# TM PROCUREMENT

# TM Procurement

TM Procurement is a cost and time saving purchasing system, tailored to the needs of the maritime industry. The module, which is fully integrated in TM Master, is easily scalable and streamlines the entire procurement process from requisition to delivery and payment.

## Centralized procurement

TM Procurement is designed to centralise and manage ship-shore purchasing information from an entire fleet of vessels, and can be scaled to the individual ship owner's workflow.

TM Procurement helps you to stay in charge of all purchasing activities throughout the fleet. Overview windows list requisitions and orders along with their current status. The details window gives you all the information you need, and keeps you in control.

The Fleet Management features allow you to approve requisitions received from a vessel, with the option to make any amendments necessary. The built-in replication manager guarantees that all relevant information is readily available on board, as well as to your purchasing department, making the procurement process an easier task.

## On board procurement

The on board procurement features provide full purchasing functionality on the vessels, enabling them to administer all the purchasing activities. The vessels operate as independent purchasing departments, while staying connected through one common system. From the office you can monitor all the activities in the cross-fleet overview.

## Customisation

TM Procurement has been designed with the end-user in mind. An intuitively arranged interface with the ability to create user defined views, gives you control at a glance.

## Integration

TM Procurement has a seamless integration towards third party systems such as:

- Accounting systems: ShipNet/ SNACS and Eyeshare/ Visma
- Logistic system: DSV
- E-commerce system: ShipServ

## Main functions and features

TM Procurement has adopted the user-friendliness from TM Master, and the users which have worked with TMPO will recognize the powerful functions and features in TM Procurement, such as:

- Summary screen of order status for the entire fleet, or for any selected vessel
- User defined status overviews
- On board purchasing functionality
- Send RFQ's to various suppliers
- Evaluation of several quotations
- Reminder function
- Connect orders to docking projects
- Budget and accounts
- Effective all-purpose search function of purchase documents
- Powerful drag-and-drop functionality

- Split requisitions into several purchase orders
- Follow up the receiving process
- Create rest orders and non-conformance reports
- Electronic filing system for finished orders
- Dynamic report engine
- Define user access levels
- Purchase templates
- Add any files and documents
- Advanced and reliable replication

## Basic Purchase

TM Maintenance & Inventory comes with a flexible onboard purchasing solution. Generate orders and requisitions at the push of a button, and use the replication manager to synchronize information between ship and shore. The purchasing capability may be used with both the inventory and the consumables modules.

The drag-and-drop feature allows you to attach documents to a component in the simplest of manners. The system supports all document formats, including text, pdf, images and various audio and video formats.

## Setup possibilities

### Basic Purchase at the vessel – TM Procurement at the office

This is for those using TM Procurement at the office.

**At the vessel**: The vessels need the license for "TMv2_Spart_PO", and in the PO settings "TMPO" is to be selected from the dropdown list.

**At the office**: The office needs the license for "TMv2_PO", and in the  PO settings "None" is to be selected from the dropdown list.

### Basic Purchase at the vessel – External TMPO at the office

In this situation/arrangement, it is **not** possible to use TM Master v2 at the office to send out RFQ and so on, that has to be done in TMPO. Changes in TMPO will be replicated to both TM Master and TM Master v2, so changes in centralized data only need to be entered once.

**At the vessel**: The vessels need the license for "TMv2_Spart_PO, and in the PO settings "TMPO" is to be selected from the dropdown list.

**At the office**: If the office wants to see the purchase orders in TM Master v2[1], then the office needs the license for "TMv2_Spare_PO", and in the PO settings "TMPO" is to be selected from the dropdown list. TM Master v2 at the office then receives requisitions from the vessels, and automatically forward them to TMPO. The same goes for changes made in TMPO, these will be transferred via TM Master v2 at the office, and forwarded to the TM Master v2 at the vessels.

[1] The office should not be making any changes to the purchase orders in TM Master v2, it should be done in TMPO.

## Basic Purchase at the vessel – Basic Purchase at the office

This is for those companies that do not use a purchase system onshore. The vessels only send direct purchase orders to the vendors.

**At the vessel**: The vessels need the license for "TMv2_Spart_PO, and in the PO settings "None" is to be selected from the dropdown list. In addition, to avoid the users having to approve the requisitions, you can specify that it is only allowed to send direct purchase orders.[2]

**At the office**: If the office wants to see the purchase orders in TM Master v2, then the office needs the license for "TMv2_Spare_PO", and the PO settings "None" is to be selected from the dropdown list

## TM Procurement at the vessel – Basic purchase at the office

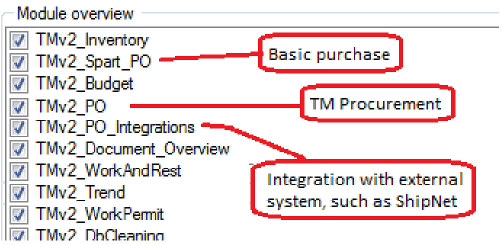
This is for those companies where there is no purchase department onshore and the vessels send out request for quotation and handles the purchase order flow themselves.

**At the vessel**: The vessels need the license for "TMv2_ PO", and in the PO settings "None" is to be selected from the dropdown list.

**At the office**: If the office wants to have "read only" access to the  purchase orders in TM Master v2, then the office needs the license for "TMv2_Spare_PO", and the PO settings "None" is to be selected from the dropdown list

# Setup TM Procurement

## Setup to use TM Procurement




Functionality of the different purchase setups is controlled by licenses.

To see which modules are licensed, log in with a user with administrator rights, and select

[System] – [Settings]. In the "General" tab, you will find the overview of the modules that your license covers

At the vessel, it is also important to setup what kind of purchase system is used onshore, since there are restrictions in place in connections with what can be done with an order after it has been approved.

[System] – [Settings]. In the "General" tab, you will find where to setup the PO settings

- None: Select this if the office doesn't have a purchase system.
- SAP_Subsea7:  For those using SAP
- SNAPS: For those using SNAPS
- TMPO: This is to be used if the office uses the external TMPO or the integrated TM Procurement.

[2] [System] – [Settings], select the "Order Settings" tab, and tick "Only allow direct purchase order"

# Database changes for TM Procurement

## Codes used in TM Procurement

There are several codes that need to be entered before TM Procurement is ready to be used. Examples marked wih (*) are standard codes that can be imported from files included in the TM Master v2 installation[3]. Otherwise they need to be entered manually[4]. If you need to enter a lot of codes, it is timesaving to click on the Pencil button in the horizontal toolbar and type directly into the grid.

- Cost codes
  - 3 Unforeseen expenses
  - 6 Mob/demobilization
- Country (*)
  - N Norway
  - DK Denmark
- Currency (*)
  - NOK Norwegian Kroner
  - USD US Dollar
- Order delivery terms
  - CRF CFR (Cost and freight)
  - DDP DDP (Deliveded duty paid)
- Order Fwd
  - DHL DHL
  - Air Air fright
- Order priority
  - H High
  - L Low
- Procurer group
  - NO Norway
  - AB Abeerdeen
- ShipServ Approved UOM[5]
  - KGM KiloGram
  - LTR Litre
- Terms of payment
  - 15D 15 days
  - 30D 30 days
- UOM (*)
  - pce Piece
  - Kg Kilogram

## Currency

- *Base currency:* The one currency that the exchange rates are based on. This is setup at the office, once.
- *Ship Currency:* For each vessel you need to specify which currency to use.
- *Supplier currency:* This is the default currency the vendor uses.
- *Order currency:* The currency for each order. By default this is the Ship Currency, but this can be changed in the vendors currency when you have select supplier for the PO

## Exchange rates

If the company uses several different currencies, the exchange rates need to be specified after the base currency is defined[6,7]

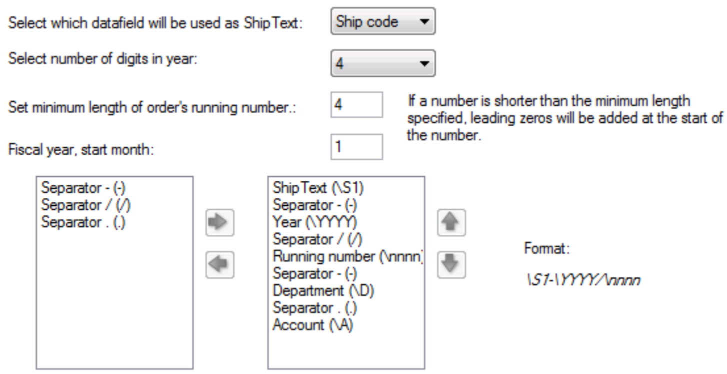
[3] File menu: Import – Import codes
[4] You can contact Tero Marine for suggestions of what to enter in the different codes
[5] for those communicating with ShipServ. The ordinary UOM list must be equal to the ShipServApproved UOM
[6] [Administration]-[Currency]: Click on [New] to enter the new exchange rate against the base currency. Repeat until all exchange rates has been defined.
[7] See example – Currency on how to do this

# Order number format

[System]-[Settings]-[Order No Format]

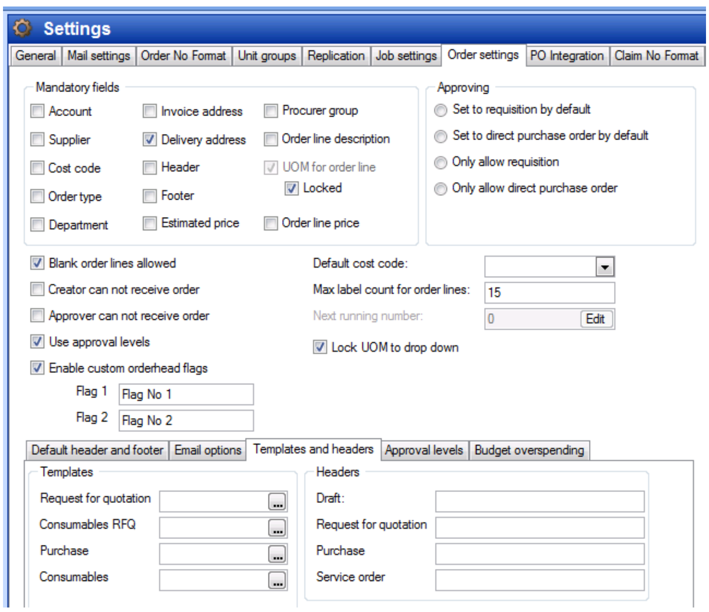
The order number format can be defined with several parameters.

- Ship text (ShipCode: BAM, Ship name: Tug Theodore, Free text: You can type what you want
- Year with 2 or 4 digits (11 or 2011)
- Running numbers (reset at the start of each year)(Ex: 0123)
- Account (Ex: 6540)
- Department (Ex: D – Deck)
- Seperator between the parameters (“-“ or “/” og “.”)




BAM-2011/0123-D.6540

# Order settings




[System]-[Settings]-[Order settings]

***Mandatory fields***: you can tick which fields should always be filled out before the crew is allowed to approve the order.

