Purchase Order Workflow

Overview: This introduction to ordering your Securastock products through the Purchase Order feature will get you familiar with the Steps to completion, editing, and copying and printing your orders.

<u>**Shortlist - You will need:**</u>

Step		Required
1	**Order**	- Purchase Order number - Short Description of order - Machine Type - Any file attachments for the order
2	**Machine Information**	- Confirm Machine and Color

3	**Product Form**	- Bins: All bin sizes, color, and part numbers
		- Badge Reader type:
		    805 is the Standard,
		    800 is used if Badge Test request indicates it is required.
		- List of accessories if desired.

4	**Order Summary** Review	n/a
5	**Distributor Accts Payable Info**	- Distributor (Your company) / branch address - Accounts Payable Contact information Name, Email address, phone number.
6	**Distributor Branch info**	- Distributor Branch Contact for machine: Name, Email address, phone number

7	**Shipping information**	- Shipping method option
		    - Prepay, collect, schedule your own.
		- Where is machine being delivered.
		    Company Name,
		    Ship to address
		    Contact name, email, phone

8	**End User information**	- Final Destination Location for machine Full address - Local Machine level administrator to be loaded into database.
9	**Machine Configuration info**	- Which method will you use to access the machine? | PIN	Default
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Biometrics	Facial Recognition
Universal Badge Reader	Badge Test Request to be completed and sent in for testing and programming of the Access Reader.
Standard RFID	RFID Fob, Card, Sticker	
10	**Order Notes**	-

LOCATION: **Access**: https://access.securastock.com

Login: Login with your Single Sign-On Credentials.

Once you are logged in. Your Dashboard will appear, the Menu options will reflect your level of permissions.

Purchase Order Table - Overview

Location: On the Dashboard Menu Options select: **Purchase Orders >** then from the submenu: **Orders**

The Purchase Orders Table displays a summary list of all Purchase Order entries.

Some of the key fields of interest are:

- Status of Order
- Customer PO

- Submitted by
- Approved by

- Created Date

There are several action options: Print   Copy   Continue   Delete

- **Print**: Print the current purchase order will download a pdf version of the Order Summary for printing
   - ✓ Be aware that incomplete POs will not contain all information.
- **Copy:** Copy the selected PO use as a base for a new PO order.
   - ✓ Advance through the steps and complete blanks areas and edit other fields as needed.
- **Continue:** Pick up where you left off
- **Delete:** Delete the order.

Search Filters ▶ Search any field or combination of fields to locate previous orders.

Entering an Order

New Purchase Order   Select the Purchase order icon to begin a new order.

Begin. Step 1:

Mandatory Fields: All mandatory fields are noted with an asterisk**.**

Order - Step 1 of 10

Create Date:	2019-03-14 10:27:06
SecuraStock Sales Order Number:	502379010
Customer PO Number * :	1963900
Short Order Description * :	Stock GRN/grn
Require Approval:	☐
Requested Approver:	▾
Order Type * :	SecuraStock ▾
Customer Attachment:	Choose File No file chosen [file │☐delete]
Distributor Name * :	Distributor - Agora Edge

Back   Next

* **Customer PO Number:** Your Company Purchase Order ID
* **Short Order Description:** Its common to use the machine type and color
* **Order Type:** Drop down selection of the Machine
* **Distributor Name:** Defaults to the assigned Distributor Level of your SSO User record.

✓ **Customer Attachment:** You may include a copy of your Purchase order if desired.

✓ **When editing:** Previously attached files will show options to the right of the **Choose** file button [file │☐delete].

- **file:** Click on **file** to download the file for viewing.
☐ **delete:** Click on the **checkbox** to **delete** the attachment.

Select   Next   to continue.

Step 2: Machine

Machine Type: Click the drop-down arrow to select the Machine Type and color you wish to configure an order for.

✓ **Review the machine/color selection is correct.**

Select [Next] to continue.

Step 3: Product Form

In this section you will select the machine and additional items you wish to add on to your order.

✓ When selecting the machine, all the items that come with your machine package will auto select.

✓ **Re: Securastock machine orders:** Bins, dividers, and fences will be noted as storage, any overage will be calculated and adjusted as needed once it is submitted.

