



PROTEUS MMX TRAINING MANUAL –  
PURCHASING

EAGLE TECHNOLOGY, INC.



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# REQUISITIONS

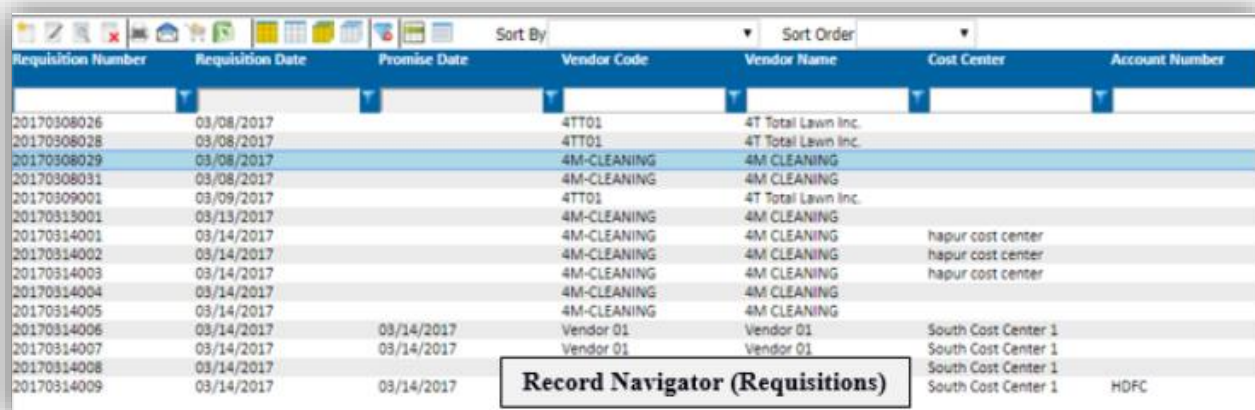
## 1. OVERVIEW

The Requisitions module in the **Purchasing** Functional Area is used to create, delete, or edit requisitions for parts and assets. Once a requisition is created, it can be issued a Purchase Order number, thus making it a purchase order.

**Note:** Purchase Orders can also be created directly in the Purchase Order module. Where you create them depends on your company's purchase order process and your rights to Proteus MMX.

The Record Navigator displays a listing of the current requisitions. The fields listed in the Record Navigator are:

- Requisition Number
- Requisition Date
- Promise Date
- Vendor Code
- Vendor Name
- Cost Center
- Account Number
- Requester
- Buyer
- Grand Total



Requisition Number	Requisition Date	Promise Date	Vendor Code	Vendor Name	Cost Center	Account Number
20170308026	03/08/2017		4TT01	4T Total Lawn Inc.		
20170308028	03/08/2017		4TT01	4T Total Lawn Inc.		
20170308029	03/08/2017		4M-CLEANING	4M CLEANING		
20170308031	03/08/2017		4M-CLEANING	4M CLEANING		
20170309001	03/09/2017		4TT01	4T Total Lawn Inc.		
20170313001	03/13/2017		4M-CLEANING	4M CLEANING		
20170314001	03/14/2017		4M-CLEANING	4M CLEANING	hapur cost center	
20170314002	03/14/2017		4M-CLEANING	4M CLEANING	hapur cost center	
20170314003	03/14/2017		4M-CLEANING	4M CLEANING	hapur cost center	
20170314004	03/14/2017		4M-CLEANING	4M CLEANING		
20170314005	03/14/2017		4M-CLEANING	4M CLEANING		
20170314006	03/14/2017	03/14/2017	Vendor 01	Vendor 01	South Cost Center 1	
20170314007	03/14/2017	03/14/2017	Vendor 01	Vendor 01	South Cost Center 1	
20170314008	03/14/2017				South Cost Center 1	
20170314009	03/14/2017	03/14/2017			South Cost Center 1	HDFC

## 2. DETAILS TAB

The Details Tab consists of basic requisition fields. These fields are:

- Requisition Number
- Vendor Buyer
- Requisition Date
- Cost Center
- Requester
- Promise Date
- Account
- Grand Total

**Note:** Vendor and Buyer are required fields to create a record. All other fields are optional with the default configuration.

