

# Purchase

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- Purchase Requisition
- Purchase Order

# Purchase Management

Efficient and streamlined purchasing processes are critical to the operational success of any organization. In Ultro, the purchase module facilitates comprehensive management of procurement activities, ensuring transparency, control, and efficiency at every step. Below is an overview of the key stages involved in the purchasing lifecycle:

## Purchase Requisition

The purchasing process begins with the generation of a Purchase Requisition. This document is used to formally request the procurement of goods or services. It provides detailed information such as item descriptions, quantities, and expected delivery dates, initiating the purchasing workflow.

## Purchase RFQ (Request for Quotation)

Once the requisition is approved, a Request for Quotation (RFQ) is sent to potential suppliers. This document invites suppliers to provide their best offers for the requested items or services, enabling the organization to gather multiple proposals for evaluation.

## Supplier Quotations

Suppliers respond to the RFQ with their quotations, which include pricing, delivery timelines, and other terms. These quotations are recorded and tracked in the system for further analysis and comparison.

## Quotation Comparison

The next step is to evaluate the supplier quotations. The system facilitates an in-depth comparison of price, quality, delivery terms, and other criteria to select the best supplier for the purchase.

## Purchase Order

Once a supplier is chosen, a Purchase Order (PO) is issued. The PO serves as a formal agreement between the organization and the supplier, detailing the terms of the purchase, including quantities, prices, and delivery schedules.

## Service Order

For procurement involving services rather than goods, a Service Order is created. It specifies the nature of the service, expected deliverables, and timelines, ensuring clear communication between the organization and the service provider.

## Service Receipt

Upon completion of the service, a Service Receipt is generated to confirm the delivery and acceptance of the requested service. This step is critical for initiating payments and maintaining accurate service records.

## Price List

The Price List acts as a reference for managing standardized pricing for frequently procured items or services. It ensures consistency and helps streamline future procurement activities by providing pre-approved pricing details.

These processes form the foundation of an organized and effective purchasing strategy, helping organizations optimize costs, maintain supplier relationships, and ensure timely procurement of goods and services. Each process is integrated seamlessly within our ERP system to provide a user-friendly and automated experience.

For more detailed insights, please refer to the dedicated pages for each process.

# Purchase Requisition

## Create New Purchase Requisition

Go to Purchase → Purchase Requisition → Add New.

Home / Purchase Requisition

Purchase Requisition

Add New

Actions

<input type="checkbox"/>	Name	Pr Date	Target Date	Requestor	Department	WareHouse	Status
	<input type="text"/>	<input type="text" value="mm/dd/yyyy"/>	<input type="text" value="mm/dd/yyyy"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	PR/0016	2024-10-17T07:38:38.43Z		Erp Admin	Finance	RVS D-59	Approved
<input type="checkbox"/>	PR/0015	2024-10-16T05:16:26.11Z		Erp Admin	Finance	RVS D-59	Fully Planned
<input type="checkbox"/>	PR/0014	2024-10-15T06:23:24.169Z		Erp Admin	Finance	RVS D-59	Fully Planned
<input type="checkbox"/>	PR/0013	2024-10-10T12:15:52.85Z		Sakshi Choudhary	Warehouse	RVS, Noida	Approved
<input type="checkbox"/>	PR/0012	2024-10-09T10:26:52.849Z		Ajay K Srivastava	Warehouse	RVS D-59	Fully Planned
<input type="checkbox"/>	PR/0011	2024-10-09T10:19:16.97452Z	2024-10-23T16:30:00Z	Ajay K Srivastava	Warehouse	RVS D-59	Draft
<input type="checkbox"/>	PR/0010	2024-10-09T05:31:46.618692Z					Draft
<input type="checkbox"/>	PR/0009	2024-10-08T13:57:49.969195Z					Draft
<input type="checkbox"/>	PR/0008	2024-10-08T12:46:10.290048Z					Draft
<input type="checkbox"/>	PR/0007	2024-10-08T12:45:52.714099Z					Draft
<input type="checkbox"/>	PR/0006	2024-10-08T12:06:51.754961Z					Draft
<input type="checkbox"/>	PR/0005	2024-10-08T12:04:30.027511Z					Draft
<input type="checkbox"/>	PR/0004	2024-10-08T12:04:10.427913Z					Draft

Main Section:

System will pickup the Date, User & Department details automatically.

