors					
Order Date :		06-07-2020					
Issued By :							
Department :							
						Total Amount Exc. VAT & AIT: 2,500	
						VAT Amount: 375	
						TAX Amount: 0	
						Total Amount Inc. VAT & AIT: 2,875	
Item	QTY.	Unit of Measure	Unit Cost	Amount Exc. VAT & AIT	VAT%	AIT%	Amount Inc. VAT & AIT
Lower bearing shell 021.11.003	5	PCS.	500	2,500	15	0	2,875
							0

D. Report Action Bar will be appeared on the report as below initially -



Actions are chronologically organized as below

1. Previous Page
2. Next Page
3. Zoom Out
4. Zoom In
5. Fit page to window width
6. Fit full page in window
7. Select Text
8. Pan the document
9. Download to file
10. Print

PR-303 How To: Generate Purchase Invoice Reports

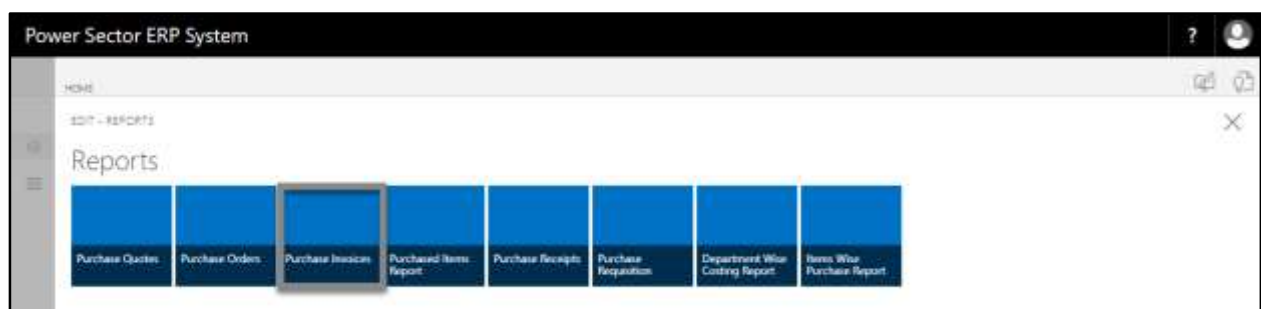
Introduction

This process demonstrates how to generate Purchase Invoice Reports.

PR-303 Purchase Invoice Report

To generate Purchase Invoice Report, please follow the steps below

- A. Open "Procurement Report Landing Page" through "Access to Report Tab"
- B. Choose "Purchase Invoice Report" from Procurement Report Page.



The following **Report Calling Page** will be appeared.

Edit - Purchase Invoices Report

Date Filter

Date Filter Category

1

Invoiced Date

▼

Start Date

2

7/1/2020

...

End Date

3

7/6/2020

...

Purchase Invoice

Invoice No.

4

PPI0000003

...

Department

...

5

6

7

8





Send to...

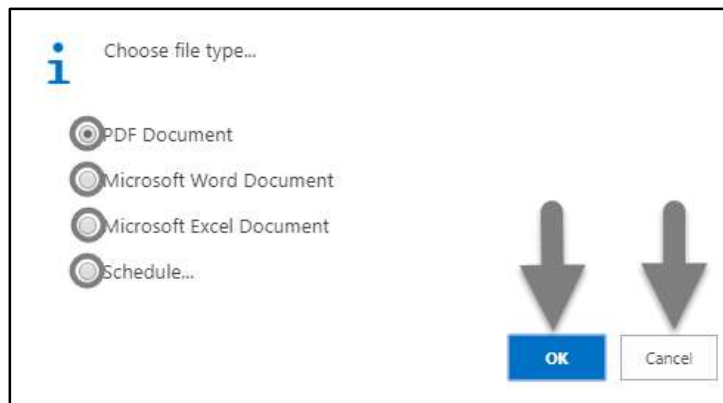
Print


Preview

Cancel



C. Choose the above Actions to view report successfully.

1. Choose **Date Filter Category** by clicking on  button.
 - **Date Filter Category: Invoiced Date**
2. Choose **Start Date** by clicking on  button.
 - **Start Date: 07-01-20**
3. Choose **End Date** by clicking on  button.
 - **End Date: 07-06-20**
4. Choose **Invoice No.** by clicking on  button.
 - **Invoice No: PPI000003**
5. Choose **Send to** take it on PDF, Excel And Word



- Click "OK" after select an option.
 - Click "Cancel" to cancel this page
6. Choose **Print** to print the document.
 7. Choose **Preview** to preview the document.
 8. Choose **Cancel** to close this page.
 9. Click on  button to make it full page.

The following Report will be appeared.



Date: 06-07-2020

Sample Power Company

Purchase Invoices Report

Purchase Invoice - PPI0000003							
Requisition No :		PR0000012					
Quote No :							
Order No :		PO0000008					
Receipt No :		PPR0000005					
Vendor No :		VEND000013					
Vendor Name :		Uttora Motors					
Vendor Order No :							
Vendor Invoice No :							
Department :							
Invoiced Date :		06-07-2020			Total Amount Exc. VAT & AIT: 2,500		
Posting Date :		06-07-2020			VAT Amount: 375		
Due Date :		06-07-2020			TAX Amount: 0		
					Total Amount Inc. VAT & AIT: 2,875		
Item	QTY.	Unit of Measure	Unit Cost	Amount Exc. VAT & AIT	VAT%	AIT%	Amount Inc. VAT & AIT
Lower bearing shell 021.11.003	5	PCS.	500	2,500	15	0	2,875

D. Report Action Bar will be appeared on the report as below initially -



Actions are chronologically organized as below

1. Previous Page
2. Next Page
3. Zoom Out
4. Zoom In
5. Fit page to window width
6. Fit full page in window
7. Select Text
8. Pan the document
9. Download to file
10. Print

PR-304 How To: Generate Purchased Items Reports

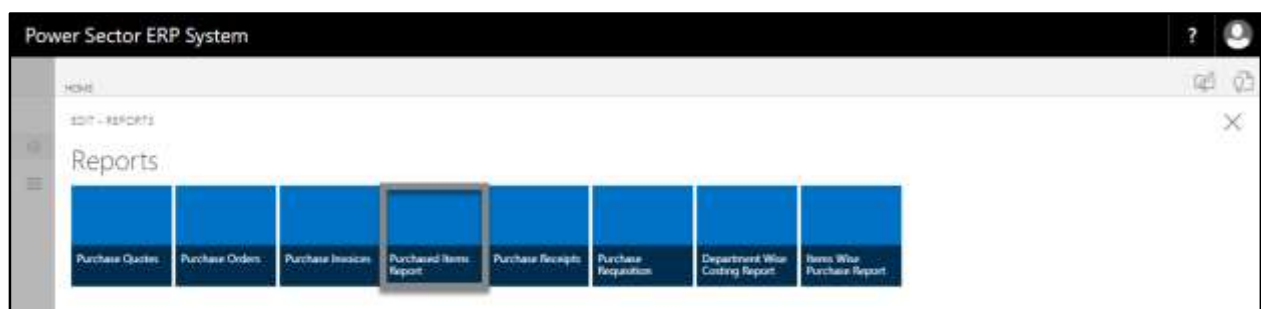
Introduction

This process demonstrates how to generate Purchased Items Reports.

PR-304 Purchased Items Report

To generate Purchased Items Report, please follow the steps below

- A. Open "Procurement Report Landing Page" through "Access to Report Tab"
- B. Choose "Purchased Items Report" from Procurement Report Page.



The following **Report Calling Page** will be appeared.

Edit - Vendor/Item Purchases

Saved Settings

Name 1 Last used options and filters

Options

New Page per Vendor ☐

Vendor

Show results:

Where: No. 2 is: VEND000013

And: Search Name is:

And: Vendor Posting Group is:

Value Entry

Show results:

Where: Item No. 3 is: ITM0000009

And: Inventory Posting Group 4 is: PUMP SPARE PARTS

And: Posting Date is:

5 6 7 8

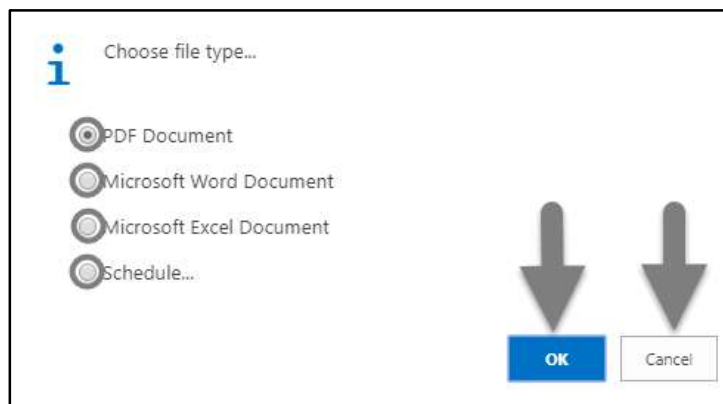
Send to... Print Preview Cancel


C. Choose the above Actions to view report successfully.

1. Choose **Name** by clicking on ▼ button.
 - **Name: Last Used options and filters.**
2. Choose **Vendor Information** by clicking on ... button.
 - **Where: No.**
 - **Is: VEND000013**
3. Choose **Value Entry** by clicking on ... button.
 - **Where: Item No.**
 - **Is: ITM0000009**
4. Choose **Value Entry** by clicking on ... button.

