# The Procurement Process

Step 1: Create the Opportunity

1. In the NEW menu, under CRM, choose New Opportunity
2. Complete the information on the New Opportunity screen.
3. Choose the customer from the account list. You may add new customers here if needed.
4. Enter information in the fields as necessary. Fields without a red asterisk are optional.
5. Assign a name to the opportunity, such as "New Server installation" or "Hardware upgrade."
6. When finished, click "Save and Create Quote."
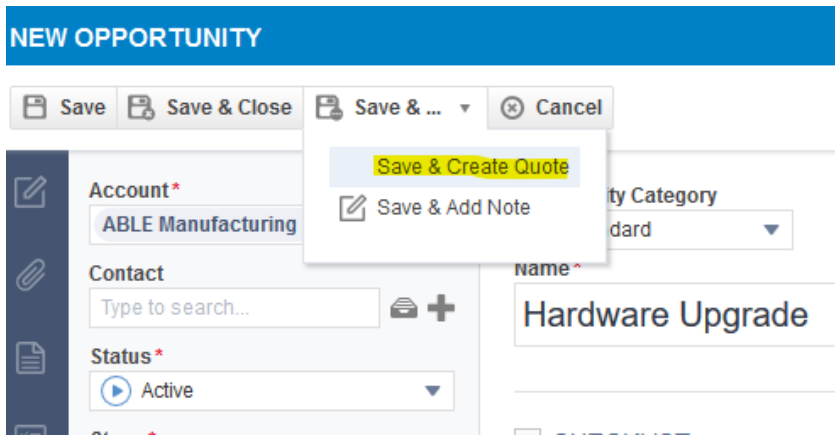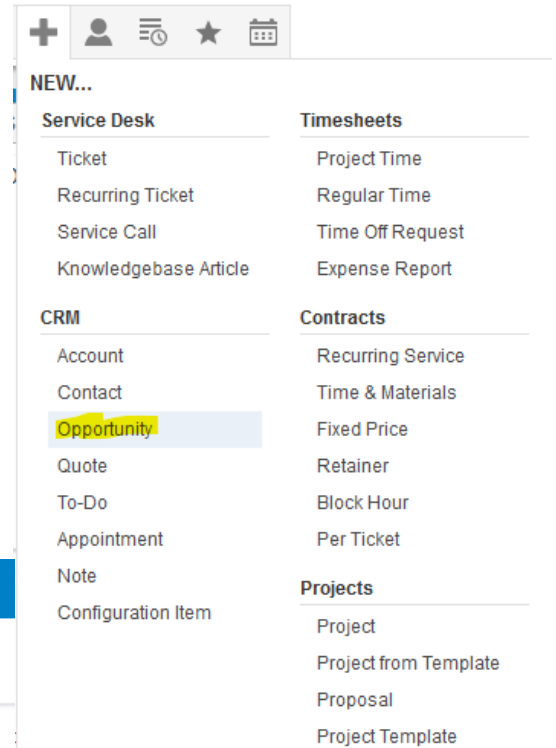
Step 2: Create Quote

1. Review the information as it is transferred from the Opportunity.
2. Enter any missing information as necessary.
3. Click "Save and Open Quote."
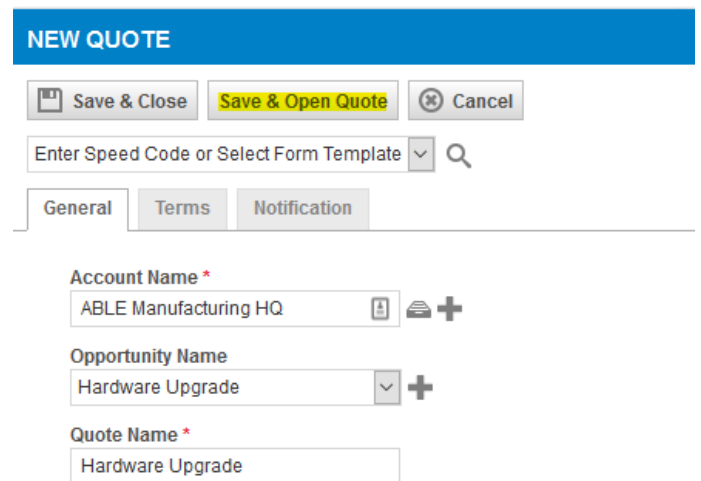
Step 3: Prepare Quote

1. Enter New Items into the quote.
2. Choose from Labor, Products, Services, Charges, etc.
3. You can group by category if desired. You can also choose multiple products at a time.
4. The Tools menu allows you to import quotes from quoting tools, create configuration items and recurring service contracts.
5. Click "Publish Quote" to send the quote to your customer. You may also choose to preview the quote or print it prior to publishing.
6. Publishing will open an email to your customer that provides a link to the online quote.
7. After sending the quote, choose Tools > Open Opportunity to return to the Opportunity Detail screen.