User will have to fill the other Mandatory Details such as

Warehouse: Specify the location of the requisition.

Store/Location: Select the specific area within the warehouse.

Home / Purchase Requisition / Purchase Requisition Form

## Purchase Requisition

Create RFQ Next Action Print Save Close New

Purchase Requisition No.

Created By\*

Requisition Date\*

Warehouse\*

Project

PR Category

Description

Requestor (Change to Requestor's name)\*

Target Date


Location

Cost Center

For Style/Product

Item/Material Requestor Details Other Details

Product

S.No	Products	Image	Description
1	<input type="text" value="Zebra Tape (2 Inch)-RVS/B-0014F"/>		Zebra Tape (2 Inch)

## Product Table

In the Product Table, user need to enter the product details.

Product: Enter the product name or SKU.

Quantity: Input the required quantity for the product.

On selection of product system will automatically pick up the Unit of measurement.

Based on the selected Store/Location, system will show the on hand quantity.

User can enter multiple product lines.

Click Save to create the Purchase Requisition.

## Approval Process:

Click the Next Action button.

Select Send for Approval.

Purchase Requisition

Create RFQ

Next Action

Print

Update

Close

New

Draft

Purchase Requisition No.

PR/0017

Created By\*

Erp Admin

Requisition Date\*

Oct 17, 2024

Warehouse\*

RVS D-59

Project

-Select-

PR Category

-Select-

Description

Requestor (Change to Requestor's name)\*

Erp Admin

Target Date

Location

D-59/Stock

Cost Center

-Select-

For Style/Product

-Select-


Item/Material

Requestor Details

Other Details

Product

Load Product Line

S.No	Products	Image	Description	On Hand Qty
1	Zebra Tape (2 Inch) RVS/IB 0014F		Zebra Tape (2 Inch)	

Open Notification

Purchase Requisition

Create RFQ

Next Action

Print

Update

Close

New

Approved

Purchase Requisition No.

