



02 A budget manager’s guide to creating a purchase order

shop4support’s Budget Manager allows you to create a purchase order or a schedule order.

A **schedule order** is a request for service that often requires a face to face meeting to take place before the schedule is confirmed and payment arranged. The Schedule Order Wizard allows you to set a repeating pattern for a service over a set period of time. A purchase order will be generated automatically from the information contained in the schedule.

A **purchase order** can be more immediate, and if accepted by the provider, can be processed relatively quickly.

Both order types are sent to a provider for confirmation. You can make multiple orders by placing your products or services in the shopping basket.

This document explains how you, the budget manager, can create a purchase order.

Creating a purchase order

Once you have added your items to your basket you can begin to create a purchase order by clicking on the Checkout button.

The screenshot shows the shop4support website interface. At the top, there is a user greeting: "Hello, rob alger, you are acting as A.LA.BM.User | End.act.as | Logout Budget Manager role Change". Below this is a breadcrumb trail: "You are here: Catalogue / Categories / Adapted Products and Equipment".

On the left side, there is a navigation menu with categories such as Accessories, Accommodation, Adapted Products and Equipment (highlighted), Advice and Brokerage, Central Heating, Community and Leisure, Events, Education and Training, Health and Therapy, Installation, Nursing Care Services, Personal and Domestic Support, Provisional, Repairs, Repairs and Maintenance Services, Services for Carers, Servicing, Test Category (Level 1), and Transport.

The main content area features a search bar with the text "Im Justa Normal Individual" and "Public catalogue". Below the search bar is a table of products:

<input type="checkbox"/>	Action	Product code	Product name	Appointment(s) Duration	Availability	Supplier name	Manufacturer
<input type="checkbox"/>		RSTMIKE01	MIKE TEST 001			Rob the Supplier	RTS
<input type="checkbox"/>		B330	Long Handled Shopping Service	1hrs 0min, 1 days, 1 weeks	Mon to Fri 07:00 a.m. - 07:00 p.m.	Rob the Supplier	Bob
<input type="checkbox"/>		a2000	Apollo 200 vacuum cleaner			Rob the Supplier	Bob
<input type="checkbox"/>		AA03	AA Product No.3			zAA Associates Ltd.	AAMan
<input checked="" type="checkbox"/>		AA001	Product No. 1			zAA Associates Ltd.	AAMan
<input type="checkbox"/>		AA02	AA Product No.2			zAA Associates Ltd.	AAMan

On the right side of the interface, there is a "My Basket" section showing "Items 0" and a "Checkout" button. There are also "Refresh" and "Add to Basket" buttons.

You will be directed to the My Basket summary screen. Here, you will need to select the item for which you want to create a purchase order. Once you've selected the required quantity, click on the Process button **Process** and you will be taken to the Purchase Order Wizard screen.

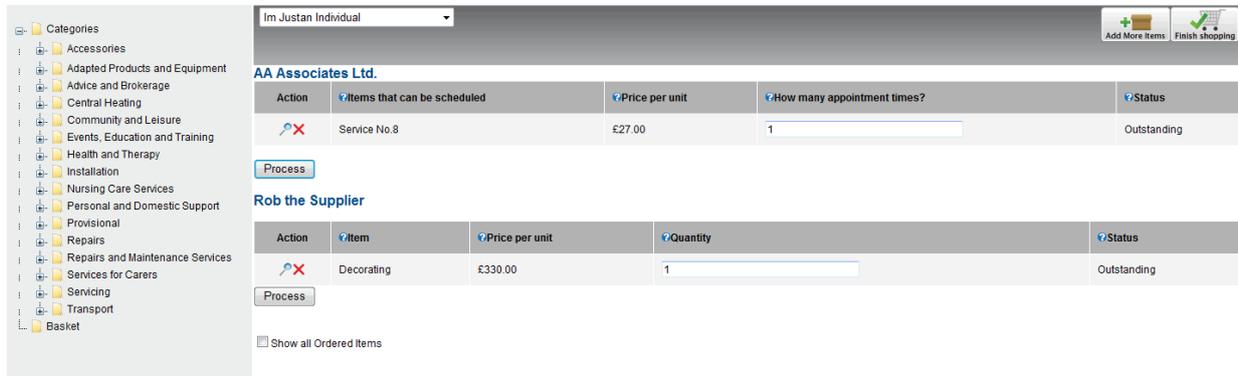


Fig.1 My Basket Summary Screen

Using the Purchase Order Wizard

Step 1 - Delivery Dates & Times

To select the delivery date for your order click on the calendar icon and select the relevant date. When you have completed this, click on the Ok button.

