

Creating Purchase Orders and Ordering Goods in KBBConnect

Contents

Creating Purchase Orders and Ordering Goods using KBBConnect	2
Creating a Purchase Order	2
Sending your Order to your Suppliers	5
E-mailing Purchase Orders/ Direct Electronic Ordering	5
To order using KBBConnect:	5
Direct Electronic Ordering to Suppliers' on-line ordering systems	6
Printing Purchase Orders	7
Tracking Purchase Order Status.....	7
Document Manager	7
PO Sent Tab.....	8
Items Overview tab with in the main Projects view	8
Feedback	9


Creating Purchase Orders and Ordering Goods using KBBConnect

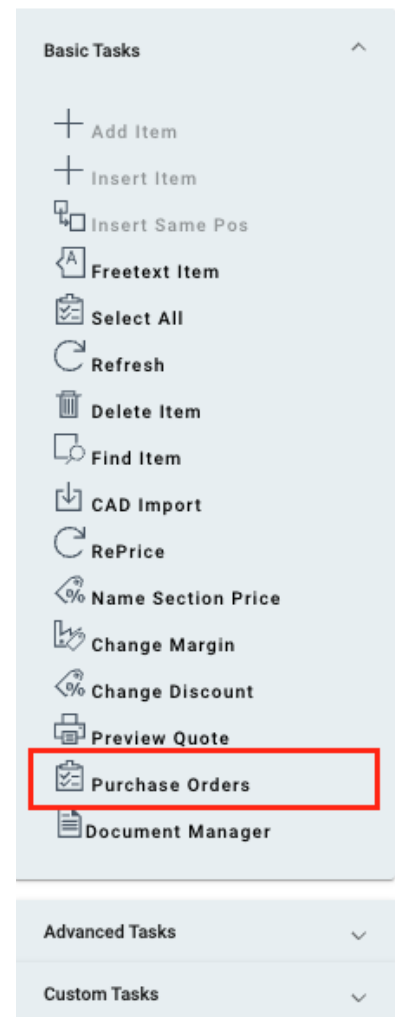
KBBConnect provides a quick and effective way to order and track all your project orders. Once you have finalised a quote for a customer and they have placed an order with you, from this quote you can:

- Create Purchase orders for some or all suppliers
- Order the Goods
- Create Invoices (see Quick Guide [Sales Invoicing in KBBConnect](#))

Orders are made electronically via the KBBConnect system, either direct to suppliers' online portals, or via e-mail to addresses they specify. A record of every order you place is stored within the KBBConnect system.

Creating a Purchase Order

1. In the main Projects view (Projects tab) open the Job you want to order goods for.
2. Select the  **Purchase Orders** button on the Basic Tasks Menu on the left:



3. This will display the following screen:

Purchase orders

1 Suppliers

Show not ordered only

Name	Phone	Fax	Account Ref
Chippendale	(01405) 743333		
Neff UK Ltd G7E Core	01908 328300		

2 Address

Pos	Qty	Code	Name	Price	Do Not Print	Deliv. req.	Confirmed	Stock reference	Qty decreased from stock	To Stock	Width	Height	Depth	Type
1	1	BFRS30L	300 HI Breakfront Inc Shelf Lh		<input type="checkbox"/>		<input type="checkbox"/>							0
2	1	100BDJGV	1000 356 Bridge No Hndl J Pull Gls Ivory		<input type="checkbox"/>		<input type="checkbox"/>							0
3	1	B30BW	300 Base Pullout - HI Onyx Wire		<input type="checkbox"/>		<input type="checkbox"/>							0
4	1	B30BW	300 Base Pullout - HI Onyx Wire		<input type="checkbox"/>		<input type="checkbox"/>							0
5	1	B30LPT3	300 Base Unit Pullout Lh T3		<input type="checkbox"/>		<input type="checkbox"/>							0
6	1	B30BW	300 Base Pullout - HI Onyx Wire		<input type="checkbox"/>		<input type="checkbox"/>							0
7	1	B303AL	300 Base Carcase Aluminium		<input type="checkbox"/>		<input type="checkbox"/>							0
8	1	B30BW	300 Base Pullout - HI Onyx Wire		<input type="checkbox"/>		<input type="checkbox"/>							0

Here you will see the list of the receiving suppliers. At the bottom of the screen, a list of all the items to be ordered will be displayed, separated by supplier and including position number, quantity and code information.

If **Do Not Order** is selected for an item, the item will not appear on the order.