The screenshot shows a web-based interface for a 'Requisition' system. At the top, the title 'Requisition' is on the left and the number '20170308029' is on the right. Below the title is a horizontal tab bar with the following tabs: 'Details' (highlighted in green), 'Parts', 'Assets', 'Costs', 'Shipping', 'Billing', 'Email', 'Attachments', and 'Approval'. The main content area is divided into two columns of input fields. The left column contains: 'Requisition Number' (with the value '20170308029'), 'Vendor' (a dropdown menu showing '4M-CLEANING - 4M CLEANING'), 'Buyer' (a dropdown menu), 'Requester Contact Information', 'Resolution', 'UserField 7', 'Building And Location', 'Work Order Time of Day Completed', and 'Requisition Status'. The right column contains: 'Requisition Date' (with the value '03/06/2017'), 'Cost Center' (a dropdown menu), 'Requester' (a dropdown menu), 'REF # / REFERENCE #', 'UserField 5', 'UserField 8', 'Dispatcher Name', and 'UserField 14'. At the bottom center, there is a button labeled 'Details Tab'.

### 3. PARTS TAB

The Parts Tab consists of the parts that are being ordered and added to the requisition. These fields are:

- Part Number
- Part Name
- Stockroom
- Vendor Part Number
- Account/GL#
- Unit Cost
- Quantity Ordered
- Measurement Units
- Total Quantity Required
- Last Received Date
- Tax Rate (Percent)
- Total Cost

The screenshot displays the 'Requisition' window with the 'Parts' tab selected. The window title is 'Requisition' and the requisition number is '20170308029'. The interface includes a navigation bar with tabs: Details, Parts, Assets, Costs, Shipping, Billing, Email, Attachments, and Approval. The 'Parts' tab is active, showing two sections: 'Stockroom Parts' and 'Non-Stockroom Parts'. The 'Stockroom Parts' section has a table with columns: Part Number, Part Name, Stockroom Name, Vendor Part Number, Account/GL#, Unit Cost Amount, Unit Cost Currency, Quantity Ordered, Measurement Unit, Tax Rate (%), and Total Cost. The table is currently empty, displaying 'No Data To Display'. The 'Non-Stockroom Parts' section has a table with columns: Part Number, Part Name, Unit Cost Amount, Unit Cost Currency, Quantity Ordered, Tax Rate (%), Account/GL#, Total Cost Amount, and Total Cost Currency. The table contains one row with the following data: Part Number: 033, Part Name: Non, Unit Cost Amount: 500.00 USD, Unit Cost Currency: USD, Quantity Ordered: 3, Tax Rate (%): 0.50, Account/GL#: , Total Cost Amount: 1,500.00 USD, Total Cost Currency: USD. A 'Parts Tab' label is visible at the bottom of the window.

## 4. ASSETS TAB

The Asset Tab consists of the assets that are being ordered and attached to the requisition. These fields are:

- Asset Number
- Asset Name
- Asset Tag
- Manufacturer
- Model
- Serial Number
- Description
- Category
- Rating
- Capacity
- Weight
- Warranty Date
- Initial Cost
- Estimated Delivery Date
- Installation Cost
- Tax Rate (Percent)
- Total Cost

**Note:** Assets are created after they are received.



The screenshot shows a software window titled "Asset" with a light blue header bar. Inside the window, there is a form with multiple input fields arranged in a grid. The fields are: Asset Number, Description, Warranty Date, Asset Name, Category, Estimated Delivery Date, Asset Tag, Rating, Original Cost, Manufacturer, Capacity, Installation Cost, Model, Weight, Tax Rate (%), Make, Units, Facility, and Serial Number. The Tax Rate (%) field is set to 0.00. At the bottom center of the form, there is a button labeled "Assets Tab".

