

Manual

BOS-Purchase User Guide





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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.

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+ Account Payable					_			
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Purchasing				Group Nar	ne (1)			
Purchase				Group Nar	ne (2)			
Transport				Group Nar	ne (3)			
Item Description				Group Nar	ne (4)			
Item Template				Group Nar	na (5)			
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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.

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	save&new
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Back Office Master	Template Name (2) :
+ Account Payable	Template Name (3) :
Department	Template Name (4) :
Purchasing	Tomolate Name (F) :
Item Description	Remark :
Item Template	Item source
 Vendor Price List 	
 System Config 	Item search 🔑
	Marketlist document 🖉
My Favorite	PO document 🔑
Back Office	Select Remove
	Seq ID Item Code
My Profile	

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



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.

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+ Account Payable		Inventory ○ Fix Asset ○ P	roject				
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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.

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+ Account Payable	Status (Show Details)
 Purchasing 	
+ Marketlist system	
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 Operations PO 	
PR Listing	
Purchase Order	
PO Listing	
Purchase Document Approve L	
Reports	Fog No. Item Code
	Seq No Trem Code Trem Name
My Favorite	
Back Office	

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.

BOS SYS	Purchase Order										
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Back Office											
a Account Pacabla											
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Operations PO	Term :	17/00/2023		THE PLACE -	2.00	bacourt :	0.00				
PR Listing	PR/MK Request Date :	17/06/2025		Vat Type :	Include Vat 🗸	Before Net Amount :	0.00				
Purchase Order	Vendor Name :	₽		Discount :	0.00 % 0.00 Baht	Before Vat Amount :	0.00				
PO Listing	Transport :	Delivery by Seller	\mathbf{P}	Deposit :	0.00	Vat Amount :	0.00				
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	Status P/R Numbe	er Item Code	Item Name		UOM Name	Quantity Price	Disc Amount	Amount Vat Type	Remark		

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.

BOS SYS	Purchase	Document App	prove Level												
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Marketlist system	Statu:	s Approved	Documer	Document No.	Document D	Amount Remark	Create By	Create Date	Department Name	Preview	Attach	Level 1	Level 2	Level 3	Level 4
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PR Listing		0/1	PRFA	PRN2505280002	28/05/2025	0.00 404	Jiraporn Boonperm-A.HKM	28/05/2025 18:44:	HOUSEKEEPING DEPARTME	A		Q			
Purchase Order															
PO Listing	н	• ī=			H										Page 1 of 1 (2 items)
Purchase Document Approve Level															
Reports															
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Note: All purchases must undergo approval before moving to the receiving stage.