Available mandatory fields: (Those marked with an (*) can be preselected/set up with default

- Account
- Supplier
- Cost code (*)
- Order type
- Department
- Invoice address (*)
- Delivery address (*)
- Header (*)
- Footer (*)
- Estimated price
- Procurer group (*)
- Order line description
- UOM for order line[8]
- Order line price

[8] If you want to disable the possibility for the user to type in the UOM instead of select the predefined UOM, you can tick “Lock UOM to drop down”.

***Approving***[9]

- *Set to requisition by default* means that when the draft is approved, the option box where you select if it should be a requisition or a direct order is pre-selected "Requisition". This can be an advantage if the vessel mostly uses requisitions.
- *Set to direct purchase by default* means that when the draft is approved, the option box where you select if it should be a requisition or a direct order is pre-selected as "Direct Purchase". This can be an advantage if the vessel mostly sends orders directly to the suppliers.
- *Only allow requisitions*: If the vessel is not allowed to send orders directly to the vendors themselves, "Only allow requisitions" can be selected to prevent them from selecting direct purchase orders.
- *Only allow direct purchase order*: If the office never handles requisitions, select this to avoid the vessel selecting "requisitions" by mistake.

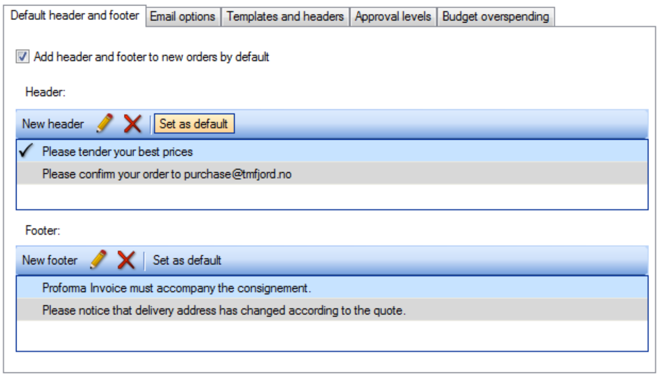
**Other settings**

- *Blank order lines allowed*: It is possible to purchase items that are not already in TM Master v2. An item order entered as a blank order line will not be entered in to the stock when it is received. A blank order line item is identified by a before the item name.
- *Creator cannot receive order*: The user who creates the draft is not allowed to be the one that receives the order.
- *Approver cannot receive order*: The user who approves the draft is not allowed to be the one that receives the order
- *Use approval levels*: This can be used if users are allowed to approve different order prices. [10]
- *Enable custom order head flag*: It is possible to use two different flags to mark orders specially. An example can be that flag no 1 is used for the vessel manager to indicate to the fleet manager that he must take a look at the order before the VM approves it.
  It is important that these flags are identical on both the vessels and the office to avoid conflicts in the use of the flags.
- *Default cost code*: If the vessel uses the same "CostCode" most of the time, it is possible to have the selection predefined.
- *Max label count for order lines*: To avoid the crew printing out 100 labels by a mistake when they receive 100 identical items, the maximum number of labels for an item can be defined.
- *Next running number*: Usually TM Master v2 keeps track of the next running number itself, but in some cases this has to be manually updated. Click on "edit" to enable typing, and click on "save and close" after.
  Be careful when changing the next running number. A lower number may cause conflict with existing order numbers.
- *Lock UOM to dropdown*: This is to avoid the user to type in the UOM. This is important if the company uses ShipServ.

---

[9] Regardless of which setting you chose, all orders will be visible on both the office and the vessel
[10] To set it up, see "Setup approval level"

## Default headers and footers



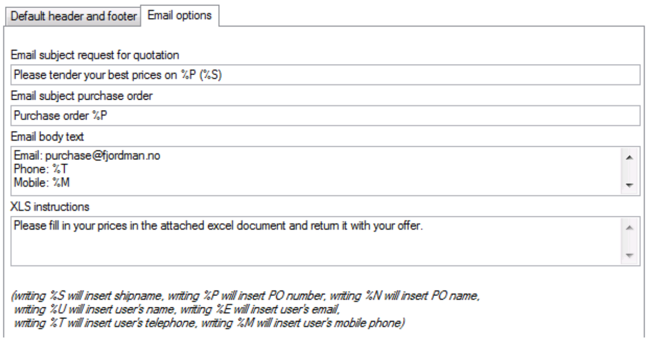

Click on "New header" to add a new header.

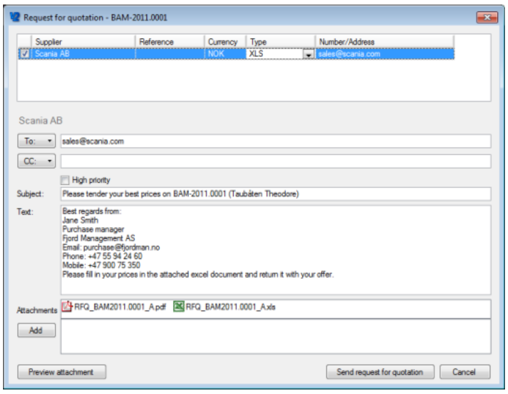
It is also possible to have the header/footer to be added automatically on new orders. Tick "Add header and footer to new orders by default". Highlight the header/footer you want to use as default, and click on "Set as default".

## Email options

When sending out price request and purchase orders by email, TM Procurement can generate the subject and body of the email with several parameters.

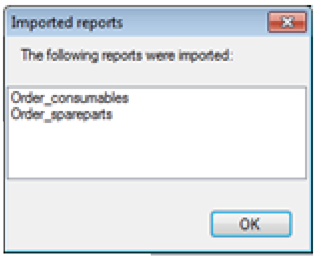
- Name of the logged on user (%U)
- Email (%E), telephone number (%T) and mobile number (%M) to the logged on user
- Shipname (%S)
- Purchase number (%P)
- Name of the PO (%N)

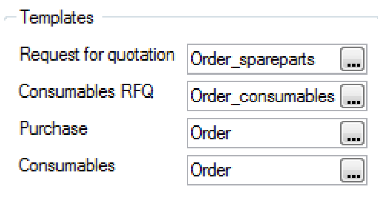


## Templates and headers

It is possible to have different layouts on purchase order formulas on different vessels[11] and different order types. First, you must import the new reports[12]. On the file menu, select File – Import – Import report. Select the v2reports-file you want to import (Ex: orderreports.v2reports). As default all vessels and order types have the standard order formula "order".

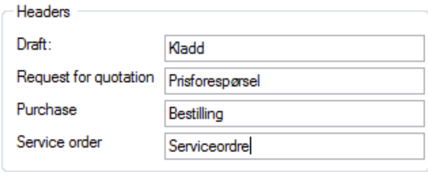


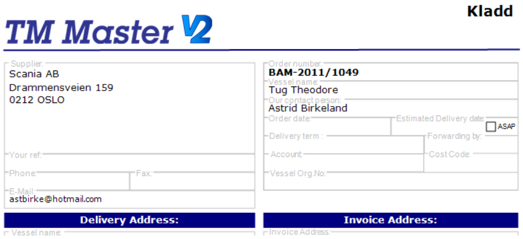




[11] [Fleet] – [Units], select the "Order settings" tab. Repeat for each unit

[12] The reports can be tailor made for you by Tero Marine, or maybe you have just done minor changes on them yourself.

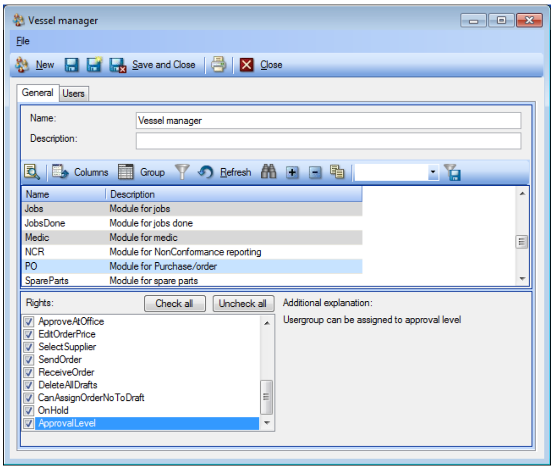
If you would like to use another header for the purchase form, you can overrule the default (the example shows the Norwegian words for drafts, purchase etc.)



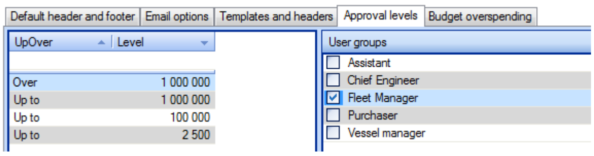




## Setup approval level

[Administration] – [User groups]. Open the detail window for the user group you want to allow to approve orders. Select the "PO" module, and tick "ApprovalLevel".



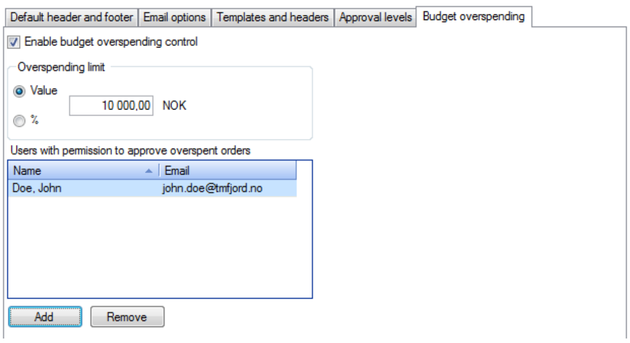

Next, select [System] – [Settings], select the "Order settings" tab. Tick " Use approval levels " Enter the different levels you want, and tick the user group that should be able to approve orders at that level. [13]




## Setup budget overspending

[System ] – [Settings], select the "Order settings" tab[14].

First, tick "Enable budget overspending control", and type in value or % for when the budget control should trigger. Next, add the persons that shall have permission to approve orders that will overspend a budget.

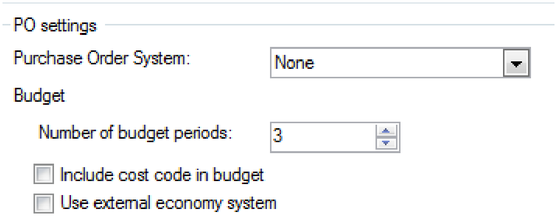



[13] When using "Budget overspending" and "Approval levels", the order can't the approved before the status of the order is "Supplier selected".
[14] If you want different limits on different vessels, you can overwrite this in "Fleet – Units" -> Order settings.

## Setup budget

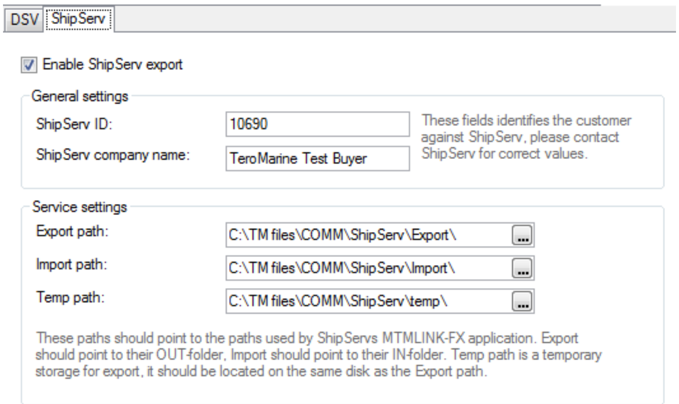
[System]-[Settings], select the "General" tab.

