TALLORDER SOLUTIONS

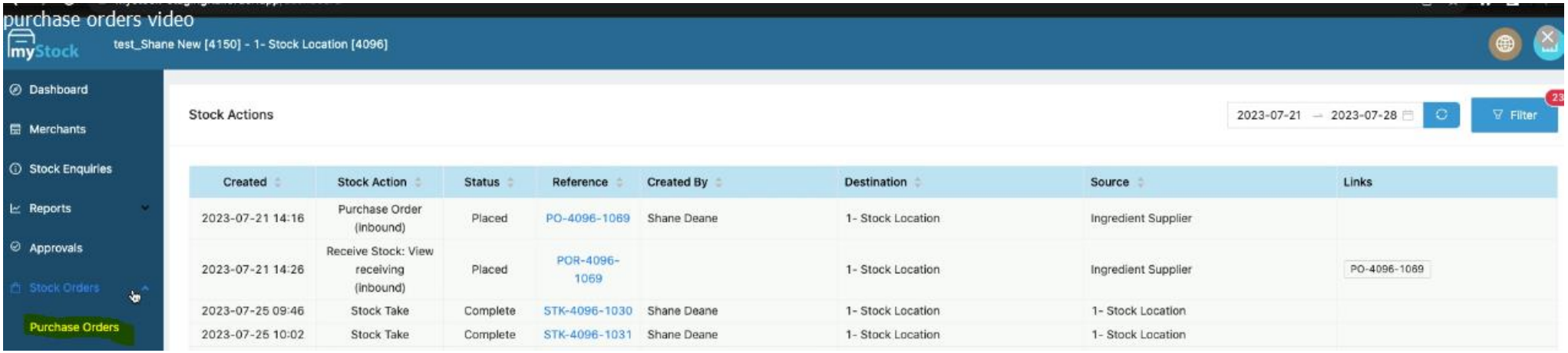
MYSTOCK PURCHASE ORDERS

TallOrder / myStock Purchase Orders Manual

Purchase orders are a vital aspect of managing your stock inventory in myStock. They allow you to streamline the ordering process and maintain accurate stock levels. In this manual, you will learn how to create, manage, and finalise purchase orders with ease.

To access the Purchase Orders section in myStock, follow these steps:

1. Navigate to Stock Orders.
2. Click on Purchase Orders.



- The purchase orders page will open. On this page it allows you to view certain purchase orders in draft or completed status. Here you can view templates and create templates for purchase orders and rejected purchase orders.

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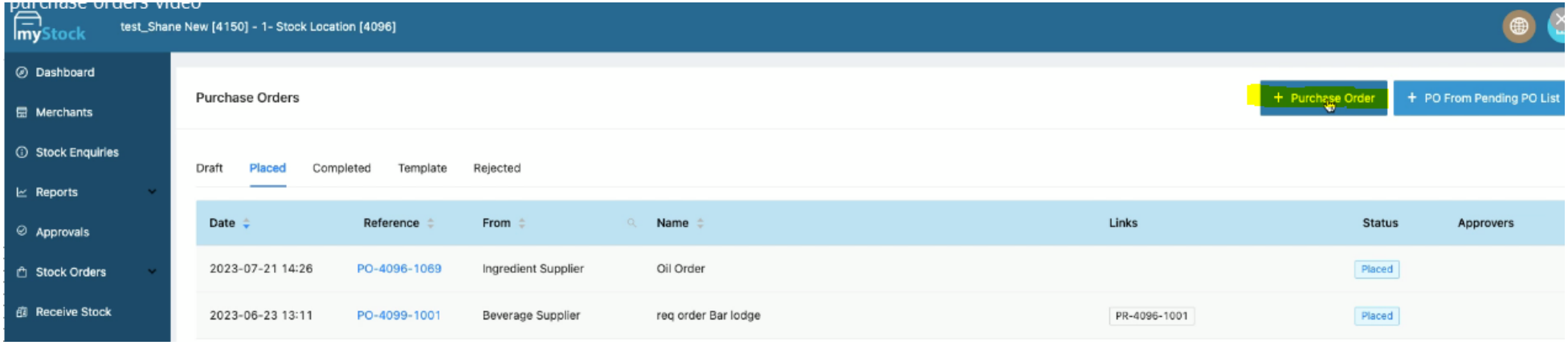
If you look at "Placed" there may potentially be some purchase orders. You will be able to see:

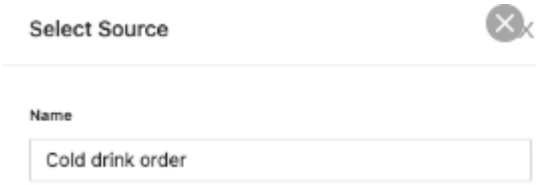
- Date order was placed.
- References from which supplier it's being placed on.
- Name of the purchase order.
- What links there are.
- The status of the order.
- If there are any approvals.

Creating a purchase order:

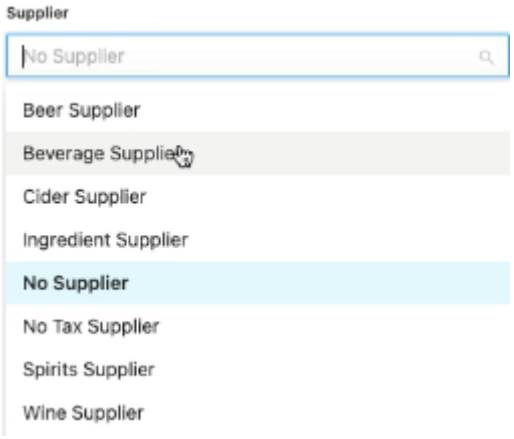
- Click the "Purchase Order" button on the top left.



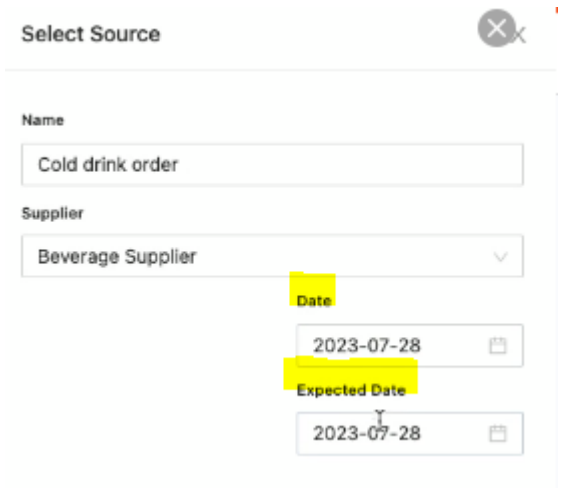
- Give the order a descriptive name.



- Select a supplier from the linked list.



- Choose the order date and expected delivery date.

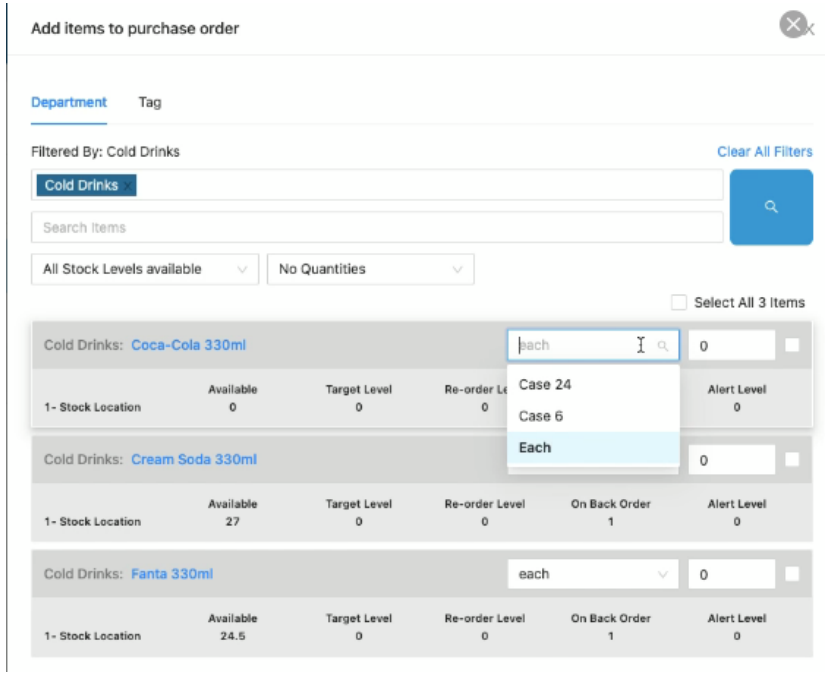


- Click "Add Items" to begin selecting items for the order.

- You can search by filtering under the departments that the merchant has or you can simply type in the item”s name

- Select search and all the cool drinks will appear.
- On the right you will see that there are two different fields. Unit and quantity. This is your order unit and whatever is showing here is usually your default order unit. There will not always necessarily be a drop-down draw that is because you might only have one order unit which is your sales unit that is set to this item.

- **For example:** Have a look at an ingredient. You will see **bacon** is an ingredient from the ingredients department and that it is a kilogram. So that means that it doesn't have the option to select a different alternative unit. That means that this is the sales unit as well as the default order unit.