Asset Number	Description	Warranty Date
Asset Name	Category	Estimated Delivery Date
Asset Tag	Rating	Original Cost
Manufacturer	Capacity	Installation Cost
Model	Weight	Tax Rate (%)
Make	Units	Facility
Serial Number		

Assets Tab

## 5. COSTS TAB

The Costs Tab consists of the cost information associated with the requisition. These fields are:

- Parts Total
- Payment Terms
- Assets Total
- Subtotal
- Freight
- Other Total
- Grand Total

The screenshot shows a form with the following fields:

Parts Total	Assets Total
15,500.00	0.00
Freight	Other Total
Payment Terms	

Costs Tab

## 6. SHIPPING TAB

The Shipping Tab consists of the shipping information related to the requisition. These fields are:

- Ship To
- Address 1
- Address 2
- City
- State
- Zip Code
- Country
- Contact Phone
- Contact Email
- FOB
- Shipping Method

Bill To		
Address 1	Address 2	City
State	Postal Code	Country
Contact Phone	Contact Email	POB

**Shipping Tab**

## 7. BILLING TAB

The Billing Tab consists of the billing information related to the requisition. These fields are:

- Bill To
- Address 1
- Address 2
- City
- State
- Zip Code
- Country

Bill To		
Address 1	Address 2	City
State	Postal Code	Country

**Billing Tab**



## 8. CREATING A NEW REQUISITION

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### TO CREATE A NEW PURCHASE ORDER REQUISITION:

1. From the record navigator screen, select the **New** icon.
2. On the Details tab, choose a vendor. (You can also enter more information such as the Buyer, Requester, Promise Date, Cost Center, etc.)
3. Select the **Save** icon when you've concluded with the Details tab.
4. On the Parts tab, add any Stockroom Parts to the requisition by selecting the **green (+)** icon. In the Part window, select the box with **3 dots** next to the **Vendor Stockroom Parts** field to access the list of Parts associated with the vendor on the requisition. Select a part and select the **OK** icon. Then enter the Quantity Ordered and select the **Save** icon. (You can also change the default Unit Cost, enter a Tax Rate and add an Account/GL#.)

**Note:** You can also add Non-Stockroom Parts that aren't in your MMX database. When you receive these parts, they won't be added to the Parts of Stockrooms modules of Proteus MMX.

5. If you're buying a new asset, on the **Assets** tab, select the **green (+)** icon to enter the Asset Number, Asset Name, Facility (**all required**) and any additional information you need. Select the **Save** icon when complete.
6. Enter any additional information on the Costs, Shipping, and Billing tabs. Save the requisition when complete.

At this point, the Requisition might need to be approved by a supervisor or purchasing manager. Once it is authorized, someone with sufficient MMX rights can assign a purchase order number to the requisition.

**Note:** There is a **Search** option for **Vendor** in **Create Requisition**.

To utilize the search function, you will go to:

**Purchasing > Requisitions > Create New Requisition**

The screenshot shows the 'Requisition' form with tabs for Details, Parts, Assets, Costs, Shipping, Bidding, Email, Attachments, and Approvals. The 'Vendor' dropdown menu is open, showing a list of vendors including '777 - 777', '111 - 11', '11 - 11', '2323 - 2424', '1132 - 4', '12 - 4', and '4M-CLEANING - 4M CLEANING'. A red box highlights the dropdown list, and a blue arrow points to it.

## 9. ASSIGNING A PURCHASE ORDER NUMBER

From a requisition, a user can create a purchase order.

### TO ASSIGN A PURCHASE ORDER NUMBER:

1. Select a requisition record from the **Record Navigator**.
2. Select the **Assign Purchase Order Number** icon from the icon list.
3. Enter a unique PO number or select a Blanket PO from the drop-down.
4. Select the **Save** icon.

The screenshot shows the 'Assign Purchase Order Number' dialog box. It contains the text: 'To assign a Purchase Order Number for this Requisition, please enter a new Purchase Order Number below or choose a Blanket Purchase Order from the list.' There are two radio buttons: 'Purchase Order Number' (selected) and 'Blanket Purchase Order'. The 'Purchase Order Number' field is a text input, and the 'Blanket Purchase Order' field is a dropdown menu.

The requisition will then leave the Requisition module and move to the Purchase Order module.






# PURCHASE ORDERS

## 1. OVERVIEW

The **Purchase Orders** page in the **Purchasing** Functional Area is used to create new purchase orders or to receive parts or assets against a purchase order. Once a requisition has been assigned a Purchase Order Number, it becomes a purchase order. Purchase orders can also be closed, amended, or canceled from the **Purchase Order** page.