In the budget settings, select number of periods of your budget (12 if you have a monthly budget, 4 the yearly budget is separated into quartiles, and 1 if you use a yearly budget.) Tick "Include Cost code in budget" if you want to separate the budget even more.  Tick "Use external economy system" is you want to send information to your account system such as ShipNet.[15]




# PO Integration (Communication with other systems)[16]

## Integration with ShipServ



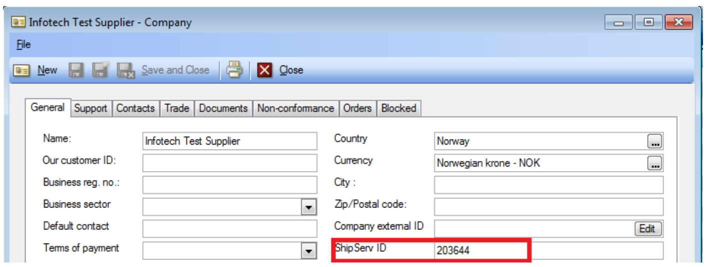

Tick "Enable ShipServ Export  in "General settings". Type in your ShipServ ID and company name, provided to you by ShipServ (www.shipserv.com/ support@shipserv.com).

Select the different paths to where the ShipServs MTMLINK-FX application collects the replication files.

- Export path must point to the OUT folder in MTMLINK-FX
- Import path must point to the IN folder
- Temp path is a temporary folder for storage before the file is moved to the export path, and shoud be located on the same disk as the Export path.

TM Master v2 communicates via files with the program MTMLINK-FX[17] provided from ShipServ.

### *Companies using ShipServ*




All companies that use ShipServ, must have a unique ShipServ ID.

[15] If you uses external system, the budget fuctions of TM Procurement is disabled, and all information is received through the external system.
[16] This module requires licence
[17] For information of setting out MTMLINK, contact ShipServ.

## *ShipServ Unit of Measurement*

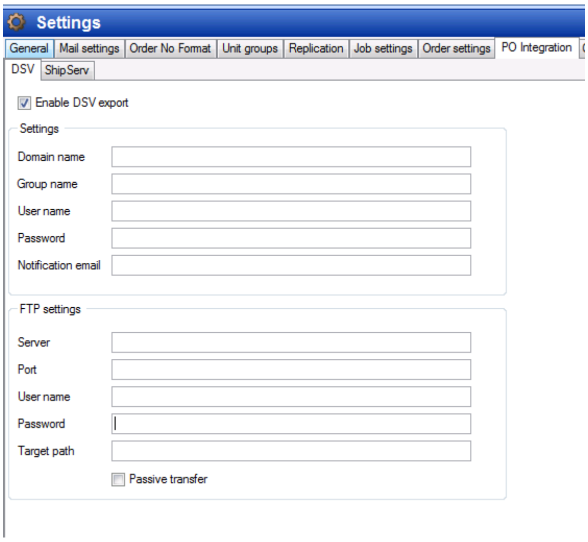
ShipServ is quite rigid in the use of its UOM codes, so you must import the ShipServ approved UOM codes to be able to approve orders for ShipServ suppliers.

[File menu] – [Import]-[Import Codes]-[Standard codes]. Select "C:\Program Files\TM Software\TM Master v2\v2 Data\Codes\TMCodeShipServApprovedUOM.xml". It is of course possible to enter the codes manually in [Administration]-[Codes]

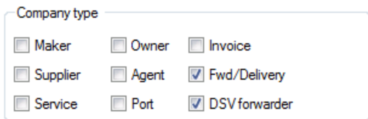
These codes have to be identical to the codes in the ordinary UOM table. Otherwise a new code has to be entered in [Administration]-[Codes], and the non-identical must be "code-washed". [18]

## Integration with DSV

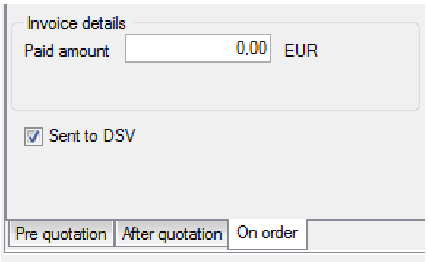
Tick "Enable DSV export" and type in the user name and password provided to you by DSV.




Open the company that is to be a DSV forwarder and tick "DSV Forwarder".




In daily use, you do not have to do something to trigger the order to be sent to DSV. Once the order changes status to "OnOrder", it will be sent to DSV.

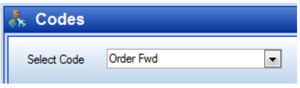



If you want to resend an order to DSV, simply remove the tick, and the purchase order will be sent in the next replication loop.

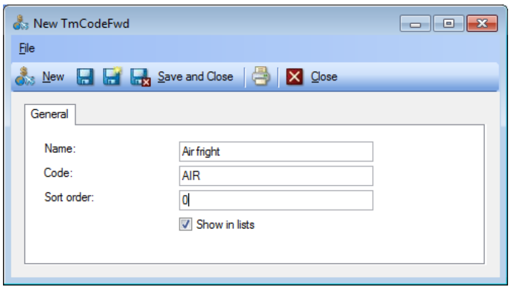
[18] Tools – Code Cleaning (Please attend to a TM Master v2 Code Cleaning course before doing this)

# Example – Codes

*You want to enter the codes for Order Forward.*



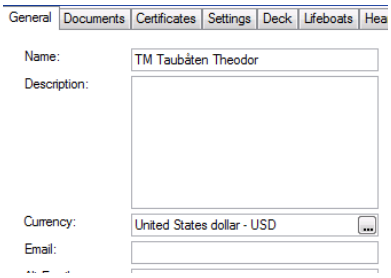

[Administration]-[Codes]. From the dropdown list, select “Order Fwd”




Click on New and type in the Code and name. Repeat until all codes are entered. By default, all codes will be presented alphabetically. This can be overruled by setting the sort order manually.

# Example – Currency

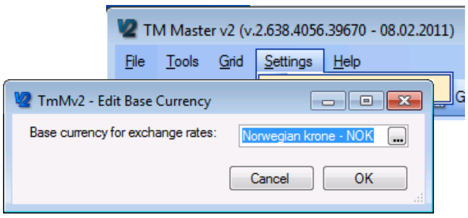
*The vessels use USD and the vendors use Euro . The exchange rates are from the Norwegian bank DNBNor, and are in NOK. (Ship Currency = USD, Supplier Currency = Euro, Base Currency = NOK)*




On each vessel, the *ship currency* needs to be specified: [Fleet]-[Units]. Double click on the vessel. Click on … to select the currency.

Repeat until all vessels have a currency defined.

The next step is to setup *Base currency* at the office: [Administration]-[Currency].




On the file menu at the top of the window, select “Settings” – “Edit base currency”

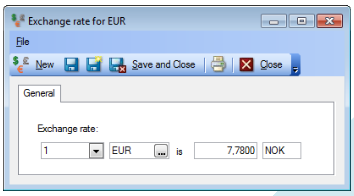
The vendor needs to have a currency (*Supplier currency)*

[Purchasing]-[Contacts]. Double click on the vendor.

If you first select “Country”, the currency of the country is automatically selected. This can be overwritten by clicking

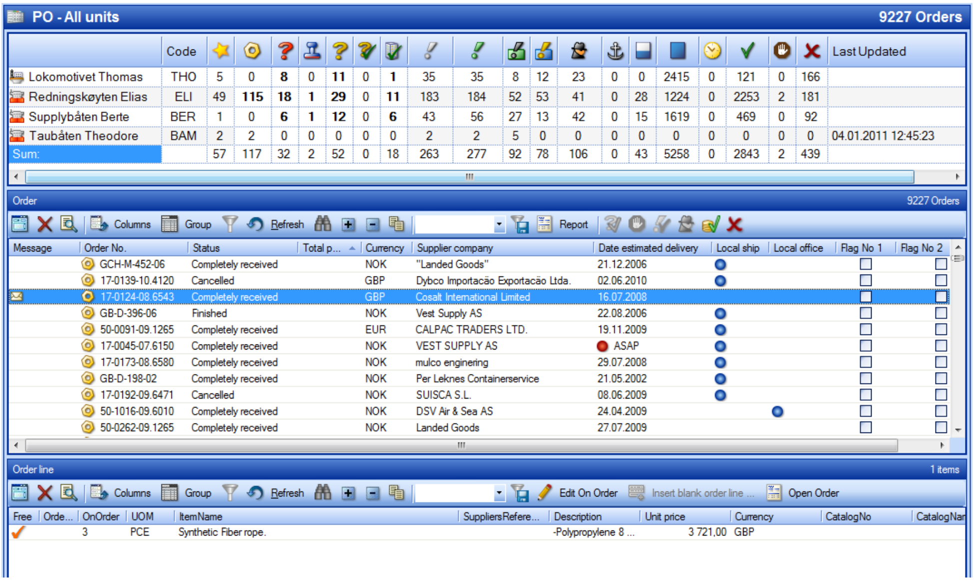

on … and selecting another currency.

The final step is to set the different exchange rates: [Administration]-[Currency].




Click on “New” and enter the exchange rates against the base currency. Repeat until all required exchange rates are defined.

# TM Procurement




If you choose [Fleet]-[PO], in the top pane, you will find all the orders for the entire fleet or a group of vessels[19] or if you want to work on a specific vessel choose [Purchasing]-[Overview].

If you click on the name of the vessel, you get all the orders for the vessel regardless of the status of the order. In a similar manner, click on "Sum" for all orders regardless of status and vessel.

