Purchase Orders

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PO Workflow Overview

Purchase orders will start as a Requisition created via Construct PM by the Purchaser, who could be the Buyer, Project Manager, or other project personnel. The Purchase order will then be created by the Purchasing Agent, using the Requisition details. The PO document will be generated by Project Controls and sent to the project team for approval. Following this internal approval, the Procurement team will send out to vendor via Docusign for signature.

Requisitions into POs

Requisition Entry

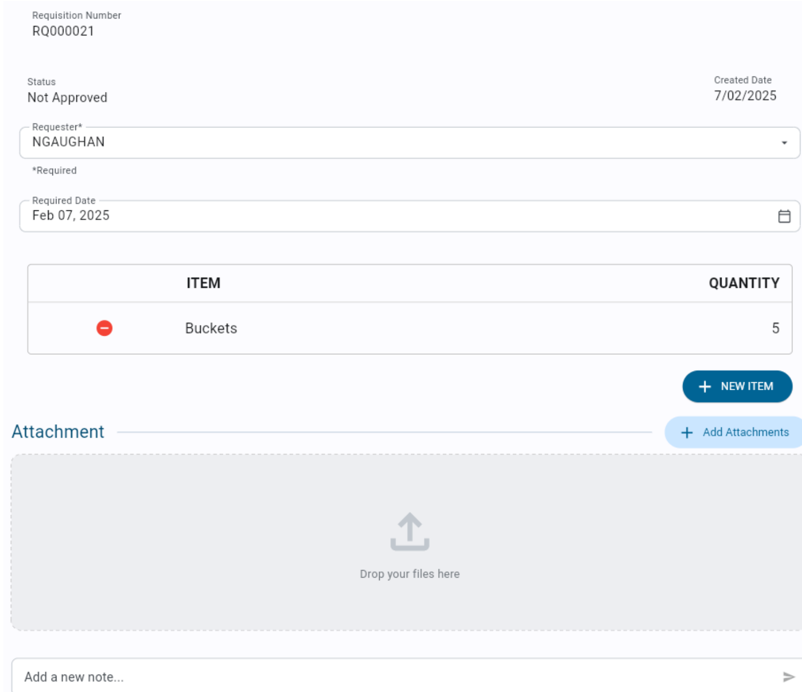
Navigate to Construct PM > Requisitions

Press the Requisition icon [ ] in the Construct PM menu to launch the Requisition log screen. This screen will list previously entered requisitions and allows to create new requisitions.

- Log Screen
  - Search – the search bar at the top looks at the Requisition column.
  - Filter bar – requisitions can be filtered by author (show mine only) and Status.
  - Sort – each of the 5 columns can be sorted by clicking on the column header.
- Enter a New Requisition – click the [+ Create Requisition] button to bring up the New Requisition screen.
  - Requester – choose the requester from the dropdown for this entry.
  - Required date – will default to date created but can be changed if needed.
  - Add Items – to add new items to the requisition, click the [+ New Item] button, which will launch the New Requisition Item screen.
    - Item Type – Select Free-form as the other two types will not be used by Keeley Construction.
    - Item Code – enter a distinct number for each item within a requisition.
    - Item Name – enter a name or short description of the item.
    - Quantity and Weight Measure – enter the quantity being ordered and the unit of the item being requested.
    - Job – select the job on which the item will be used.
    - Cost Code – select the cost code for the item.

- Category - select the category for the item. This field is only available when a value has been entered in the Cost Code screen.
- Comments – enter any additional comments about the item.
- To save, click the checkmark in the top right corner of the blue bar.

- Attachments - Press the [Add Attachments] button in this field to add an attachment to the requisition. The user can either take a new photo with the device's camera, attach a file from the device library, or attach a document or drawing already saved in Construct PM.
- Notes – enter Scope of Work for the requisition.



- Once saved, the requisition will be available for the Procurement team to review in the Requisition form within Enterprise. This will be checked daily by the Procurement team for new entries to add pricing and approve.