QUOTE - Hardware Upgrade (17)   ★ ❓

[+ New Item ▾] [Tools ▾] [Edit Quote] [Publish Quote ▾] 🔍 🖨   Quote [PRIMARY: Hardware Upgrade ($7,523.00)] [▾] ✓ +

Group by [Group by Period Type Only ▾]

	Item#	Item	Item Type	Manufacturer Product Number	Quantity	Unit Price	Discount %	Unit Discount	Adjusted Unit Price	Unit Cost	Gross Profit	Markup %	Extended Price
One-Time Items													
↑ ↓ ✎	1)	Mobile iPhone	Product	000 B2 200	1	$299.00			$299.00	$250.00	$49.00	19.60 %	$299.00
↑ ↓ ✎	2)	Surface	Product		1	$2,799.00			$2,799.00	$2,449.00	$350.00	14.29 %	$2,799.00
↑ ↓ ✎	3)	Server Dell	Product	000 B8 300	1	$3,750.00			$3,750.00	$2,925.00	$825.00	28.21 %	$3,750.00
↑ ↓ ✎	4)	Labor	Product	000 A0 200	5	$135.00			$135.00	$0.00	$675.00		$675.00
								One-Time Total	$1,899.00		33.77 %	$7,523.00
								Subtotal	$1,899.00		33.77 %	$7,523.00
								Total Taxes	-		-	$583.03
								Total	$1,899.00		33.77 %	$8,106.03

PUBLISH

[Finish Publishing]

[−] NOTIFICATION

Notify
☐ Quote Contact (Notify via To)

☑ Account Manager (Rayanne Buchianico) (Notify via BCC)

Contacts (Notify via To)
[Type to search...]

Email Message
[Use Default: HTML Quote]

Resources (Notify via BCC)

SUCCESS   ✕

✓ The quote has been published.

[OK]

Step 4: Win the Opportunity

1. From the Opportunity Detail window, choose "Won Opportunity" to open the Won Opportunity Wizard.
2. Review the information, change the Stage, Sales Rep, Revenue and Date as needed. Click Next.
3. On the next screen, check the box to Create Ticket in Post Sale Queue.
4. Enter the ticket information. I recommend a Work Type for Purchasing and Procurement for tracking.
5. Check the boxes to Convert the Quote items.
6. Choose the radio button for Ticket Charges in the right column.
7. This creates a ticket charge to invoice the customer for the items on the quote. This is for the customer invoice only and has no relationship to the purchase order.
8. **NOTE:** Some boxes on this screen are greyed out. The options on this screen have a direct relationship to the items on the Quote. If Recurring Services are chosen on the quote, then the option to create a Recurring Service Contract will be enabled.
9. Click Next.
10. The following screen allows you to choose the cost code for invoicing your customers. This portion is for the customer invoice only and has no bearing on the purchase order. See the Invoicing Process below to invoice the customer for these charges.
11. Click Next and complete the wizard by clicking Finish on the final screen.
12. Close the Wizard.

Step 5: Approve Items for Purchase

1. From the Inventory Menu, choose Purchase Approvals.
2. **NOTE:** Only items needing approval prior to purchase will be in this window. Approval requirements are set in Admin > Application-Wide Features > System Settings
3. Place a check in the boxes for items approved for purchase.
4. Click Approve.

PURCHASE APPROVALS

Approve   Reject

	Product	Account	Sales Order	Ticket / Project / Contract	Quantity Needed	Ex
☐	Laptop	BEARING SUPPLY COMPANY*	Network Project Template	T20140519.0001	1	
☐	Laptop	ABLE Manufacturing HQ*	Laptop Request	T20140608.0001	1	
☐	Mobile iPhone	ABLE Manufacturing HQ*	Hardware Upgrade	T20200110.0001	1	
☐	PC	ABLE Manufacturing HQ*	Network Technology Refresh	T20170719.0002	50	
☐	Printer	ABLE Manufacturing HQ*	Network Technology Refresh	T20170719.0002	4	
☐	Server Dell	BEARING SUPPLY COMPANY*	Network Project Template	T20140519.0001	1	
☑	Server Dell	ABLE Manufacturing HQ*	Hardware Upgrade	T20200110.0001	1	
☑	Surface	ABLE Manufacturing HQ*	Hardware Upgrade	T20200110.0001	1	

Step 6: Create Purchase Order

1. From the Inventory Menu, choose Purchasing/Fulfillment.
2. Choose the items needed and click Create Purchase Order
3. Enter Vendor Name
4. Do NOT enter a Vendor invoice number at this time
5. External PO refers to a purchase order created in another system prior to this purchase order.
6. In the right column, check to ensure the proper customer is listed.
7. Choose the Ship To location.
8. You may add items to the purchase order on this screen if needed.