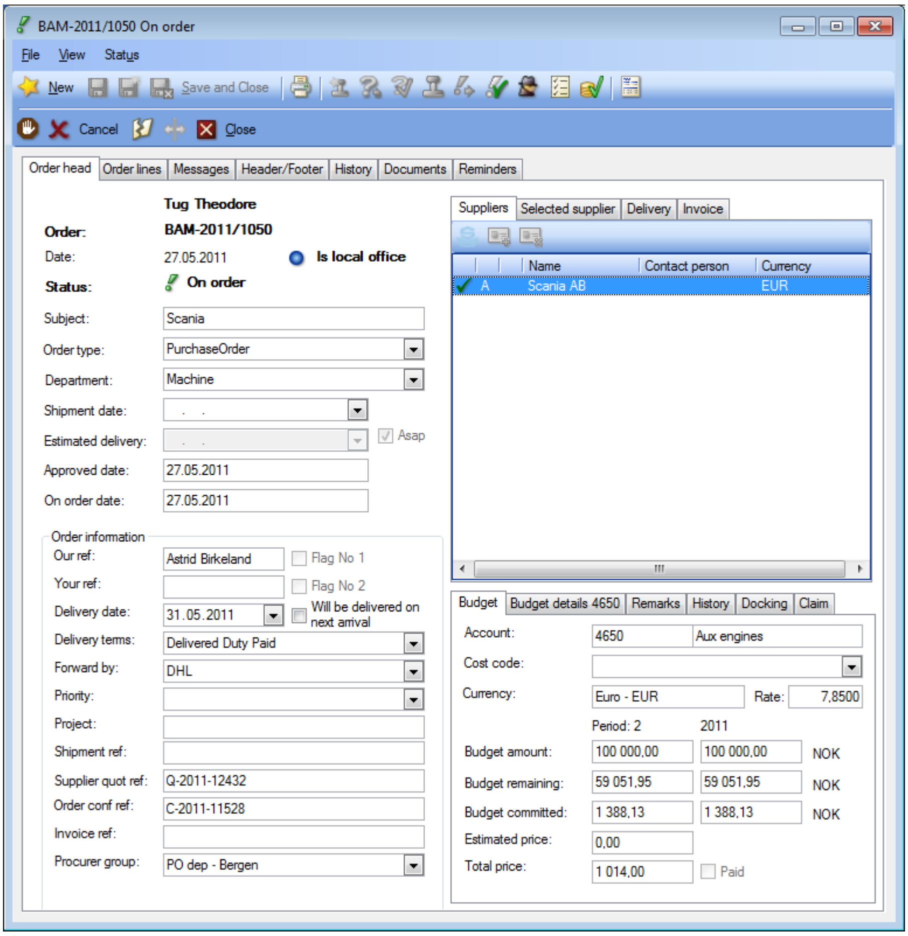
| | | |
|---|---|---|
| Draft | New requisition | Direct purchase orders |
| Request for quotation | Quotation sent(but not approved). | Quotation received (from ShipServ) |
| Approved quotation | Supplier selected but order not approved | Orders created at the office |
| Approved order | Supplier selected and order is approved | |
| OnOrder | Order Not confirmed | Reminders due |
| Received agent | Will be delivered on next arrival | On hold /passive/inactive orders |
| Partly/Completely received | Finished | Cancelled |

[19] This can be defined in [System]-[Settings], select the "Unit group" tab, or your personal group added in [My place]-[Preferences], PO Settings.

## Visual indications in the overview

-  The order item is a blank order line item
-  The order has one or more unread messages
-  The order is connected to a claim
-  The order should be delivered ASAP
-  Local office order, or Local ship order

## The “Order head” tab




When you open the detail window, you find information about the order, such as reference numbers, delivery dates, and supplier and price details. Be aware that further information is available in sub tabs in the “Order head tab”.

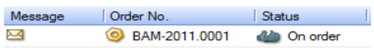
- *OrderNo*: Order number is automatically generated when the order is approved. On a draft, OrderNo will be the same as “Name”[20]
- *Date*: Date of when the draft was created
- *Type of order*
  - Requisition: The order is created at the vessel, and sent as a requisition to the office
  - Is Local Office: The order is created at the office
  - Is Local Ship: The order is sent directly from the vessel to the supplier

[20] See the “How to” section about the possibilities to assign order number to a draft

- *Status*: Shows the current status of the order
- *Name*: A free text field used to give a brief descriptive name of the order.
- *Order type*:
    - *Purchase order*: Automatically chosen when the vessel orders spare parts
    - *Service order*: Automatically chosen when the vessel orders service jobs from the due list.
    - *Consumables*: Will be automatically chosen when ordering from the Catalogue module
    - *Medic:* Only available when ordering through the "Medic" module.
    - *Work order:* Available, but functionality will be added later.
    - *Contract:* Available, but functionality will be added later
- *Department*
- *Shipment date*
- *Estimated date of delivery/ASAP:* If you tick "ASAP", it will show graphically in the overview grid with an ASAP instead of the delivery date.
- *Approved date:* Filled in automatically when the order is approved.
- *On order date:* Filled in automatically when the order changes status to "OnOrder"
- *Our ref*: Automatically filled out based on the approver. This can be overwritten
- *YourRef:* Automatically filled out if there is a default contact on the supplier. This can be overwritten
- *Flag 1* and *flag 2* are only available if this is setup[21] in the database
- *Delivery date* is automatically filled in based on the delivery date of the selected supplier when the order changes status to "OnOrder"
- *Terms of delivery* is selected in the dropdown list (Code table)
- *Forward by* is selected in the dropdown list (Code table)
- *Priority* is selected in the dropdown list (Code table)
- *Shipment ref* can be filled in when available
- *Suppliers quotation ref* is copied in from the "Order line" tab when status changes to "Supplier selected".
- *Order conformation ref* can be filled in when available
- *Invoice ref* can be filled in when available
- *Procurer group:* can be selected if in use
- *Suppliers*: It is possible to add as many suppliers as you want to send request for quotations to. A ✓ before the supplier name means that this can either be the supplier that the vessel suggested, or the supplier that the purchaser selected when he changed the status to "OnOrder".
- *The "Selected supplier*" tab gives contact details of the selected supplier
- *The "Delivery" tab* gives the delivery address[22].
- *The "Invoice" tab* gives the invoice address[23]..

[21] [System]-[Settings], "Order settings" –tab. Tick "Enable custom order head flag
[22] This can be preselected: [Fleet]-[Units], "General tab", "Default Delivery" sub tab.
[23] This can be preselected: [Fleet]-[Units, "Generalt tab", "Invoice"- sub tab

- *Account*: These accounts are the same as in [Purchasing] – [Account]. Accounts are centralized data meaning that accounts have to be entered at the Office, and they are then replicated to all vessels.
- *Cost Code*: Cost codes can be used to separate the accounts even more. For example “Operation expenses”, “Breakdown”. [24]
- *Currency*: This reflects the currency of the order. Until the order changes status to “OnOrder”, the order currency is ship currency, when a supplier is selected and order has changed status to “OnOrder”, the currency changes to the currency of the supplier.
- *Rate*: If the order has a currency other than the Ship Currency, the rate will reflect the exchange rate between the Ship Currency and the Order Currency. If it is the same currency, the exchange rate is 1,00.
- *Budget amount*: This shows the value entered in [Purchasing]-[Budget] for the corresponding account number. Both the budget period and the year’s total budget is shown
- *Budget remaining*: This shows the value “Rest”[25] from [Purchasing]-[Budget] for the account number. Both the budget period and the year’s total budget is shown
- *Budget Committed*: This is a calculated amount, including orders which is put to “OnOrder”, but not still paid. Both the budget period and the year’s total budget is shown.[26] [27]
- *Estimated price*: In cases where prices are not available on the item prices, the estimated total price can be entered to give an estimate to the purchaser.
- *Total price* reflects the order line sum and the shipment cost given by the selected supplier when the order changes status to “OnOrder”.
- *“Paid”* will be ticked once the order has been paid. This is available by selecting  . This is activated after the order changes status to “OnOrder”.
- *“Budget details”* sub tab gives information about the selected account.
- The *“Remarks”* sub tab is a free text field where any remarks for the order can be typed in.
- The *“History”* sub tab shows changes made to the order. [28]
- The *“Docking”* sub tab lets you connect the order to a specific docking job. In this way, you can easily follow up the orders belonging to docking projects.
- The *“Claim”* sub tab gives you the possibility to connect the order to a claim. This will be shown in the”Status” column in the Overview grid



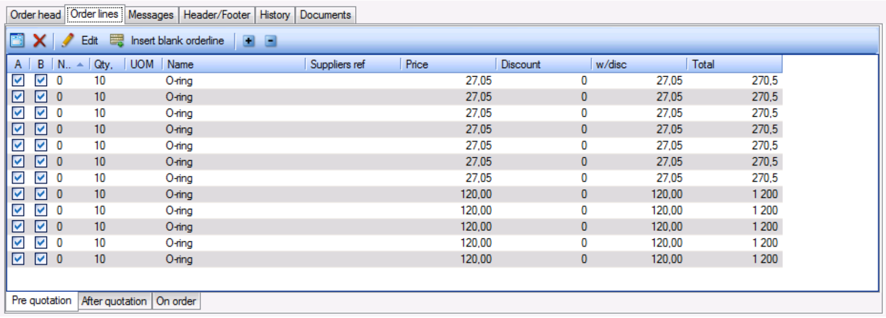

## The “Order lines tab”

The “*Order lines*” tab gives information about what items are to be purchased, and is where you find the prices that each supplier has offered. There are 3 sub tabs in this window. “*Requisition*” is where you can choose which items you want to send RFQ for and to which supplier. “*After quotation*” is where you can compare the prices, and “On Order” shows the prices for the supplier who has been chosen to receive the order.

---

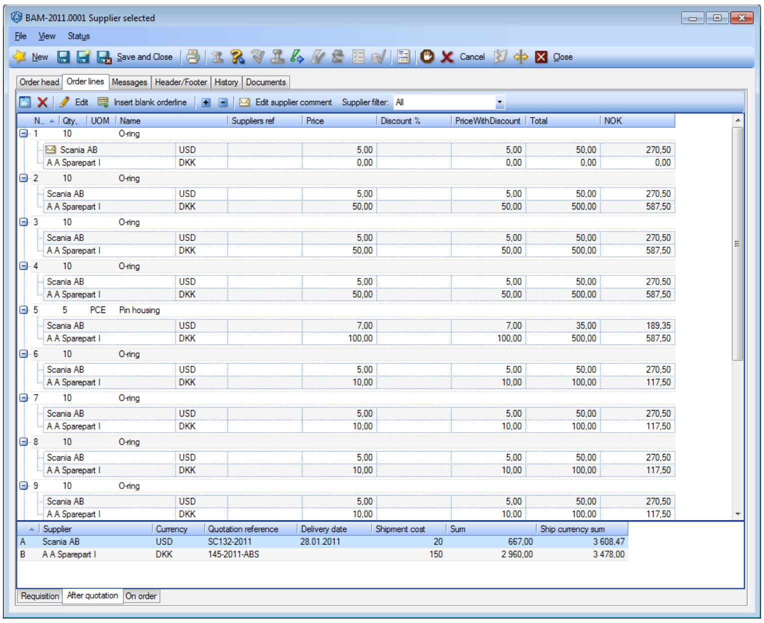
[24] [System]-[Settings], “General” tab. Tick “Include cost code in budget”
[25] Rest = Budget – sum of finished/paid orders
[26] Budget Committed is only available for those having the “Budget” module and uses the integrated TM Procurement in TM Master v2. It is not available for those running TMPO at the office instead of TM Procurement
[27] Budget amount and remaining is only available for those have the “Budget” module
[28] You find the entire history log on the “History” tab

## The “Order lines” tab – “Pre quotation/Requisition” sub tab




The pre quotation/requisition sub tab is used to select which suppliers receive RFQ’s for which orderline items. As default all orderlines is sent to all suppliers. A = Scania AB, B = AA Sparepart from the “General sparepart” screenshot.

