

Purchase Settings

Purchase Settings (Admin View)

General Settings

units

Approval Settings

COMmodity group

Sub group

Vendor category

1
2
3
4
5
6

GENERAL SETTINGS

To get started selling your items, we need to check to see if your settings are just as you'd like them. On the left-hand side menu click "Purchase" which will drop down a sub menu. Click on "settings" at the bottom of the menu to open your settings page. In the "General Settings" tab, you can choose to adjust the Prefix number for your Purchase orders, Purchase requests, Purchase invoices, as well as choose the category you'd like to create invoices based on your needs and preferences. You can add terms and conditions, as well as vendor notes to be included at the bottom of each order. Click the browse button to select your logo.

General Settings Units Approval Commodity group Sub group Vendor category

Not create Purchase request, Quotation@
☐ Load items by vendor
RESET DATA

Purchase order number prefix: #PO
Purchase request number prefix: #PR
Purchase invoice prefix: #INV
Create invoice by: Contract

Terms & Conditions
Vendor note

Logo on Purchase Order
Browse... No file selected.

UNITS

In the "Units" tab of the setting section you will be able to add, edit, or delete the units you offer. Depending on your industry this could be very useful.

General Settings Units Approval Commodity group Sub group Vendor category

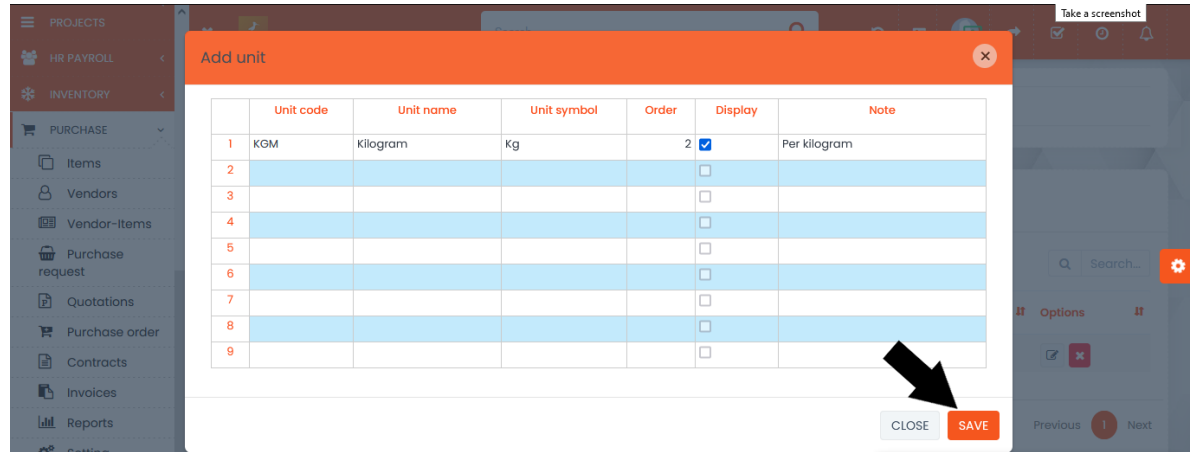
ADD UNIT



ID	Unit code	Unit name	Unit symbol	Order	Display	Note	Options
1	EA	Each	0	1	Display	0	