PR/0017

Created By\*

Erp Admin

Requisition Date\*

Oct 17, 2024

Warehouse\*

RVS D-59

Project

-Select-

Description

Requestor (Change to Requestor's name)\*

Erp Admin

Target Date

Location

D-59/Stock

Cost Center

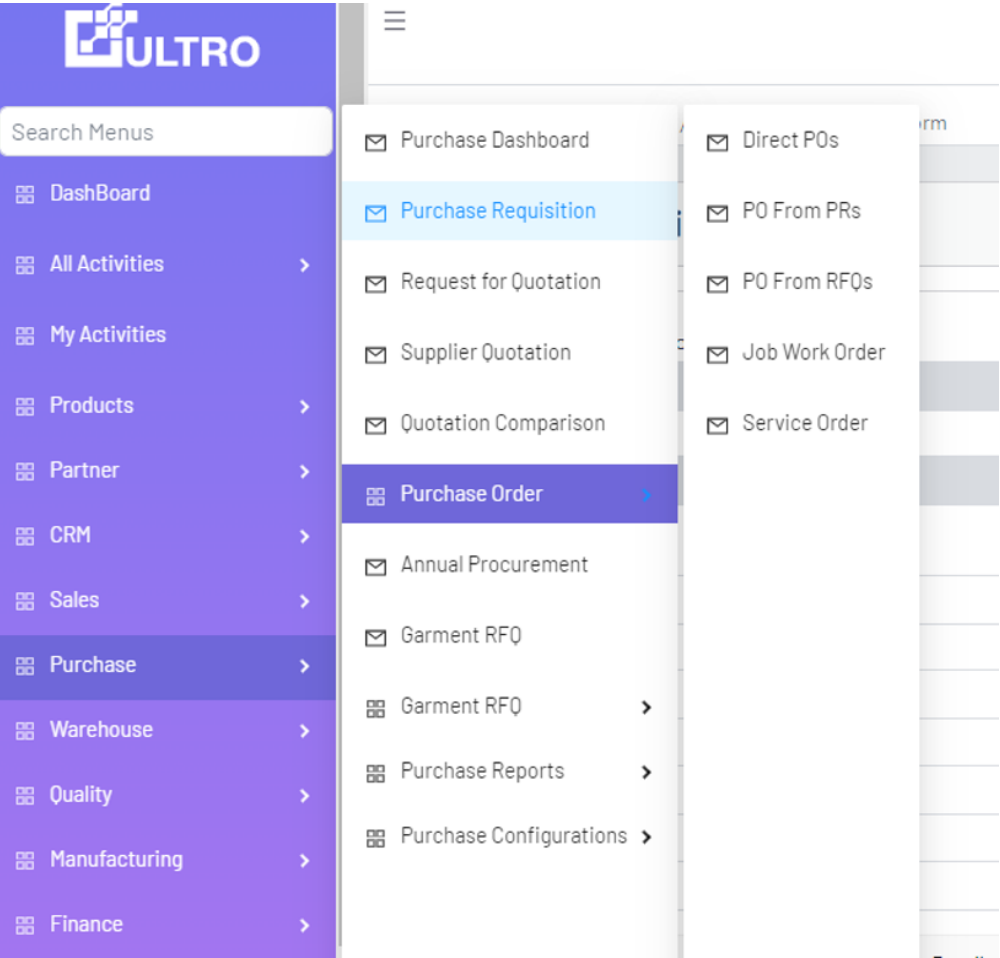
-Select-

Once the approver reviews and approves, the status changes from Pending Approval to Approved.

# Purchase Order

## Navigation:

Go to Purchase → Purchase Order → PO from PR → Add New.



Home / PO From PR

PO From PR										<a href="#">Add New</a> <a href="#">Actions</a>	
<input type="checkbox"/>	PO No.	Date Order	Partner Name	Status	Summary	Purchase Person Na...	Team	Currency	Total Amount		
<input type="checkbox"/>	POJ0027	2024-10-17T09:22:11.57	HIP India Sales Private Limited	Fully Processed		Erp Admin			80000		
<input type="checkbox"/>	POJ0026	2024-10-17T09:08:33.61	M/S Hagur Tech Private Limited	Draft		Erp Admin					
<input type="checkbox"/>	POJ0025	2024-10-17T07:41:03.18	TOSHIBA JSW POWER SYSTEMS	Draft		Erp Admin					
<input type="checkbox"/>	POJ0024	2024-10-17T07:34:08.48	Crest Digital Private Limited	Fully Processed		Erp Admin			5000		
<input type="checkbox"/>	POJ0023	2024-10-17T07:33:48.34	Crest Digital Private Limited	Confirmed		Erp Admin			10000		
<input type="checkbox"/>	POJ0022	2024-10-17T07:29:51.97	Crest Digital Private Limited	Confirmed		Erp Admin			1000		
<input type="checkbox"/>	POJ0021	2024-10-17T07:29:51.97	Crest Digital Private Limited	Confirmed		Erp Admin			1000		

## Instructions:

## Fill the Mandatory Fields:

Vendor: Select the vendor for the order.

Warehouse: Specify the receiving warehouse.

Expected Date: Input the date when the goods are expected to arrive.

Home / PO From PR / Purchase Order

### Purchase Order

Next Action Print Save Close Now Draft

Purchase Order No.		Purchase Order Date		Summary	
<input type="text"/>		Oct 17, 2024		<input type="text"/>	
Supplier *		Purchase Person (Buyer) *		Shipment Due On	
HP India Sales Private Limited		Erp Admin		<input type="text"/>	
PO Source (Change if PO to be created from PR or RFQ)		Price List			
From PRs		-Select-			
Currency	Currency Rate	Transportation Mode	PO Category		
Indian rupee		Courier	-Select-		
Fulfillment To (Warehouse)*		Location			
RVS D-59		D-59/Stock			
Source Document	Supplier Reference	Cost Center	Project		
<input type="text"/>	<input type="text"/>	-Select-	GSM antenna Repair		
For Style/Product		Upload Attachment			
Select					

Purchase Requisitions Product Freight & Other Charges Addresses Advance Payment Terms & Other Info Acknowledgement

Purchase Requisition

Link the Approved PR:

Locate the PR Field.