## The “Order lines” tab – “After quotation” sub tab




To be able to change Order Quantity for the order lines, you have to click on “Edit”

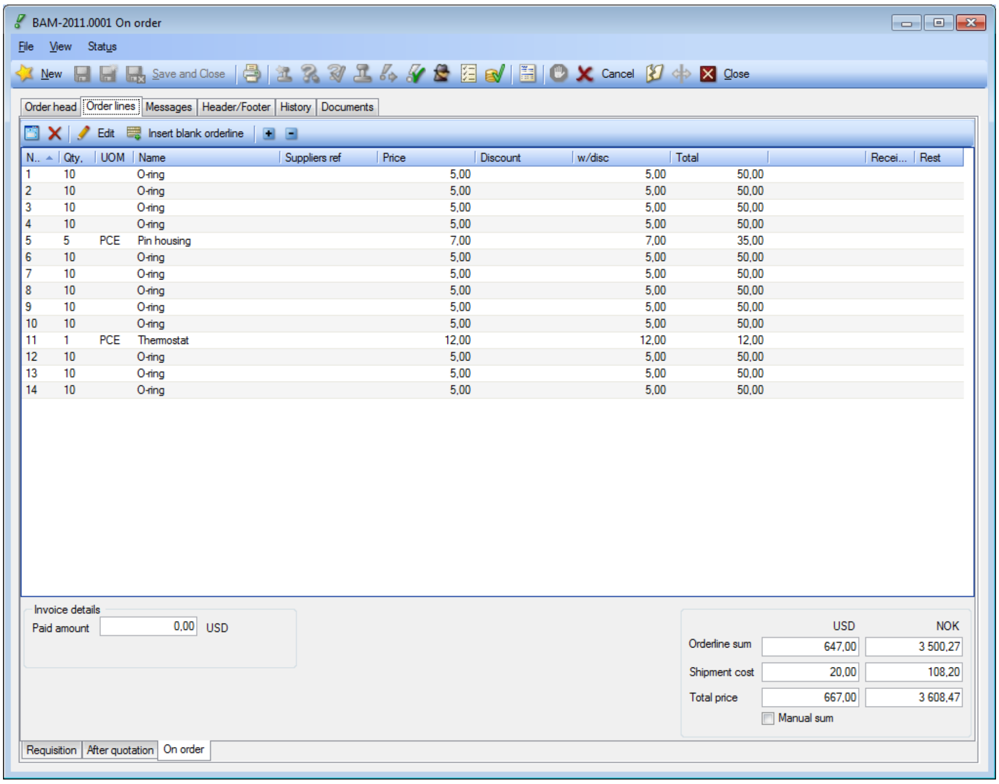
If you see a in front of an orderline, it means that there is a comment from the supplier. You can edit the comment by selecting “ Edit Supplier comment” from the horizontal toolbar.

When entering prices, it is possible to filter out other supplier’s prices , to make it easier to enter the prices from a specific supplier. The items might have a price when the requisition is received from the vessel. Those are “Ship prices” that are the prices from the last time the different item were purchased. These are the prices which appear in the same line as the name of the item. .

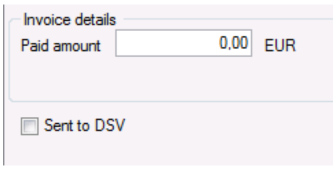
The “Total” column reflects the price in the supplier currency, while the NOK column shows the Ship Currency (This will of course show GBP if the Ship Currency is GBP)

On the lower pane, you can enter the quotation ref, delivery date and any shipment costs received from the supplier in the RFQ. When selecting a supplier, all this information will be copied to the order head tab.

## The “Order lines tab” - “On Order” sub tab



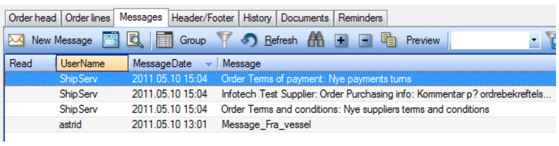
When the order has changed status to “OnOrder”, the prices received from the supplier on the “After Quotation” tab are copied into the “On Order”-sub tab, along with any shipment costs.

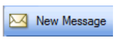



If the company communicates with DSV, it will be ticked whether or not the order has been sent to DSV.

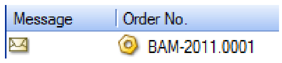
At the bottom of the window, the total price, both in Order currency and Ship Currency is shown. This can be overwritten by clicking on “Manual sum” and entering the total price manually, if it is different from the TM Master v2 value. The “Paid amount” will be updated when the order has the status “Complete” (meaning received and paid)

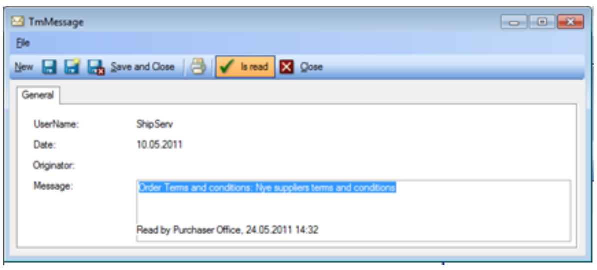
## The “Messages” tab

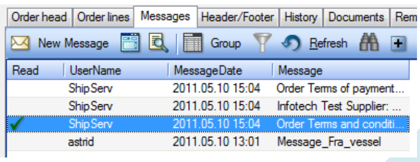


Click on  to add a new message.

The “Messages” tab is used for the vessel to give messages to the office, and vice versa. ShipServ will also send some of the variances into the “Message” tab. It is for internal use only, meaning that information given here, will not be sent to the supplier.



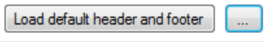





If there is a message connected to the order, it is shown in the

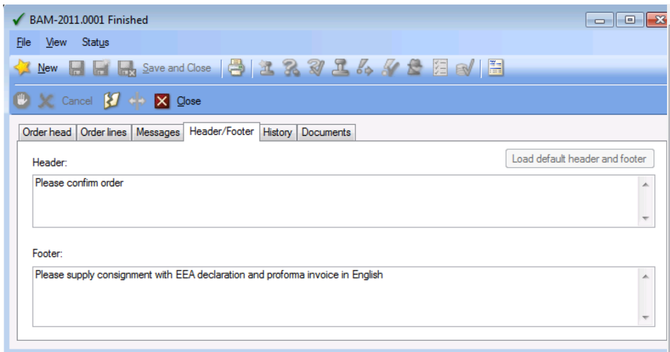
Overview grid. If you want to indicate that you have read the message, double click on the message and click on "Is read. Once all messages are read, the envelope disappears.

## The "Header/Footer" tab

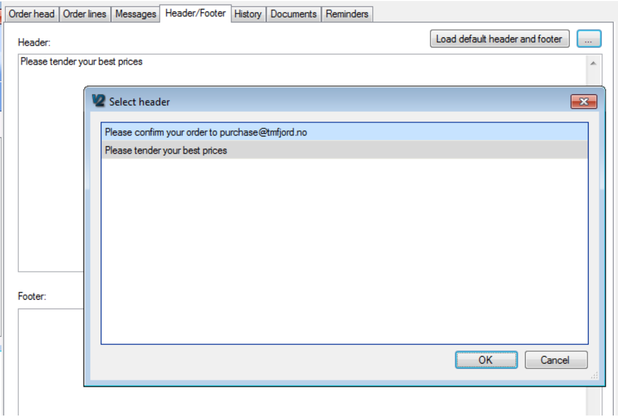
Click on "  " to select the header/footer you want to use. You can use more than one header.



It is possible to set up Master v2 to automatically fill in a default header and footer[29]. Another option





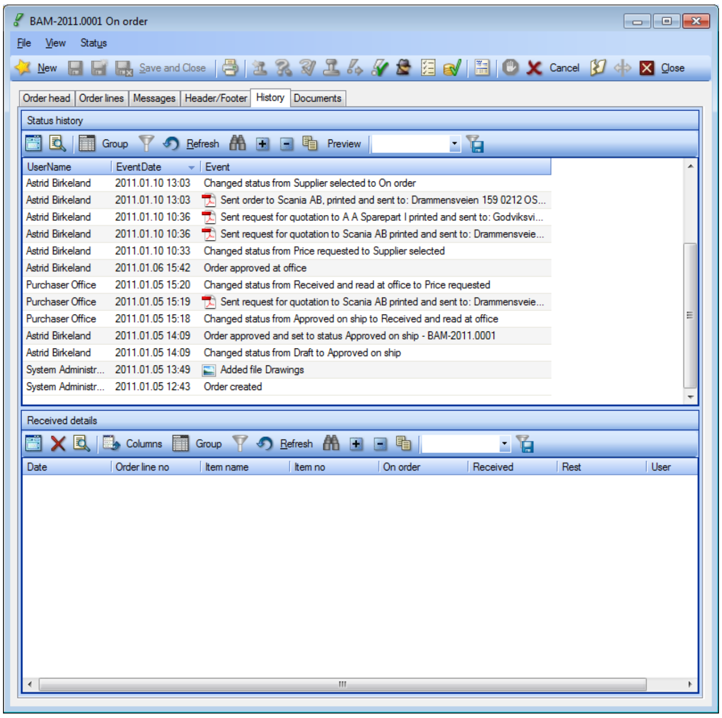




is to insert a pre-defined header & Footer. This is only possible if there is pre-defined "Default header and footer" in [System]-[Setting], "Order Settings" tab. Otherwise, the header/footer needs to be typed in manually[30].

## The "History" tab

The top pane shows major changes done to the order, who made the change, when the change was done, and what was done.



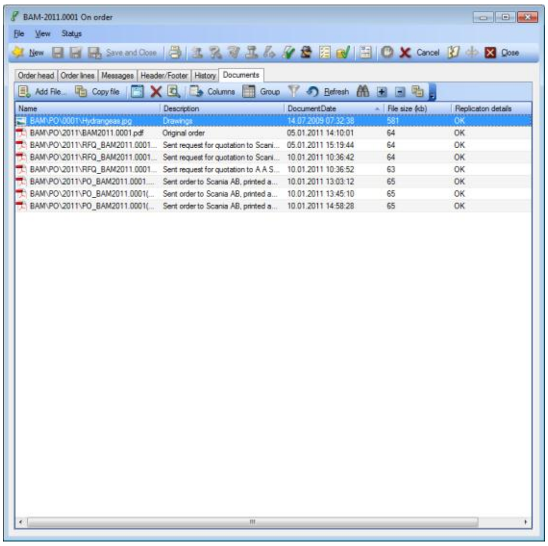


This way, you can keep track of the changes and figure out what's happened with an order especially if something unusual has been done to the order.