PURCHASING & FULFILLMENT

Create Purchase Order

	Product	Account	Sales Order	Ticket / Project / Contract
☐	Labor	ABLE Manufacturing HQ*	Hardware Upgrade	T20200110.0001
☐	None	Carol's Test		Carol's Testing
☑	Server Dell	ABLE Manufacturing HQ*	Hardware Upgrade	T20200110.0001
☑	Surface	ABLE Manufacturing HQ*	Hardware Upgrade	T20200110.0001
☐	Workstation	ABLE Manufacturing West Coast	New Workstation Request	T20121107.0002

9. If you would like to email this PO to the vendor, choose Submit & Email.
10. Save and Close – this saves the Purchase Order in the system, but it is not completed. Use this option if someone needs to review it, or if the PO is not complete.
11. Save and Submit – this finalizes the PO and marks it ready for receiving. No changes can be made to the PO after it is submitted.
12. Enter the Estimated Arrival Date for easy tracking of open POs.

NEW PURCHASE ORDER ★ ❓

Save & Close | Save & Submit | Save & New | Submit & Email | View/Print Purchase Order | Cancel

– GENERAL INFORMATION

Vendor Name *	Synnex	Purchase For Account	ABLE Manufacturing HQ*
Vendor Invoice #		Ship To	◉ Home Office ◯ Other Address ◯ Selected Account
External P.O. #		Name *	BEARING SUPPLY COMPANY*
Terms		Address 1 *	123 test street
Tax Region		Address 2	
	☐ Display tax category ☐ Display separate line item for each tax	Zip Code/City/State	79760 ODESSA TX
General Memo		Phone/Fax	(999) 999-9999
		Shipping Type/Date	
Auto-fill order with	Items where Vendor is Default All Items Associated with Vendor	Freight (Amount)	

PURCHASE ORDER ITEMS

+ New | ⊘ OK | ⊗ Cancel | Apply Estimated Arrival Date | ▦   Use Descriptions from: Product (Catalog) ▾   Total Sale: $5,374.00

Sales Order (Account) ▲	Ticket / Project / Contract	Product Name	Inventory Location	Quantity	Cost	On Hand	Max	Min	On Order	Back Order	Already Reserved / Picked	Available	Add or Edit Memo
Hardware Upgrade (ABLE Manufacturing HQ*)	T20200110.0001	Server Dell	Warehouse 1	1	$2,925.00	4	1	1	0	0	3	1	📝
Hardware Upgrade (ABLE Manufacturing HQ*)	T20200110.0001	Surface	Cage	1	$2,449.00	3	2	1	0	0	2	1	📝

ESTIMATED ARRIVAL DATE

Some of the items on this purchase order do not have an Estimated Arrival Date. You may populate those dates here, submit without populating those da submission.

Save & Submit | Submit & Email | ⊗ Cancel | ☐ Do not show this again

Sales Order (Company)	Ticket/Project/Contract	Product Name	Inventory Location	Quantity	Estimated Arrival Date
Hardware Upgrade (ABLE Manufacturing HQ*)	T20200110.0001	Server Dell	Warehouse 1	1	01/15/2020 📅
Hardware Upgrade (ABLE Manufacturing HQ*)	T20200110.0001	Surface	Cage	1	01/15/2020 📅

Step 9: Receive items in Autotask

1. From the Inventory menu, choose Receiving.
2. Mark the items that have been received.
3. Click Receive Full/Partial
4. In the Receive Purchase Order window, enter the vendor invoice if available and enter the amount of shipping/freight
5. Enter quantities received. Or, if receiving all items, click the Auto-populate button
6. Serial Numbers will be required if the item is marked for serial number tracking
7. Click Save & Close

Search

HOME	Inventory
CRM	Inventory Items
CONTRACTS	Transfers & Updates
PROJECTS	Locations
SERVICE DESK	Products
TIMESHEETS	**Item Procurement & Delivery**
INVENTORY	Purchase Approvals
REPORTS	Purchasing & Fulfillment
OUTSOURCE	Purchase Orders
ADMIN	Receiving
	Delivery & Shipping
	Purchase Order History
	Reports
	Reports

