Manual

BOS-Purchase User Guide

SORASO

Version : 1.0
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Author : Documentation Team

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1. Overview

The BOS Purchase system streamlines procurement processes from internal requisitions to PO approval, receiving, and inventory reconciliation. It ensures transparency, policy compliance, and seamless integration with Inventory and GL systems. The system supports standardized item templates, supplier setup, and multi-step approval flows to enhance operational accuracy and financial traceability.

2. Set Configuration

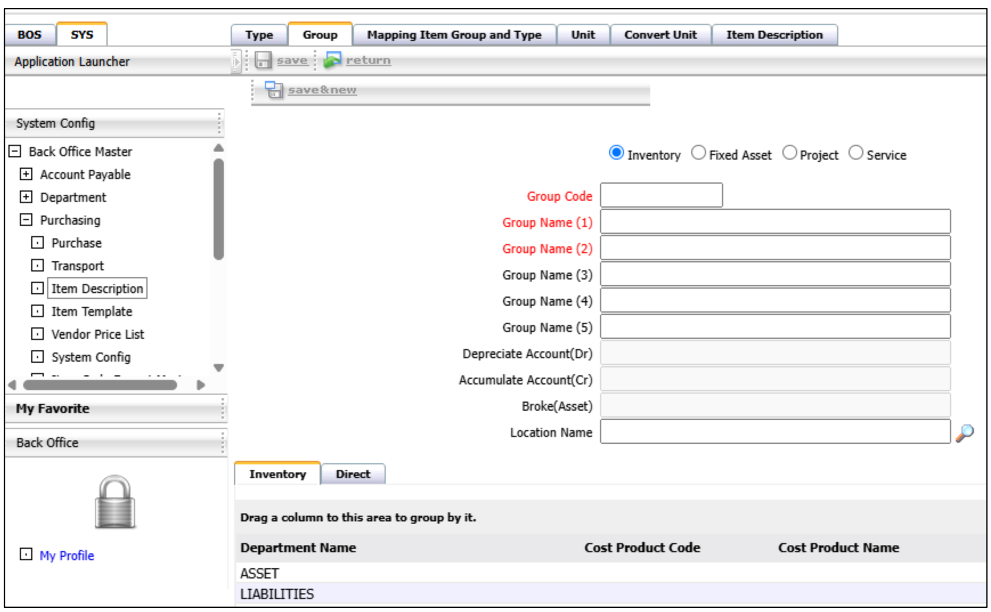
Initial configuration includes setting menu items and templates for purchasing operations. Users define supplier information, categories, units, and default purchase settings.

2.1 Menu Items

The Menu Items section is used to define key procurement parameters including vendor classification, payment conditions, and account references. These foundational settings ensure the system behaves consistently and complies with accounting and purchasing policies.

To perform the task:

1. Go to SYS > Back Office Master > Purchasing.
2. Configure supplier categories and item groups.
3. Set default payment terms and warehouse destinations.
4. Assign GL codes and accounting references.
5. Review approval limits and authorization roles.