[29] [System]-[Settings], select the "Order settings" tab. Tick "Add header and footer to new orders by default

[30] In later versions of TM Procurement, it will be possible to add and select from personal defined headers and footers

## The “Documents” tab

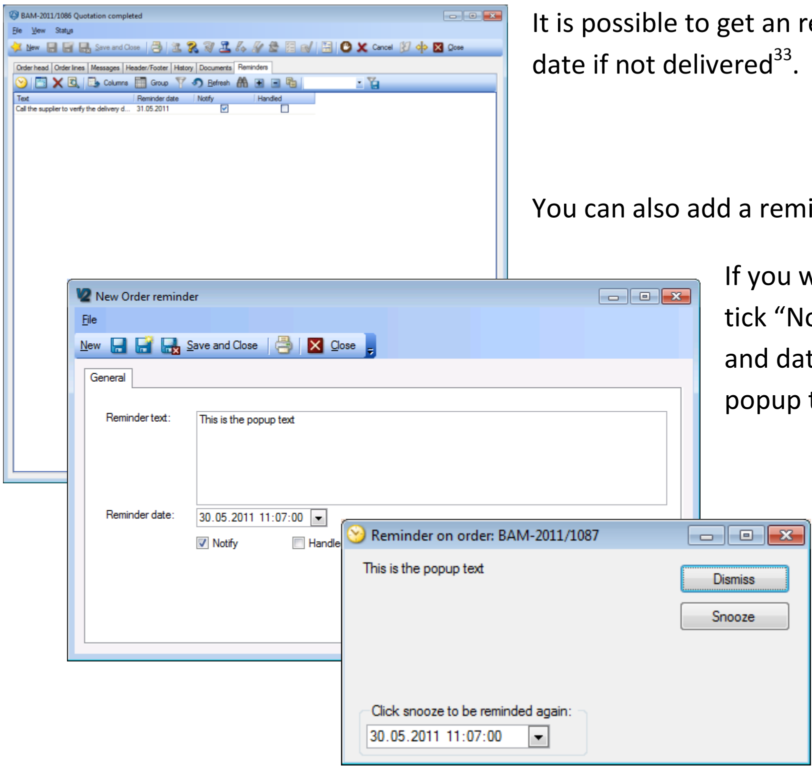


All attachments, documents and files connected to the order, are available through the “Documents” tab. This is regardless of whether the attachment is added on the vessel or at the vessel, as long as “Replication details” shows “OK”.

Attachments are automatically replicated as long as the attachment is below the allowed replication file size[31].

It is possible to use “drag-and-drop” of attachments from Windows Explorer into the “Documents” tab[32].

## The “Reminders” tab




It is possible to get an reminder XX days after delivery date if not delivered[33].

You can also add a reminder manually by clicking on .

If you want a popup at a specific time, tick “Notify” and enter the reminder text and date/time when you want the popup to come.

[31] [Fleet]-[Units], select the “Settings” tab. Type in “Max size replicated files”:

[32] In TMPO you could do “drag-and-drop” of attachmens into the history. In TM Procurement, this is done in the “Documents” tab, and a link to the attachment will be copied into the history

[33] [My place] – [Preferences], the “PO Settings” tab.

## Status changes

A typical order flow follows these steps

| Step | Icon | Where | Description |
|---|---|---|---|
| New draft |  | Vessel | At the vessel, a new draft is added, and they add information such as order lines, Department, account code and other information. The draft will be visible at the office, but it has to be approved at the vessel before the office can work on it. |
| Approve draft[34] |  | Vessel | The draft is approved, and then replicated to the office |
| New requisition received |  | Office | A new requisition is received and the purchaser opens it. |
| Approve order |  | Office | The vessel manager (VM) takes a brief look at the requisition, possibly enters an estimated price and approves the order |
| Send RFQ to suppliers |  | Office | The purchaser selects one or more additional suppliers, adjusts order lines, adds new order lines, header/footer and when he is finished, sends RFQ to the suppliers |
| Receive quotations[35] | | Office | The quotations are typed in, or the received xls is imported into the "Order pane" in [Purchasing]-[Overview]. |
| Select supplier[36] | Right click on the supplier, and select "Select supplier" | Office | The purchaser compares the different offers, and selects the supplier which has given the best offer. |
| Approve quotation[37] |  | Office | The quotation might be approved as a "Go!" to indicate that the order can be sent. |

[34] Draft added at the vessel can only be approved at the vessel, and vice versa
[35] Send RFQ and receive quotation can be repeated until an acceptable offer is received
[36] This step is only necessary if there is more than one supplier
[37] This step is not necessary to be able to continue the order flow

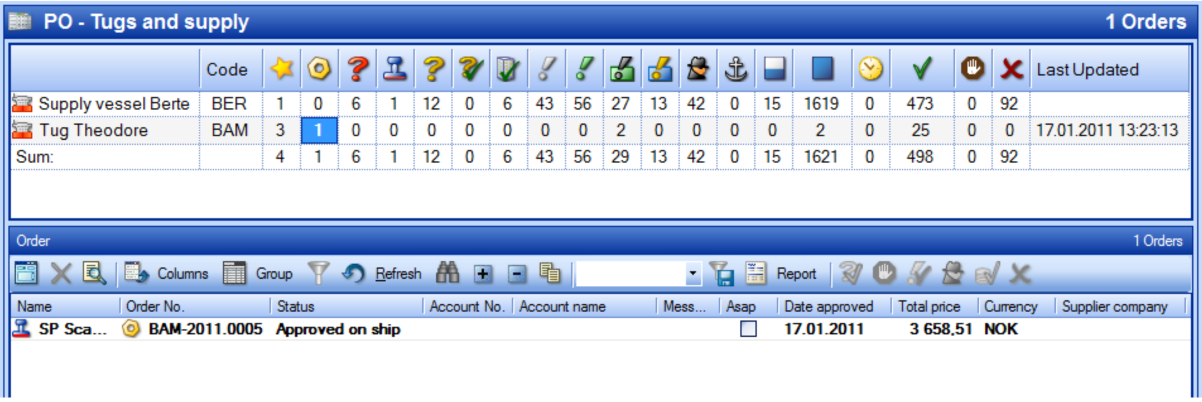
| | | | |
|---|---|---|---|
| Send order | | Office | The purchaser finishes the order by adding a new header/footer, adding additional order information, and then sends the order, by email, fax or by mail. |
| Confirm order[38] | | Office | The purchaser receives an order confirmation and types in the “order conf ref” in the order head, before he confirms the order |
| Receive orders | | Vessel | The vessel receives the items |
| Set order paid | | Office | When the invoice is paid, the purchaser changes the status to “Finished” and updates the order head with the invoice ref. |

[38] This step is not mandatory

# Example – From requisition to received order

*A new requisition is received from the vessel.*

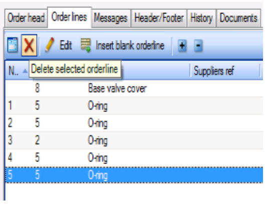
## Make a requisition ready for sending a price request



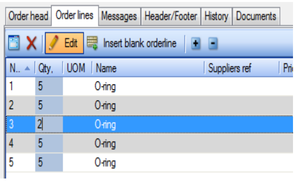

A new requisition is received at the office with status “Approved on ship”. The new requisition has bold font. Double click to open it.

The requisition changes status to “Received and read at office”. The vessel manager takes a look at the requisition, and the order lines. He then wants to

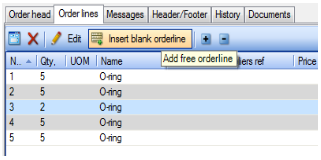
delete one of the order lines



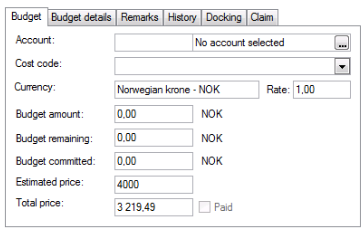

change quantity of one of the items



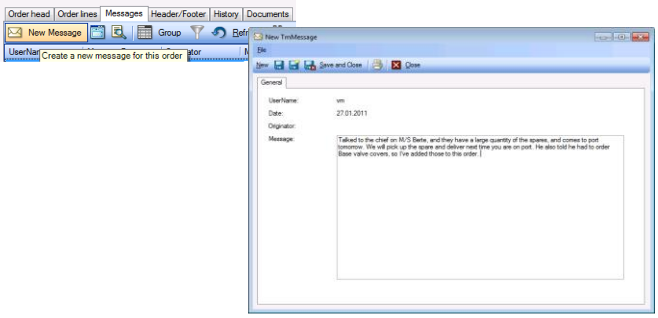

add an additional item




Since he doesn’t know the exact price of the item, he leaves it with “0 NOK” and types in an “Estimated price” to indicate an approximate price to the purchaser.



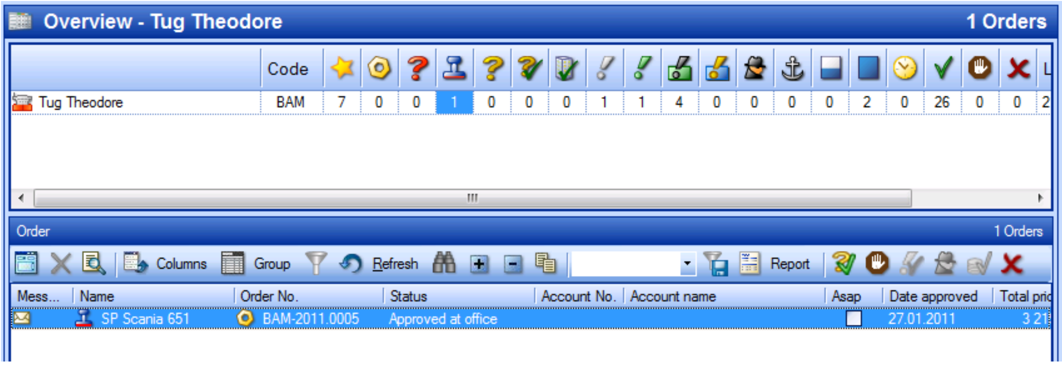

He also adds a message to the vessel, to explain why he has changed the requisition

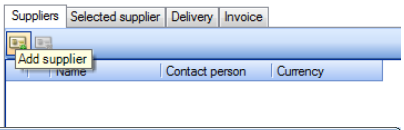




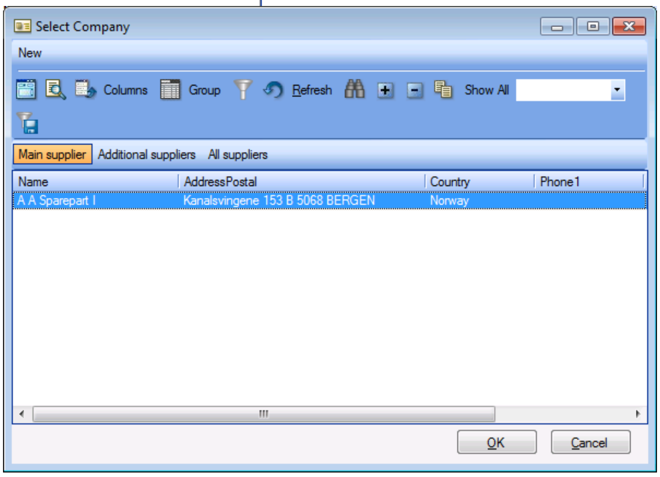
Finally, he approves the order to indicate to the purchaser that he can start working on the order.

The purchaser sees that there is an approved order ready for processing.

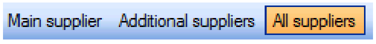



He opens the order, and look at the order lines and messages. He decides which suppliers he wants to receive quotations from, and adds them to the suppliers list.

