

# Procurement 9.2 - Volume 1

---

## Contents

<b>Introduction</b>	<b>5</b>
<b>Procurement Overview</b>	<b>7</b>
<b>Inventory Order Processing</b>	<b>9</b>
Supplier Setup	9
Item Setup	16
Pricing Setup	24
Inventory Purchase Order Entry	26
Send Purchase Order	32
Receipt Processing	44
<b>Non-Inventory Order Processing</b>	<b>47</b>
Supplier Setup	47
Non-Inventory Purchase Order Entry	47
Send Purchase Order	52
Match Invoices to Receipts	61
<b>Procurement Setup</b>	<b>63</b>
<b>System/Cross Module Setup</b>	<b>63</b>
Branch/Plant – Business Unit Structure	63
<b>Branch/Plant Constants</b>	<b>65</b>
Branch/Plant Locations	73
<b>System Constants</b>	<b>75</b>
Standard Units of Measures	80
User Default Branch	82
<b>Procurement Module Setup</b>	<b>86</b>
Document Types	86
Line Types	91
Order Activity Rules	92
Supply & Demand Inclusion Rules	94
PO Print Messages	96
Basic AAls	104
<b>Supplier Setup</b>	<b>104</b>
Address Book	104
Supplier Information	104
Supplier Master Information	109
<b>Item Setup</b>	<b>113</b>
Item Master/Item Branch	113
Item Master Types	113
Item Numbers	115
Category Codes	123
Non-Stock Item Masters	126

<b>Item Branch Information</b>	<b>128</b>
Maximum/Minimum/Multiple Order Quantities	134
<b>Purchased Item Costs</b>	<b>136</b>
Cost Methods	136
Cost Elements	142
<b>Supplier/Item Setup</b>	<b>143</b>
Item Cross Reference	143
<b>Supplier Pricing</b>	<b>144</b>
Item Cost File	145
Supplier Catalog Pricing	147
Blanket Order Pricing	149
<b>Inventory Based Purchases</b>	<b>151</b>
<b>Purchase Order Entry</b>	<b>151</b>
PO Entry Process	151
PO Numbering	155
Branch/Plant	158
PO Addresses	158
Payment Terms	164
Purchase Order Tax Information	167
Multi-Currency	168
Items to Order/Quantities	168
Order Dates	171
Units of Measure	172
PO Price	174
Additional-Charge Lines on Inventory Orders	182
<b>Other Methods for PO Release</b>	<b>186</b>
<b>Defining Header to Detail Information</b>	<b>187</b>
<b>Purchase Order Print</b>	<b>190</b>
<b>PO Print Versions</b>	<b>190</b>
Proof/Internal Use Only	191
Print for Release to Supplier	205
Reprint	216
Change Order	222
Blanket Order	231
<b>Purchase Order Forms/Display</b>	<b>238</b>
Supplier Cross Reference	238
PO Notes	245
<b>Purchase Order Receipts</b>	<b>255</b>
Receipt to Inventory Process Overview	255
Receipt Processing Examples	259
Receipt Tolerance on Quantity	269
Receipt Reversal	281
Receipt Tolerance on Date	283
<b>Put-Away Location/Location Split</b>	<b>284</b>
Primary Bin Maintenance	284

Location Override _____	291
Receipt to Multiple Locations _____	294
Receipt Notification _____	299
<b>Voucher Match _____</b>	<b>307</b>
Programs Used _____	307
Three-Way Voucher Match: Stock Lines _____	308
Non-Inventory Lines on an Inventory Order _____	318
Adding Lines During Voucher Match _____	336
Other Setup Options _____	344
<b>Conclusion _____</b>	<b>348</b>
<b>Intermediate Topics for Inventory Purchases _____</b>	<b>349</b>
<b>Requisitions/Quote Orders _____</b>	<b>349</b>
Requisitions Overview _____	349
Requisition Entry _____	350
Consolidate Requisitions _____	358
Request for Quote Suppliers _____	365
Quote Price Breaks _____	369
Printing Quote Orders (RFQ) _____	373
Enter Quote Responses _____	379
Release Purchase Order from Quote _____	386
<b>Order Acknowledgement _____</b>	<b>392</b>
Acknowledgement Process _____	392
<b>Order Revisions _____</b>	<b>415</b>
Revisions Tracking _____	415
Printing a Change Order _____	434
Adding Lines to an Order _____	441
Revisions Without Revision Tracking _____	446
Inactivating Revision Tracking _____	450
<b>Blanket Order _____</b>	<b>452</b>
Blanket Order Setup _____	452
Creating a Blanket Order _____	459
Automatically Release a Blanket Order _____	462
Printing a Blanket Order _____	469
Manually Release a Blanket Order _____	476
Blanket Release Tolerance Check _____	489
Closing Blanket Orders _____	498
<b>Debit Memos/Return to Vendor Processing _____</b>	<b>502</b>
Background _____	502
Sample Process Flow _____	503
System Setup _____	503
Examples of Debit Memo Orders _____	504
<b>Lot Control _____</b>	<b>509</b>
System Set Up _____	509
Application Setup _____	513
Item Setup _____	515
Lot Receipt Example _____	519