- **And: Inventory Posting Group**
- **Is: PUMP SPARE PARTS**

5. Choose **Send to** take it on PDF, Excel And Word



- Click "OK" after select an option.
 - Click "Cancel" to cancel this page
6. Choose **Print** to print the document.
7. Choose **Preview** to preview the document.
8. Choose **Cancel** to close this page.
9. Click on  button to make it full page.

The following Report will be appeared.

Date: 06-07-2020

Sample Power Company

Purchase Items Report

Description	Unit of Measure		
VEND000013 Uttora Motors Phone No.			
ITM0000009 Lower bearing shell 021.11.003 Uttora Motors	5 PCS.	2,500.00 2,500.00	0.00 0.00
Total		2,500.00	0.00

D. Report Action Bar will be appeared on the report as below initially -



Actions are chronologically organized as below

1. Previous Page
2. Next Page
3. Zoom Out
4. Zoom In
5. Fit page to window width
6. Fit full page in window
7. Select Text
8. Pan the document
9. Download to file
10. Print

PR-305 How To: Generate Purchase Receipts Reports

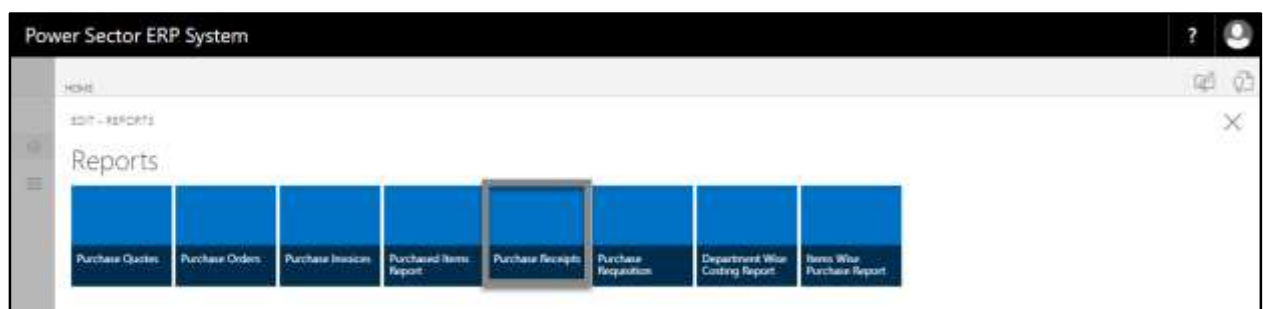
Introduction

This process demonstrates how to generate Purchase Receipts Reports.

PR-305 Purchase Receipts Report

To generate Purchase Receipts Report, please follow the steps below

- A. Open "Procurement Report Landing Page" through "Access to Report Tab"
- B. Choose "Purchase Receipts Report" from Procurement Report Page.



The following **Report Calling Page** will be appeared.

Edit - Purchase Receipts Report

Date Filter

Date Filter Category: Received Date

Start Date: 7/1/2020

End Date: 7/6/2020

Purchase Receipt

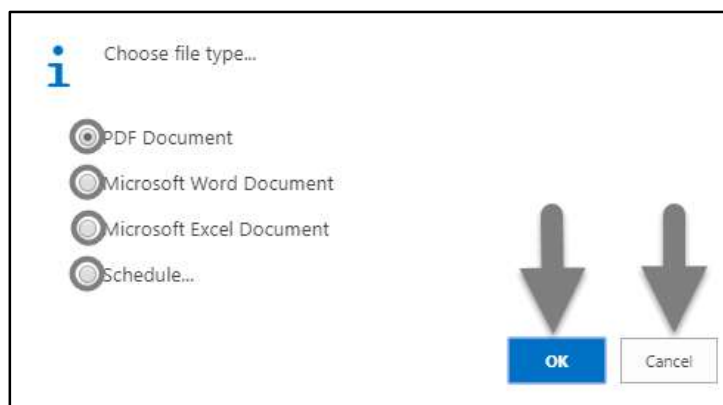
Receipt No.: PPR0000005


Department:

Send to... Print Preview Cancel



C. Choose the above Actions to view report successfully.

1. Choose **Start Date** by clicking on button.
 - **Start Date: 7/1/2020**
2. Choose **End Date** by clicking on button.
 - **End Date: 7/6/2020**
3. Choose **Receipt No.** by clicking on button.
 - **Receipt No.: PPR0000005**
4. Choose **Send to** take it on PDF, Excel And Word



- Click "OK" after select an option.
 - Click "Cancel" to cancel this page
5. Choose **Print** to print the document.
 6. Choose **Preview** to preview the document.
 7. Choose **Cancel** to close this page.
 8. Click on  button to make it full page.

The following Report will be appeared.

		Date: 06-07-2020																				
Sample Power Company																						
Purchase Receipts Report																						
Purchase Receipt - PPR0000005																						
<table style="width: 100%; border: none;"> <tr> <td style="width: 30%;">Requisition Title :</td> <td></td> </tr> <tr> <td>Vendor Authorization No :</td> <td>VAUTH0000012</td> </tr> <tr> <td>Purchase Quote No :</td> <td></td> </tr> <tr> <td>Purchase Order No :</td> <td>PO0000008</td> </tr> <tr> <td>Purchase Invoice No :</td> <td>PPI0000003</td> </tr> <tr> <td>Vendor Invoice Serial :</td> <td>INV123</td> </tr> <tr> <td>Vendor No :</td> <td>VEND000013</td> </tr> <tr> <td>Vendor Name :</td> <td>Uttora Motors</td> </tr> <tr> <td>Received Date :</td> <td>06-07-2020</td> </tr> <tr> <td>Department :</td> <td></td> </tr> </table> <div style="text-align: right; margin-top: 10px;"> Total Amount Exc. VAT & AIT: #Error VAT Amount: #Error TAX Amount: #Error Total Amount Inc. VAT & AIT: #Error </div>			Requisition Title :		Vendor Authorization No :	VAUTH0000012	Purchase Quote No :		Purchase Order No :	PO0000008	Purchase Invoice No :	PPI0000003	Vendor Invoice Serial :	INV123	Vendor No :	VEND000013	Vendor Name :	Uttora Motors	Received Date :	06-07-2020	Department :	
Requisition Title :																						
Vendor Authorization No :	VAUTH0000012																					
Purchase Quote No :																						
Purchase Order No :	PO0000008																					
Purchase Invoice No :	PPI0000003																					
Vendor Invoice Serial :	INV123																					
Vendor No :	VEND000013																					
Vendor Name :	Uttora Motors																					
Received Date :	06-07-2020																					
Department :																						
Item	QTY.	Unit of Measure	Unit Cost	Amount Exc. VAT & AIT	VAT%	AIT%	Amount Inc. VAT & AIT															
Lower bearing shell 021.11.003	5	PCS.	500	2,500	15	0	2,875															

D. Report Action Bar will be appeared on the report as below initially -



Actions are chronologically organized as below

1. Previous Page
2. Next Page
3. Zoom Out
4. Zoom In
5. Fit page to window width
6. Fit full page in window
7. Select Text
8. Pan the document
9. Download to file
10. Print

PR-306 How To: Generate Purchase Requisition Reports

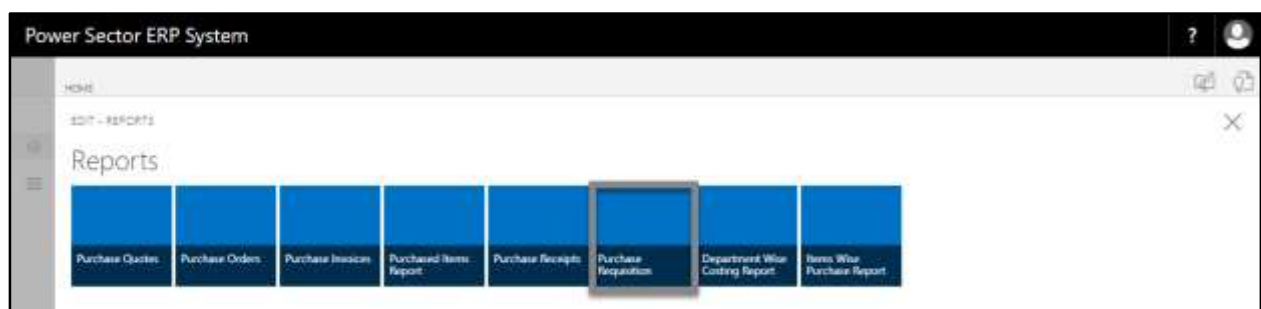
Introduction

This process demonstrates how to generate Purchase Requisition Reports.


PR-306 Purchase Requisition Report

To generate Purchase Requisition Report, please follow the steps below

- A. Open "Procurement Report Landing Page" through "Access to Report Tab"
- B. Choose "Purchase Requisition Report" from Procurement Report Page.



The following **Report Calling Page** will be appeared.

Edit - Purchase Requisitions


Date Filter

Date Filter Category
Requisition Date

Start Date
1
7/1/2020
...

End Date
2
7/6/2020
...

Requisition

Requisition No.
3
PR0000012
...

Department
...