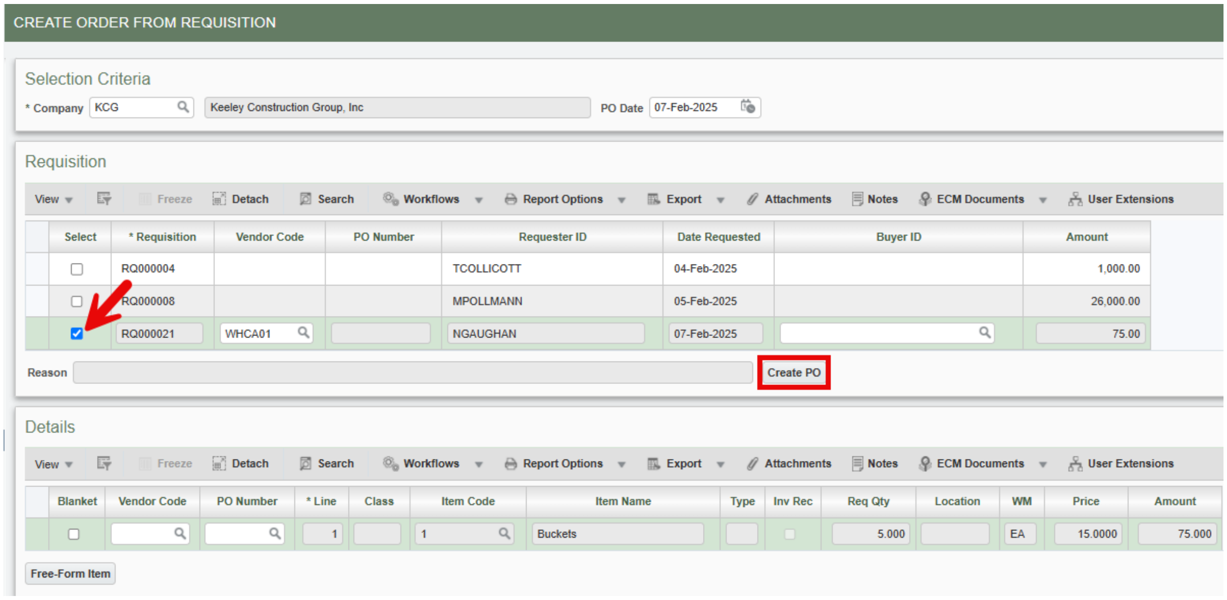
Create Purchase Order

Following the requisition pricing update and approval, the Procurement team will be able to create a Purchase Order from the requisition. The system will create a purchase order for each requisition selected.

Navigate to Enterprise > Asset Management > Requisitions > Create Purchase Order

- Selection Criteria – enter the Company and the PO Date desired.
- Requisition – only approved requisitions will populate the table.
  - Click the "Select" checkbox of the requisitions that should be converted into Purchase Orders.
  - Vendor Code – The vendor can be entered in this field and will be applied to the PO.
  - PO Number – leave blank, the system will assign a PO number.
  - Requester ID, Date Requested, Amount – read-only populating from the requisition.
  - Buyer ID – the Purchasing Agent may add their ID from the LOV.
  - Reason – populates from the requisition's "Reason" tab.

- Details – the requisition items will populate this section for review. Note that the items are locked and cannot be changed.
- Click the [Create PO] button. A message will appear with the assigned PO number.



- The Procurement team will access the Enter Purchase Order screen to add approvers.