Note: Once the order has been sent, the **Ordered On** column will completed automatically.

4. Select the supplier you wish to order from and click on the **Next** button to proceed. The following orders front sheet screen appears, is displayed, which

Purchase orders

1 Suppliers

2 Address

Order Ref: 1495/Customer 1 Order requested date: 06/02/2024

Delivery Address: Default Save

Name: SMART Test Company

Address 1: Suite 13, Silwood Business Centre

Address 2: Shanghai

Town: Ascot

County: Shanghai

Postcode: SL5 7PWY

Contact:

Phone:

Back
Next

Requested Date

Date you are requesting the supplier to deliver the order. Automatically defaults to today's date – change this in the calendar.

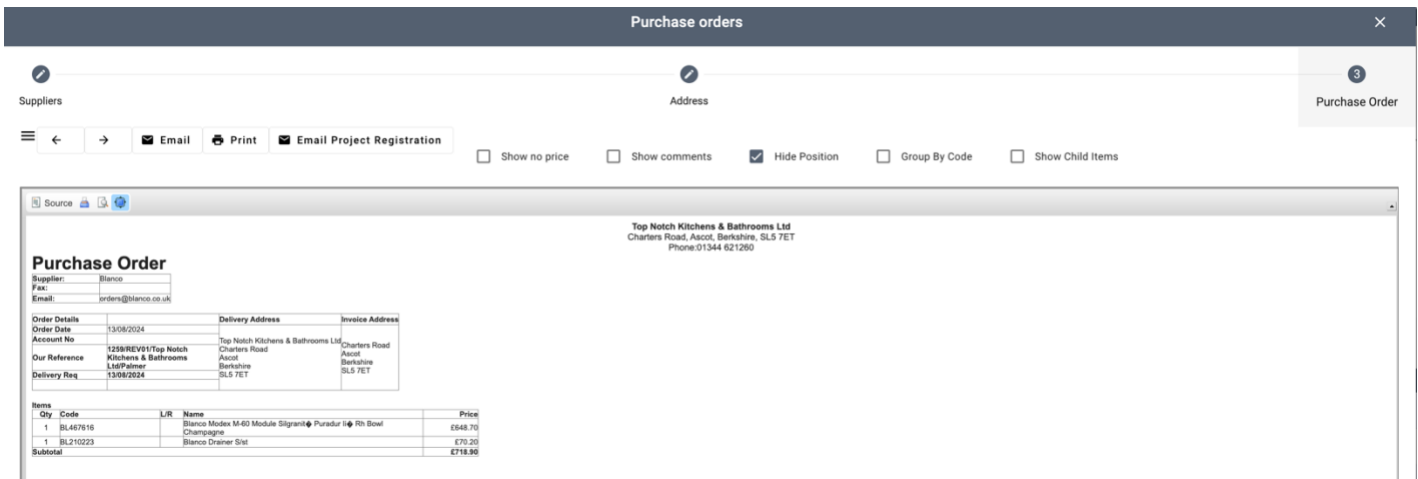
Order Ref Automatically completed picking up the job reference/Customer name but is editable.

Delivery Address Where would you like the goods to be delivered? The default is your address but change this for your site or warehouse address.

Once delivery address for Default, Warehouse 1 and Warehouse 2 has been entered once, click the **Save** button and this will be stored for future use for all orders. This can be easily amended for individual orders by over-typing. Site address will always pick up information entered for the customer in the main Projects view of KBBConnect.

Comments Add any information for the supplier in the comments sections to the bottom of the screen.

5. Select the **Next** button and the Purchase Order to be sent will be displayed. The purchase order can still be edited at this point, by simply clicking anywhere within the order and typing in, editing or deleting text. You can use tick boxes on top to Hide Cost Price, Hide Position, etc..



The screenshot shows the 'Purchase orders' interface in KBBConnect. At the top, there are three tabs: 'Suppliers', 'Address', and 'Purchase Order', with 'Purchase Order' being the active tab. Below the tabs, there are navigation icons (back, forward, email, print, registration) and several checkboxes: 'Show no price', 'Show comments', 'Hide Position' (checked), 'Group By Code', and 'Show Child Items'. The main content area displays a 'Purchase Order' for 'Top Notch Kitchens & Bathrooms Ltd'. It includes a table for order details and a table for items.