Estimate
4
Unbudgeted

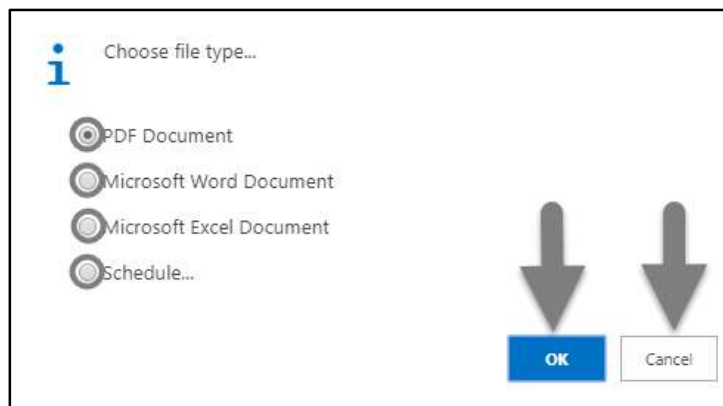
Status
5
Released


6
7
8
9

Send to...
Print
Preview
Cancel

C. Choose the above Actions to view report successfully.

- Choose **Start Date** by clicking on  button.
 - Start Date: 7/1/2020**
- Choose **End Date** by clicking on  button.
 - End Date: 7/6/2020**
- Choose **Requisition No.** by clicking on  button.
 - Receipt No.: PR0000012**
- Choose **Estimate** by clicking on  button.
 - Estimate: Unbudgeted**
- Choose **Status** by clicking on  button.
 - Status: Released**
- Choose **Send to** take it on PDF, Excel And Word



- Click "OK" after select an option.
 - Click "Cancel" to cancel this page
7. Choose **Print** to print the document.
 8. Choose **Preview** to preview the document.
 9. Choose **Cancel** to close this page.
 10. Click on  button to make it full page.

The following Report will be appeared.





Sample Power Company

Purchase Requisition Report

Date: 06-07-2020

Requisition No.	Department	Status	Estimate	Requisition Date	Item	QTY.	Unit of Measure
PR0000012		Released	Unbudgeted	07-07-2020	Lower bearing shell 021.11.003	5	PCS.

D. Report Action Bar will be appeared on the report as below initially -



Actions are chronologically organized as below

1. Previous Page
2. Next Page
3. Zoom Out
4. Zoom In
5. Fit page to window width
6. Fit full page in window
7. Select Text
8. Pan the document
9. Download to file
10. Print

PR-307 How To: Generate Department Wise Costing Reports

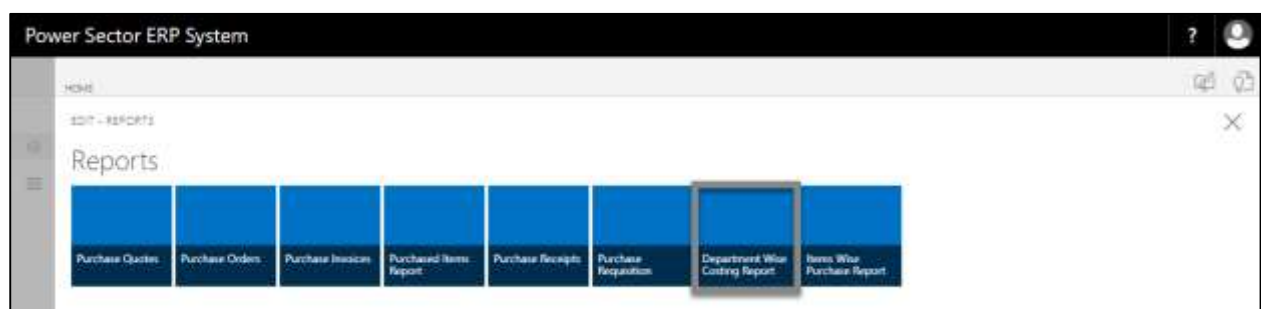
Introduction

This process demonstrates how to generate Department Wise Costing Reports.

PR-307 Department Wise Costing Report

To generate Department Wise Costing Report, please follow the steps below

- A. Open "Procurement Report Landing Page" through "Access to Report Tab"
- B. Choose "Department Wise Costing Report" from Procurement Report Page.



The following **Report Calling Page** will be appeared.

Edit - Costing Report Dept. Wise

Date Filter

Date Filter Category

Order Date

Start Date

17/1/2020

End Date

27/6/2020

Requisition

Department


3Send to...

4Print


5Preview

6Cancel

C. Choose the above Actions to view report successfully.

1. Choose **Start Date** by clicking on  **button**.

- **Start Date: 7/1/2020**

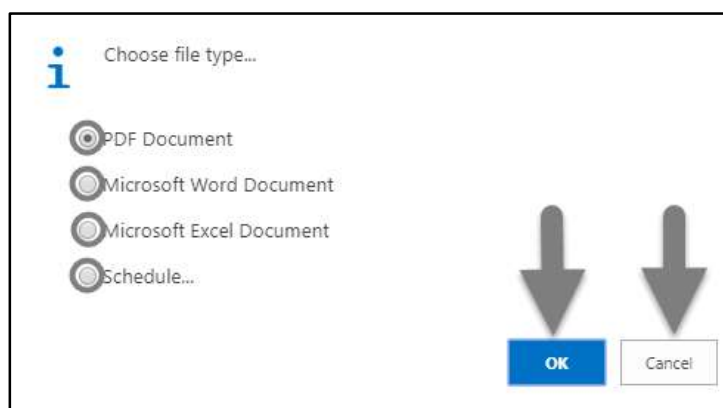
2. Choose **End Date** by clicking on  **button**.

- **End Date: 7/6/2020**

Note

Here we can generate specific department wise report.

3. Choose **Send to** take it on PDF, Excel And Word



- Click "OK" after select an option.
- Click "Cancel" to cancel this page

4. Choose **Print** to print the document.

5. Choose **Preview** to preview the document.

6. Choose **Cancel** to close this page.

7. Click on  button to make it full page.

The following Report will be appeared.

Date: 06-07-2020

Sample Power Company

Department Wise Costing Report

Department	Total Cost	Invoice No.	Requisition No.	Order No.	Order Date	Amount Including VAT & AIT
	2,875	PPI0000003	PR0000012	PO0000008	06-07-2020	2,875

D. Report Action Bar will be appeared on the report as below initially -



Actions are chronologically organized as below

1. Previous Page
2. Next Page
3. Zoom Out
4. Zoom In
5. Fit page to window width
6. Fit full page in window
7. Select Text
8. Pan the document
9. Download to file
10. Print

PR-308 How To: Item Wise Purchase Reports

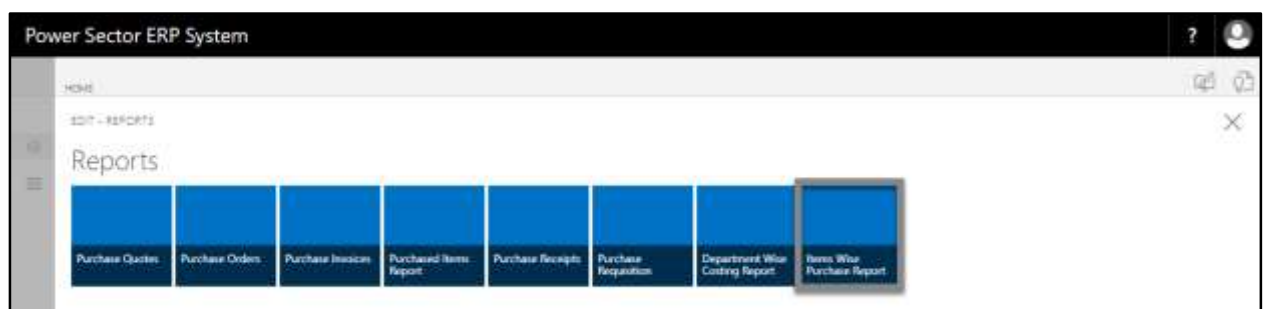
Introduction

This process demonstrates how to generate Item Wise Purchase Reports.

PR-308 Item Wise Purchase Report

To generate Item Wise Purchase Report, please follow the steps below

- A. Open "Procurement Report Landing Page" through "Access to Report Tab"
- B. Choose "Item Wise Purchase Report" from Procurement Report Page.



The following **Report Calling Page** will be appeared.

Edit - ItemsWisePurchaseCountReport

Oltem Purchased Date Filter

Date From	1	7/1/2019	...
Date To	2	7/6/2020	...

3

4

5

6

Send to...

Print

Preview

Cancel

C. Choose the above Actions to view report successfully.

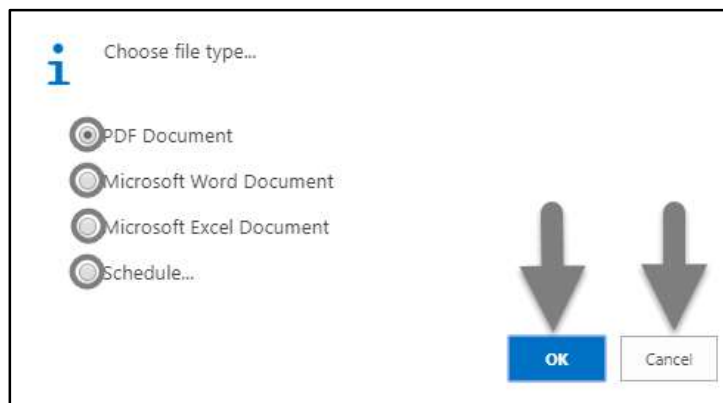
1. Choose **Start Date** by clicking on button.

