



### 03 A service provider's guide to processing purchase orders

Budget managers are able to create a purchase order or a schedule order using shop4support's Budget Manager. The budget manager will select the type of order which is most appropriate to their client's needs.

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. Budget Manager's Schedule Order Wizard enables the budget manager to set a repeating pattern for a service over a set period of time.

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

This document gives you, the service provider, an overview of the purchase order process.

#### Confirming a purchase order

When a budget manager submits a draft purchase order, it is passed to the supplier, or service provider, to confirm the order. Once you have confirmed the order, no further changes can be made to the purchase order.

#### How to confirm a purchase order

Any outstanding orders that require your confirmation will be listed in a sub folder called Pending Confirmation, as shown below. To get to this sub folder, click on Documents, then Purchase orders and finally, select Pending confirmation.

Action	State	Date submitted	Individual	PO number	Service provider logo	Buyer name	Delivery date	Gross value
<input type="checkbox"/>	Pending confirmation	03/05/2011	Indi Vidal	000039-0001-00003001		Thera Test Org (SP+BM)	29/04/2011	£38.40
<input checked="" type="checkbox"/>	Pending confirmation	03/05/2011	Indi Vidal	000039-0001-00004001		Thera Test Org (SP+BM)	28/04/2011	£38.40
<input type="checkbox"/>	Pending confirmation	03/05/2011	Indi Vidal	000039-0001-00005001		Thera Test Org (SP+BM)	03/05/2011	£38.40
<input type="checkbox"/>	Pending confirmation	03/05/2011	Indi Vidal	000039-0001-00006001		Thera Test Org (SP+BM)	05/05/2011	£38.40
<input type="checkbox"/>	Pending confirmation	03/05/2011	Indi Vidal	000039-0001-00007001		Thera Test Org (SP+BM)	06/05/2011	£38.40

Fig. 1 Purchase Order Pending Confirmation

You can select the purchase order you wish to confirm by ticking the selection box to the left of each order and then clicking on the Confirm button .

You can also review or print a purchase order by ticking the left hand box and opening the relevant order.

Once you are happy with all the details, click on the Confirm button. Once you have done this the purchase order will move to the Purchase Order/Pending Delivery folder.


Please note: once you have confirmed a purchase order it cannot be changed.

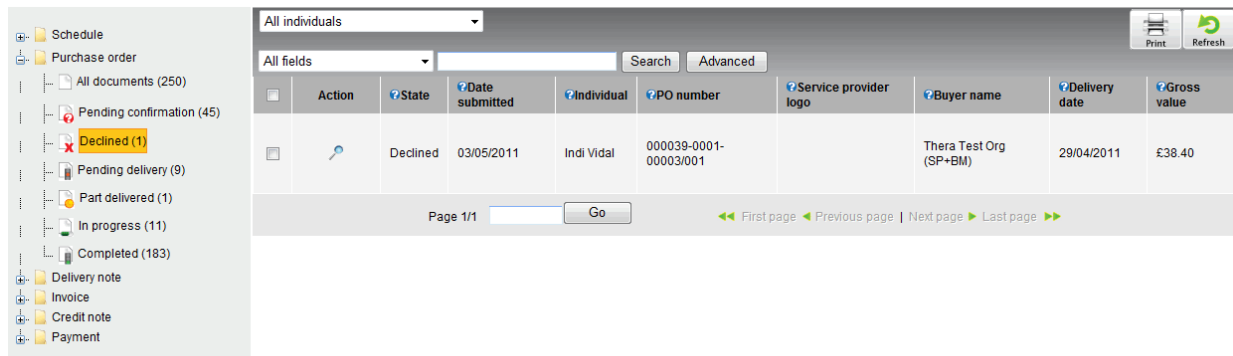
## Declining a purchase order

By declining a purchase order you are indicating to the budget manager that the order cannot be fulfilled. You should add a note indicating your reason for declining the order.

To find the purchase order go to the sub folder Purchase order/Pending confirmation summary page.

Select the purchase order that you wish to decline by ticking the selection box to the left of the order.

Click on the Decline button . The purchase order will move to the Purchase Order/ Declined sub folder.




Action	State	Date submitted	Individual	PO number	Service provider logo	Buyer name	Delivery date	Gross value
	Declined	03/05/2011	Indi Vidal	000039-0001-00003/001		Thera Test Org (SP+BM)	29/04/2011	£38.40

Fig. 2 Purchase Order Declined

## Placing a purchase order on hold

To place a purchase order on hold, go to the Purchase order/Pending Delivery, or Purchase Order/Part Delivered, or Purchase Order/In progress folder.

Select the purchase order to be put on hold by ticking the selection box to the left of the order.

Click on the On Hold button .

The purchase order will move to the Purchase Order/On Hold folder.

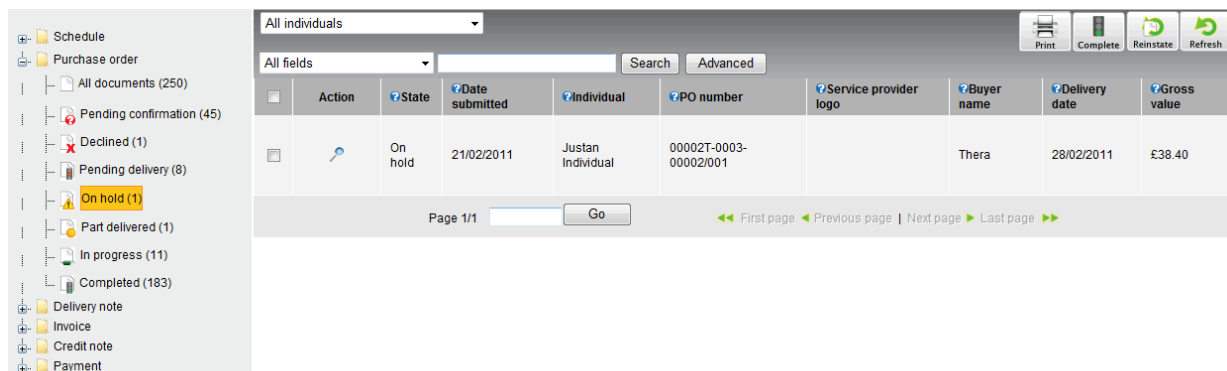


Fig. 3 Purchase Order On Hold

## Reinstating an order from on hold

To reinstate a purchase order from on hold, go to the Purchase order/On hold folder.

Select the purchase order to be reinstated by ticking the selection box to the left of the order.

Click on the Reinstate button .

The purchase order will move back to the Purchase Order sub folder from where it was placed on hold.


## Cancelling a purchase order

You cannot cancel a purchase order. A cancellation can only be completed by the budget manager.

## Completing a purchase order

If your service is never delivered then a delivery note or invoice will not need to be actioned. You can simply complete an order and move it to the Completed sub folder.

To complete a purchase order go the Purchase Order, Part Delivered / On Hold folder and select the purchase order to be completed.

Click on the Complete button . The completed purchase order will be stored in the Purchase Order, Completed folder shown on the next page. No delivery note or invoice will be generated from this process.

Action	State	Date submitted	Individual	PO number	Service provider logo	Buyer name	Delivery date	Gross value
	Completed	28/04/2011	Im a Big Individual	00003A-0000-00002/001		Thera Test Org (SP+BM)	28/04/2011	£70.55
	Completed	11/05/2011	Im a Big Individual	00003A-0000-00005/001		Thera Test Org (SP+BM)	05/05/2011	£91.00

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Fig.4 Purchase Order Completed