Purchase Order			
Supplier:	Blanco		
Fax:			
Email:	orders@blanco.co.uk		
Order Details		Delivery Address	Invoice Address
Order Date:	13/08/2024		
Account No:		Top Notch Kitchens & Bathrooms Ltd	Charters Road
Our Reference:	1259REV01/Top Notch Kitchens & Bathrooms Ltd	Palmer	Ascot
Delivery Req:	13/08/2024	Berkshire	SL5 7ET

Qty	Code	L/R	Name	Price
1	BL467816		Blanco Modex M-60 Module Sigrant® Purdur 14° Rh Bowl Champagne	£849.75
1	BL210223		Blanco Drainer Slot	£79.25
Subtotal				£718.99

Sending your Order to your Suppliers

E-mailing Purchase Orders/ Direct Electronic Ordering

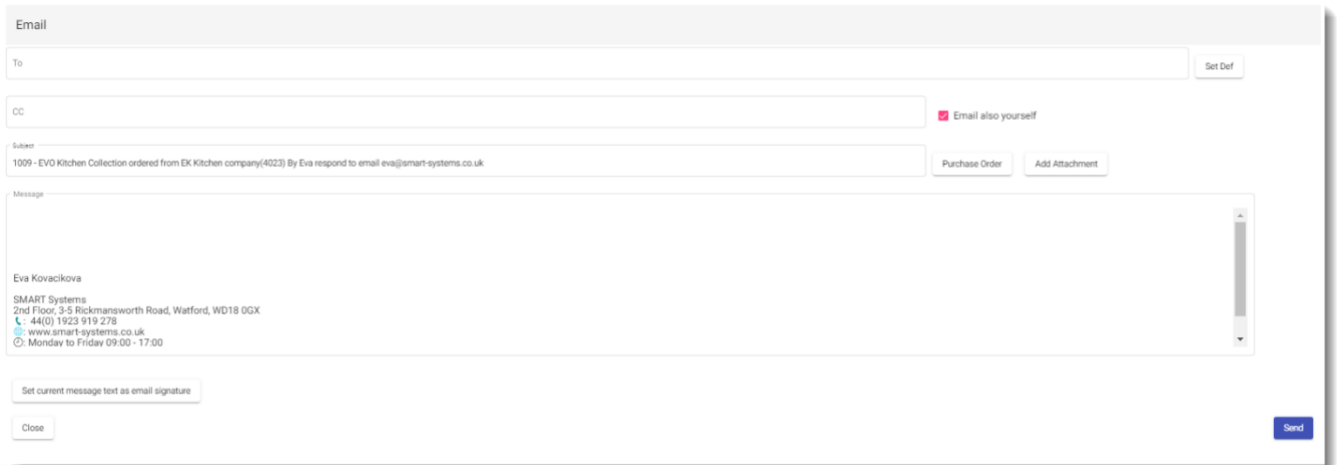
With KBBConnect, you can e-mail your orders to your suppliers direct from the system. When you send orders using KBBConnect you will receive confirmation of sending and the Purchase Order documents will be stored with the job, so you can easily retrieve them.

To order using KBBConnect:

1. When you ready to send the Purchase Order to your supplier, select the



button and an e-mail screen will open as shown:



To: In the To field, type the e-mail address of your supplier (if they have provided an e-mail address it will already be in the To field). **Set Def** sets the e-mail address for the next time you e-mail this supplier.

CC: **Email Also Yourself** is automatically ticked to send a copy of the mail and PO to your registered e-mail address. Remove the tick as required.

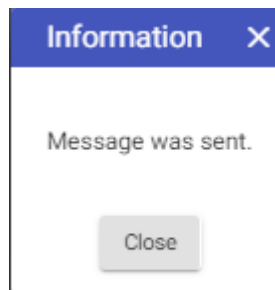
Subject: To save you time the subject area is automatically completed with order information. Overwrite this as required.

Order: The Purchase Order is automatically attached to the e-mail in pdf format. [Add attachment](#) is available should you wish to attach another file.

Message: Type your required text within the message body and;

2. Click the **Send** button - KBBConnect will attach the purchase order for that supplier and deliver it automatically.

3. The following message box will appear confirming that your order has been sent:



4. Select **Next Order (arrow Right)** to move to the next Purchase Order and **Previous Order (Arrow Left)** go back through the orders:



Direct Electronic Ordering to Suppliers' on-line ordering systems

A growing number of suppliers have on-line ordering portals, to which KBBConnect can connect. This means that your orders can go directly into their system from KBBConnect.

To use Direct Ordering via KBBConnect, you will require a Tradeplace account – see [Quick Guide](#) to assist you in setting up an account.