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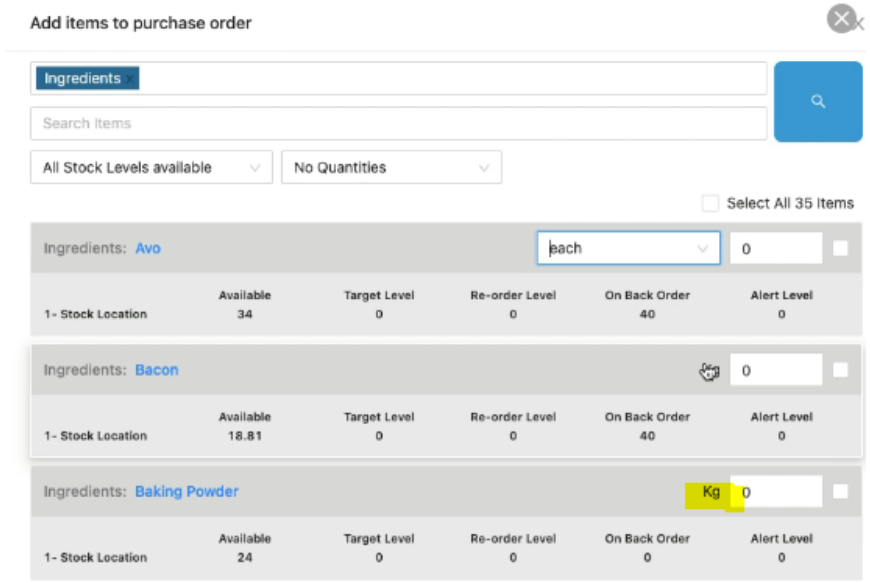
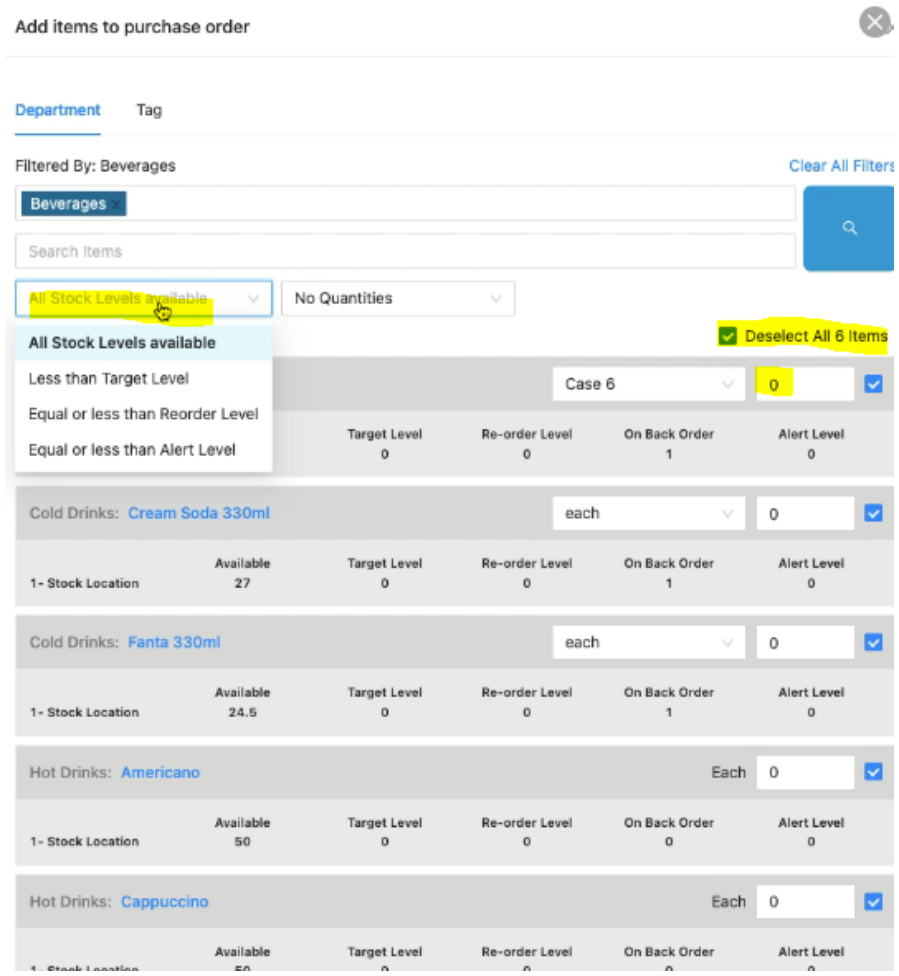
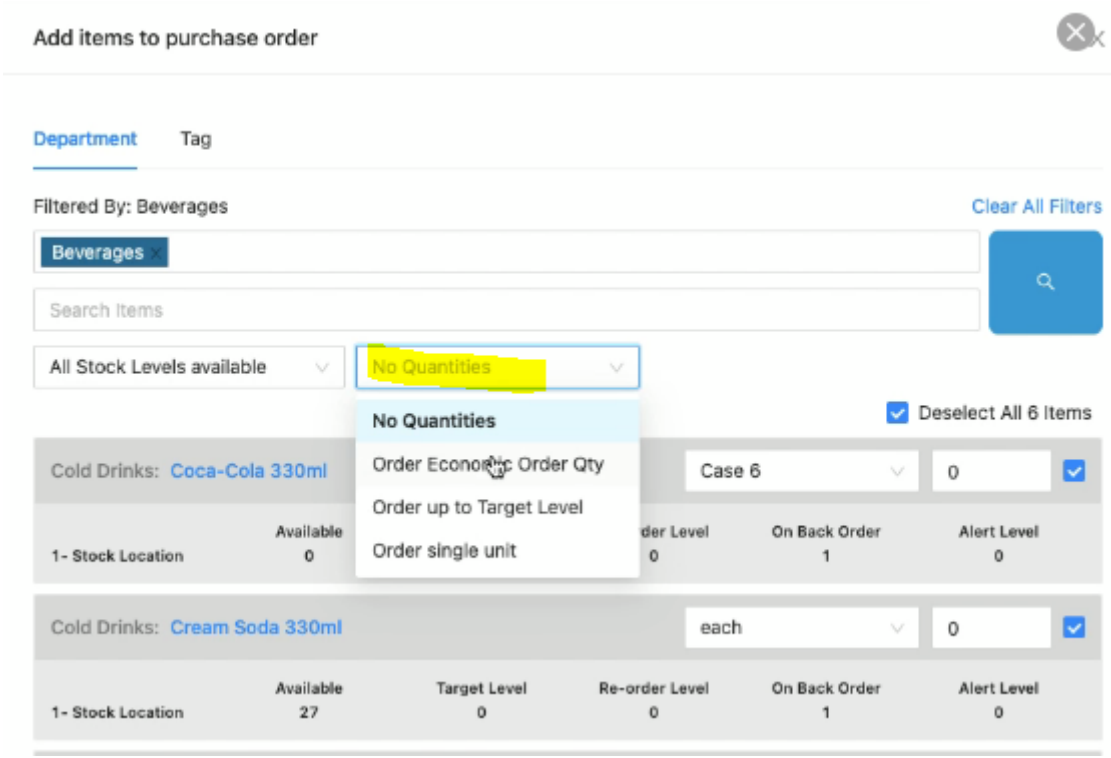


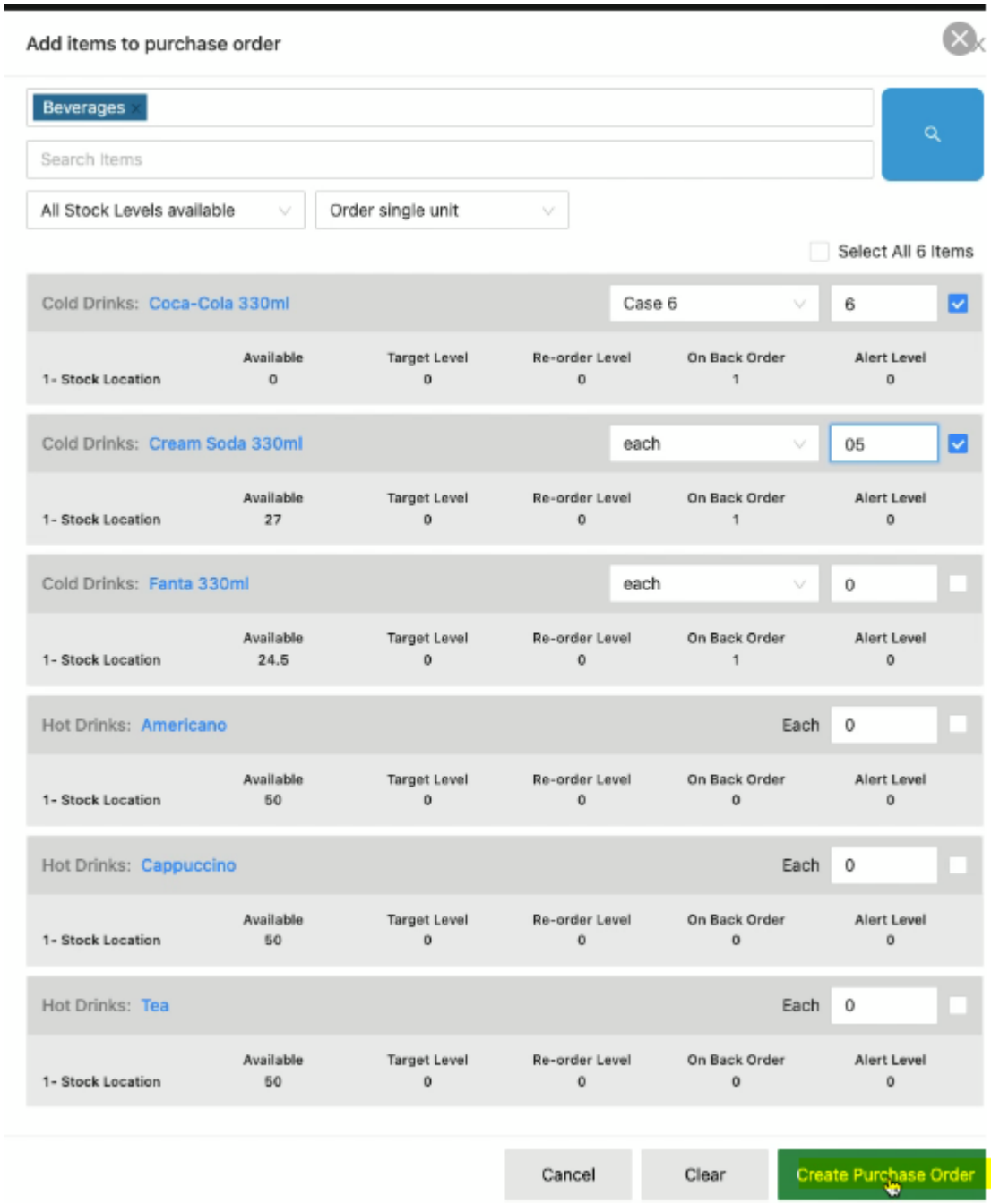
- You can select multiple items when you search. You can select which default order unit you want to use. You can also click on "Select All" to select more than one item.
- Under "All stock levels available" you can choose between:
    - Less than target level
    - Equal or less than reorder level
    - Equal or less than alert level



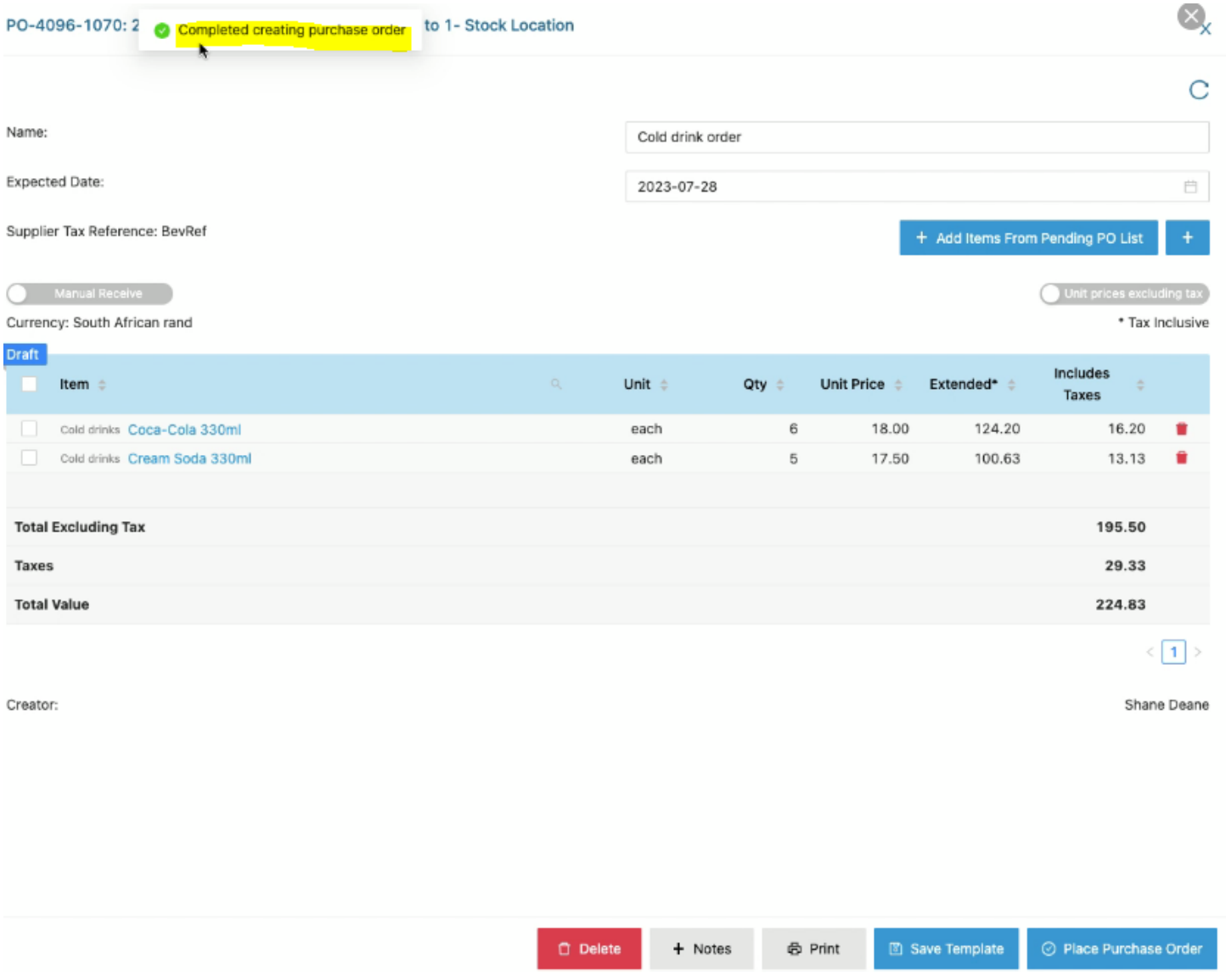
- Under "No Quantities" you can choose between:
  - Order Economic Order Quantity
  - Order up the target level
  - Order Single unit



- When you have entered all the quantities of items that you want to order click on "Create Purchase Order".