The Record Navigator displays a listing of the current purchase orders. The fields listed in the navigator are:

- Purchase Order Number
- Requisition Number
- Purchase Order Status
- Purchase Order Date
- Requisition Date
- Promise Date
- Vendor Code
- Vendor Name
- Cost Center
- Account Number
- Requester
- Buyer
- Grand Total
- Grand Total Currency

		<b>Purchase Order Number</b>	<b>Purchase Order Status</b>	<b>Purchase Order Date</b>	<b>Requisition Number</b>	<b>Requisition Date</b>
		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
		PO-12345-0001		05/09/2018	20180507001	05/14/2018

## 2. CREATING A NEW PURCHASE ORDER

The steps for creating a **Purchase Order** are basically the same as creating a Requisition, except that you're able to add a Purchase Order Number as soon as you create the Purchase Order.

### TO CREATE A NEW PURCHASE ORDER:

1. From the record navigator screen, select the **New** icon.
2. On the Details tab, enter a unique **Purchase Order Number**, choose a **Vendor** and enter the Requisition Date. (You can also enter more information such as Buyer, Requester, Promise Date, Cost Center, etc.)
3. Select the **Save** icon when you've concluded with the Details tab.
4. On the Parts tab, select the **green (+)** icon under Stockroom Parts.
5. On the Part window, select the **3 dots** icon next to the Vendor Stockroom Part field to access the list of Parts associated with the Vendor and Purchase Order. Select a part and select the **OK** icon. Then enter the Quantity Ordered and select the **Save** icon. (You can also change the default Unit Cost, enter a Tax Rate, Work Order Number and add an Account/GL#.)

**Part**

Vendor Stockroom Part

Unit Cost

Quantity Ordered

Account/GL#

Work Order Numbers

Show Parts From All Vendors

Tax Rate (%)

VAT Rate (%)

Account code

Purchase Order for Stockroom Part

**Note:** You can also add Non-Stockroom Parts that aren't in your MMX database. When you receive these parts, they won't be added to the Parts or Stockrooms modules of Proteus MMX.

6. If you're buying a new Asset, on the Assets tab, select the **green (+)** icon to enter the Asset Number, Asset Name, Facility (all required) and any additional information you need. Select the **Save** icon when complete.
7. Enter any additional information on the Costs, Shipping, and Billing tabs. Save the Purchase Order when complete.

## 3. AMENDING A PURCHASE ORDER

If you need to make any changes to a Purchase Order, you can use the **Amend Purchase Order** function.

**Note:** You will need sufficient rights to perform this function.

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#### **TO AMEND A PURCHASE ORDER:**

1. Select the Purchase Order you want to amend from the Record Navigator.
2. Select the **Amend Purchase Order** icon from the icon list.



3. Make any changes needed to the purchase order and select the **Save** icon when complete.



# RECEIVING

## 1. OVERVIEW

The **Receiving/Update Tracking Information** tab in the **Purchasing Order** Functional Area is used to receive all parts and assets on Purchase Orders. When Purchase Orders are received, the quantities and part/asset data will be updated in its specific area.

Item Type	Asset Number	Asset Name	Received Date	Receiver Name

Purchase Order Receiving

## 2. RECEIVING PARTS

### TO RECEIVE PARTS ON A PURCHASE ORDER:

1. Open the Purchase Orders module.
2. Select a **Receiving Purchase Orders** from the drop-down menu.
3. Select a Purchase Order Number from the drop-down field.

Purchase Order Number  
20171009011

Sort By Receiver Name Sort Order

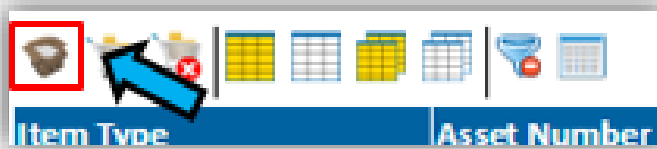
4. Select the Part to receive.
5. Select the **Receive** icon.
6. Enter Comments in the **Vendor Notes** field (these will save to the vendor and become part of the additional details for that vendor).
7. Enter quantity in **Returned to Vendor** if any parts need to be returned and **Reason for Return**.  
(In Vendors, a Return Log tab has been added to view all returned parts).