- **Start Date: 7/1/2020**

2. Choose **End Date** by clicking on button.

- **End Date: 7/6/2020**

3. Choose **Send to** take it on PDF, Excel And Word



- Click "OK" after select an option.
- Click "Cancel" to cancel this page

4. Choose **Print** to print the document.

5. Choose **Preview** to preview the document.

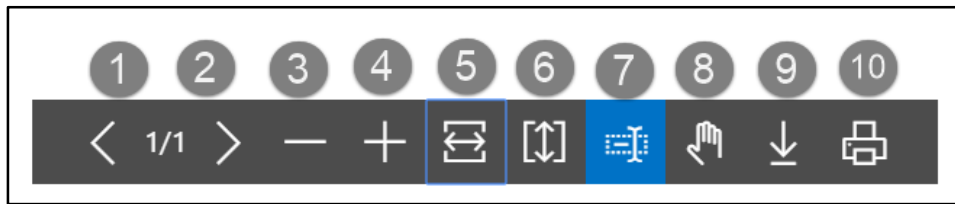
6. Choose **Cancel** to close this page.

7. Click on ☐ button to make it full page.

The following Report will be appeared.

		Date: 06-07-2020
Sample Power Company		
Item Wise Purchase Report From 01-07-2019 to 06-07-2020		
Item Name	Purchased Quantity	
Lower bearing shell 021.11.003		5

D. Report Action Bar will be appeared on the report as below initially -



Actions are chronologically organized as below

1. Previous Page
2. Next Page
3. Zoom Out
4. Zoom In
5. Fit page to window width
6. Fit full page in window
7. Select Text
8. Pan the document
9. Download to file
10. Print

PR-400 Dashboard

Introduction

This process demonstrates how to view Procurement Dashboards which can assist top management in decision making. The operational dashboard is divided into 6 sections -

PR-401	Purchase Requisition Dashboard
PR-402	Purchase Quotes Dashboard
PR-403	Purchase Orders Dashboard
PR-404	Purchase Receipts Dashboard
PR-405	Purchase Invoices Dashboard
PR-406	Others Dashboard

Roles

- Module Admin

Prerequisites

- PR Operational live data in the system

PR-401 How to: View Purchase Requisition Dashboard

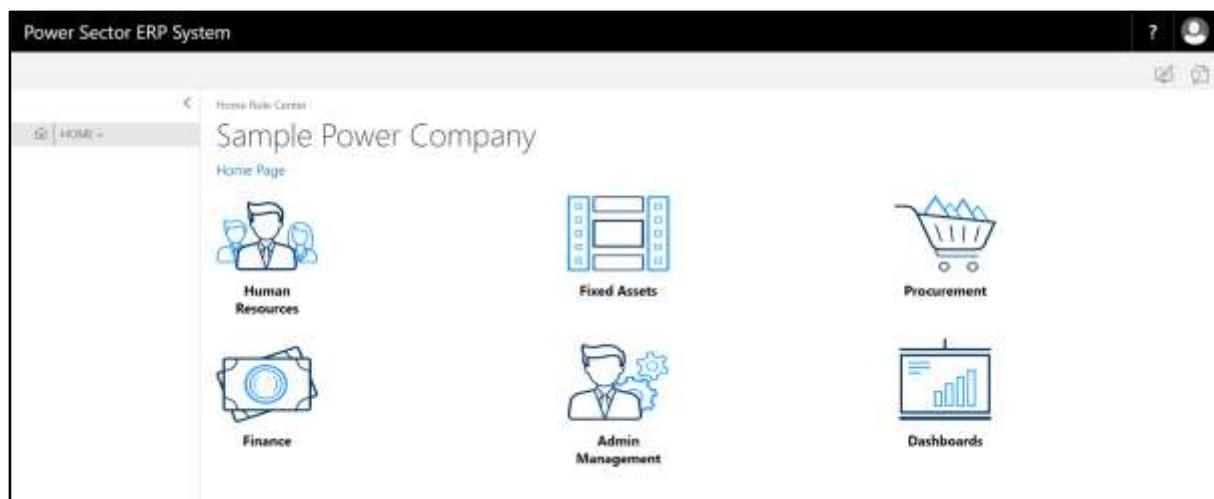
Introduction

Purchase Requisition Dashboard shows graphs on selected purchase requisition functions.

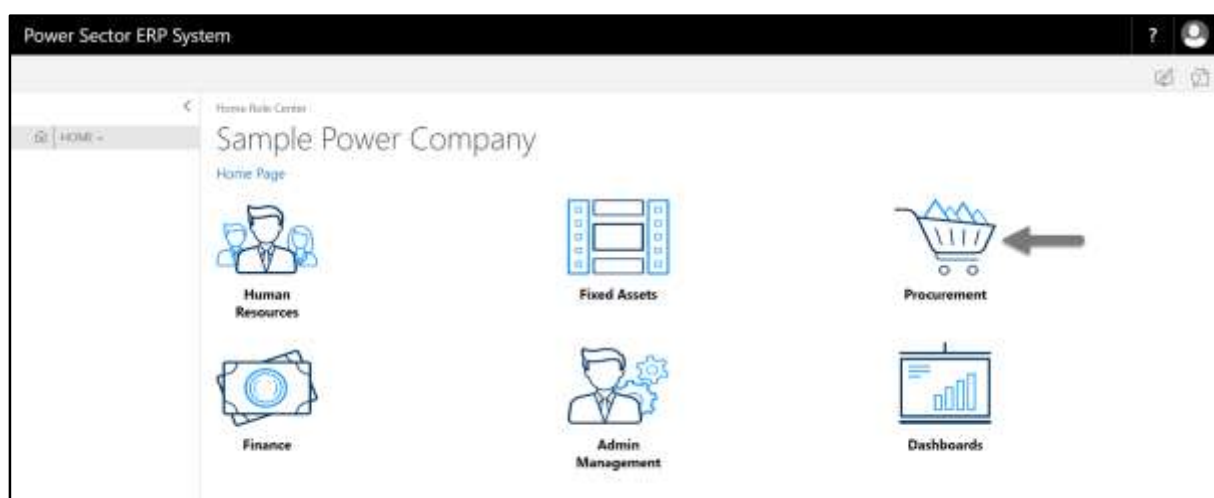
Purchase Requisition Dashboard

To view Purchase Requisition Dashboard, follow the steps below –

- A. Login with your respective **PR Admin credentials**. ERP Landing Page, as below, will be appeared on successful login.



- B. Choose the “**Procurement**” icon.



PR Landing Page will be appeared as below



C. Choose the **"Reports & Dashboard"** in PR Landing Page.



Reports & Dashboard Page will be appeared as below



D. Choose the **"Dashboard"** in Reports & Dashboard page.



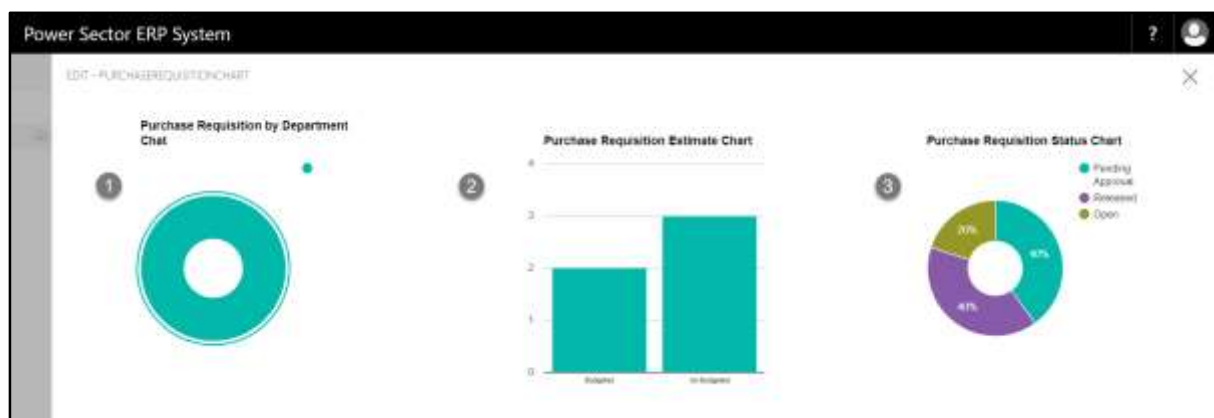
Purchase Dashboard Items Page will be appeared as below



E. Choose the **“Purchase Requisitions”** in Purchase Dashboard Items Page.



Following **Purchase Requisitions** dashboard will be appeared.



The Purchase Requisition dashboard contains 3 graphs of respective organization –

1. **Purchase Requisition by Department Chart:** This pie chart showing the value of "Purchase Requisition by Department Chart."
2. **Purchase Requisition Estimate Chart:** This bar chart showing the ratio of budgeted and unbudgeted status of purchase requisition.
3. **Purchase Requisition Status Chart:** This pie chart showing the status ratio of purchase requisition, among open status, pending approval status or released status.