Add items to purchase order
Beverages
Search Items
All Stock Levels available
Order single unit
Select All 6 Items
Cold Drinks: Coca-Cola 330ml
Case 6
6
1- Stock Location
Available 0
Target Level 0
Re-order Level 0
On Back Order 1
Alert Level 0
Cold Drinks: Cream Soda 330ml
each
05
1- Stock Location
Available 27
Target Level 0
Re-order Level 0
On Back Order 1
Alert Level 0
Cold Drinks: Fanta 330ml
each
0
1- Stock Location
Available 24.5
Target Level 0
Re-order Level 0
On Back Order 1
Alert Level 0
Hot Drinks: Americano
Each
0
1- Stock Location
Available 50
Target Level 0
Re-order Level 0
On Back Order 0
Alert Level 0
Hot Drinks: Cappuccino
Each
0
1- Stock Location
Available 50
Target Level 0
Re-order Level 0
On Back Order 0
Alert Level 0
Hot Drinks: Tea
Each
0
1- Stock Location
Available 50
Target Level 0
Re-order Level 0
On Back Order 0
Alert Level 0
Cancel
Clear
Create Purchase Order

- Once you click create purchase order, it will show you that it's completed creating the purchase order and it will save it as a draft.



Management Options for Purchase Order Drafts:

Within the Purchase Order draft, you have the flexibility to control the receipt process in two distinct ways:

1. **Auto Receive:** Enabling this option streamlines the process significantly. Once you've activated the toggle and initiated the purchase order placement, an auto receive dialog box will appear. In this dialog, you'll be prompted to enter an invoice number. Upon completing this step, you'll notice that the "Place Purchase Order" button turns a highlighted blue. This automation eliminates the need for manual stock reception, sparing you from the task of physically counting the items upon arrival. Should you opt solely for an order receipt, this option effectively fulfils that requirement. You can input invoice details, additional information, and even attach notes. The generated information is readily accessible for your records, including printing or note integration.

2. **Manual Receive:** Alternatively, you can choose to proceed with manual receipt handling. This approach entails verifying and counting the items upon their arrival in your inventory. Should you prefer to retain this level of hands-on control, you can select this option. Any accompanying invoice details, such as tax considerations, are adjustable based on your specific needs.

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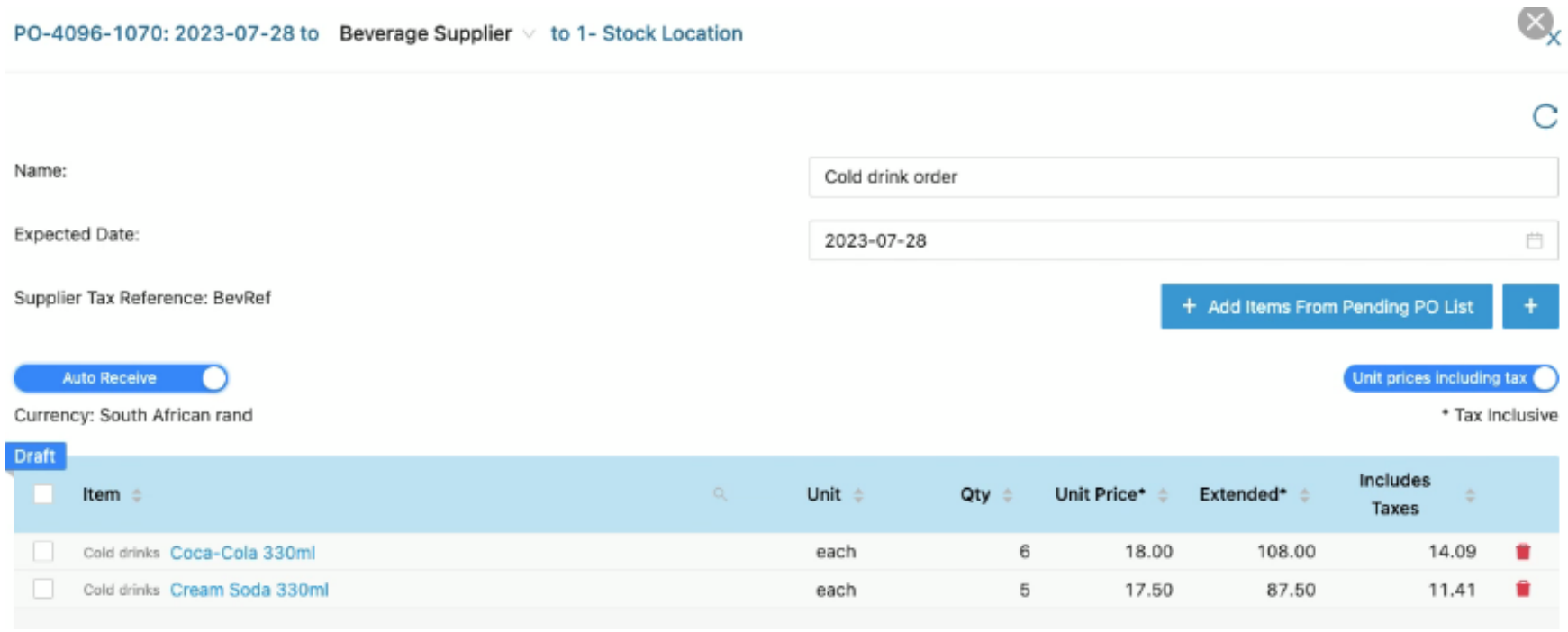
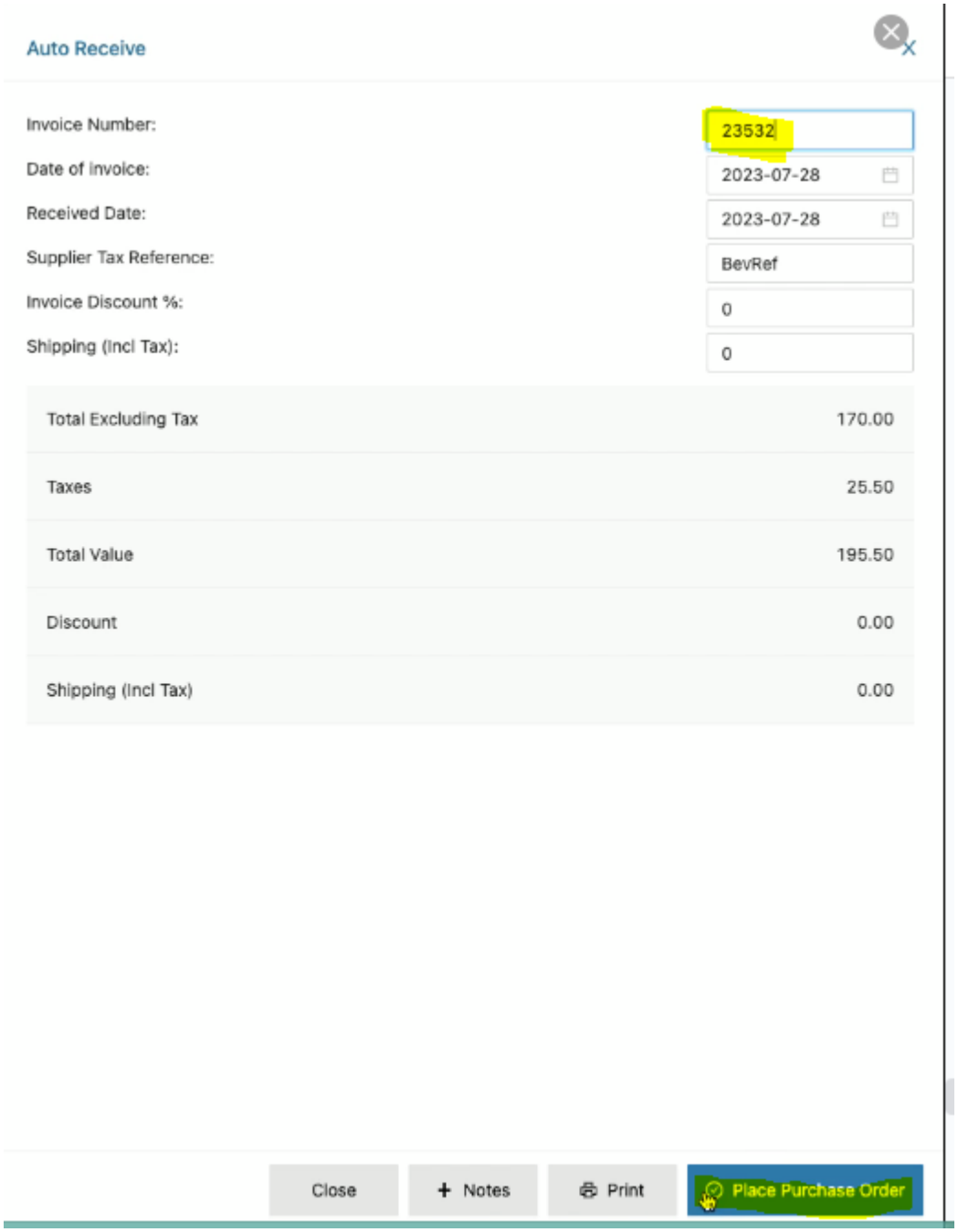
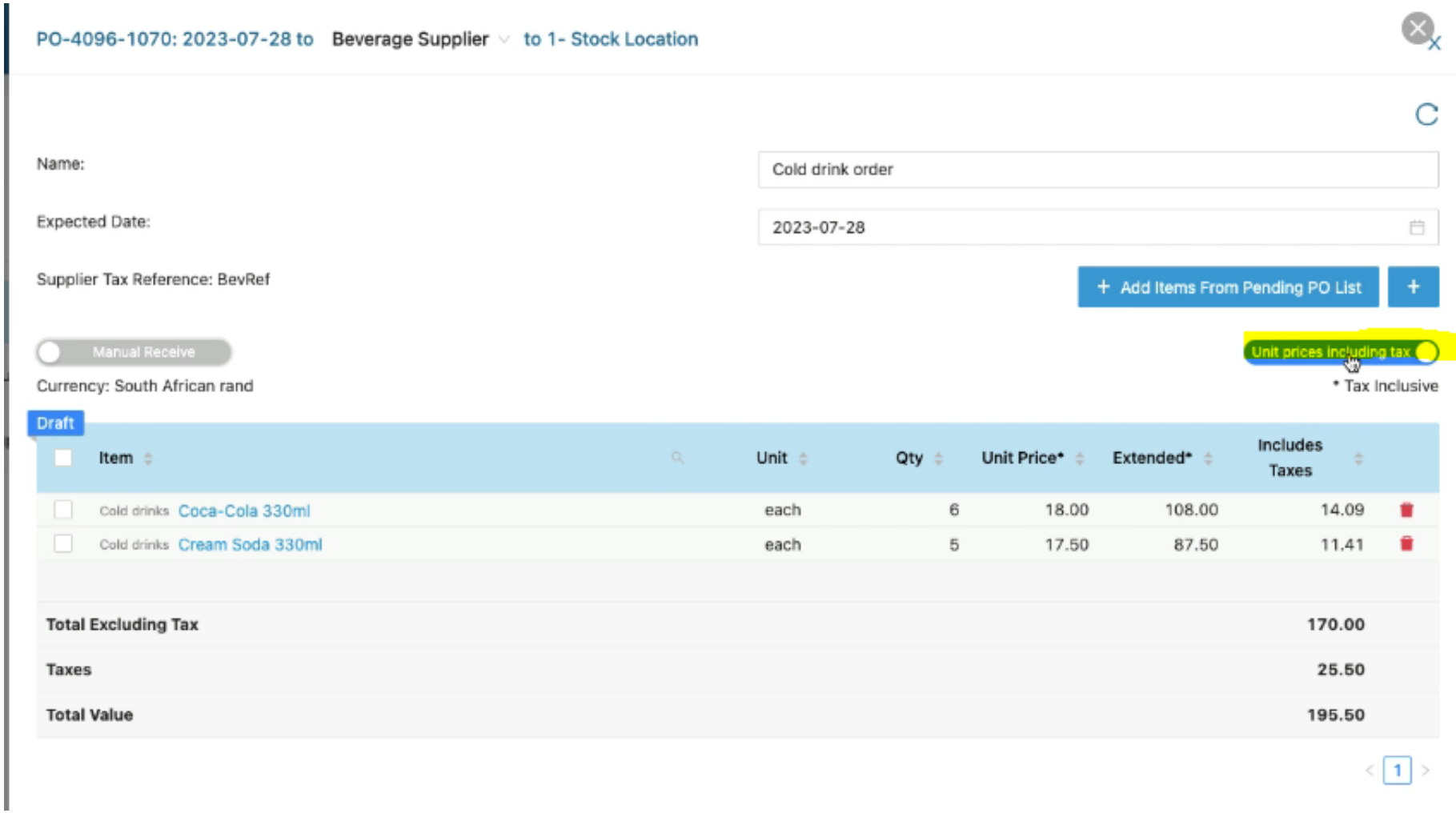