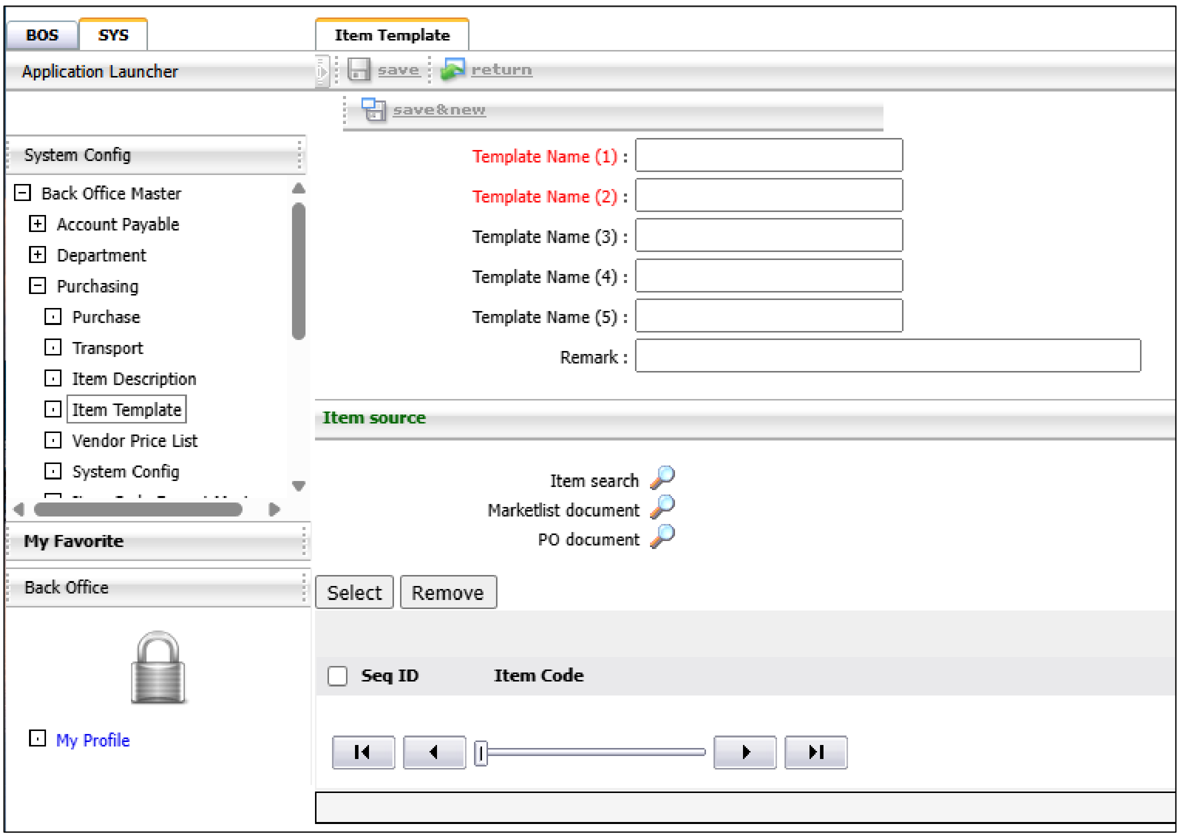
Note: This setup ensures proper alignment with accounting and warehouse modules.

2.2 Item Template

The Item Template allows pre-definition of products used in purchasing. It helps standardize item data such as units, brand, type, and tax. This ensures consistency and efficiency when creating PR and PO documents.

To perform the task:

1. Go to SYS > Back Office Master > Item Template
2. Define item attributes such as type, unit, brand, and group.
3. Set tax rate and default supplier for each item.
4. Save and update the template for future PR/PO use.



Note: Item templates speed up requisition and purchasing processes while reducing manual entry errors.

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3. Procurement System Work Procedure

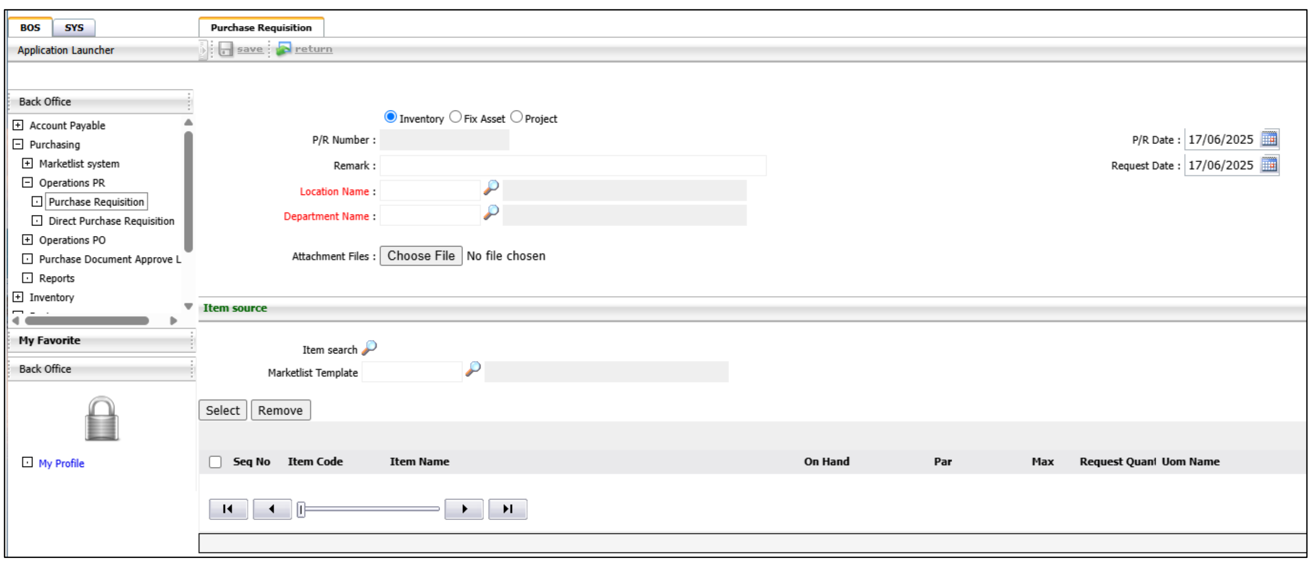
This section outlines the step-by-step operational workflow of the purchasing process, starting from the request order to the reduction of debt and inventory. Each task is tied to specific system menus to ensure procedural accuracy and traceability.