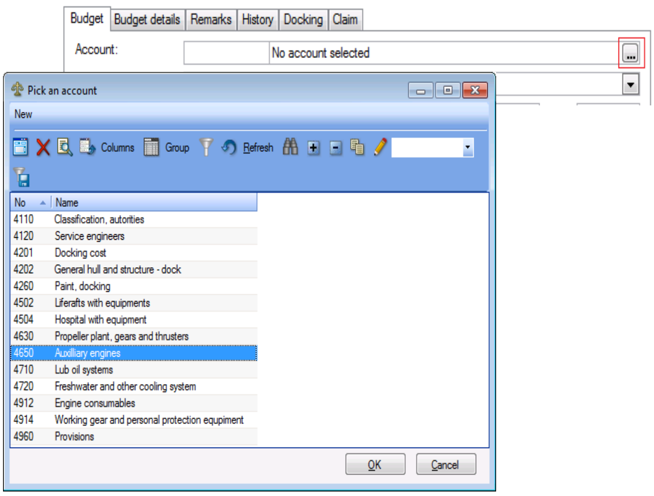


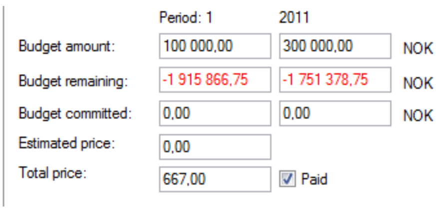

The main supplier of the spare parts is shown as a suggestion.

He adds that supplier, and wants to select another supplier. This time he wants to select from the entire suppliers list, so he selects "All suppliers" 


Next, he selects the account from the "Order head" tab:

Once selected "Account" (and "cost code" if appropriate), the budget remaining[39] and committed[40] shows.



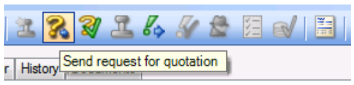




[39] Budget – Total price of finished orders
[40] Sum of orders that are "OnOrder" or "Received" but are not yet paid

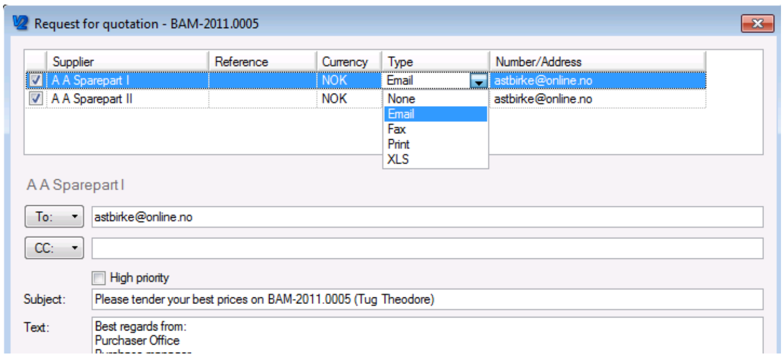
He then selects the “Header/Footer” tab and either load the default header/footer[41], or types them in manually.

## Send price request to the suppliers

Finally, it is time to send the RFQ[42] to the suppliers




From the dropdown menu of “Type”, he selects how to send the order



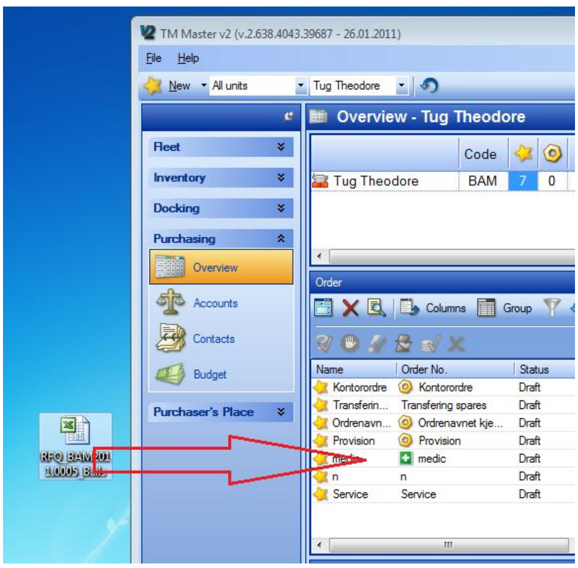

- None: The PO changing status, but it has to be sent manual to the supplier
- Email: TM Master v2 sends an email to the supplier with a pdf attachment of the request
- Fax: TM Master v2 sends a fax to the supplier
- Print: The PO changes status and is the pdf attatchment is printed out, so it can be sent by ordinary mail
- XLS: TM Master v2 send an email to the supplier with a pdf document of the request, together with a Microsoft Excel work sheet where the supplier can fill in the prices, delivery dates and other information and send it back by email for automatic import.
- ShipServ: The RFQ is sent electronical to the ShipServ database

The order  changes status to “Price requested”

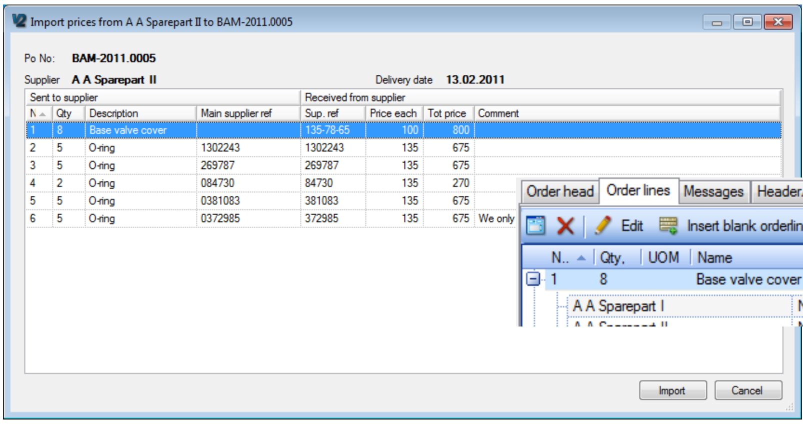
## Enter/Import prices from the suppliers

After a while, the suppliers return with their prices and delivery dates.

- Automatic import of prices: He receives the filled out Excel work sheet from the suppliers

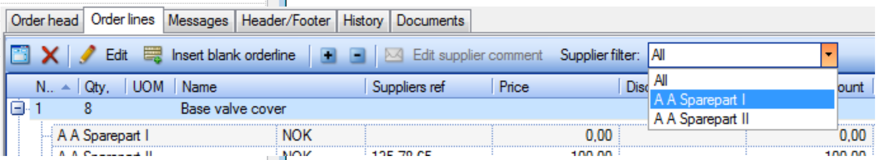



[41] It is possible to have the default header/footer automatic filled in on new orders.
[42] Request for quotation



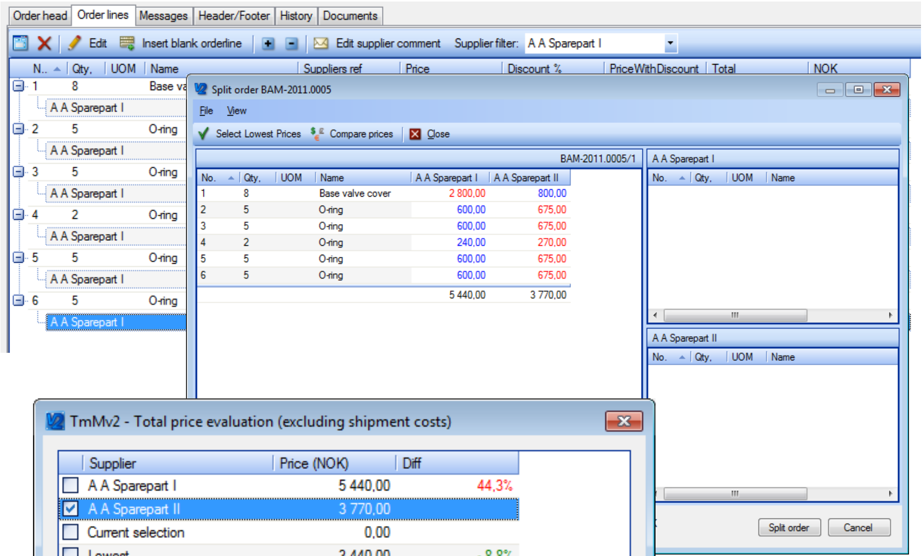

The prices, comments and delivery dates are automatically updated.

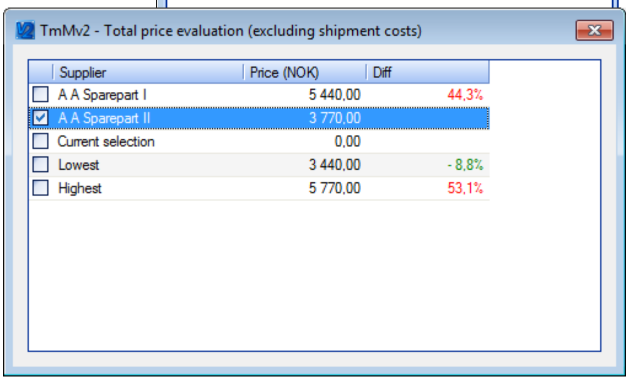
The prices from the second supplier

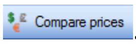



must be typed in manually. To avoid entering prices for one of the other suppliers, the purchaser uses the "Supplier filter" to show only one supplier on the item list. He then starts to type in the prices and suppliers references.

When all prices are ready[43], it's time to compare the prices in more detail, to check whether it is profitable to split up the order.


Items with a blue font, are the lowest prices, and those with a red font are the highest prices. He wants to look at this in even more detail, and clicks on 

.

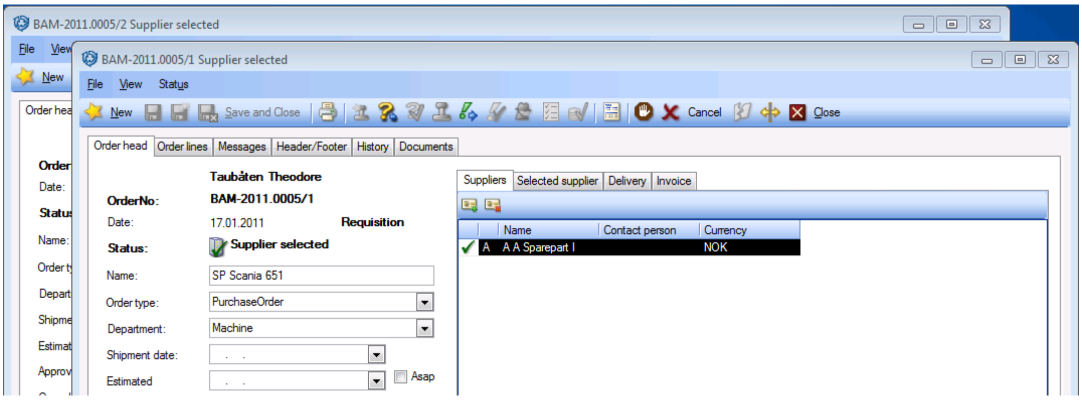
He clicks on the supplier with the lowest price offer, and sees right away that he would save 8,8% by splitting the order. He closes the window, and selects 

to automatically split the order. He could also have used "Drag-and-drop" of order lines to split the order.