PO-4096-1070: 2023-07-28 to Beverage Supplier to 1- Stock Location
Name:
Cold drink order
Expected Date:
2023-07-28
Supplier Tax Reference: BevRef
+ Add Items From Pending PO List
+
Auto Receive
Unit prices including tax
Currency: South African rand
* Tax Inclusive
Draft
Item
Unit
Qty
Unit Price*
Extended*
Includes Taxes
Cold drinks Coca-Cola 330ml each 6 18.00 108.00 14.09
Cold drinks Cream Soda 330ml each 5 17.50 87.50 11.41


Auto Receive
Invoice Number:
23532
Date of invoice:
2023-07-28
Received Date:
2023-07-28
Supplier Tax Reference:
BevRef
Invoice Discount %:
0
Shipping (Incl Tax):
0
Total Excluding Tax
170.00
Taxes
25.50
Total Value
195.50
Discount
0.00
Shipping (Incl Tax)
0.00
Close
+ Notes
Print
Place Purchase Order

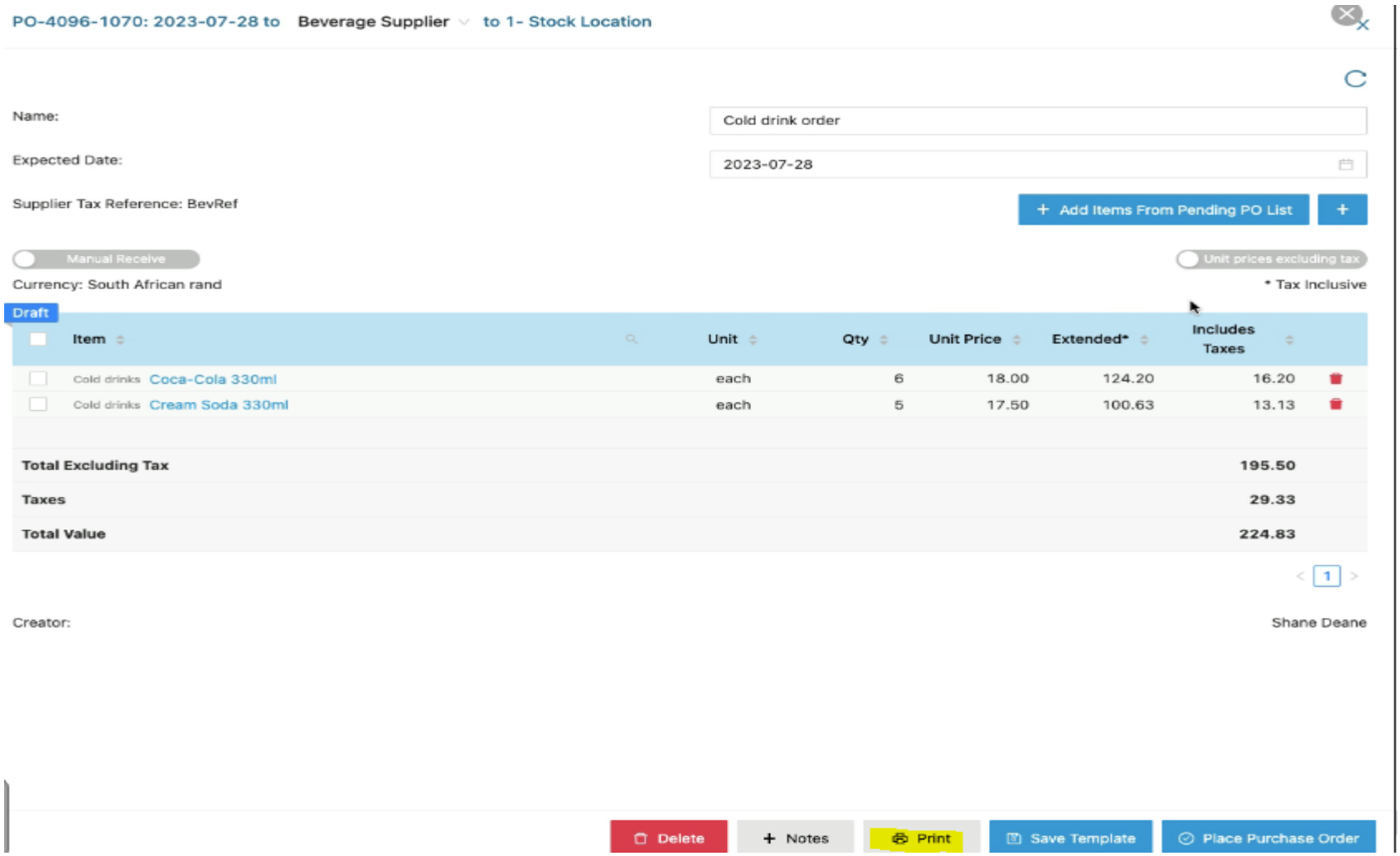


When opting for the manual receive option, you're presented with a valuable choice regarding unit prices - one that tailors to your specific needs:

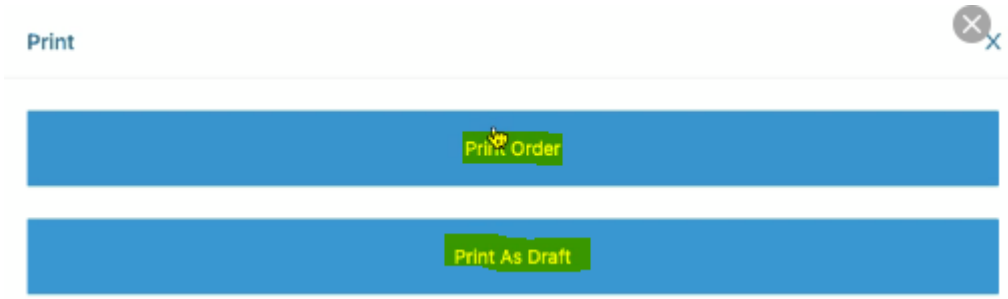
- **Tax Inclusive:** Should you decide to utilise the tax inclusive option, denoted by a small star icon, the extended price showcases an all-inclusive value that comprises both the item's base price and the applicable tax. This transparency ensures that the final price accurately reflects the total cost, providing a comprehensive perspective.

- **Tax Excluding:** Conversely, by selecting the tax excluding alternative, you're opting to view unit prices without the tax component. This approach maintains clarity on the items base cost, allowing for separate consideration of taxes during the manual receipt process.

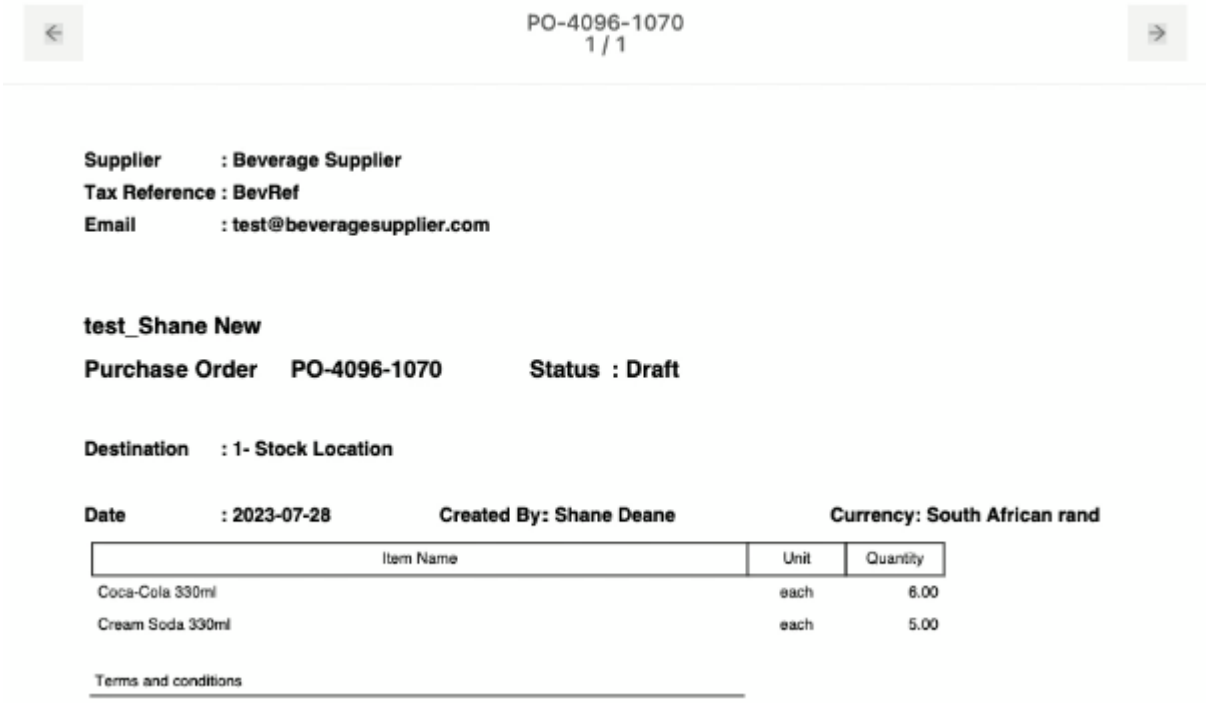
Choosing the tax-excluding option reveals the suppliers tax reference number, indicating that taxes are already incorporated in the purchase order. This simplifies future orders with the same supplier, as taxes will be automatically included based on the reference number provided.