RECEIVING

Receive Full/Partial

	Product	Account	P.O. Number	Sales Order	Ticket / Project / Contract	Quantity Needed	On Hand	Reserved / Picked	Available	Vendor	Ship To
☐	Cable Cat5e	ABLE Manufacturing West Coast	1001	New Workstation Request	T20121107.0002	5	31	7	24	Synnex	26 Tech Valley Drive Suite 2 East Greenbush, NY 12061
☐	Cable Cat5e	ABLE Manufacturing HQ*	1013	New Workstation Request	T20121107.0040	8	31	7	24	Synnex	123 test street ODESSA, TX 79760
☐	Cable Cat5e	Brown Brothers Bottling^	1014		T20190120.0001	20	31	7	24	Synnex	123 test street ODESSA, TX 79760
☐	Managed Workstation	ABLE Manufacturing HQ*	1013	Network Technology Refresh	T20170719.0002	50	55	55	0	Synnex	123 test street ODESSA, TX 79760
☐	Managed Workstation	ABLE Manufacturing HQ*	1008	Network and Firewall Deployment	T20140514.0001	5	55	55	0	Synnex	26 Tech Valley Drive Suite 2 East Greenbush, New York 12061
☐	Network Attached Storage	Brown Brothers Bottling^	1014		T20190120.0001	1	0	0	0	Synnex	123 test street ODESSA, TX 79760
☑	Server Dell	ABLE Manufacturing HQ*	1015	Hardware Upgrade	T20200110.0001	1	4	3	1	Synnex	123 test street ODESSA, TX 79760
☑	Surface	ABLE Manufacturing HQ*	1015	Hardware Upgrade	T20200110.0001	1	3	2	1	Synnex	123 test street ODESSA, TX 79760

RECEIVE/CANCEL RECEIPT OF PURCHASE ORDER

Save & Close | Print Preview | Cancel

GENERAL INFORMATION

Vendor Name	Synnex	P.O. #	1015	Order Submitted	01/10/2020 11:38 AM
Vendor Invoice #	846732-1	External P.O. #		Freight (Amount)	35.55

PURCHASE ORDER ITEMS

Enter a negative number in the "Now Receiving" column to cancel the receipt of that number of units.

Auto-populate "Now Receiving"

Location Name	Ticket / Project / Contract	Ordered	Previously Received	Now Receiving	Unit Cost	Serial Number(s)	Back Ordered	Auto-Filled	Memo
Product Name: Server Dell, Description: Dell PowerEdge Servers									
Warehouse 1			0	0	2,925.00				
○ Hardware Upgrade (ABLE Manufacturing HQ*)	T20200110.0001	1	0	1	2,925.00		1		🗐
Product Name: Surface, Description: Unknown									
Cage			0	0	2,449.00				
○ Hardware Upgrade (ABLE Manufacturing HQ*)	T20200110.0001	1	0	1	2,449.00		1		🗐

The Invoicing Process

Step 1: Approve & Post Charges

1. From the Contract menu, choose Approve & Post.
2. Choose the Charges tab and check off the items to invoice the customer.
3. Note the Labor is included in this charge screen because it was entered as a Product in the Quote.
4. Click Approve & Post.
5. Click Items to Invoice to move to the invoicing screen.

Step 2: Items to Invoice

1. From the Contract menu, choose Items to Invoice.
2. Choose the Customers to invoice.
3. Click Preview/Process Invoices.

Step 3: Process Invoice

1. In Processing Options, choose "Create Autotask Invoices" and the client's invoice template, if different from the default.
2. Choose whether to email the invoice from Autotask, or uncheck the box.
3. The Invoice Date can be changed to include the date you prefer.
4. Enter the Purchase Order Number from the Autotask PO for ease in tracking in the accounting system.
5. Set the other options as needed.
6. Click Process Invoices.

PROCESS SELECTED INVOICES

You are about to process invoices for 1 Account(s). Please select the processing action and configure the invoice properties below. To select individual billing items, click the Choose Billing Items button. You may preview the invoices before processing.

[Preview Invoices] [Process Invoices] [Choose Billing Items]

− PROCESSING OPTIONS

Processing Action

Create Autotask Invoices ▼

Invoice Template

Use Account Setting (Customer Default) ▼

☑ Email invoices to Accounts with Invoice Emailing enabled

Email Message

Use Account Setting (Autotask Default) ▼

− INVOICE SETTINGS

Invoice Date*	Invoice Number
01/10/2020	auto-number

Invoice Date Range From	Invoice Date Range To
12/10/2019	01/10/2020

Purchase Order Number

1015