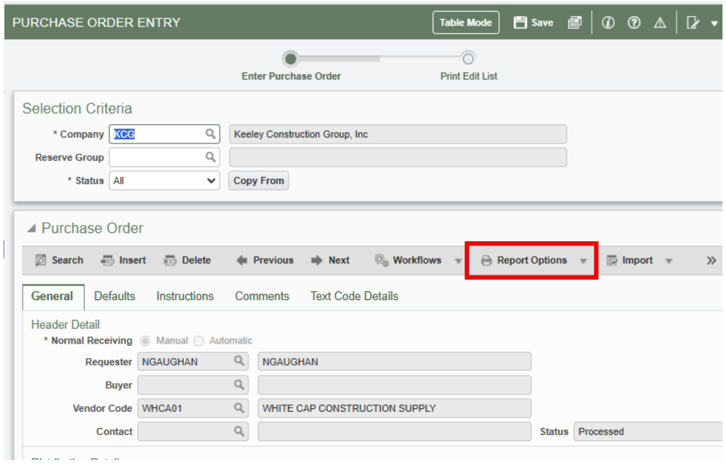
Generate and Approve POs

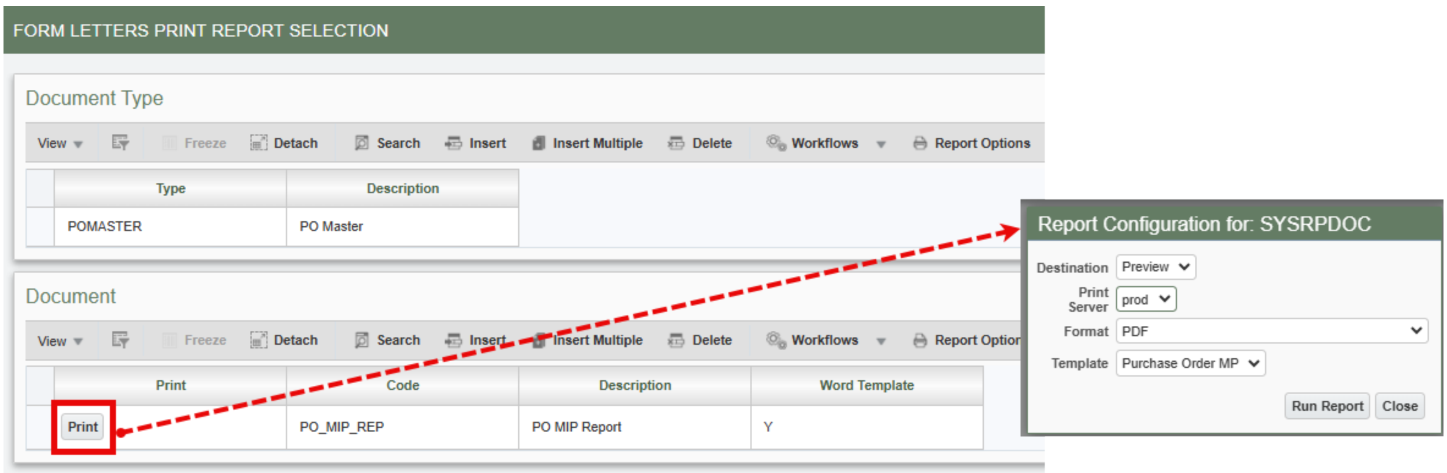
After the PO has been created, Project Controls will print the document and attach it to the record. The workflow will be triggered to notify the project team to review and approve. Once internal approval is complete, the Procurement team will upload to Docusign and issue to the vendor for signature.

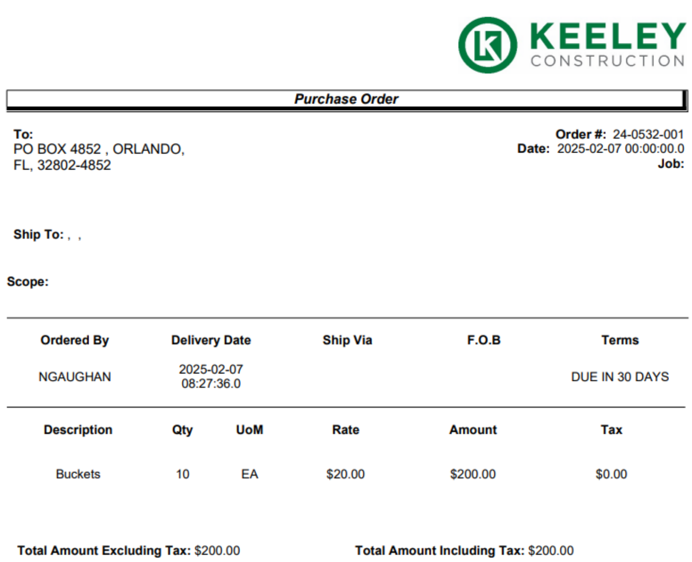
Generate PO

Navigate to Enterprise > Asset Management > Purchase Order > Process > Enter Purchase Order

- Selection Criteria - enter Company and change status if needed and tab or enter.
- Purchase Order Header – select the PO desired and click "Report Options" in the toolbar.
    - This will generate a new tab with a list of document options. Click the [Print] button.
    - Report Configuration:
        - Print Server should be "prod".
        - Format defaults to PDF but can be changed to DOCX if needed.
        - Click the [Run Report] button.
    - The report will download to your device.