- You can choose to print out the draft by selecting either the print order or print as a draft.

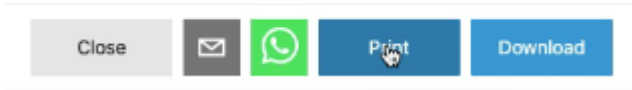


- The printable draft/order will appear on the screen.

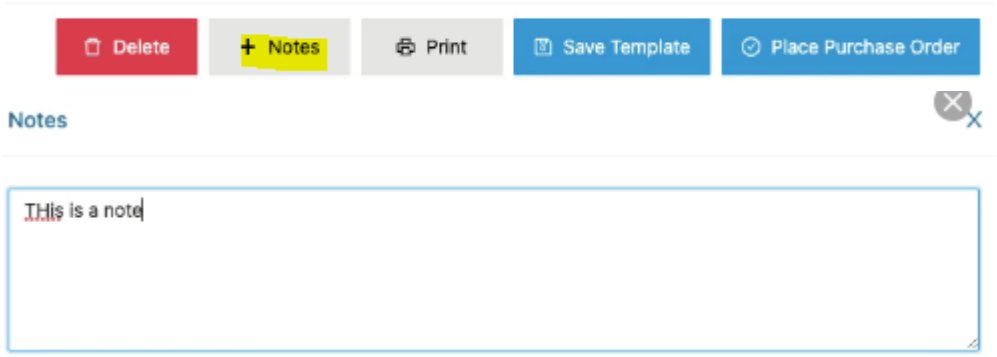


After preparing the draft, you have multiple ways to distribute it:

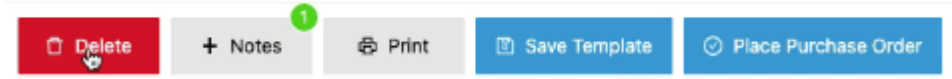
- **WhatsApp or Email:** Seamlessly send the draft through WhatsApp or email, allowing for quick and efficient communication with relevant parties.
- **Direct Printing:** Choose to print the draft directly for a tangible copy.
- **PDF Download:** Alternatively, you can download the draft as a PDF file, enhancing accessibility and digital record-keeping.



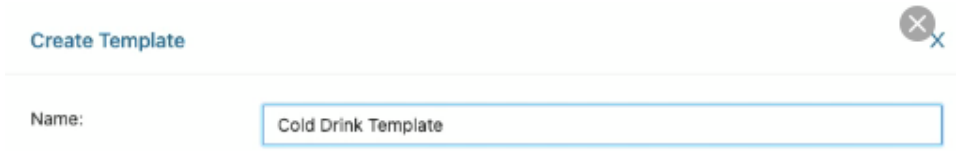
- You can add notes to the purchase order.



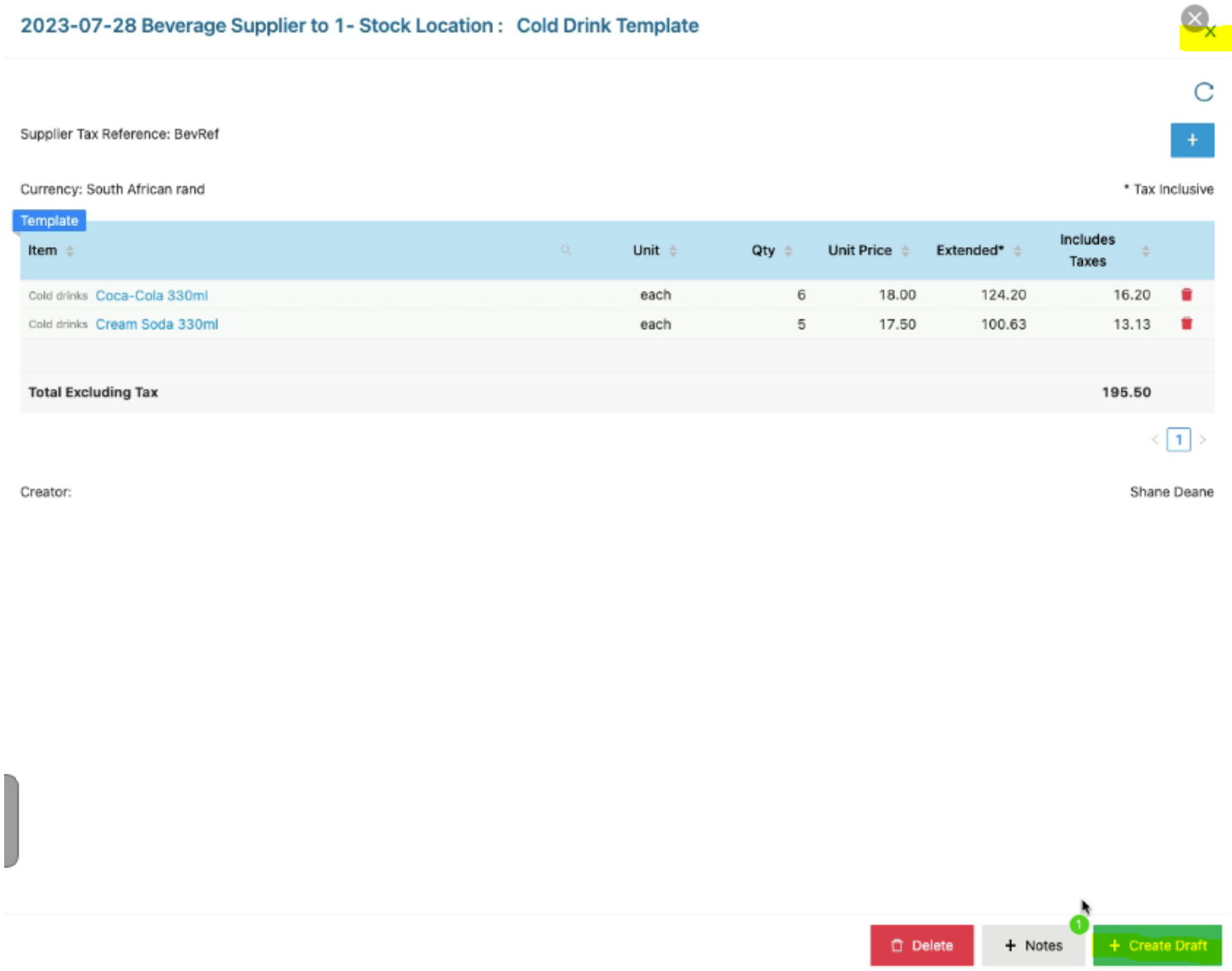
- You will see a green mark indicating that there is a note on the order or you can choose to delete this draft.



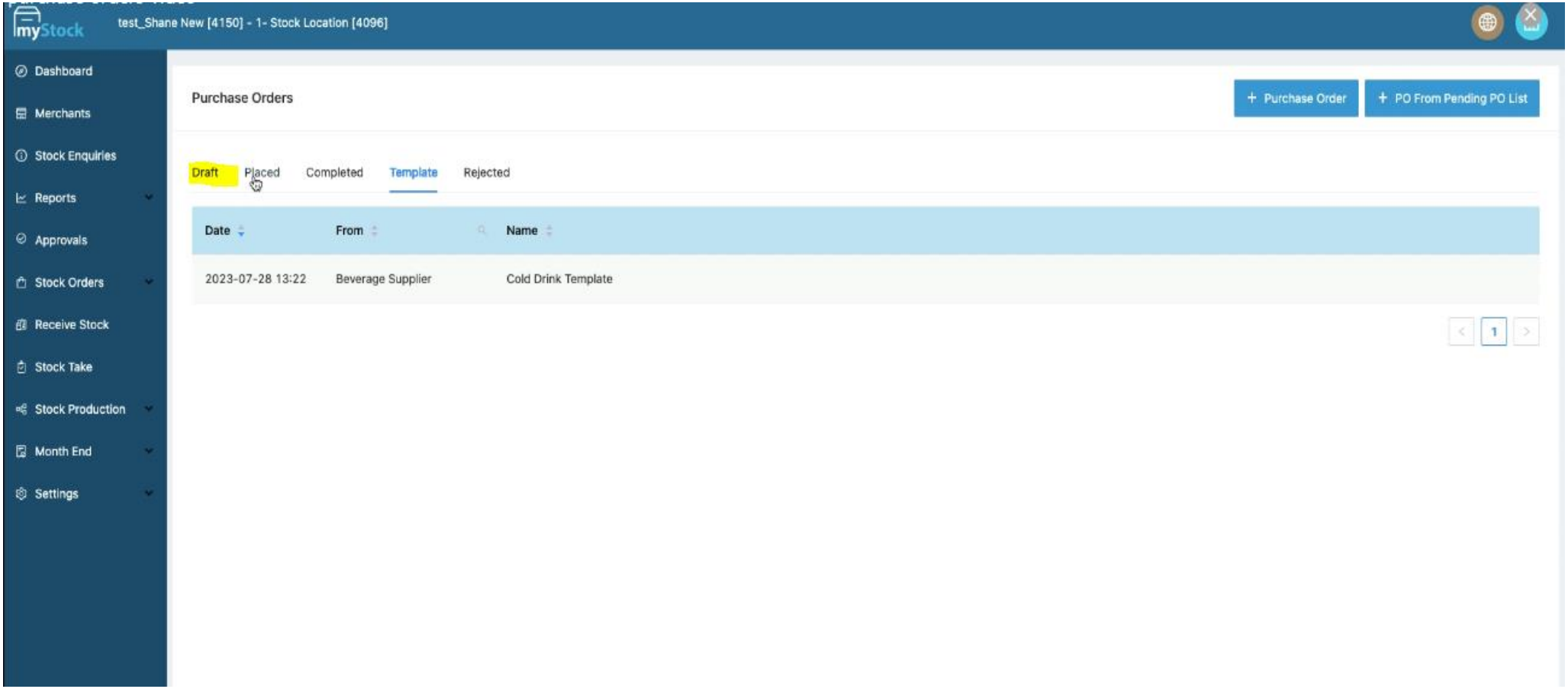
- You can also save the order as a template and can call it (for example) "Cold Drink Template" and click on the green "Create Template" tab.