<b>Serial Number Control</b>	<b>533</b>
Basic Serial Number Control	533
Advanced Serial Number Control	542

Protected by copyright (c) JDEtips, Inc.  
Unauthorized use is a copyright infringement.

# Procurement 9.2 - Volume 2

## Contents

<b>Introduction</b>	<b>5</b>
<b>Advanced Topics for Inventory Purchases</b>	<b>7</b>
<b>Inspection Processing of Inbound Goods</b>	<b>7</b>
Receipt Routing/Supplier Analysis	7
Supplier Analysis Results	26
Secondary Inspection Process	28
Alternate Receipt Routings	52
<b>Receipt Days Early/Days Late</b>	<b>70</b>
Receipt Tolerance Check	70
Supplier Analysis Results	81
Supplier Analysis Calculations	89
<b>Supplier Certification Status</b>	<b>93</b>
Approved/Disapproved Status	93
Primary vs. Secondary Supplier	99
<b>Item Restrictions</b>	<b>108</b>
Setup	109
Order Entry Example	113
<b>Supplier Consigned Inventory</b>	<b>124</b>
Business Case	124
Sample Process	124
Requirements	125
Solution 1: Consignment Branch/Plant	125
Solution 2: Receipt Routing	126
Conclusion	151
<b>Purchasing Kits</b>	<b>151</b>
Kit Parent Item Information	151
Bill of Material Information	154
PO Entry/Release	156
PO Receipt Processing	162
<b>Non-Inventory Purchases</b>	<b>167</b>
<b>Non-Stock Item Purchases</b>	<b>167</b>
Non-Stock Item Master	168
Supplier Pricing	170
Order Activity Rules	171
Purchase Order Entry	172
Purchase Order Print	176
Receive and Voucher	179
<b>Supplier Templates</b>	<b>184</b>
Supplier Template Revisions	185

Supplier Template Default _____	188
PO Entry Processing Options _____	188
Purchase Order Entry _____	189
<b>Account-Based Purchases _____</b>	<b>202</b>
Setup _____	202
Purchase Order Entry _____	202
Purchase Order Print _____	206
Receive and Voucher _____	209
<b>Non-Inventory Requisitions/Electronic Approvals _____</b>	<b>214</b>
Approval Route Revisions _____	214
Order Activity Rules _____	217
Default Route Code _____	218
Activating Approval Processing _____	221
Requisition Entry Process _____	223
Workflow Messages _____	228
Reqs Awaiting Approval _____	238
Email Notification Setup _____	241
Approval Critical Fields _____	243
<b>Manufacturing Topics _____</b>	<b>247</b>
<b>Material Requirements Planning (MRP) _____</b>	<b>247</b>
Introduction _____	247
MRP Process Flow _____	248
MRP Setup _____	248
Adding a Forecast _____	263
MRP Generation _____	265
Order Release _____	268
Planning Family Review _____	272
<b>First-Article Purchases _____</b>	<b>276</b>
Background _____	276
Alternative Solutions _____	277
Recommended Solution _____	277
Document Type _____	277
Example – First Article Purchase _____	286
AAI Setup _____	291
<b>Outside Processing _____</b>	<b>297</b>
Background _____	297
Solution _____	297
Process Scenario _____	298
Setup _____	298
Example _____	306
<b>Accounting Topics _____</b>	<b>317</b>
<b>Landed Costs _____</b>	<b>317</b>
Process _____	317
Setup _____	319
Example – Landed Costs _____	333
Purchase Price Variance Reporting _____	357
<b>Freight Claim Processing _____</b>	<b>363</b>



Background	363
Business Requirements	363
Solution	364
<b>Flex Accounting for Procurement</b>	<b>364</b>
Introduction	364
Setup	365
Flex Accounting Example	380
<b>Additional Features of Procurement</b>	<b>389</b>
<b>PO Generator</b>	<b>389</b>
<b>Advanced Pricing for Procurement</b>	<b>404</b>
Base Price	404
Branch/Plant Constants	407
Setup	410
Example	428
<b>Purchasing a Configured Item</b>	<b>433</b>

Protected by copyright (c) JDEtips, Inc.  
Unauthorized use is a copyright infringement.