Select the relevant Purchase Requisition.

Click Load PR Lines to auto-fill the details from the PR.

Enter PO Quantity:



Purchase Order No. <div></div>		Purchase Order Date <div>Oct 17, 2024</div>	Summary <div></div>
Supplier * <div>HP India Sales Private Limited</div>		Purchase Person (Buyer) * <div>Erp Admin</div>	
PO Source(Change if PO to be created from PR or RFQ) <div>From PRs</div>		Price List <div>-Select-</div>	
Currency <div>Indian rupee</div>	Currency Rate <div></div>		Transportation Mode <div>Courier</div>
Fulfilment To (Warehouse)* <div>RVS D-59</div>		Location <div>D-59/Stock</div>	
Source Document <div></div>	Supplier Reference <div></div>		Cost Center <div>-Select-</div>
For Style/Product <div>-Select-</div>			<div>Upload Attachment</div>

Purchase Requisitions

Product

Freight & Other Charges

Addresses

Advance Payment

Terms & Other Info

Acknowledge

Purchase Requisitions

Select Purchase Requisitions

-Select-

PR/0017

PR/0016

PR/0013

Load PR Lines

Requesting

For Style/Product <div>-Select-</div>		<div>Upload Attachment</div>				
Purchase Requisitions	Product	Freight & Other Charges	Addresses	Advance Payment	Terms & Other Info	Acknowledgement
Purchase Requisitions						
Select Purchase Requisitions				<div>Load PR Lines</div>		
<div>PR/0017</div>						
PR Line						
S.No	PR No.	PR Line Id	Requested By	Requesting Department	Requesting Warehouse	
1	PR/0017	8	Erp Admin	Finance	-Select-	
<div>Update PO Order Lines</div>						

Untaxed Amount:₹

Total Tax Amount:₹

Total SubTotal:₹

For Style/Product  
-Select- Upload Attachment

Purchase Requisitions Product Freight & Other Charges Addresses Advance Payment Terms & Other Info Acknowledgement

Purchase Requisitions

Select Purchase Requisitions  
PR/0017 Load PR Lines

PR Line

	PR Quantity	PR Planned Quantity (RFQ + Direct PO)	PR Open Quantity	Priority	PO Quantity
	100		100		100

Update PO Order Lines Untaxed Amount: ₹

Scroll to the Product Tab.

Review the loaded PR lines.

Update the PO Quantity as needed.

Click Update PO Order Lines to confirm changes.

A confirmation message will appear.

PrLines to PoLines mapping completed ×

**Purchase Order** Short Close PO Next Action Print Update Close New

Purchase Order No.  
PO/0028

Purchase Order Date  
Oct 17, 2024

Supplier \*  
HP India Sales Private Limited

PO Source(Change if PO to be created from PR or RFQ)  
From PRs

Currency  
Indian rupee

Currency Rate

Fulfilment To (Warehouse)\*  
RVS D-59

Source Document

Supplier Reference

Summary

Purchase Person (Buyer) \*  
Erp Admin

Shipment Due On

Price List  
-Select-

Transportation Mode  
Courier

PO Category  
-Select-


Location  
D-59/Stock

Cost Center  
-Select-

Project  
GSM antenna Repa

Purchase Order No. PO/0028	Purchase Order Date Oct 17, 2024	Summary	
Supplier * HP India Sales Private Limited	Purchase Person (Buyer) * Erp Admin	Shipmer	
PO Source(Change if PO to be created from PR or RFQ) From PRs	Price List -Select-		
Currency Indian rupee	Currency Rate	Transportation Mode Courier	PO Cate -Sele
Fulfilment To (Warehouse)* RVS D-59	Location D-59/Stock		
Source Document	Supplier Reference	Cost Center -Select-	Project GSM
For Style/Product -Select-	Upload Attachment		
Purchase Requisitions	Product	Freight & Other Charges	Addresses
Advance Payment	Terms & Other Info	Acknowledgement	

Products	Load Product Line
----------	-------------------

S.No	Products	Image	Description*	Qty	UoM	Unit Price	Discount (%)	1
1	Zebra Tape (2 Inch)		Zebra Tape (2 Inch)	100	Nos	100		
Total				0				0