8. Enter the amount in the **Quantity Received** field. Then enter the **Received Date** and **Receiver**.
- Note:** You can also enter the shipment's **Invoice Number** and **Packing Slip Number**.
9. Select the **Save** icon.
10. When all parts of the purchase order are received, you can close the purchase order by selecting the **Close Purchase Order** icon.

### 3. RECEIVING ASSETS

#### TO RECEIVE ASSETS ON A PURCHASE ORDER:

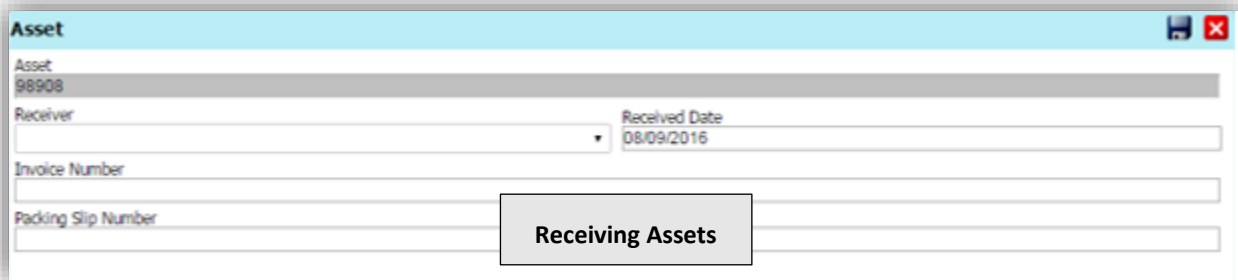
1. Open the Purchase Orders module.
2. Select a **Receiving Purchase Orders** from the drop-down menu.
3. Select a Purchase Order Number from the drop-down field.
4. Select the Asset to receive.
5. Select the **Receive** icon.



6. Enter the **Receiver** and **Received Date**.

**Note:** You can also enter the shipment's **Invoice Number** and **Packing Slip Number**.

7. Select **Save**.



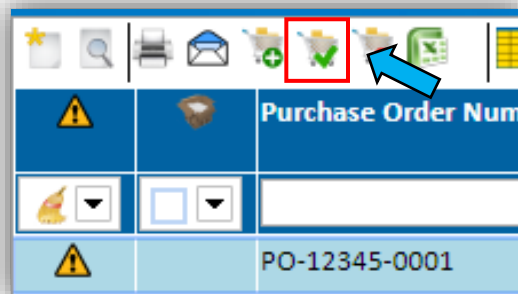
## 4. CLOSING A PURCHASE ORDER

Once you have received all Parts and Assets on a Purchase Order, you can close the Purchase Order.

**Note:** If you haven't received all Parts and Assets, but still wish to close the Purchase Order, you will need to amend the Purchase Order so that the Quantity Ordered and Quantity Received match for each part.

### TO CLOSE A PURCHASE ORDER:

1. Select the purchase order from the record navigator.
2. Select the **Close Purchase Order** icon.



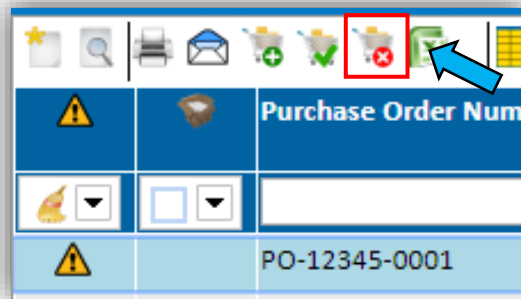
3. When asked, “Are you sure you want to close the selected Purchase Order?” select **Yes**.



## 5. CANCELLING A PURCHASE ORDER

### TO CANCEL A PURCHASE ORDER:

1. Select the Purchase Order from the record navigator.
2. Select the ***Cancel Purchase Order*** icon



3. When asked, “Are you sure you want to cancel the selected Purchase Order?”, select **Yes**.