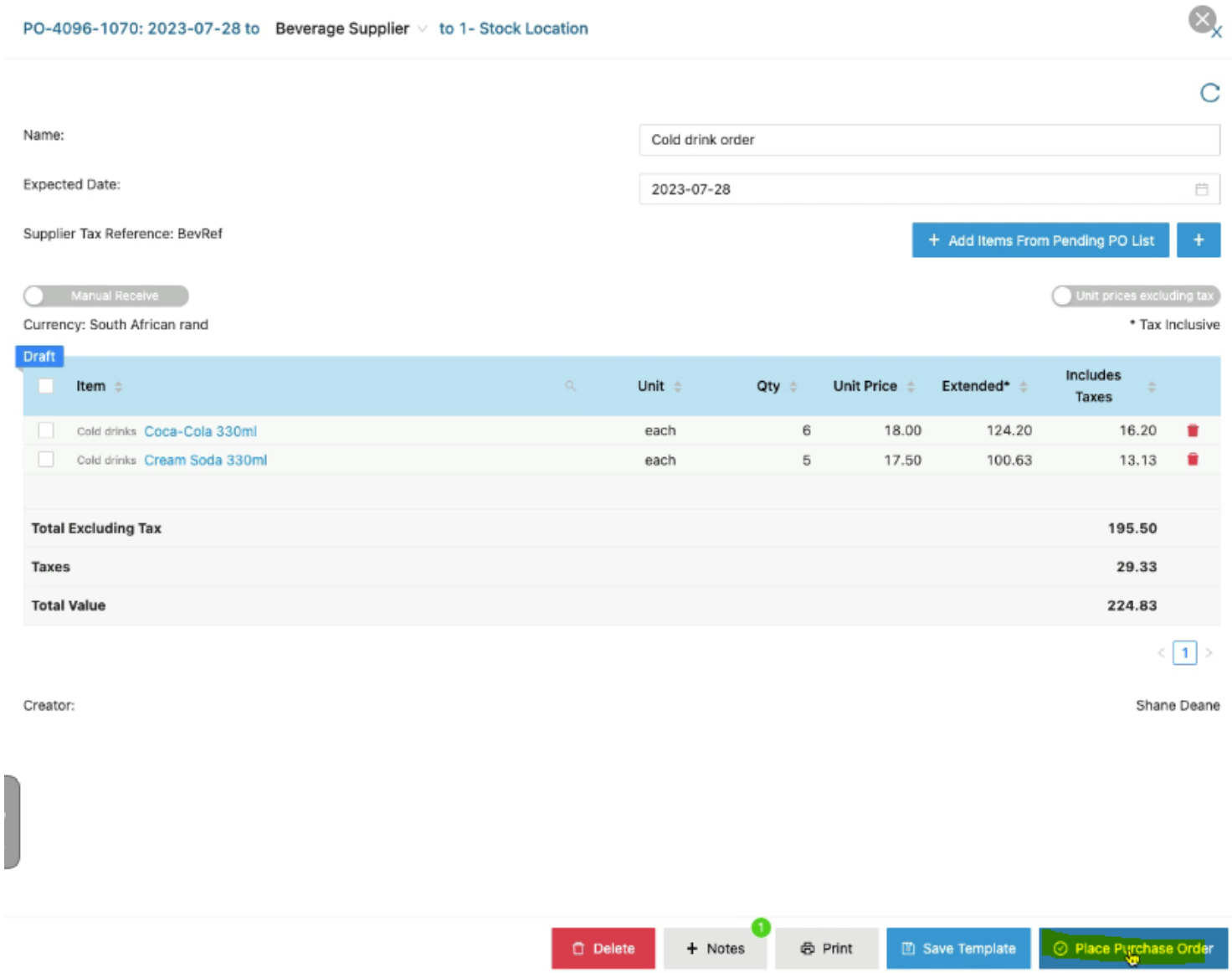
- Click on the green “Create Draft” tab or you can just close the order.



- You will now be able to see the original draft without an order being placed.



- Open the draft and click on the blue "Place Purchase Order" tab.



In cases where approvals are configured, involving specific or multiple users in the purchase order approval is a seamless procedure. Typically, only those with the requisite permission to approve are involved, as defined in your settings.

- **Approval Request:** Upon meeting the criteria, an approval request is triggered. This step ensures that the purchase orders undergo necessary scrutiny before final placement, bolstering accountability and accuracy.
- **Initiating Approval:** To initiate the approval process, navigate to the "Go Approve" tab positioned at the bottom of the screen. This click initiates the approval journey, enabling the designated users to review and authorize the purchase orders.

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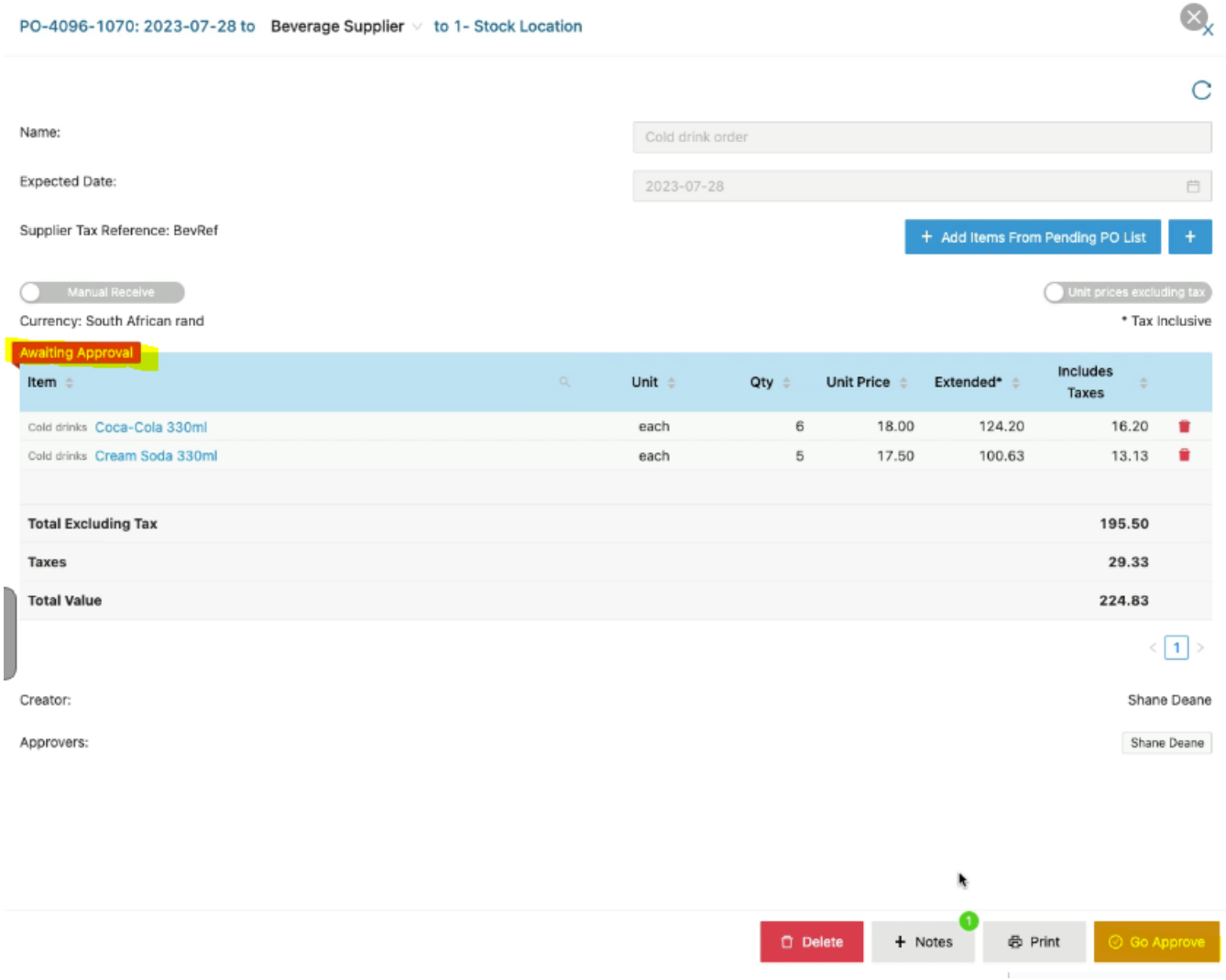
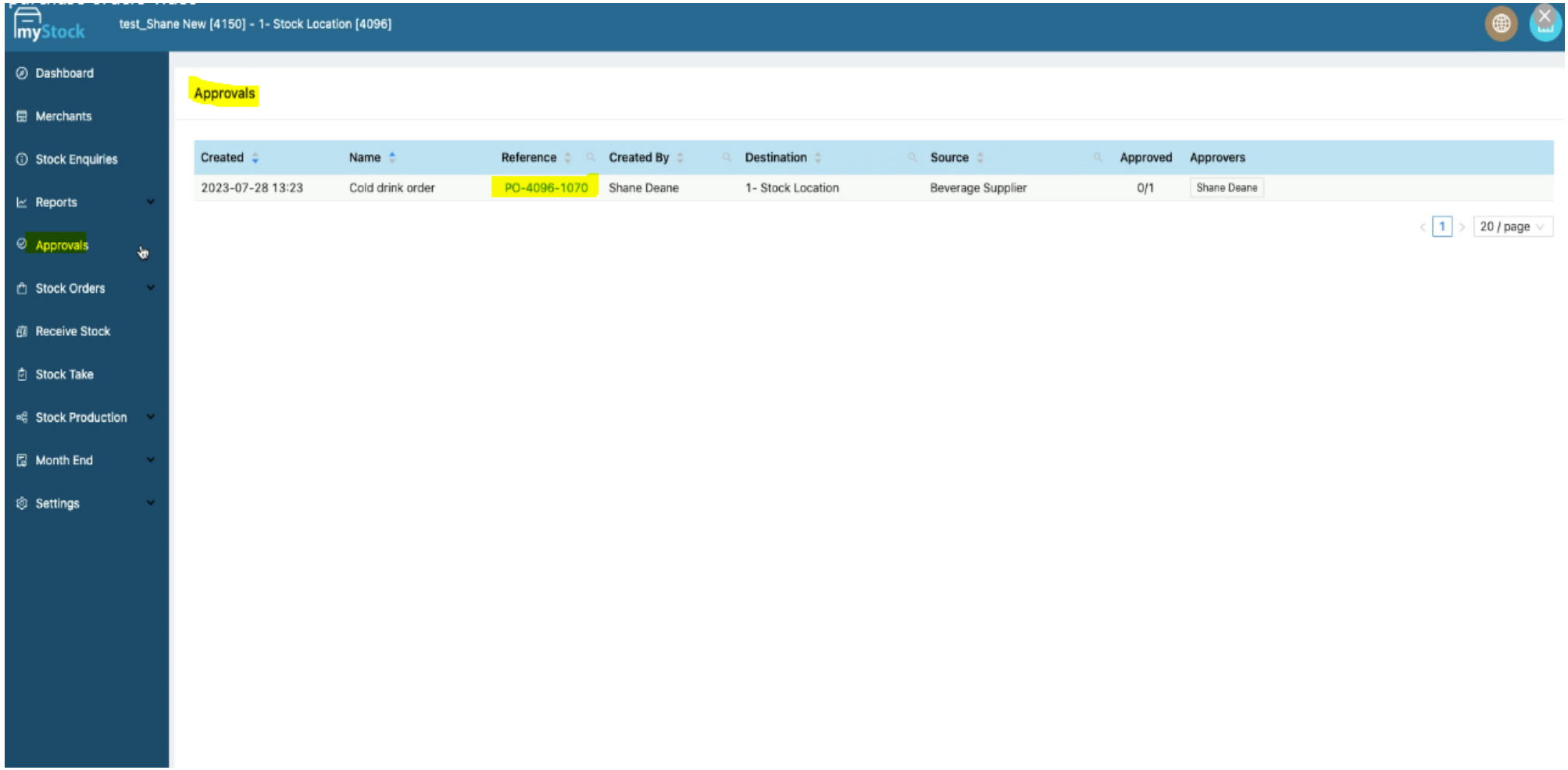