KEELEY CONSTRUCTION

Purchase Order

To:
PO BOX 4852 , ORLANDO,
FL, 32802-4852

Order #: 24-0532-001
Date: 2025-02-07 00:00:00.0
Job:

Ship To: , ,

Scope:

Ordered By	Delivery Date	Ship Via	F.O.B	Terms
NGAUGHAN	2025-02-07 08:27:36.0			DUE IN 30 DAYS

Description	Qty	UoM	Rate	Amount	Tax
Buckets	10	EA	$20.00	$200.00	$0.00

Total Amount Excluding Tax: $200.00 **Total Amount Including Tax:** $200.00

Approve POs

Following the creation of a Purchase Order, the following steps are needed to finalize approval and execution of the document.

- The Purchasing/Procurement/Project Controls personnel will add the following information into the Enter Purchase Order screen: PO Comp, Job Code, Routing Comp, Routing Job and Approvers.
- They will print the PO using instructions from the above section and attach to the PO record.
- The workflow will launch when the [Workflows] button in the PO header is clicked. The first approval will be processed by the Procurement.
- The first approval will notify the Project team that the PO is ready for their approval.
- After the second approval the Procurement team will route the document through Docusign for execution and then post the PO.

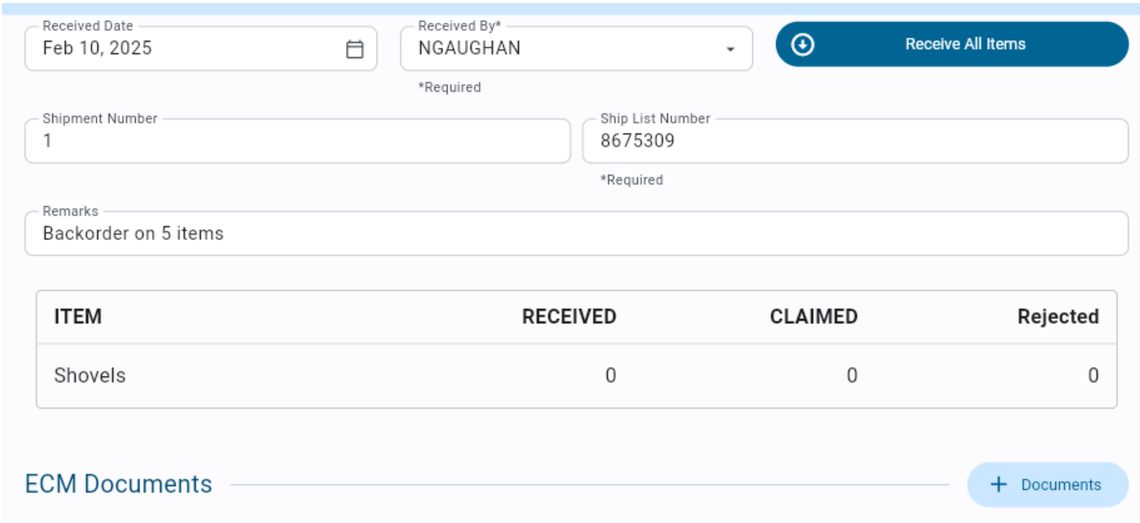
Receiving POs

Navigate to Construct PM > Receiving

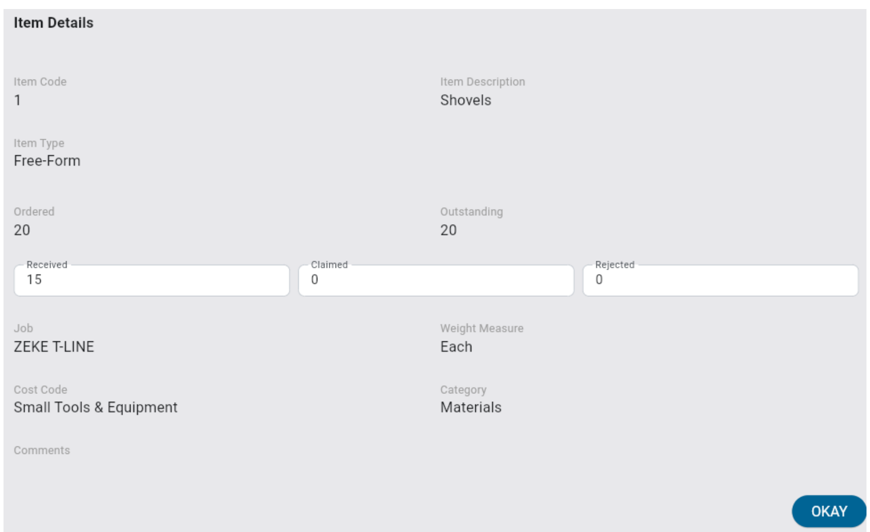
This screen is used to view purchase orders received for the current project. Select the PO to receive on.