PR-402 How to: View Purchase Quotes Dashboard

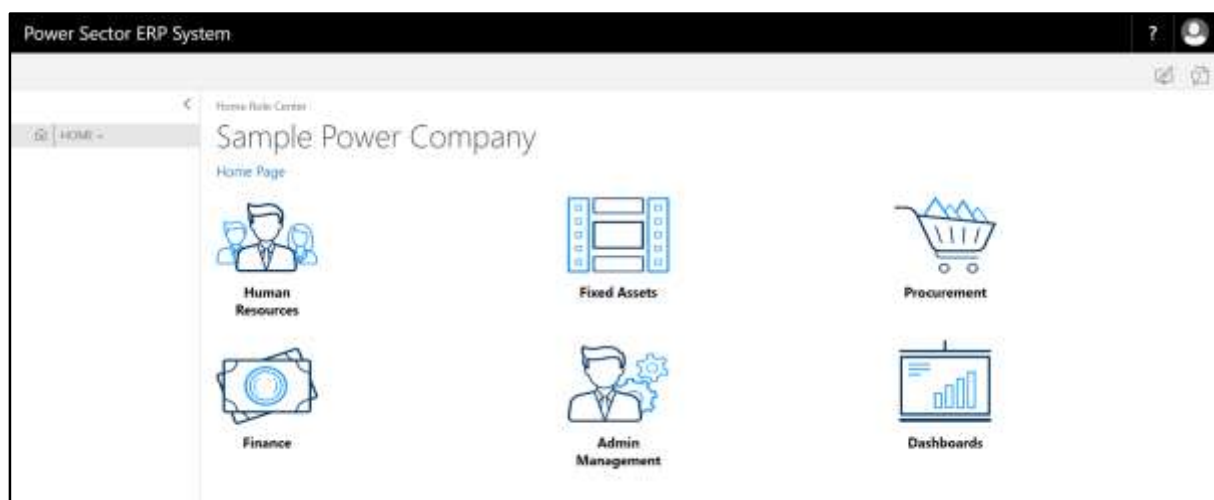
Introduction

Purchase Quotes Dashboard shows graphs on selected purchase quotation functions, which are received from the user from respective department in the organization.

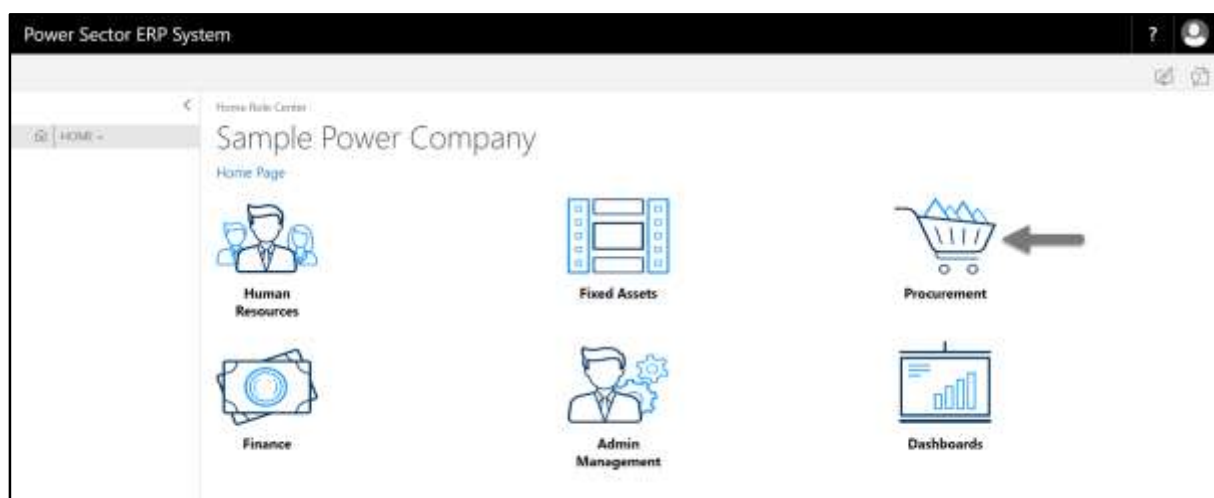
Purchase Quotes Dashboard

To view Purchase Quotes Dashboard, follow the steps below –

- A. Login with your respective **PR Admin credentials**. ERP Landing Page, as below, will be appeared on successful login.



- B. Choose the "**Procurement**" icon.



PR Landing Page will be appeared as below



C. Choose the **"Reports & Dashboard"** in PR Landing Page.



Reports & Dashboard Page will be appeared as below



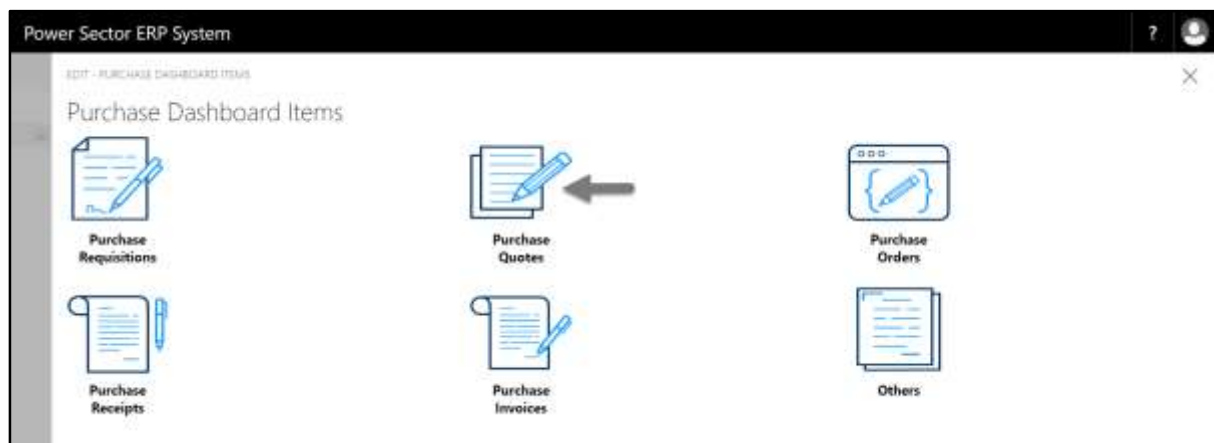
D. Choose the **"Dashboard"** in Reports & Dashboard page.



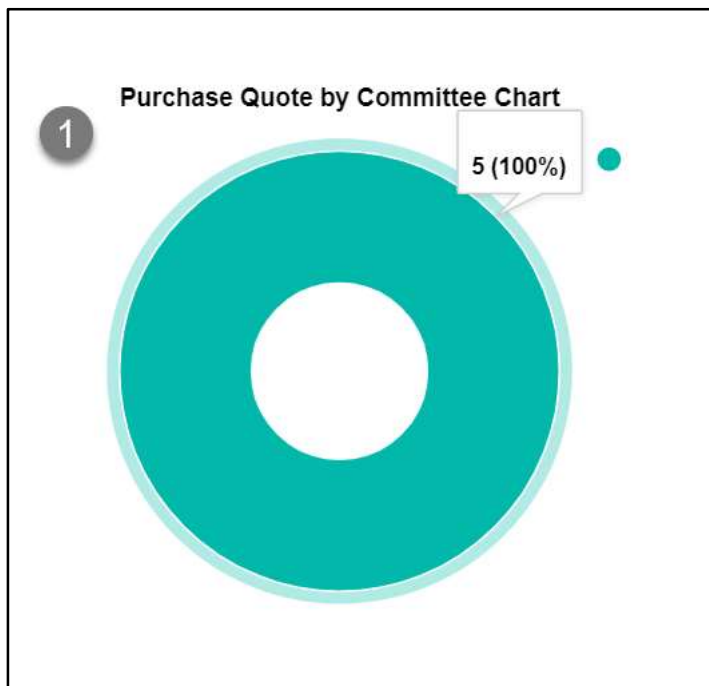
Purchase Dashboard Items Page will be appeared as below



E. Choose the **“Purchase Quotes”** in Purchase Dashboard Items Page.



Following **Purchase Quotes** dashboard will be appeared.



The Purchase Quote dashboard contains 1 graphs of respective organization –

1. **Purchase Quote by Committee Chart:** This pie chart showing the value of "Purchase Quote by Committee Chart."

PR-403 How to: View Purchase Orders Dashboard

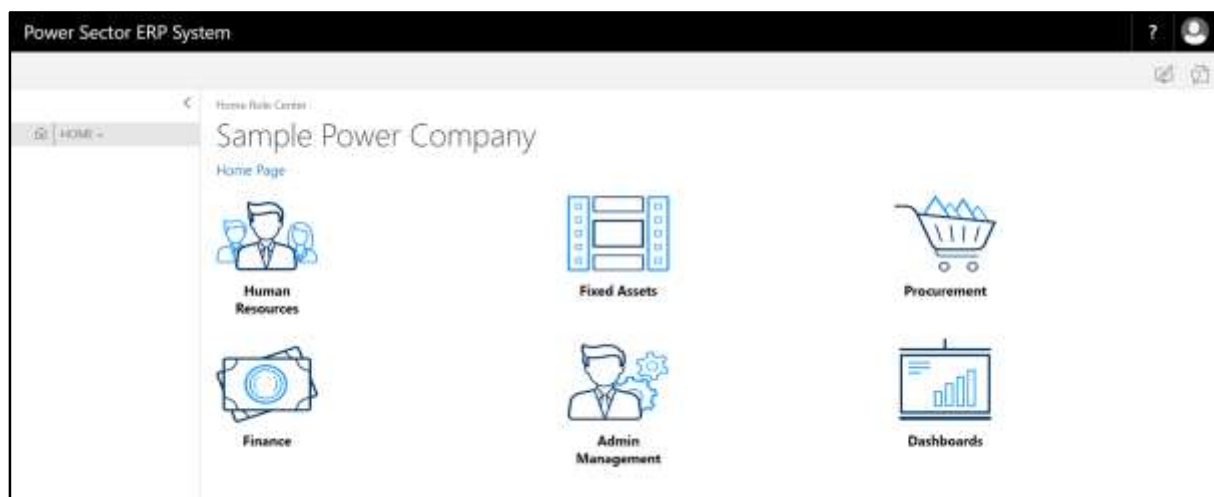
Introduction

Purchase Orders Dashboard shows graphs on selected purchase orders functions, which are getting validate and approved by the procurement admin.