Product ID	Description	Distributor Price	Quantity
SecuraStockV9GREEN	SecuraSTOCK V9 in Green, with universal badge reader, shipping crate	$ 7557.00	0
POWERBAR12	12-OUTLET CONFIGURABLE POWER STRIP OPTION	$ 80.00	0
DUSTPROTECTIONKIT	DUST PROTECTION KIT; 2 FILTERS, 12 MAGNETS, W/INSTRUCTIONS	$ 49.00	0
C5101-8015	15FT Cat5e 350MHz UTP SNAGLESS ETHERNET NETWORK PATCH CABLE, WHITE	$ 9.00	0
PW104-1215	15FT OUTLET SAVER POWER EXTENSION CORD	$ 24.00	0
FENCEGR	FRONT FENCE, 26" X 6", GREEN	$ 22.00	0
FENCERED	FRONT FENCE, 26" X 6", RED	$ 22.00	0
FENCEWH	FRONT FENCE, 26" X 6", WHITE	$ 22.00	0
DIVIDERGR	SHELF DIVIDER, 23" X 10", GREEN	$ 35.00	0
DIVIDERRED	SHELF DIVIDER, 23" X 10", RED	$ 35.00	0

Quantity: Select quantity from the drop-down list.

Select [Next] to continue.

Step 4: Order Summary

Review your order summary.

Note: Current Lead times on machine builds are noted below the order summary. Lead times are updated often and may vary between machine types.

✓ Note that the first year of software and support fees are prorated.
   Fees will be due again each January for the year.

▾ Order Summary - Step 4 of 10

Product ID	Descriptions	Price	Quantity	Item Total
SecuraStockV9GREEN	SecuraSTOCK V9 in Green, with universal badge reader, shipping crate	$7557.00	1	$7557.00
Support Fees	Software and Support Fees, First Year	$540.00	1	$540.00
POWERBAR12	12-OUTLET CONFIGURABLE POWER STRIP OPTION	$80.00	1	*included
FENCEGR	FRONT FENCE, 26" X 6", GREEN	$22.00	4	*storage
FENCERED	FRONT FENCE, 26" X 6", RED	$22.00	4	*storage
PCP30220GR	PLASTIC PARTS BIN, GREEN, SIZE B, 7-3/8 X 4-1/8 X 3", W/ MAGNET	$4.62	7	*storage
PCP30164GR	PLASTIC PARTS BIN, GREEN, SIZE J, 23-5/8 X 6-5/8 X 4 ", W/ MAGNET	$15.38	8	*storage
BADGEREADER-805	MULTI-RANGE BADGE READER 805	$295.00	1	$295.00
Storage Total				$726.38
Grand Total				$9118.38

*Lead time on a machine order is currently 6 weeks.

Select **Next** to continue.

Step 5: Distributor Accounts Payable Information

All invoicing by SecuraStock is completed via email to your company AP.

Enter the Mandatory **"*"** information regarding Accounts Payable for your company in this section.
- **Company, Full Address**
- **AP Contact name, email, and phone number**

▾ Distributor Accounts Payable Information - Step 5 of 10

Company Name * :	Your company NAMe
Address Line1 * :	Company Address
Address Line2:	
City * :	City
State * :	State
Zip/Postal Code * :	12345-0000
Country * :	United States
AP Contact Name * :	Name of AP Contact here
AP Contact Email * :	Contact@@your company.com
AP Contact Phone * :	555.555.1212

Select **Next** to continue.

Step 6: Distributor Branch

Enter the Mandatory "*****" information regarding Company Branch information.

Select Next to continue.

Step 7: Shipping

Enter the Mandatory "*****" information regarding: Shipping to information.

You may also request a ship date; and include the planned installation date to your record.

Select Next to continue.

Step 8: End User

The end user information is used to build a location for the machine to reside within your company hierarchy.

Note: **New Customer = Yes** This indicates that a location does not currently exist and will be built

New Customer = No   This indicates that a location already exists for this end user and the site ID will indicate the location that you would like the machine placed into.

ⓘ If no site is indicated machine will be placed into "Unassigned" Location within your heirarchy.

▾ End User - Step 8 of 10

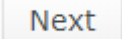|	
Company Name * :	End user company name
Address Line1 * :	address of company
Address Line2:	
City * :	City
State * :	state
Zip/Postal Code * :	zip code
Country * :	Country
Contact Name * :	Machine Administrator at the location
Contact Email * :	Admins email address
Contact Phone * :	their contact phone number.
New Customer * :	▾
Site ID:	
Account Number:	

Select Next to continue.

Step 9: Configuration

Which method will you use to access the machine? **PIN, Biometrics, Universal Badge Reader, or Standard RFID (fob, card)**

- o **The default is PIN**/PWD.
- o **Universal Badge Reader** requires a Badge Test Request to be completed and to be sent with a sample badge for testing and programming for the reader.

- ✓ **Badge test request forms can be obtained from support@securastock.com**

Select Next to continue.

Step 10: Notes

Enter any notes regarding the sale that have not been covered in the steps.

Submit Order

Once the order is submitted, you will be directed to the summary. Verify Status of submitted.

You may Print a PDF of the order details, Copy the details to a new order, or Edit this order and re submit.