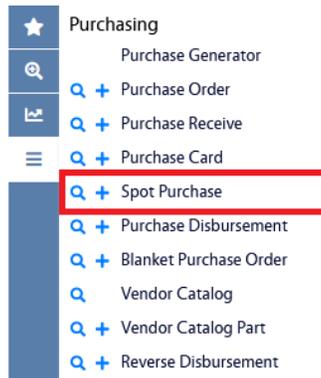
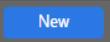


Create Spot Purchase

A Spot Purchase is normally used when purchasing items from a vendor either with cash or a credit card and not using a Purchase Order. A Spot Purchase can use the Vendor Catalog, or Non-Stock items can be entered.

- From the menu, under **Purchasing – Spot Purchase**



- Click Spot Purchase hyperlink and then click 
 - Alternatively, you can click  from the menu.

The screenshot shows the 'AiM Spot Purchase' form. At the top, there are 'Save' and 'Cancel' buttons. The form is divided into several sections:

- Header:** '1009' and 'Last Edited by DALLACE UNGER On 4/14/23 10:51 AM'.
- Left Sidebar:** 'View', 'Extra Description', 'Notes Log', 'User Defined Fields', 'Status History', 'Related Documents'.
- Main Form:**
 - Contractor:** Input field with a search icon.
 - Address Code:** Input field with a search icon.
 - Contact:** Input field with a search icon.
 - Terms:** Input field with a search icon.
 - Bank:** Input field with a search icon.
 - Account:** Input field with a search icon.
 - Check Number:** Input field.
 - Work Order:** Input field with a search icon.
 - Phase:** Input field with a search icon.
 - Line Item Type:** Dropdown menu.
- Right Panel:**
 - Status:** 'ENTERING' with a search icon.
 - Entry Date:** 'Apr 14, 2023' with a calendar icon.
 - Markup:** Input field.
 - Placed By:** 'DALIN7166' with a search icon.
 - Reference Number:** Input field.
 - Currency:** 'USD' with a search icon.
 - Summary Table:**

Subtotal	\$0.00
Tax	\$0.00
Markup	\$0.00
Total	\$0.00
- Bottom Section:** 'Line Items' table with columns: Line, Vendor Part, Description, UOM, Quantity, Work Order, Phase, Line Total. 'Remove' and 'Add' buttons are present.

- Enter the general information about the Spot Purchase. *Note: Status, Entry Date, Placed By and Currency are filled in with the default values.*
 - Enter the **Contractor** you are ordering from. Click 

AiM Contractor

Done Search Cancel	
Contractor #	Description
000000137	DWYER INSTRUMENTS
000000166	MARMON KEYSTONE
000000266	JB SAUNDERS
000000312	INTERLINE/SUPPLYWORKS
000000406	BUFFALO LOCK & KEY

- b. This will give you a list of all Contractors. Click the Contractor hyperlink to select a Contractor, or click **Search** and enter the search criteria.

AiM Contractor

Execute
Reset

★
Operator

🔍
🔍
🔍
☰

Contractor =

Description contains

1099 Code =

Qualified =

Expiration Date =

Address Code
Operator

Address Code =

Address 1 =

Address 2 =

City =

State =

Zip Code =

Phone =

Fax =

Specialties

- c. Click **Execute**

AiM Contractor

Done Search Show All Cancel	
Contractor #	Description
0000010055	ABLE LABEL INC.
0000012725	ALLIED BUILDING PRODUCTS
00000289265	GREATER EARTH ORGANICS, LLC
0000272835	INSTRUMENT & VALVE SERVICES CO
0000291935	GE BETZ INC (WATER & PROCESS)
10075	BC INTERIORS

- d. Click the Contractor hyperlink to select the Contractor.
- e. You will be returned to the Spot Purchase screen with the **Contractor** information filled in and, **IF** that Contractor only has one Address Code, it will also be filled in. If the Contractor has multiple Address Codes your will need to select one.

- f. Click the hyperlink for the Address Code you want to select. You will be returned to the Purchase Order screen with the **Contractor** and **Address Code** filled in.

The screenshot shows the 'AiM Spot Purchase' interface. At the top, there are 'Save' and 'Cancel' buttons. The main form is divided into several sections:

- Header:** '1009' (highlighted in yellow), 'Last Edited by DALLACE UNGER On 4/14/23 10:51 AM', and 'Status: ENTERING'.
- Contractor:** '000010055' (highlighted in red), 'ABLE LABEL INC.', 'Address Code: NONE' (highlighted in red).
- Bank/Account:** Fields for Bank, Account, and Check Number.
- Currency:** 'USD' (highlighted in red), 'US DOLLAR'.
- Summary Table:**

Subtotal	\$0.00
Tax	\$0.00
Markup	\$0.00
Total	\$0.00
- Line Items:** A table with columns: Line, Vendor Part, Description, UOM, Quantity, Work Order, Phase, Line Total. There are 'Remove' and 'Add' buttons.

- 4. Fill in the other fields as needed.
- 5. To load the Line Items, click 
 - a. You will be asked to select the type on item you are adding.

The screenshot shows the 'AiM Add New Line Item' dialog box. It has a title bar with 'Next' and 'Cancel' buttons. Below the title bar, it says 'Please Select:' and has two radio button options: 'Catalog' (which is selected) and 'Non-Stock'.

- b. You have two choices:
 - i. Catalog – Requires that your organization maintains non-inventory vendor parts since you can only select a Vendor Catalog Part that is not associated with an Inventory Part Profile.
 - ii. Non-Stock – Allows you to enter any part on the line. Including multiple parts lumped together in a free-form type entry.
- c. Select the radio button and then click 

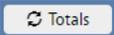
d. In the **Vendor Part** field:

i. If Catalog was selected click  to search the Vendor Catalog Parts.

1. Enter the criteria to find the part and click 
2. Click the Vendor Part hyperlink to select the part. This will return you to the Spot Purchase Line Item and will fill in the fields.

ii. If Non-Stock was selected the field will accept any entry up to 25 characters and there must be something in the field.

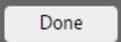
e. Enter a Unit of Measure (UOM).

f. Enter the Unit Cost and Quantity. Note to see the Line Total you must click the  button on the right hand side of the screen.

g. Select a Work Order by either typing it in, or searching for it by clicking the . If the Work Order only has one Phase it will automatically be entered, otherwise you will need to select the Phase from a list presented.

h. The Subledger defaults to Materials, but you can select one of the other options (Labobr, Equipment or Contract) if needed.

i. Click either:

- i.  To save this Line and start a new one,
- ii.  To abandoned this line, or
- iii.  To save this Line and return the Shop Purchase screen.

6. After all lines are entered, if the Status need to be change click the  to see a list of possible Statuses and select one.
7. When complete, click 