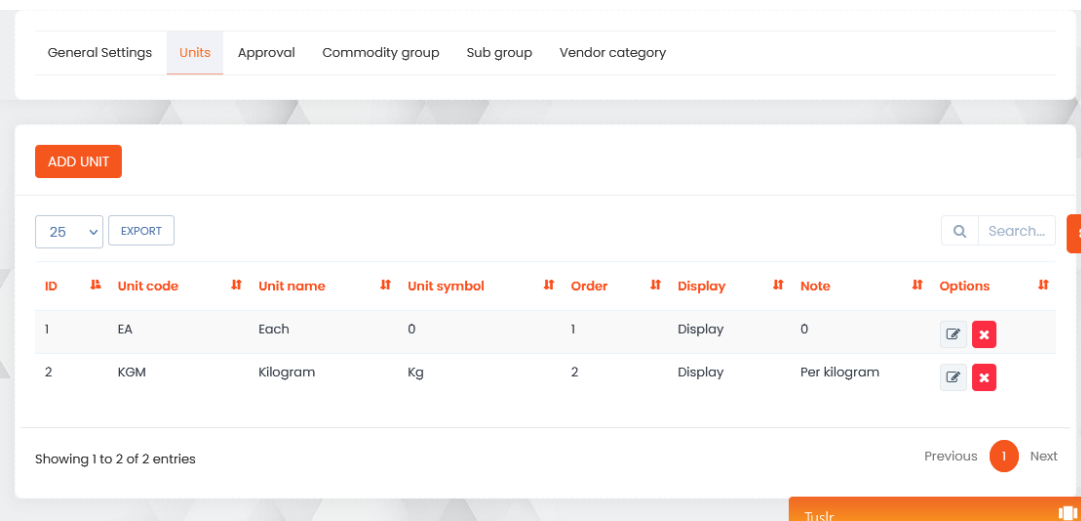
Showing 1 to 1 of 1 entries

Previous 1 Next

To add a unit, click the “Add Unit” button on the left corner of the page. This will open a chart that you can up to 9 units as you like at one time. Once your unit details are entered click “save”.

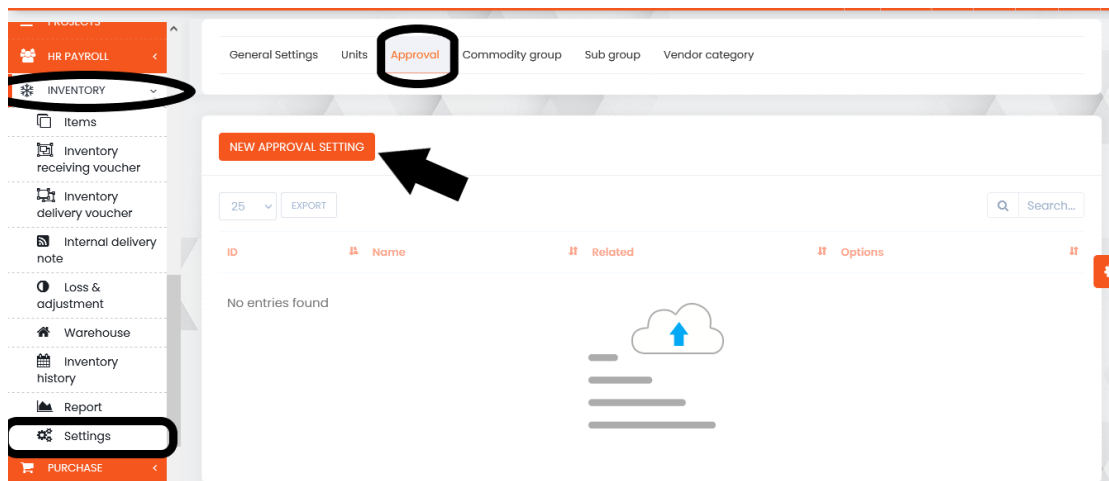


Now you can see the list of the units you have ready to use. If you no longer need a unit click the  button next to the unit you would like to delete. To edit a unit simply click the  button next to the unit you would like to edit.



APPROVAL SETTINGS

To set up an approval system your orders are approved before going out click the approval tab followed by the new approval settings button.



New approval setting ✕

* Subject
Approval for Purchase Orders

* Related
Purchase Order

Staff: Yasmine Abdullah Action: Approve +

Staff: Tyrese Hill Action: Sign -

CLOSE SAVE

Here you can select the operation line for your approval system. By clicking the “related” section you can choose if this approval setting is applied to a Purchase Request, Purchase Order, Quotation, or Payment Request. You can also add additional staff members to either sign or approve by clicking the + button. To delete a staff member already assigned, click the - button. When you’re finished entering the approval settings click “save”.

NEW APPROVAL SETTING

25 EXPORT Search...

ID	Name	Related	Options
1	Approval for Purchase Orders	Purchase Order	✎ ✕

Showing 1 to 1 of 1 entries Previous 1 Next

You now have an approval setting ready to use. If you would like to edit the setting click on the ✎ button. To delete a setting click the ✕ button.