3.1 Request Order

The Request Order function is used to initiate internal purchase requisitions. Users specify the required items, quantities, and delivery needs before forwarding them for approval. This step ensures internal control and validation before moving to procurement.

To perform the task:

1. Go to BOS > Purchasing > Operations PR > Purchase Requisition
2. Click 'Add New' to create a request.
3. Select department, enter required items with quantity, description, and expected date.
4. Submit for approval based on assigned authority levels.



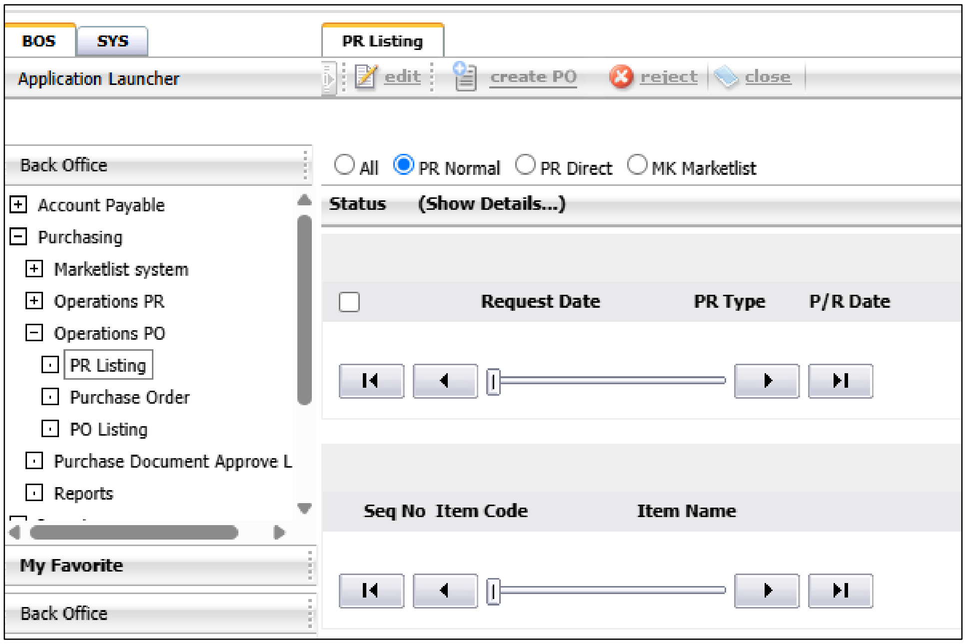
Note: The request must be approved before generating a Purchase Order.

3.2 Compare Product Prices (RFQs)

The RFQ comparison process allows procurement teams to request and evaluate quotes from multiple suppliers. It supports data-driven decision-making by comparing price, availability, and supplier terms before confirming a purchase.

To perform the task:

1. Go to BOS > Purchasing > Operation PO > PR Listing
2. Select request order reference and send RFQs to multiple suppliers.
3. Input prices, compare offers, and select the most suitable option.
4. Approve selected quote for PO issuance.