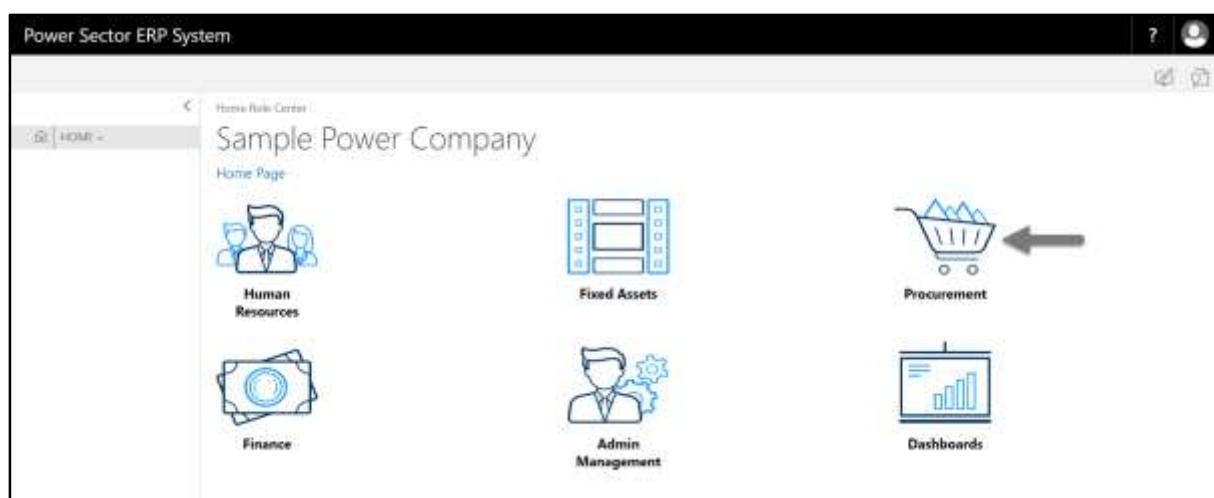
Purchase Orders Dashboard

To view Purchase Orders Dashboard, follow the steps below –

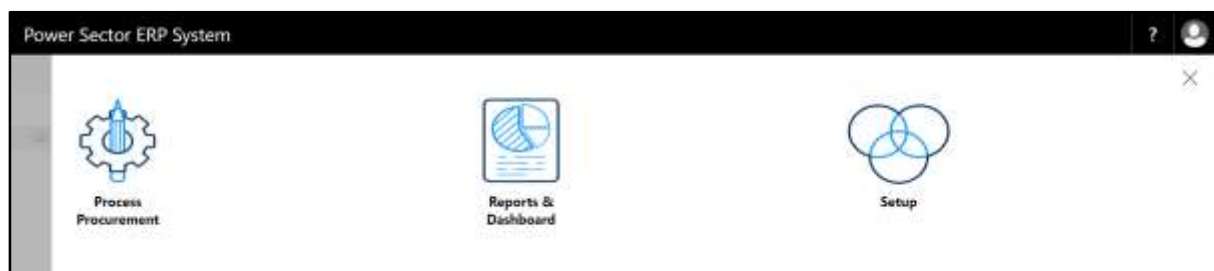
- A. Login with your respective **PR Admin credentials**. ERP Landing Page, as below, will be appeared on successful login.



- B. Choose the “**Procurement**” icon.



PR Landing Page will be appeared as below



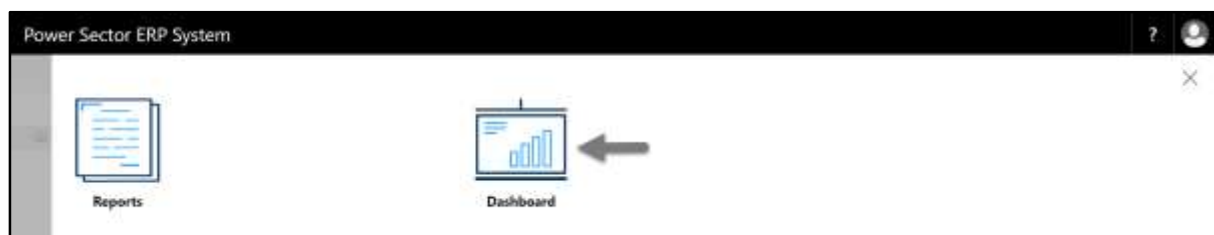
C. Choose the **"Reports & Dashboard"** in PR Landing Page.



Reports & Dashboard Page will be appeared as below



D. Choose the **"Dashboard"** in Reports & Dashboard page.



Purchase Dashboard Items Page will be appeared as below



E. Choose the “**Purchase Orders**” in Purchase Dashboard Items Page.



Following **Purchase Orders** dashboard will be appeared.



The Purchase Orders dashboard contains 3 graphs of respective organization –

- 1. Purchase Order by Vendor:** This line graph showing the value of "Purchase Order by Vendor."
- 2. Purchase Order by Item:** This line graph showing the value of "Purchase Order by Item."
- 3. Purchase Order by Department:** This pie chart showing the value of "Purchase Order by Department."
- 4. Top Vendor (Item wise):** These line graph shows top vendor by the item.

PR-404 How to: View Purchase Receipts Dashboard

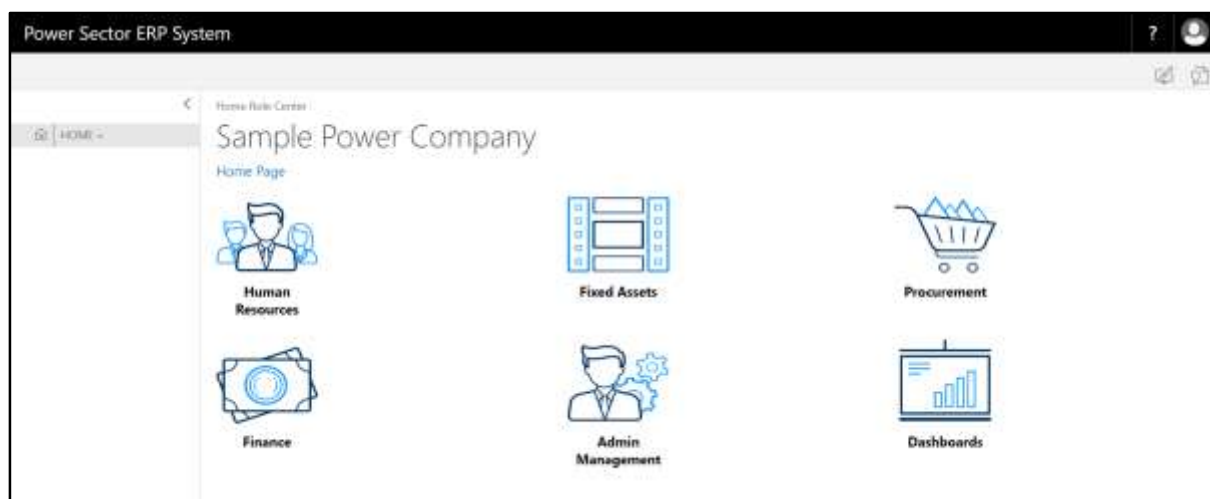
Introduction

Purchase Receipts Dashboard shows graphs on selected purchase receipts functions.

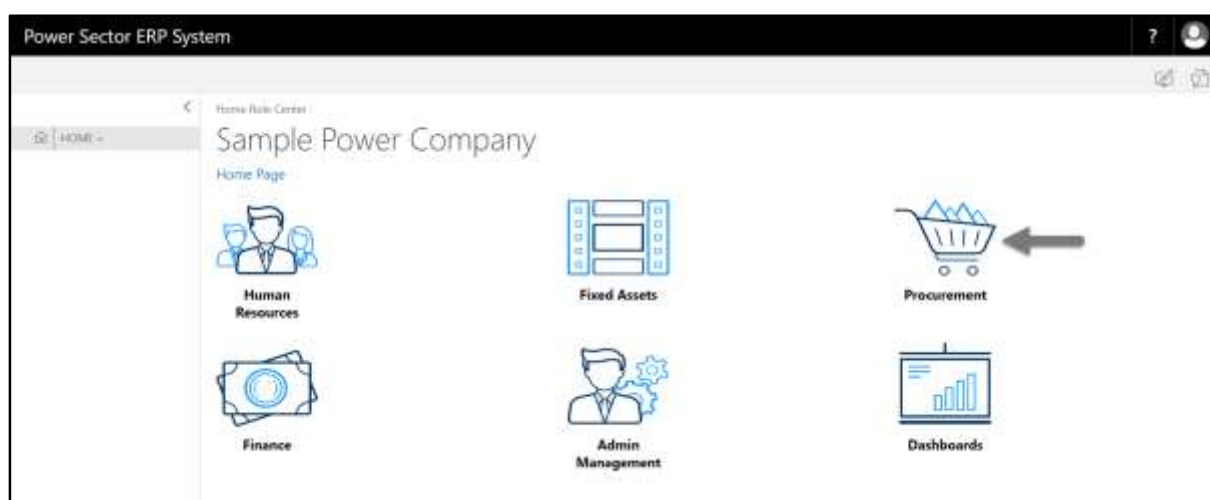
Purchase Receipts Dashboard

To view Purchase Receipts Dashboard, follow the steps below –

- A. Login with your respective **PR Admin credentials**. ERP Landing Page, as below, will be appeared on successful login.