COMMODITY GROUP

Our next tab in line of the Product Settings tabs is the “Commodity Group” tab. This tab will help you keep your products categorized. To add a commodity group type click commodity group type in the community group tab.

INVENTORY ▼

- PURCHASE** ▼
- Items
- Vendors
- Vendor-items
- Purchase request
- Quotations
- Purchase order
- Contracts
- Invoices
- Reports
- Setting**

TASKS
SUPPORT
LEADS

General Settings Units Approval **Commodity group** Sub group Vendor category

ADD COMMODITY GROUP TYPE

25 EXPORT Search...

ID	Commodity group code	Commodity group name	Order	Display	Note	Options
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No entries found

Tuslr



Add commodity group type

	Commodity group code	Commodity group name	Order	Display	Note
1	53101501	Boys slacks or trousers or shorts		<input checked="" type="checkbox"/>	
2				<input checked="" type="checkbox"/>	
3				<input checked="" type="checkbox"/>	
4				<input checked="" type="checkbox"/>	
5				<input checked="" type="checkbox"/>	
6				<input checked="" type="checkbox"/>	
7				<input checked="" type="checkbox"/>	
8				<input checked="" type="checkbox"/>	
9				<input checked="" type="checkbox"/>	

CLOSE

SAVE

Here you can add up to 9 commodity group types at a time. Click "Save" when finished.

You can now see the list of current commodity group types. To edit your commodity groups in the list select the  icon. To delete an item in the list click the .

General Settings
Units
Approval
Commodity group
Sub group
Vendor category

ADD COMMODITY GROUP TYPE

25
EXPORT

Q

Search...

ID

Commodity group code

Commodity group name

Order

Display

Note

Options

1



53101501

Boys slacks or trousers or shorts

0

Display

0

Showing 1 to 1 of 1 entries

Previous
1
Next

QUICK LINKS

Commodity Codes on Excel

Tabs on the Excel workbook include Common Purchases in Alphabetical order or Common Purchases by Category.

How to Search the Spreadsheet Guidance

If you would like some information on setting up or understanding Commodity codes for your items, a good resource is <https://finance.uw.edu/ps/resources/commodity-codes> where you can find an excel sheet under "Quick Links" on the right hand side of the webpage including a list of the common purchase codes.

SUB GROUP

Once we have our commodity group in place, we can go over to our sub

INVENTORY
PURCHASE
Items
Vendors
Vendor-Items
Purchase request
Quotations
Purchase order
Contracts
Invoices
Reports
Setting

General Settings
Units
Approval
Commodity group
Sub group
Vendor category

ADD SUB GROUP TYPE

25
EXPORT

Q

Search...

ID

Sub group code

Sub group name

Group name

Order

Display

Note

Options

No entries found

groups. Click the “Sub Group” tab to further categorize our commodities. On this page we will find our list of current sub groups. To add a new sub group, click “Add Sub Group Type”.

A pop-up window will display our sub group options. Enter the Sub Group Code, Sub Group Name and Select the group name. Since we just entered our group name we will choose that one. You can also add the order number, if you would like to display the sub group and any notes. Click “save” when complete.

ADD SUB GROUP TYPE

25 EXPORT

Search...

ID	Sub group code	Sub group name	Group name	Order	Display	Note	Options
1	53101501-LF	Loose fit Boys Pants	Boys slacks or trousers or shorts	0	Display	Loose fitting pants for boys.	

Showing 1 to 1 of 1 entries

Previous 1 Next

You can now view, edit (✖) or delete (🗑) sub groups from your list.

VENDOR CATEGORY

Our final tab in the settings section is the vendor category. Click the “New” button to make a new vendor category.

New vendor category

Name
Apparel

Description
Clothing from Vendors.

CLOSE SAVE

A pop-up window allows you to add the name and description of your new vendor category. Click "Save" to add this to your new list.

We have now added our new vendor category and can view edit () or delete () any items in your vendor category list.



General Settings	Units	Approval	Commodity group	Sub group	Vendor category
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NEW

25

EXPORT

Q Search...

ID	Name	Description	Options
1	Apparel	Clothing from Vendors.	 

Showing 1 to 1 of 1 entries

Previous

1

 Next