Purchase Order line can see in product tab:

Purchase Order No. PO/0028	Purchase Order Date Oct 17, 2024	Summary	
Supplier * HP India Sales Private Limited	Purchase Person (Buyer) * Erp Admin	Shipmer	
PO Source(Change if PO to be created from PR or RFQ) From PRs	Price List -Select-		
Currency Indian rupee	Currency Rate	Transportation Mode Courier	PO Cate -Sele
Fulfilment To (Warehouse)* RVS D-59	Location D-59/Stock		
Source Document	Supplier Reference	Cost Center -Select-	Project GSM
For Style/Product -Select-	Upload Attachment		
Purchase Requisitions	Product	Freight & Other Charges	Addresses
Advance Payment	Terms & Other Info	Acknowledgement	

Products	Load Product Line
----------	-------------------

S.No	Products	Image	Description*	Qty	UoM	Unit Price	Discount (%)	1
1	Zebra Tape (2 Inch)		Zebra Tape (2 Inch)	100	Nos	100		
Total				0				0

Click on update button:

Home / PO From PR / Purchase Order

Purchase Order

Short Close PO

Next Action

Print

Update

Close

New

Draft

Purchase Order No.  
PO/0028

Purchase Order Date  
Oct 17, 2024

Summary

Supplier  
HP India Sales Private Limited

Purchase Person (Buyer)  
Erp Admin

Shipment Due On

PO Source(Change if PO to be created from PR or RFQ)  
From PRs

Price List  
-Select-

Transportation Mode  
Courier

Currency  
Indian rupee

Currency Rate

PO Category  
-Select-

Fulfillment To (Warehouse)  
RVS D-59

Location  
D-59/Stock

Project  
GSM antenna Repair

Source Document

Supplier Reference

Cost Center  
-Select-

For Style/Product  
-Select-

Upload Attachment

Send for Approval:

Click Next Action → Send for Approval.

Home / PO From PR / Purchase Order

Purchase Order

Short Close PO

Next Action

Print

Update

Close

New

Draft

Purchase Order No.  
PO/0028

Purchase Order Date  
Oct 17, 2024

Summary

Supplier  
HP India Sales Private Limited

Purchase Person (Buyer)  
Erp Admin

Shipment Due On

PO Source(Change if PO to be created from PR or RFQ)  
From PRs

Price List  
-Select-

Transportation Mode  
Courier

Currency  
Indian rupee

Currency Rate

PO Category  
-Select-

Fulfillment To (Warehouse)  
RVS D-59

Location  
D-59/Stock

Project

Source Document

Supplier Reference

Cost Center

Approval Workflow

Duplicate

Audit History

Add Activity

Show All Activities

Send for Approval

After the approver confirms the PO, the status changes from Pending Approval to Approved.

Home / PO From PR / Purchase Order

Purchase Order

Short Close PO

Next Action

Print

Update

Close

Now

Pending Approval

Purchase Order No.

PO/0028

Purchase Order Date

Oct 17, 2024

Summary

Supplier \*

HP India Sales Private Limited

PO Source

From PRs

Currency

Indian rupee

Fulfillment To (Warehouse)\*

RVS D-59

Source Document

For Style/Product

-Select-

Purchase Person (Buyer) \*

Erp Admin

Price List

-Select-

Transportation Mode

Courier

Location

D-59/Stock

Cost Center

-Select-

Shipment Due On

PO Category

-Select-

Project

GSM antenna Repair

Upload Attachment

Approval Workflow

Duplicate

Audit History

Add Activity

Show All Activities

Approve

Home / PO From PR / Purchase Order

Purchase Order

Short Close PO

Next Action

Print

Update

Close

Now

Approved

Purchase Order No.

PO/0028

Purchase Order Date

Oct 17, 2024

Summary

Supplier \*

HP India Sales Private Limited

PO Source

From PRs

Currency

Indian rupee

Fulfillment To (Warehouse)\*

Purchase Person (Buyer) \*

Erp Admin

Price List

-Select-

Transportation Mode

Courier

Location