Once you have a Tradeplace account and wish to order from suppliers with on-line trade portals, you will see the additional buttons in your Purchase Order screen, in the following example we are ordering some Neff goods – note the **Direct** button. You can still e-mail the order if you wish, but the direct button enables your order to go straight into their system.



Printing Purchase Orders

If you wish to print your purchase orders from KBBConnect, this is done in the Purchase Order screen. select the Print button to print directly or save as pdf.



Tracking Purchase Order Status

KBBConnect has a number of ways to track the status of your projects. Once you have sent a purchase order for goods, you will see a copy of that order in:

- **Document Manager**
- **PO Sent** tab
- **Job Summary** tab with in the main **Projects** view

Document Manager

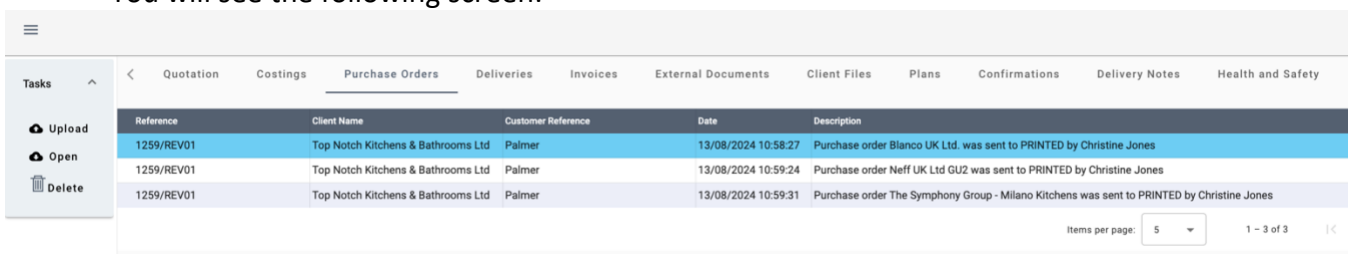
The KBBConnect Document Manager is a great way to store and easily access all documents related to each job you create in the system.

- Any document, e.g. quote, purchase order, invoice you send from the system is automatically stored in the Document manager
- You can load any file related to a job in the Document Manager – e.g. photos, CAD drawings
- All documents are date stamped, so it provides an easy way to track what you’ve sent and when

To use the Document Manager:

1. Go to the main **Projects** view i.e.no jobs open
2. Select the **Document Manager** in Tasks

You will see the following screen:



Reference	Client Name	Customer Reference	Date	Description
1259/REV01	Top Notch Kitchens & Bathrooms Ltd	Palmer	13/08/2024 10:58:27	Purchase order Bianco UK Ltd. was sent to PRINTED by Christine Jones
1259/REV01	Top Notch Kitchens & Bathrooms Ltd	Palmer	13/08/2024 10:59:24	Purchase order Neff UK Ltd GU2 was sent to PRINTED by Christine Jones
1259/REV01	Top Notch Kitchens & Bathrooms Ltd	Palmer	13/08/2024 10:59:31	Purchase order The Symphony Group - Milano Kitchens was sent to PRINTED by Christine Jones

Items per page: 5 1 - 3 of 3

Note the example above shows purchase orders sent on 13th August. To open and view what you've sent click the **Open** button.

To upload other documents related to the job that have not been sent from the KBBConnect system, select the **Upload** button. This will take you to your system to find the documents you want to load into KBBConnect.

Tasks ^

- Upload
- Open
- Delete

PO Sent Tab

All Purchase Orders sent from a your KBBConnect accounts are displayed here.

Orders can be filtered using the [Filter](#) button in Tasks or Quick Filter on top.

The [Open](#) button in the Tasks Menu opens the selected Purchase Order in a PDF format.

You can also see items Ordered, in Warehouse or Items without Purchase Invoices.

Items Overview tab with in the main Projects view

You can also track what PO's have been sent and whether the supplier has confirmed delivery using the **Items Overview** tab, as shown below.

Once a delivery date has been confirmed by the supplier, the Confirmed Date and Number can be completed using the **Warehouse** command in the **Tasks** Menu.

Feedback

We hope you found this document useful and would love to know what you think of KBBConnect.

To comment on this Quick Guide or anything else regarding KBBConnect, for help, or for information regarding training courses, please contact:

e-mail us at: info@smart-systems.co.uk

or

Telephone Number: +44 (0)1923 919 278