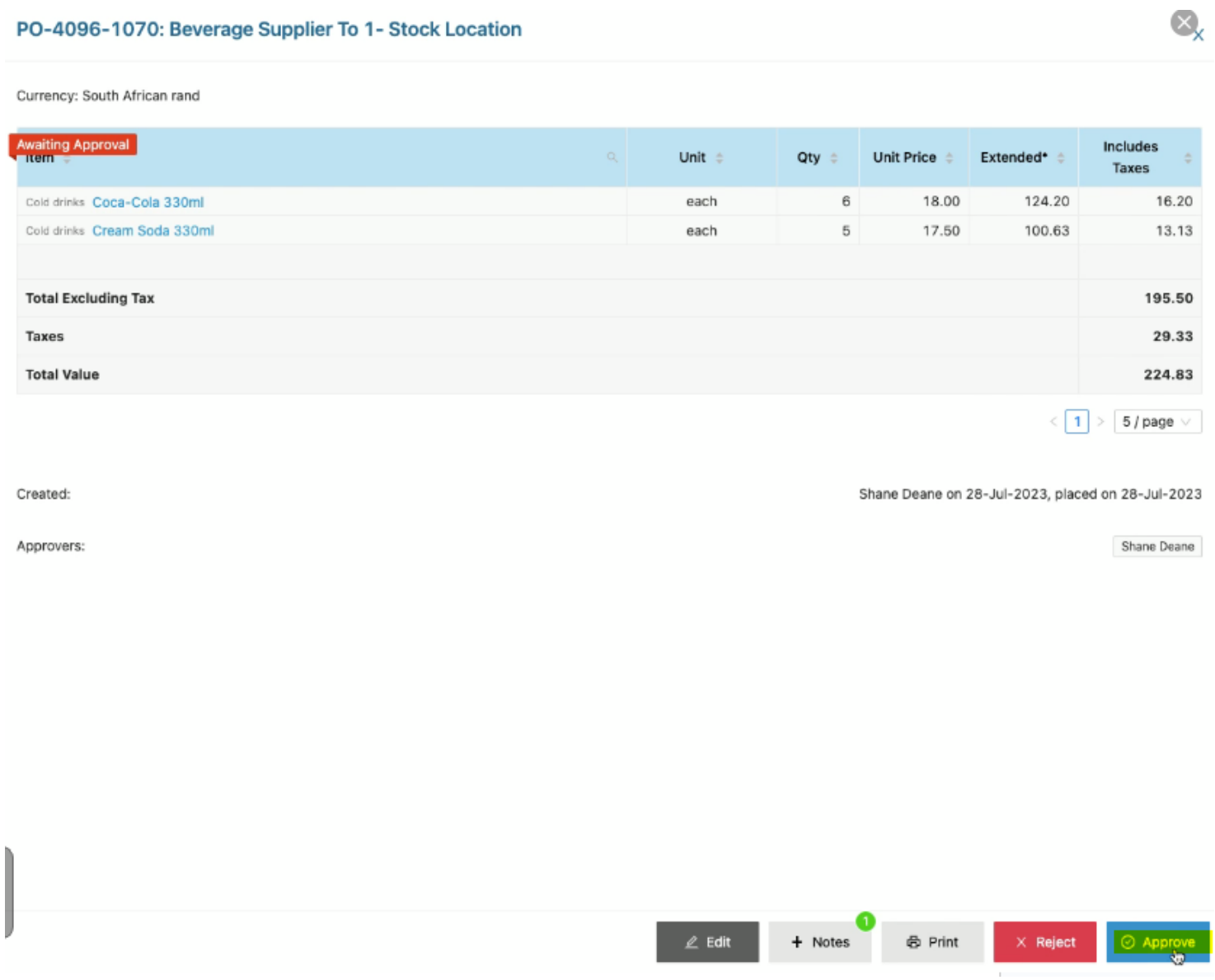
Navigate through the approval process effortlessly:

- **Access "Approvals":** Begin by selecting "Approvals" from the myStock menu, streamlining your route to manage pending approvals.

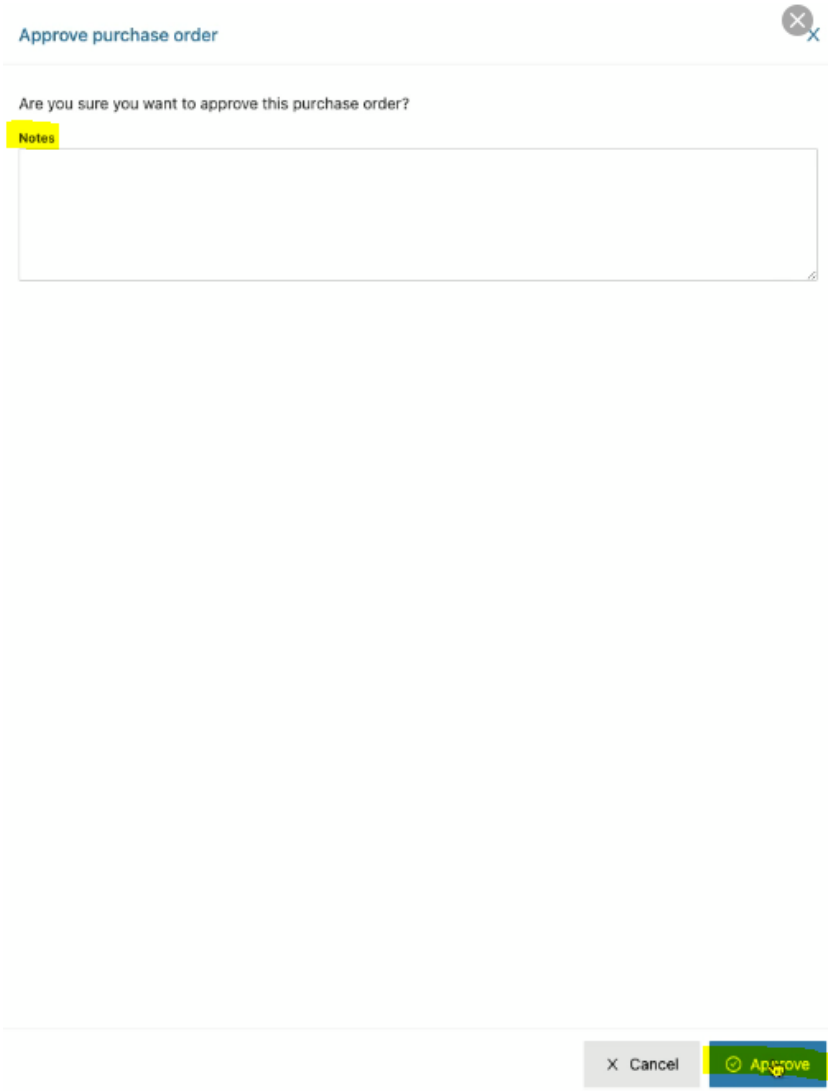
- **Open the Purchase Order:** Locate the specific purchase order that requires approval and click to open it. This step allows for comprehensive review and facilitates the approval procedure.



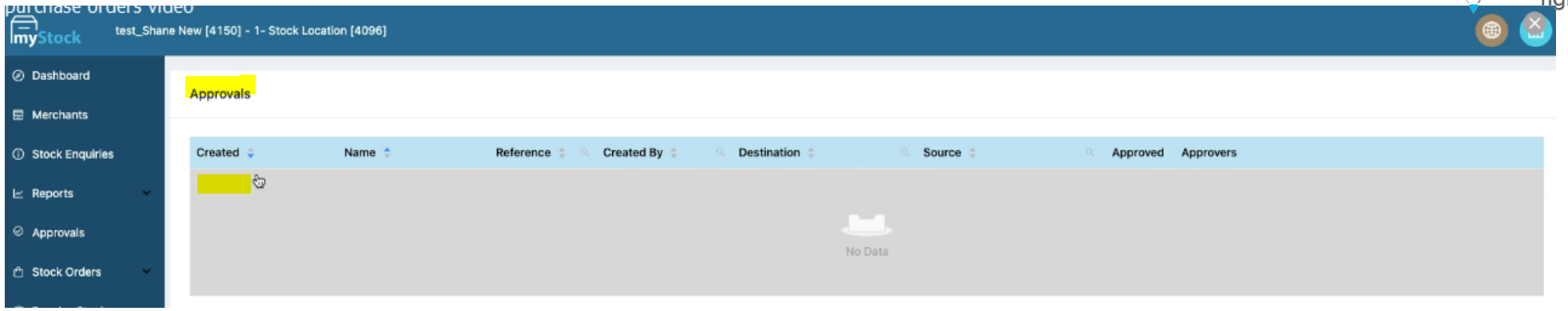
- Click on the blue “Approve” tab to approve the order.



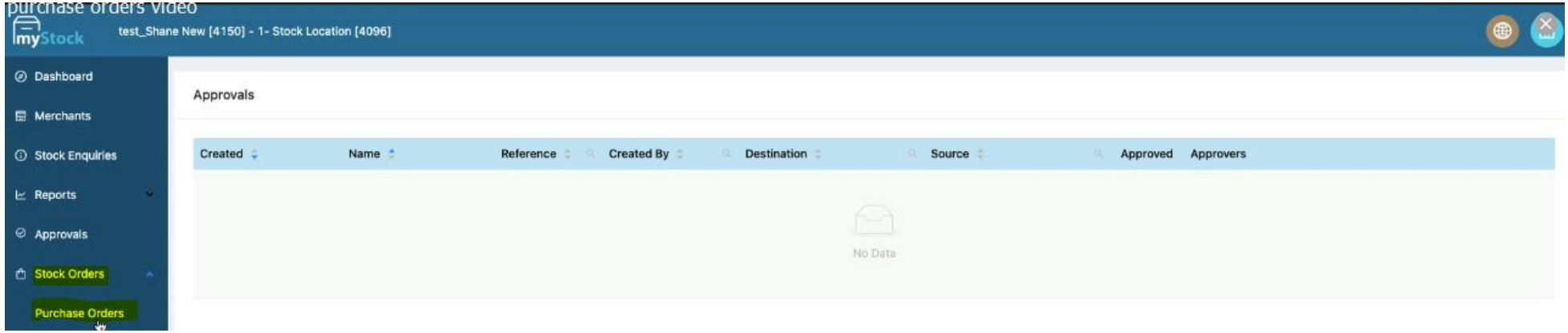
- You can also add a note on the approved order if necessary.
- Click on the blue “Approve” tab to finalise the purchase order.



- When the purchase order has been approved there will be no awaiting orders for approval. This means the order has been placed.

