Purchasing	AiM User Guide		
Purchase Order Disbursement		_	Commented [CP1]: Only Option 2 worked. Need Option 1 Commented [CP2R1]: we should not get a question about closing the PO. Update screenshot
Purchase Orders are used to purchase materials on a Purchase Order they will need to be disburs (if non-stock or catalog). Only items that have b	rom Contractors (vendors). Once the items have been received ed to the warehouse (if inventory) or a Phase on a Work Order een received can be disbursed.		
1. There are two ways to start a Purchase (	rder Disbursement		
a. From the Purchase Receive scree	n. The most direct is to do it after completing the receiving.		
<ul> <li>From the Purchase Disbursement receiving.</li> </ul>	t screen. This method is easiest if you need to search for the		
<ol> <li>OPTION 1 – From the Purchase Receive : menu.</li> </ol>	creen, click the Purchase Disbursement hyperlink in the Action		
AIM Purchase Receive			
< Back Edit Ne	v Search Browse		
★ Action     Purchase Disbursement     Email     Print     View     Extra Description	1029 AUTO-GENERATED PO DIFFERENTIAL PRESSURE GAUGE - DWYER INSTRUMENTS		
Shipping Information Sent Email	Contractor 0000000137		
<ul> <li>OPTION 2 – From Purchasing, click Purch</li> <li>Purcha</li> <li>Q</li> <li>+</li> <li>+<!--</td--><td>ase Disbursement ing urchase Generator urchase Order urchase Receive urchase Card pot Purchase urchase Disbursement lanket Purchase Order</td><td></td><td></td></li></ul>	ase Disbursement ing urchase Generator urchase Order urchase Receive urchase Card pot Purchase urchase Disbursement lanket Purchase Order		
a. Click Purchase Disbursement hy	erlink and then click		
b. Alternatively, you can click 🕇 fi	om the menu.		

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					AiM User Guide	
			AiM Purchase Disbursement			
			Next Cancel			
			Please Select:			
			Purchase Receive			
			Spot Purchase			
			<ul> <li>Purchase Card</li> </ul>			
c	. If need	ded, cl	ck the radio button for Purchase Receive (the defa	ult) and click	Next	
d	. Fill in	the se	arch screen to find the Purchase Order you want	to do the rec	eiving for an	d then
	click	Execute				
AiM Purchase Rece	ive Transactio	ons Search			0	(+
Execute Basic S	earch Res	set				
Action			Operator			
Q <u>New Query</u> View	D	Sescription		)		
=	c	Contractor		20		
	E	iditor				
				4		
	E	dit Date				
		Purchase Ord	Operator			
	Pi	urchase Order				
		0.000				
e	. Enter	the cri	teria needed to find the Purchase Receive. The Tr	ansaction is t	the simplest	way to
	find th	ne Purc	hase Receiving.			
f.	Click t	he Tra	nsaction hyperlink to select the Purchase Receive.			
M Purchase Receiv	re - Eligible Trar	nsactions			SCOTT	<b>0</b> 🕩
Done Cance Transaction Line Pu	l rchase Order Ven	ndor Part	Description	UOM Qu	antity Received Inventory Part	Subtotal
1007 1 10	012345678 1NF	-G8	TIFF BRISTLE JOHNNY MOPS INFG8	EA	12.0000	\$41.88
	012345678 1NF	G8	.TIFF BRISTLE JOHNNY MOPS 1NFG8	EA	3.0000	\$41.88
□ <u>1008</u> 1 <u>10</u> □ <u>1012</u> 1 A0	<u>201011</u>	T NI IMRED	ABB VFD			\$60.00
1008 1 10 1012 1 AC	001013 PAR 3454	67		EA	1.0000	\$750.00
1 1008 1 10 1 1012 1 AC 1 1013 1 AC 1 1025 1 10	001013 PAR 3454 102383838 LEV	/123	JGHT FXTURE	EA	1.0000	\$750.00

	AIM Purchas	se Receive										
	< Back	Edit	New	Sear	ch B	rowse						
		Disbursement ription nformation	AUTO DIFFE	-GENERATED I RENTIAL PRES:	PO SURE GAUGE - D	WYER INSTRUME	NTS					
4. Once t disburs here of Purchase Disbursen we Cancel	the Disburseme sed. The work of ther than enhan nent	nt is brou rder and di ice the desi	ght up, the sburse quar cription or f	default atity shou ill in the I Last Edite	assumptic uld already Delivered 7	on is that be filled ir To name.	the entire h. There sho	receiving ould be lit	g will be tle to do			
og I Documents	DIFFERENTIAL PRESSURE GAUGE	DWYER INSTRUMENTS		Work 0	Order Phase	Total Warehouse Bin	Component Group	Remove	\$75.59 Add			
	Line Transaction Item Inve	nber Vendor Part 2010		<u>W200</u>	<u>0166 001</u>			1.0000 0.000	y Total Canterly D \$75.59 USD			
a.	Lee Transaction Rom Mar 1 302 3 But if you need AIM Disbursement Lint Done Add Ver Erra Deciption	tice Vender Part 2010 2010 2010 2010 2010 2010 2010 201	e anything o	wzee	e Item, clic	k the Item	number hy 	V 1.0000 0.000 V V V V V V V V V V V V V	1022 AUTO-GENERAT DIFFERENTIAL PI Ce	SCOTT ED PO RESSURE GAUGE	<b>() (</b> +)	

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5. Click Save	
<ol> <li>If all receiving and Order quanitity and</li> </ol>	disbursement is complete, and your system is configured for a 2-way match (Purchase nd Received quantity) you will be asked if you want to close the Purchase Order.
AiM Purchase Disbursement	
★ © =	Close the PO 115-2 Yes No
7. Click Yes to closed manually.	o close the Purchase Order. If you do not close the Purchase Order it will need to be

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