- B. Choose the **"Procurement"** icon.



PR Landing Page will be appeared as below



C. Choose the **"Reports & Dashboard"** in PR Landing Page.



Reports & Dashboard Page will be appeared as below



D. Choose the **"Dashboard"** in Reports & Dashboard page.



Purchase Dashboard Items Page will be appeared as below



E. Choose the “**Purchase Receipts**” in Purchase Dashboard Items Page.



Following **Purchase Receipts** dashboard will be appeared.



The Purchase Receipts dashboard contains 2 graphs of respective organization which shows date range wise received of item.

PR-405 How to: View Purchase Invoices Dashboard

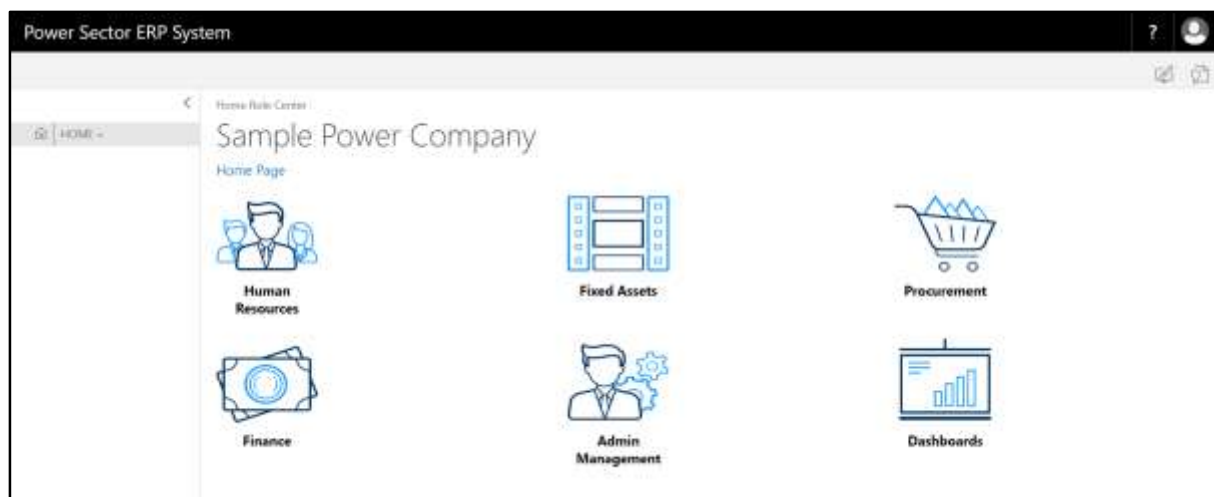
Introduction

Purchase Invoices Dashboard shows graphs on selected purchase invoices status in the organization.

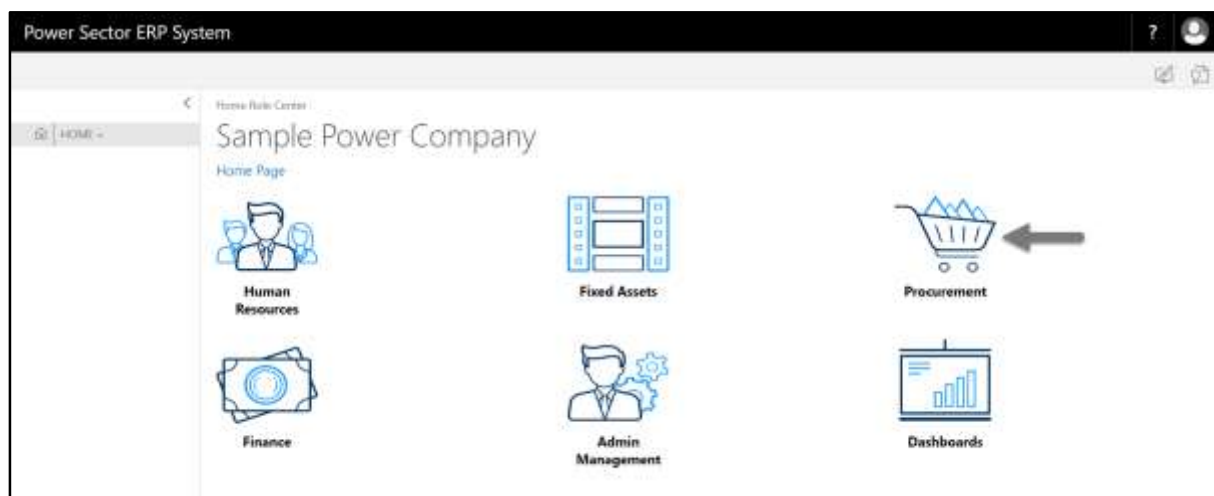
Purchase Invoices Dashboard

To view Purchase Invoices Dashboard, follow the steps below –

- A. Login with your respective **PR Admin credentials**. ERP Landing Page, as below, will be appeared on successful login.



- B. Choose the **"Procurement"** icon.



PR Landing Page will be appeared as below



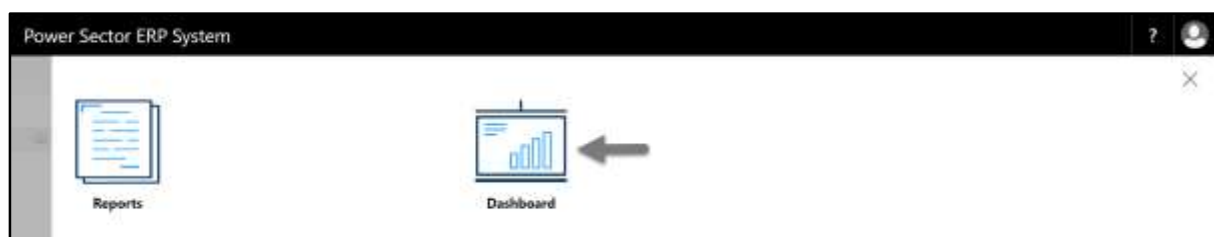
C. Choose the **"Reports & Dashboard"** in PR Landing Page.



Reports & Dashboard Page will be appeared as below



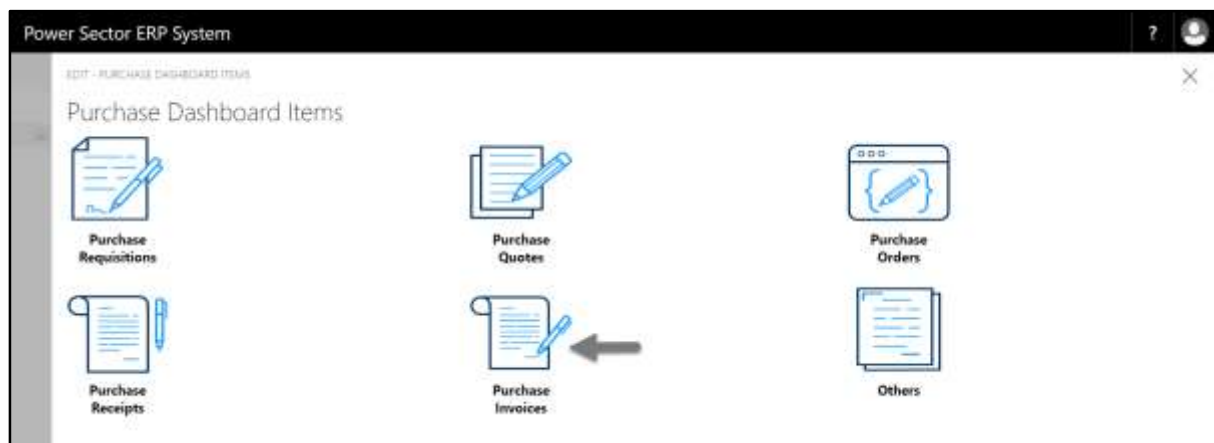
D. Choose the **"Dashboard"** in Reports & Dashboard page.



Purchase Dashboard Items Page will be appeared as below



E. Choose the “**Purchase Invoices**” in Purchase Dashboard Items Page.



Following **Purchase Invoices** dashboard will be appeared.



The Purchase Invoice dashboard contains 7 graphs of respective organization –

- 1. PI Payment Status:** This pie chart shows the ratio of PI Payment Status.
- 2. Purchase Invoice Status:** This column graph represent all the Purchase Invoice Status of vendor.
- 3. Purchase Received Status:** This column graph represent the Purchase Received Status of vendor.
- 4. Posted Invoice Count (Last 10 Days):** This line graph represent all the Posted Invoice Count based on last ten days.
- 5. Posted Invoice Count (Last 3 Months):** This line graph represent all the Posted Invoice Count based on last three months.
- 6. VAT Paid/Unpaid Invoice Chart:** This pie chart represent the ratio between VAT Paid/Unpaid Invoice Chart.
- 7. AIT Paid/Unpaid Invoice Chart:** This pie chart represent the ratio between AIT Paid/Unpaid Invoice Chart.

