

# Purchase Orders Course Outline

## Training Course Details

**Duration and location:** 1-day course at either our Wakefield office, Remote sessions delivered via Zoom or On-site training sessions run by one of our highly experienced Agility Trainers. The training sessions run from 9:30am until 3:30pm.

**Included:** All course materials and the course manual.

## Delegate Information

### Who should attend?

- Agility System Administrators
- System Champions
- Stores Personnel
- Finance Personnel

### Delegate prerequisites:

- Basic PC Skills including using an internet browser
- Previous attendance of the Introduction to Agility course

## Why Attend?

On completion of this course you will be able to create General, Blanket, and Release Purchase Orders driven by your Reactive and Planned Work Order requirements. You can also decide whether you want an Approval Process in place for the Purchase Orders raised. To finish the process, you will learn how to complete Goods Receipts against Purchase Orders on the Core system and also on the Mobile Stores App. Understanding and using this will help you to reduce administration costs and introduce streamlined processes.

## What will be covered:

Modules	Course Content	Time
Module 1: Configuring Agility for Purchase Orders	<ul style="list-style-type: none"> <li>➤ Configuring System Parameters</li> <li>➤ Purchase Order Statuses</li> <li>➤ Creating Purchase Order Delivery Addresses</li> <li>➤ Designating the Users who can create Purchase Orders</li> <li>➤ Creating Purchase Order Approval Groups</li> <li>➤ Creating Cost/Account Codes</li> </ul>	1.75
Module 2: Creating Purchase Orders without Approval Groups	<ul style="list-style-type: none"> <li>➤ Creating General Purchase Orders without Approval Groups</li> <li>➤ Purchase Order Scan</li> <li>➤ Purchase Order Line Scan</li> <li>➤ Creating Blanket Purchase Orders without Approval Groups</li> <li>➤ Creating Release Purchase Orders without Approval Groups</li> <li>➤ Receiving Goods against a Purchase Order on the Core System</li> <li>➤ Receiving Goods against a Purchase Order on the Mobile Stores app</li> </ul>	1.25

<b>Module 3: Creating Purchase Orders with Approval Groups</b>	<ul style="list-style-type: none"> <li>➤ Creating General Purchase Orders with Approval Groups</li> <li>➤ Going through the Approval Process</li> <li>➤ Purchase Order Scan</li> <li>➤ Purchase Order Line Scan</li> <li>➤ Creating Blanket Purchase Orders with Approval Groups</li> <li>➤ Creating Release Purchase Orders with Approval Groups</li> <li>➤ Receiving Goods against a Purchase Order via the Core system</li> <li>➤ Receiving Goods against a Purchase Order via the Mobile Stores app</li> </ul>	<b>1.5</b>
<b>Module 4: Auto Purchase Orders and Reports</b>	<ul style="list-style-type: none"> <li>➤ Automating Purchase Orders</li> <li>➤ Inventory Replenishment Report</li> <li>➤ Items Below Minimum Quantity</li> <li>➤ Supplier Spend Report</li> </ul>	<b>0.5</b>