- Search - Press the Filter icon in the search bar to filter the search results. Purchase orders can be filtered by status, author (show mine only), and vendor.
- Sort - Press the icon that reads "Order Date" to sort purchase orders by order date or vendor. Press the arrow next to the sort option to sort in ascending or descending order.
- Entering a New Shipment - Press the New Shipment icon to bring up the New Shipment screen.
    - Received Date – Select the actual date the shipment was received. The system will default the current date.
    - Received By - select the name of the receiver.
    - Receive all Items – Press this button to receive all outstanding items on the purchase order.
    - Shipment Number - Enter a company-defined internal shipment number for the goods being received.
    - Ship List Number - Enter the ship list number as it appears on the freight bill. The entry of a ship list number allows for the entry of single or multiple purchase orders against a specific ship list (freight bill).
    - Remarks – enter any additional comments about the shipment.

- ECM Documents - Press the [+ Documents] button in this field to add a document to the shipment. The user can attach a file from the device library or attach a document already saved in Construct PM.



- Items - To update item totals, press that item's row in the Item table. This will bring up the Item Details screen, shown below. Here, users can enter the number of the ordered items that have been received, claimed, and rejected. Click the [Okay] button when complete.



- Click the checkmark in the blue bar to save.

Receipts are entered and saved, then posted through the PO Post Receipts screen in the Purchase Order module.

Initiating PO Change Orders

Following the posting of a Purchase Order, any changes that need to be made should be done through a PO Change Order. A change order can be entered against a posted purchase order with a status of "Processed" or "Received". If a purchase order is in "Closed" status, it can be opened using the Close/Re-open Purchase Order screen so a change order can be added.

Navigate to Construct PM > Requisitions

The Project team will submit a requisition for a change order using the instructions noted above to enter a Requisition. You must include the Purchase Order and vendor information in the Requisition Item comments (not the Notes on the requisition's main screen).

The change order requisition will be reviewed with new PO requisitions and processed as a PO change order by the Purchasing team.

Navigate to Enterprise > Asset Management > Purchase Order > Change Order > Enter Change Order

- Selection Criteria – the Company will default based on user settings and the status can be adjusted if a specific view of the log is needed.
- Click the [Add New] button to add a new change order.
- Change Order section:
    - General

    - PO number – enter or select the purchase order number. Once you select the PO number, several fields with automatically display the PO details. Dates and other editable fields may be updated as needed.
    - Populate Details – clicking this button will bring the PO details into the "Change Order Detail" section below.
  - Change Order Detail:
    - The Quantity field is cumulative and should only reflect the change made to the quantity of the items ordered in the original PO. Example: 5 buckets were ordered in the original PO, but 3 more are needed. The value entered in the Quantity field should be 3, bringing the total quantity to 8 buckets.
      - To decrease the quantity, enter a negative value. They must be equal to or less than the number originally entered on the PO.
    - The Price field is not cumulative, but is the new price assigned to the detail line and will apply to the quantity, regardless of what the price was listed as on the original PO. Example: the original PO had a quantity of 5 and a listed price of $15 but is changing to $20. The original PO was a total of $75 but with the change order will now be $100.
      - The quantity and price fields may both be updated in the same CO but note that the new price will be applied to the original quantity as well. The Extended price reflects the total value change.
    - When adding additional information new to the order, move to the next available line and enter the change order detail following the same rules as when entering a purchase order.
- Save the record.

Generate and Approve PO Change Orders

- Printing - In the "General" tab, the Procurement team will click the [Print] button to print the draft change order document. This draft will be attached to the change order record.
- Launch the workflow by clicking the [Workflow] button in the Change Order header. A notification will be sent to the Project team to approve.

- Following Project team approval, the Procurement team will approve and issue the change order to the vendor via Docusign.
- The Procurement team will post the change order to finalize commitment when the document is executed.
  - **Navigate to Enterprise > Asset Management > Purchase Order > Change Orders > Post Change Order**
  - Locate the PO Change Order by filtering by PO number or vendor.
  - Click the "Select" checkbox and then the [Process] button.
- Printing – to print the final change order document, navigate to Print Change Order, locate and select the PO CO, click the [Print] button.