Purchasing

## AiM User Guide

## **Purchase Generator**

Purchase Orders are used to purchase materials from Contractors (vendors). The Purchase Generator allows you to gather items from multiple Purchase Requests onto one Purchase Order. The Generator will show you what Contractors have unfulfilled items and let you select the one you want to put on the Purchase Order and then generate the Purchase Order for processing.

1. From the menu, under Purchasing – Purchase Generator



2. Click Purchase Generator hyperlink.

AiM	Purchase Generator		0	0	•							
Б	Execute Basic Search Reset											
*	Action		Operator									
Q	New Query	Transaction	=	~								
	View	Description	contains	~								
2		Work Order	-	~	Q							
≡		Phase	=	~	Q							
		Date Needed	=	~								
		Requested By	=	~	Q							
		Status	-	~	Q							
		Region	-	~	Q							

3. Enter the criteria needed to get the Purchase Requests you need. (Purchase Request statuses must be of the Finalized type. Purchase Requests that are still in an Open state are not ready for purchase.)

<b>iM</b> Ρι	urchase Genera	or	0	<b>(</b> )
Sear	ch			
<b>k</b> r				More Det
۹ 🗆	Contractor	APEX ELECTRIC	Line 1 Items	Generate F
≤	Address Code	1	Total \$33.23	Generater
	Contractor	DYNATECH AIR FI	Line to	
	Address Code	1	terms Total \$152.80	Generate F
	Contractor	NICHOLS	Line 2 Items 2	Generate F
	Address Code	1	Total \$305.12	

5. You will get a list of Contractors with outstanding items requested from them. On the right side you can see the number of items (not the quanities) and the total cost of the items.

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6.	То	see moi	re details a	bout the items to be	e ordered	, click Mo	re Detail			
AiM	Purc	hase Generat	tor						0	9 🕩
	Search									
* @										Less Detail
2		Contractor Address Code	APEX ELECTRIC				la l	ne 1 ems 1 ntal \$33.23		Generate PO
≡		Purchase Request	Item Type	Vendor Part	Work Order	Phase		tity UOM	Unit Cost	Line Total
		1012	2 NonStock	CABLE HDMI CABLE 100 FT	W0001074 REMOVE WHITEBOARD FROM CINDY GARY'S OFFICE (TC 1)	001 REMOVE WHITEBOARD FROM CINDY GARY'S OFFICE (TC 1)	1.0	100 EA	\$33.23	\$33.23
		Contractor Address Code	DYNATECH AIR FI				Lii Ite To	e 10 ns 10 al \$152,80		Generate PO
		Purchase Request	Item Type	Vendor Part	Work Order	Phase		tity UOM	Unit Cost	Line Total
		<u>1068</u>	<u>1</u> Catalog	HFLNK1660 FILTERS, LINK 16'X60' 3 PLY POLY LINK (3-16'X20')	W0001160 FIXED METERED TEST	001 FORD EXPLORER 2014 PM	20	100 EA	\$7.64	\$15.28
		<u> </u>	<u>1</u> Catalog	HFLNK1660 FILTERS, LINK 16'X60' 3 PLY POLY LINK (3-16'7/20')	W0001213 FIXED METERED TEST	001 FORD EXPLORER 2014 PM	2.0	100 EA	\$7.64	\$15.28
ш	Co Ad	ldress Code 🛛 🕅	AA	R INSTRUMENTS				Line 1 Items 1 Total \$75.59		Less Detail Generate PO
=	G		st Item Type <u>1</u> NonStock	Vendor Part 2010	Work Order	Phase 0	Capital Project Quan	ity UOM	Unit Cost \$75.5900	Line Total
				DIFFERENTIAL PRESSURE GAUGE, INCH OF WATE 0-10 <sup>°</sup> RANGE, +/-2%, 2000 SERIES	W200005 AIR CONDITIONING FAN MAKING NOISE	(DEN) - AIR CONDITIONING FAN MAKING NOISE		10 EA	575.5900	\$75.59
8.	Or	nce you	have made	e the selection(s) for		(DEN) - AIR CONDITIONING FAN MAKING NOISE	Generate PO	U EA	575,5900	\$75.59
				0-10" RANGE, +/-2%, 2000 SERIES	a Contrad		Generate PO			
	You	u will be	taken to t	e the selection(s) for	a Contrad		Generate PO	Purcha	se Order	
	You Aim	U WIII DE Purchase Orde Save Cano	e taken to t Ir cel	e the selection(s) for the Purchase Order s	a Contrad	Ctor click	Generate PO	Purcha	Se Order	
	You AiM Mew Extra I Shippi	u will be Purchase Orde Save Cane Description	taken to t	e the selection(s) for the Purchase Order s	a Contrad	Ctor click	Generate PO	Purcha PENDING REV NORE STOCK F	se Order	) (+
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Asset

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10. As part of the processing	of the Purchase Order, do not forget to	set the Disbursement Defaults	on the Commented [C	P1]: what is Disbursement Defaults ?
	lown the PO Issuance later.			
AIM Disbursement Defaults Done Cancel		SCOTT 🛈 GA		
1	Last Edited by SCOTT LLOYD On 10/20/22 10:36 AM	Purchase Order A001042     AUTO-GENERATED PO     Line 1		
		Quantity Differential PRESSURE GAUGE, INCH OF WATER, 0-10' RANGE		
Warehouse	Transaction 1058	Unit Cost \$75.5%		
Bin Work Onder W22000005 Q,		Subtotal 575.1 Discount S0.0	0	
Work Order W2200005 Q. AIR CONDITIONING FAN MAKING NOISE	Line 1	Tax 1         \$0.0           Tax 2         \$0.0           Tax Rebute         \$0.0	0	
Phase 001 Q		Shipping S0.0	0	
(DEN) - AIR CONDITIONING FAN MAKING	NOSE	Sequence Total \$75.5		
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