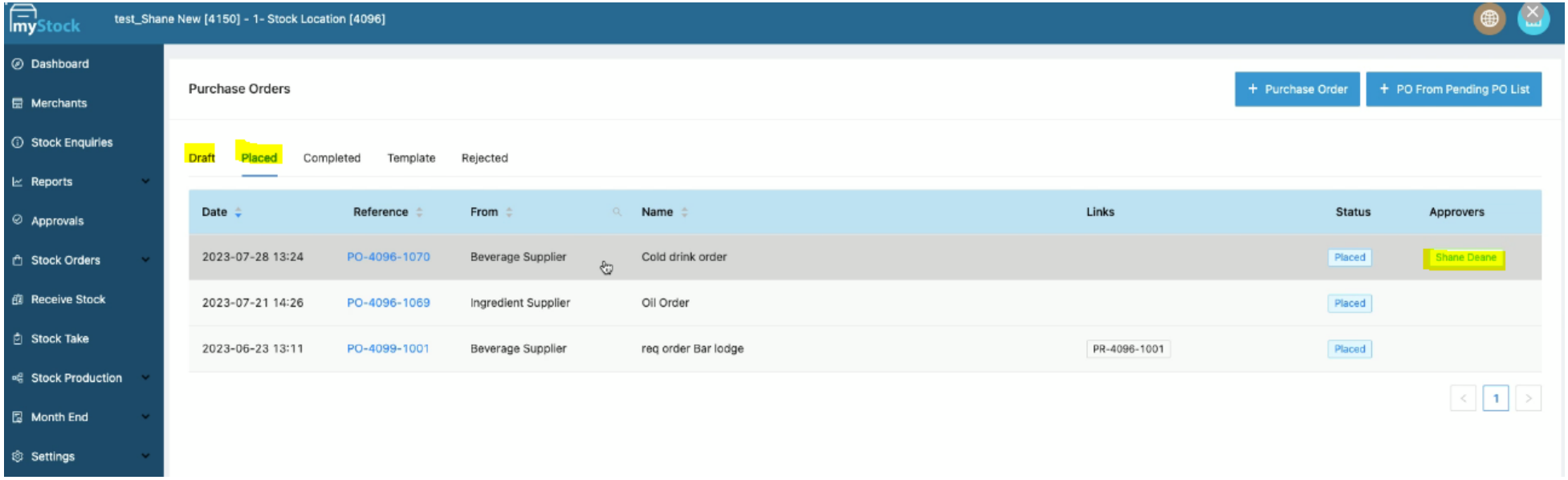


- Select "Stock Orders" from the myStock menu.
- Click on "Purchase Orders"

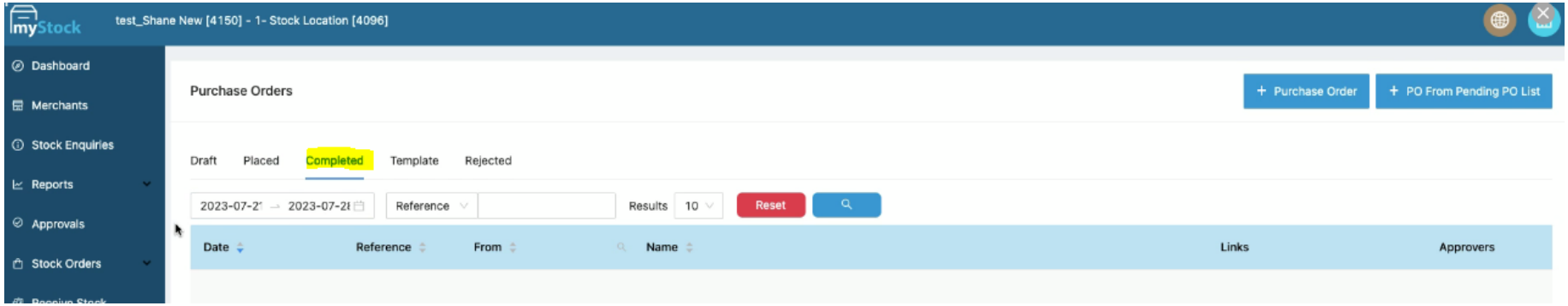


- The draft status should be empty.

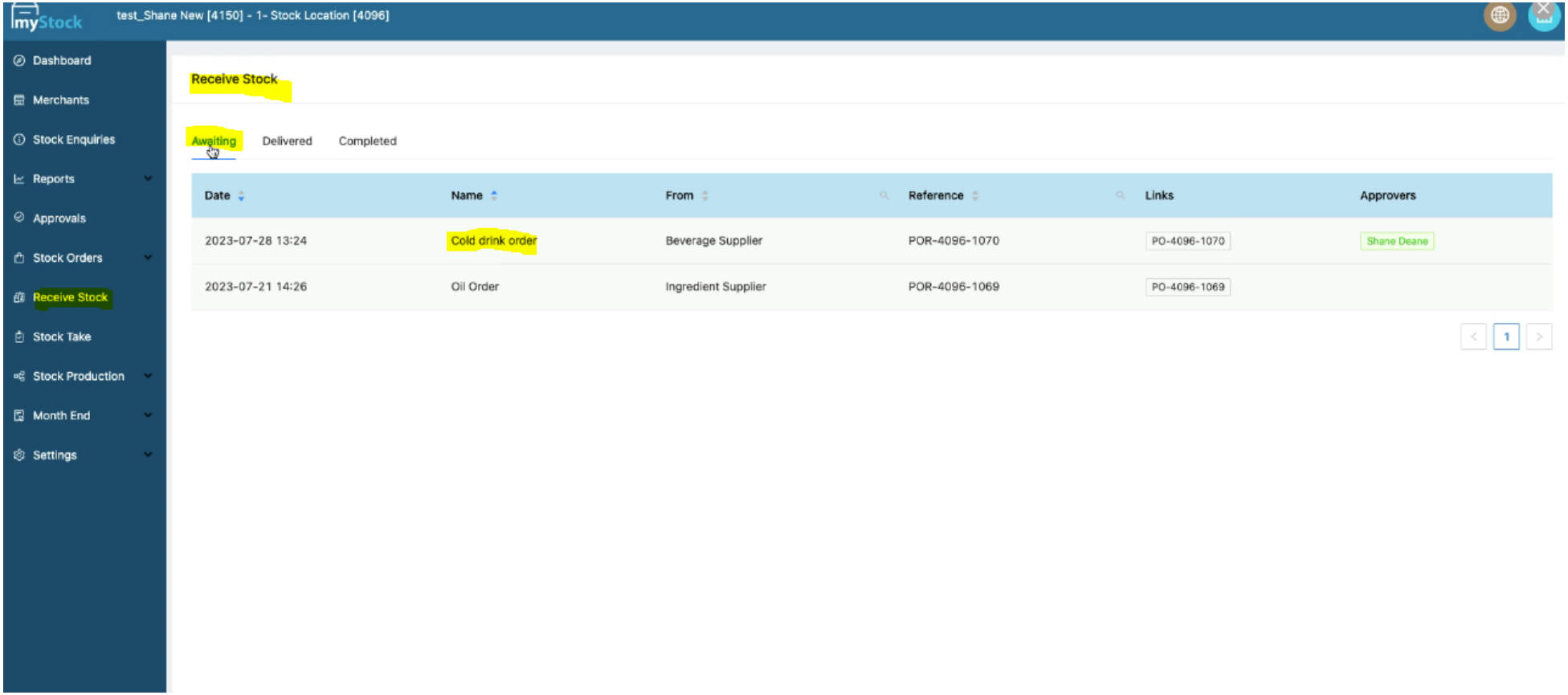
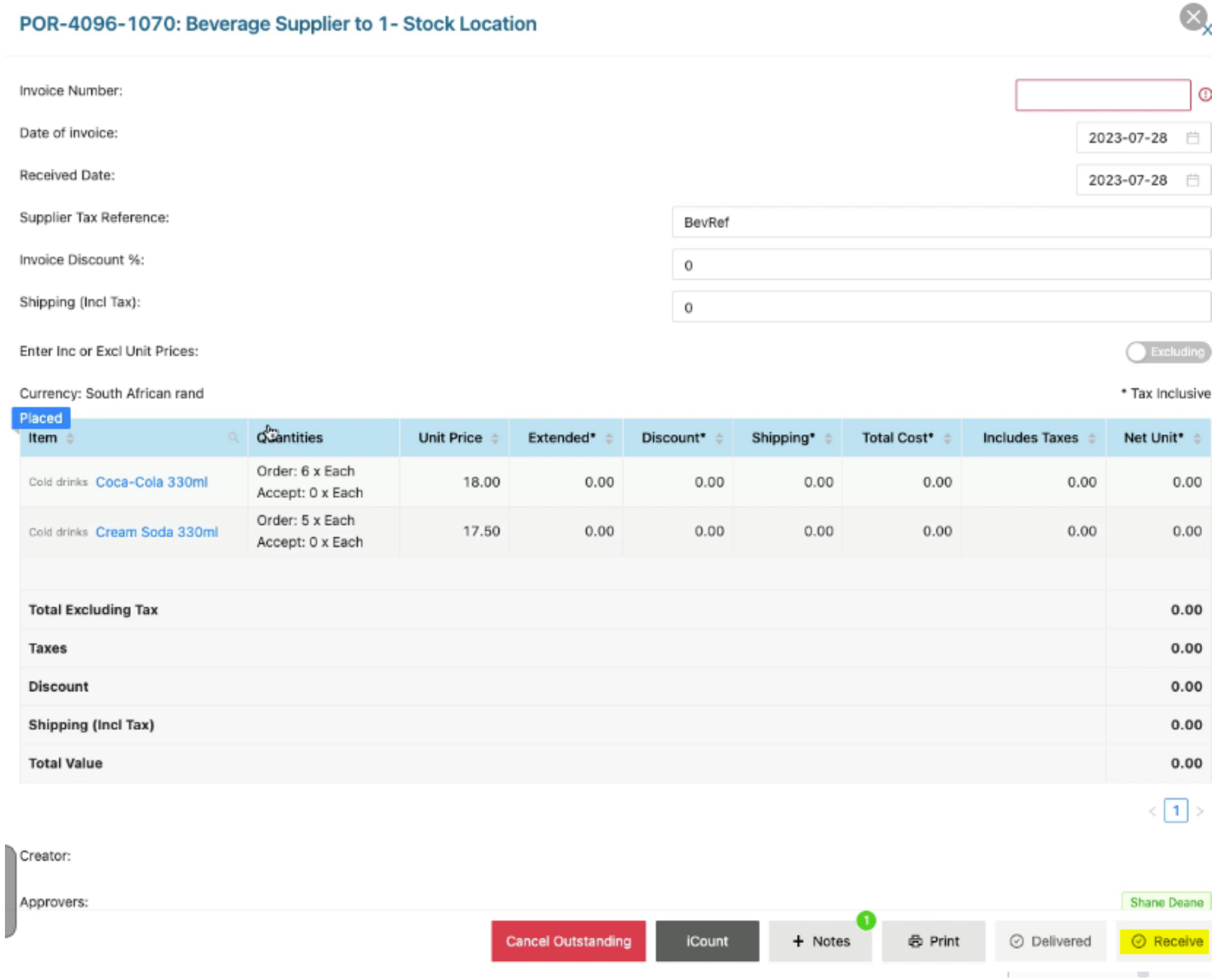
- Click on “Placed”.
- You will see that the Purchase order has been placed and approved.



- If it was an “Auto Receive” purchase order it would have automatically been received and it would have gone straight to the “Completed” tab.



- If it was a manual receive then you would still need to go to your ”Receive Stock” from your myStock menu and the purchase order will be under the “Waiting” tab.



- Click on the purchase order when you have received the stock to complete the order.