PR-406 How to: View Other Dashboard

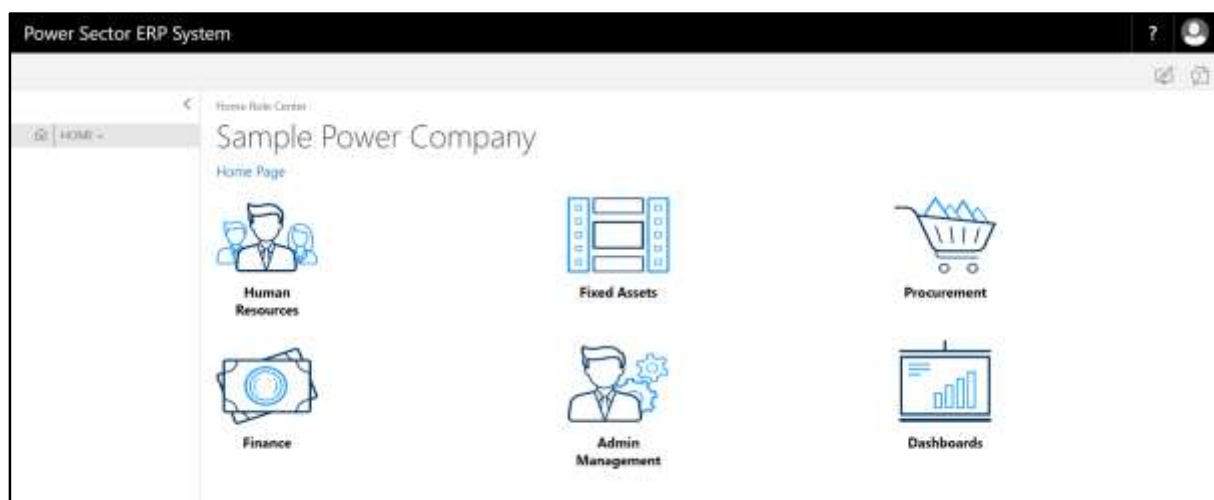
Introduction

Other Dashboard shows graphs on selected criteria functions, like, Method wise Procurement, Requisition Status, Top Items etc.

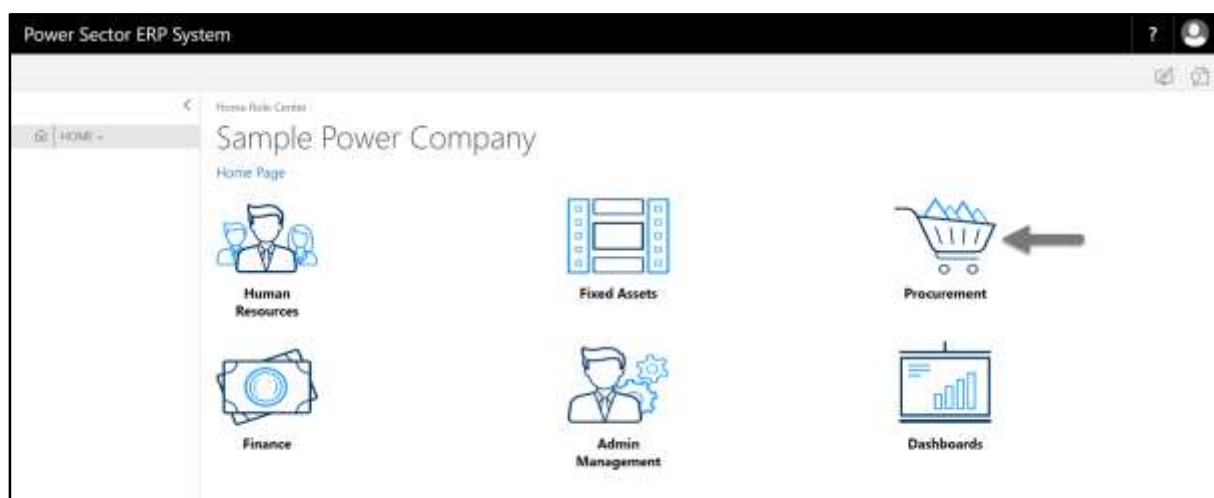
Purchase Invoices Dashboard

To view Purchase Invoices Dashboard, follow the steps below –

- A. Login with your respective **PR Admin credentials**. ERP Landing Page, as below, will be appeared on successful login.



- B. Choose the “**Procurement**” icon.



PR Landing Page will be appeared as below



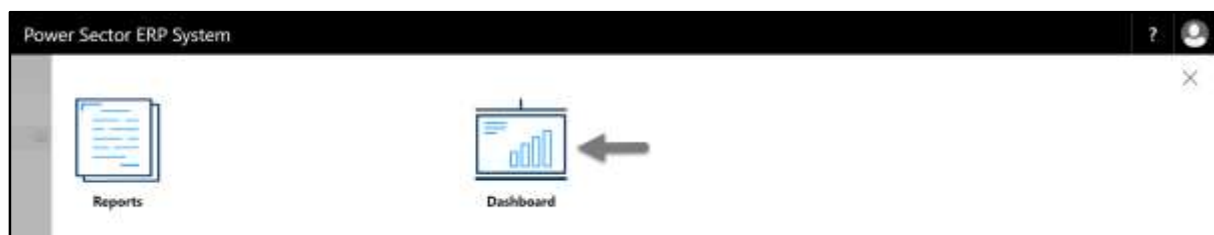
C. Choose the **"Reports & Dashboard"** in PR Landing Page.



Reports & Dashboard Page will be appeared as below



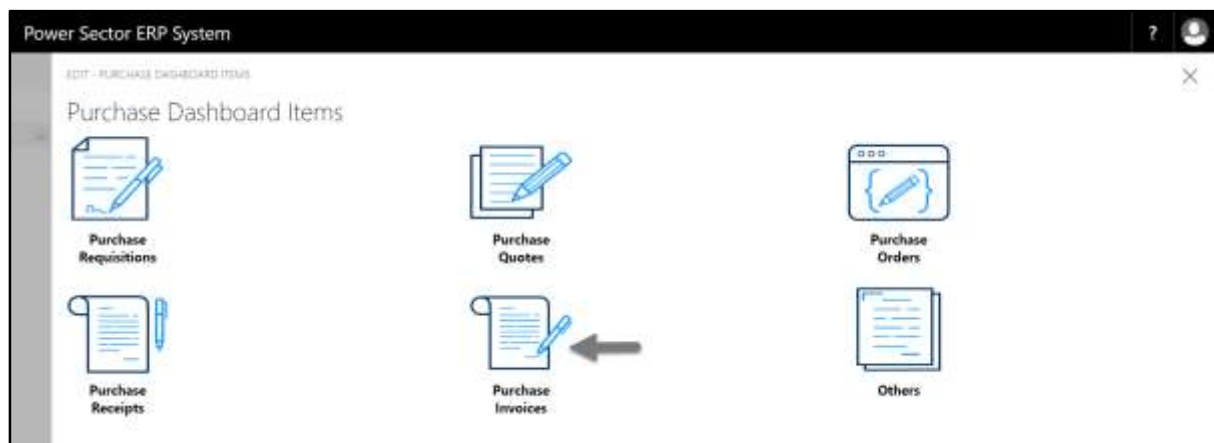
D. Choose the **"Dashboard"** in Reports & Dashboard page.



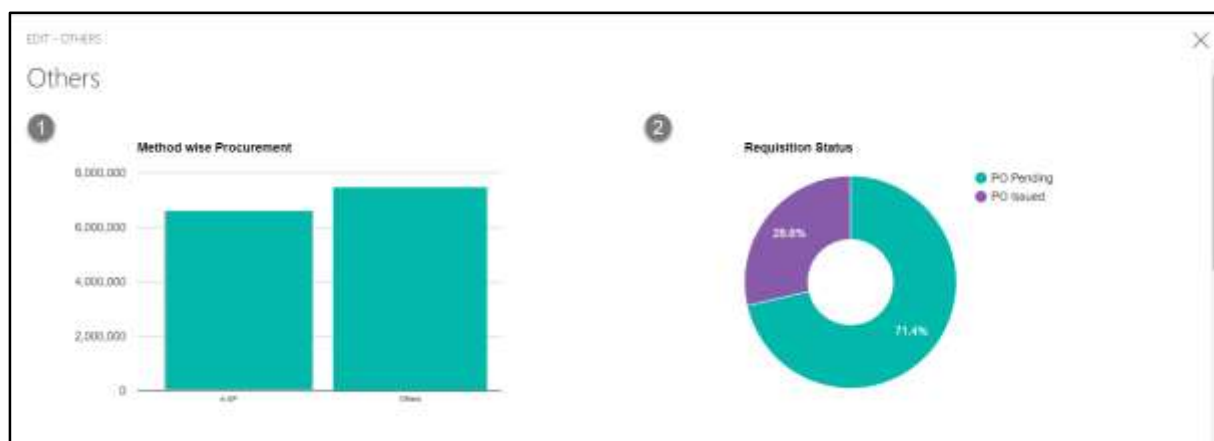
Purchase Dashboard Items Page will be appeared as below



E. Choose the **"Others"** in Purchase Dashboard Items Page.



Following **others** dashboard will be appeared.





The **others** dashboard contains 5 graphs of respective organization –

- 1. Method wise Procurement:** This column graph represent the ratio among methods used in procurement process, like, e-GP, OTM, LTM etc.
- 2. Requisition Status:** This pie chart shows the ratio of the requisition status.
- 3. Top Items:** This column graph shows item wise comparison of the top value of item.
- 4. Procurement Trend:** This column graph represent the procurement trend based on year.
- 5. Procurement Status:** This pie chart showing the ratio of procurement status, like, Completed or Not Initiated.