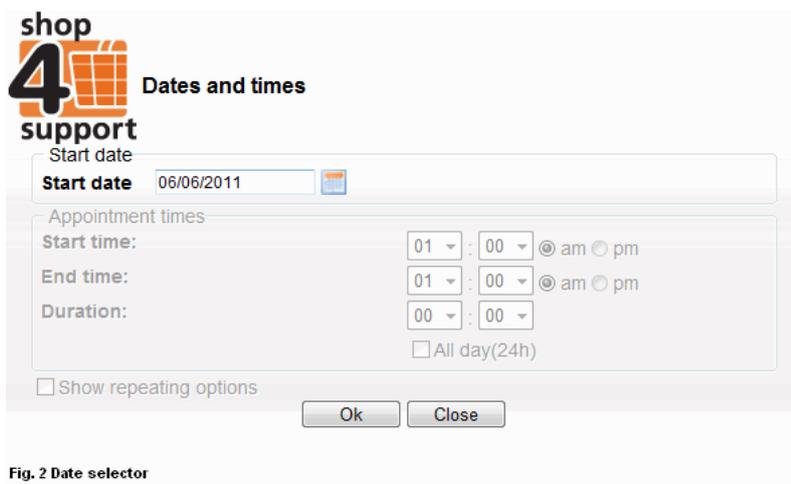


Fig. 2 Date selector

You will then be directed to the screen below, where you will be able to select how many units you require for your order. You then need to click on the Next button on the right hand side of the screen.

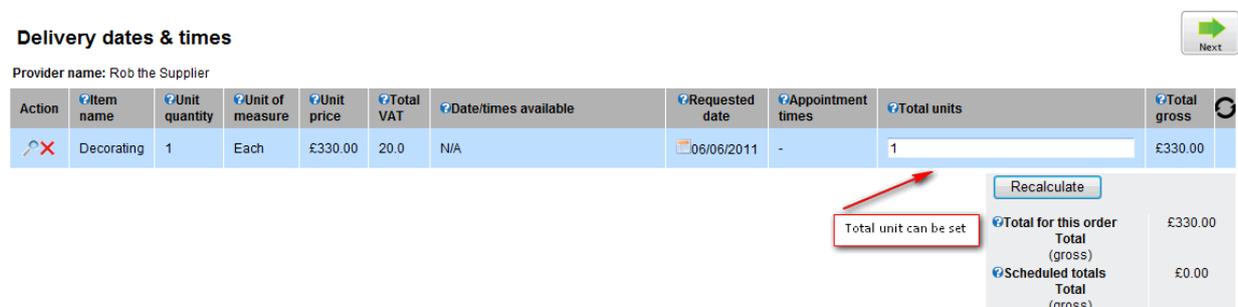


Fig. 3 Total Units

Step 2 - Additional Information

Step 2 of the Purchase Order Wizard allows you to amend the Document Reference Number. You can also add notes and attachments to your order. Click on the Next button to proceed to Step 3.

Additional information Previous Next

Doc ref	Doc type	Item name	Requested date	Appointment times
000032-0000-0000A/001	Purchase order	Decorating	06/06/2011	-

Request assessment meeting for schedules

Date & time: 01 : 00 am pm Location:

Notes

Attach notes to purchase orders Attach notes to schedule orders

Select notes template: Note a note

Here's a note, C#

Attachments:

Attach to purchase order Attach to schedule order

Fig. 4 Additional Information

Step 3 - Summary

This screen provides a summary of the purchase order. If you are happy with the details click on the Next button.

Summary Previous Next

Action	Product name	Unit quantity	Unit of measure	Unit cost	Requested date	Appointment times	Planned activity	Payment method	Ordered units	Total gross
	Decorating	1	Each	£330.00	06/06/2011	-		Offline	1	£330.00
Total for this order										£330.00
Total (gross)										
Scheduled totals										£0.00
Total (gross)										

Fig. 5 Summary

Step 4 - Address Details

You can set-up delivery and invoice addresses at this stage.

You can add a new address to the order by selecting the Add New Address button, or alternatively you can select a previously saved address by clicking on the Select Saved Address button.

Once you have added the relevant addresses, click on the Next button to proceed to Step 5.

Previous Next

Address details

Delivery address: 2 Smithy Court, Wigan

Delivery note:

Invoice address: 2 Smithy Court, Wigan

Delivery details:

Item name	Ordered units	Price
Decorating	1	£330.00

Total net: £275.00

Total VAT: £55.00

Total cost (including VAT): £330.00

Fig. 6 Address Details

Step 5 - Confirmation

This is the final confirmation screen. Here, you must check all the details are correct before clicking on the Finish button. Clicking the Finish button will create a draft purchase order.

Previous Finish

Confirmation

Custom number	Document type	Item name	Requested date	Payment method
000032-0000-0000A/001	Purchase order	Decorating	06/06/2011	Offline

Fig. 7 Confirmation

Depending on the status of the purchase order, the document will progress between different users (local authority, service provider and budget manager).

When a user chooses to edit a purchase order from draft status, this will open a pre-populated Purchase Order Wizard.

shop
4
support

Hello, rob alger, you are acting as [Ima Budget Manager](#) | [End act as](#) | [Logout](#) Budget Manager role Change

[Home](#) | [Help](#)

You are here: Documents / Purchase order - Draft

Im Justan Individual

All fields	Action	State	Individual	PO number	Supplier name	Service provider logo	Buyer name	Delivery date	Gross value
<input type="checkbox"/>		Draft	Im Justan Individual	000032-0000-00009/001	Rob the Supplier		Thera Test Org (SP+BM)	03/06/2011	£54.00
<input type="checkbox"/>		Draft	Im Justan Individual	000032-0000-0000A/001	Rob the Supplier		Thera Test Org (SP+BM)	06/06/2011	£330.00

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Fig. 8 Draft Purchase Order