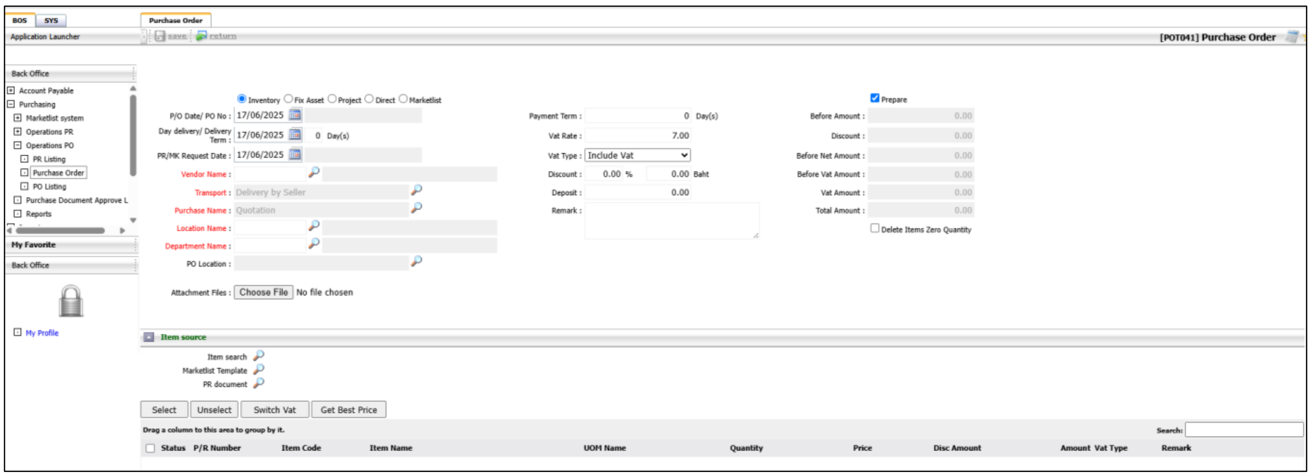
Note: Comparing prices from multiple suppliers ensures best value procurement.

3.3 PO Procurement

Purchase Orders (POs) are generated based on approved requisitions or selected RFQs. This ensures that all purchases are accurately documented, approved, and aligned with supplier agreements.

To perform the task:

1. Go to BOS > Purchasing > Operation PO> Purchase Order.
2. Select approved quotation or request order.
3. Confirm supplier details, pricing, and delivery timeline.
4. Save and forward PO for final approval.



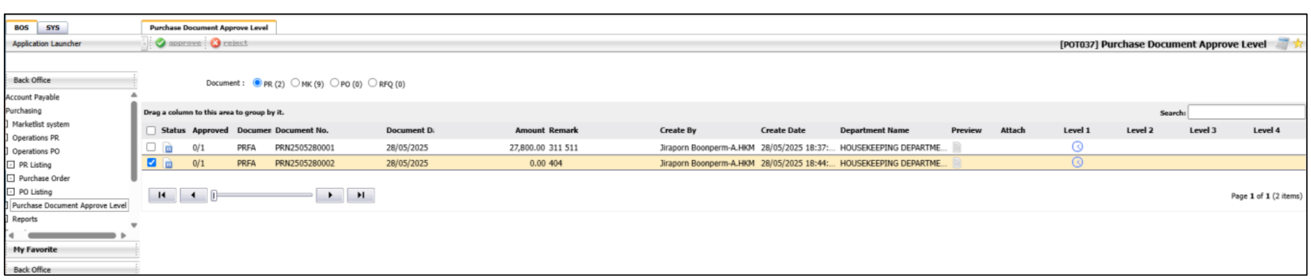
Note: Ensure supplier information and order details match the RFQ.

3.4 Approve PR / PO

The PR/PO approval process adds a layer of authorization to verify that each procurement transaction complies with policy and budget. Only approved documents proceed to the next stage of procurement or receiving.

To perform the task:

1. Go to BOS > Purchasing > Operation PO> Purchase Document Approve Level
2. Review pending PRs and POs in the list.
3. Check for completeness and policy compliance.
4. Approve or reject based on authority and remarks.



Note: All purchases must undergo approval before moving to the receiving stage.