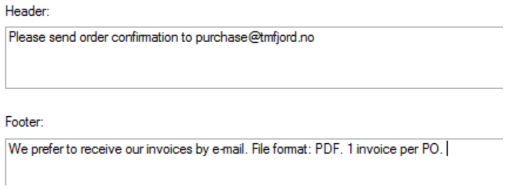
When he clicks on "Split order", the original order is seperated into two new orders, with a new postfix to the ordernumber (BAM-2011.005/1 and BAM-2011.005/2)

---

[43] Prices, quote ref and delivery dates from ShipServ suppliers will be imported automatically.




After a split, TM Master v2 understands which supplier to receive the order, and automatically set status til “Supplier selected”. Otherwise,  the purchaser must do this manually by right clicking on the selected supplier and clicking “Select as supplier”.

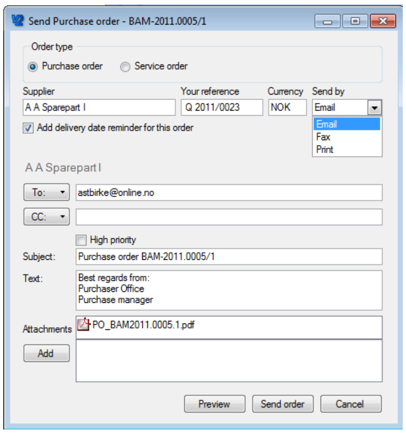



He has to change the “Header/Footer”  to fit for an order instead of a request.

He then selects the “Order head” tab and types in “Supplier quote ref” (if not imported) and any delivery dates and terms.

## Send the order

When the order is ready, he clicks on “Send order”  to activate the different sending possibilities.

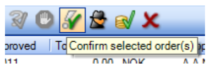



If he wants to set  a reminder in the case that the vessel hasn’t received the items within the delivery date, he tick this, and also selects the way to send the order:

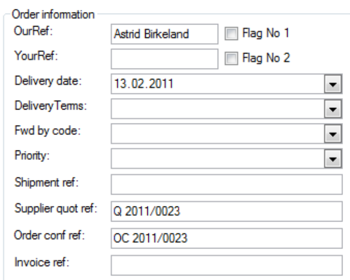
- Email: TM Master v2 sends an email to the supplier with a pdf attachment of the order with the agreed prices
- Fax: TM Master v2 sends a fax to the supplier
- Print: The PO changes status and the pdf attatchent is printed out, so it can be sent by ordinary mail
- ShipServ: TM Master v2 sends the PO directly into the ShipServ database.

He repeats this for both of  the orders.

## Order confirmation

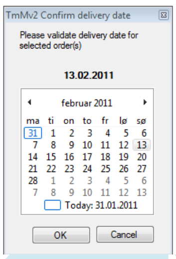


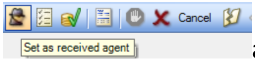

He received a confirmation of the order after a while and updates the status in the overview pane, or he selects to open the order where he also types in the “Order conf ref” for further references to the order.




## Received at the agent

After a few days, he gets a phone call from the agent who notifies him that he has received the order, and that it is ready to be delivered the next time the ship is



in the port. The purchaser updates the status 

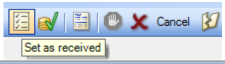
and confirms the delivery date

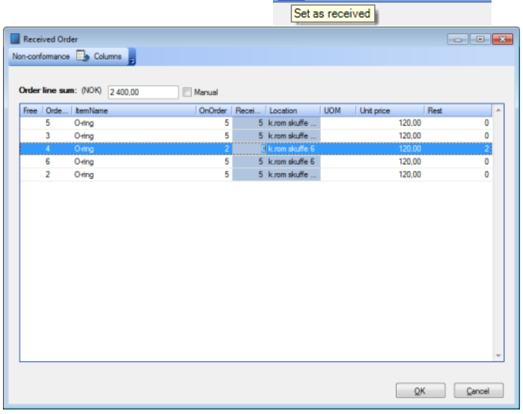
The order changes status to “Received agent”

## Receive the order items[44]

The purchaser gets a phone call from the vessel, telling him that they have had some problems with the computer, and asks if the purchaser can update TM Master v2. All items received, except the 2 O-rings that will be delivered the next day.

He clicks on the “Receive” button and a window appears, where the number of items received can be entered. He types in “0” in the O-rings not received and clicks on “OK” on the other items.



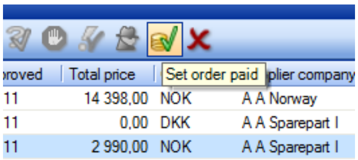

He is then questioned about what he wants to do with the items not received

- *Set order to partly received* is used in the cases where you expect to receive the rest later
- *Set order to received and move rest to new draft* is used in cases where maybe the supplier could not deliver the items anyway
- *Set order to received and cancel rest* can be used those times where it is OK that you do not receive everything.

He knows the items will be received the next day, and therefore selects “Set order to partly received”

The next day, the last items are received, and he repeats the receive procedure. The order changes to “Completely received”.

After a few weeks, he gets an email from the account department with a list of all paid orders.

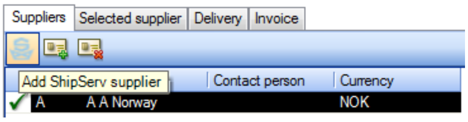



He selects the order in the overview window and clicks on “Set order paid”. The order changes status to “Finished”.

[44] Usually, it is the vessel who receives the orders, but it is possible to do this at the office also

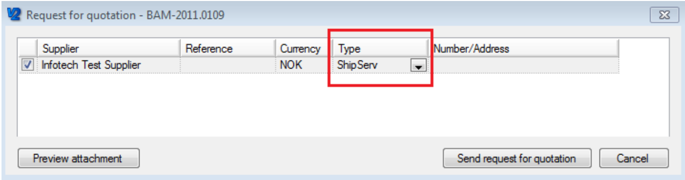
# TM Procurement and ShipServ

## Send RFQ and Purchase order by using ShipServ

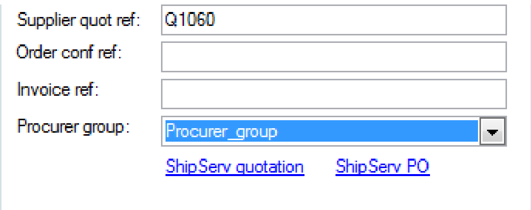



When you have enabled ShipServ, a new icon appears where you select suppliers. If you select suppliers from that list[45], then only those using ShipServ are listed.

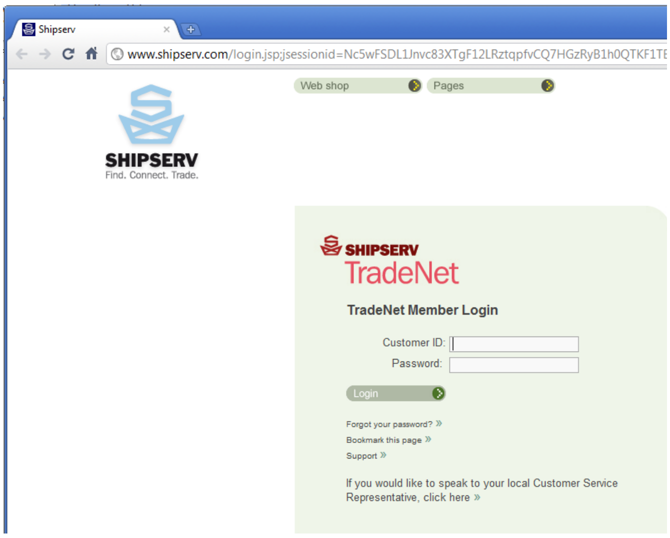
Notice that when you send request for quotation to a ShipServ-supplier, the “Type” is automatically selected as “ShipServ”




## ShipServ web integration




After sending RFQ and purchase orders to ShipServ, the quotation and PO can be viewed on the webpage of ShipServ. The links to access these will appear on the orderhead for easy access. The user will have to log on to the web page with their ShipServ password to view these pages.

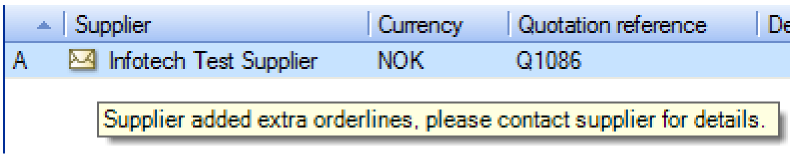



## Variances and updates from ShipServ

If the supplier makes changes on the quotes, add comments or similar, a variance or comment will be made.

### The supplier adds an additional order line

TM Master v2 doesn’t import additional orderlines from ShipServ. The variance shows as a comment from the supplier.



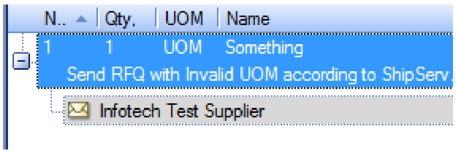

### The supplier gives a “Suppliers Ref”

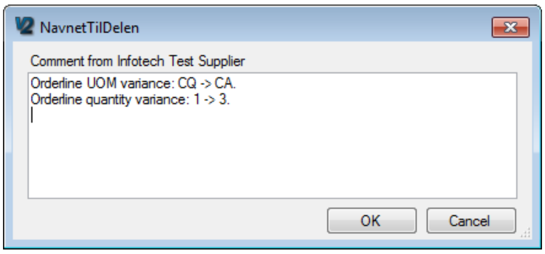
Suppliers Ref is automatically updated in TM Procurement

45 You can of course select the contact from the ordinary contact list also.

## The supplier changes UOM or quantity

Double click on the envelope to the left of the supplier on each order line to see information about the variance




- Change the UOM by double clicking on the order line and editing in the detail window.
- Change the quantity either by editing directly in the grid or editing it in the detail window.

## The supplier changes the Item Description

Variance on the item description is ignored by TM Procurement, but you will of course see this in the variance report received for ShipServ.

## The supplier gives a discount on prices

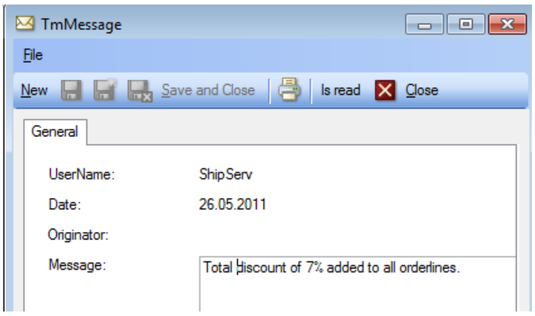
If there is a discount of total price of the order, this will be converted to order line discount.

Example: If each item has an original discount of 6%, the supplier says that you will get an additional 7% off if you order all items from this vendor.

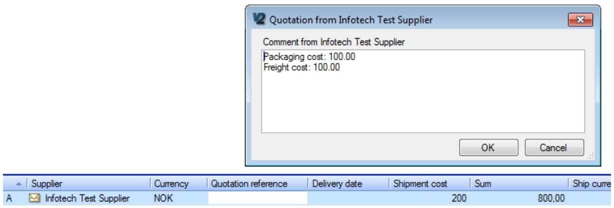
This will show in TM Procurement as 12,58% discount on the order line.

| Price | Discount | w/disc |
|---|---|---|
| 100,00 | 12,58 | 87,42 |

You will also receive a message about this in the "Message" tab.



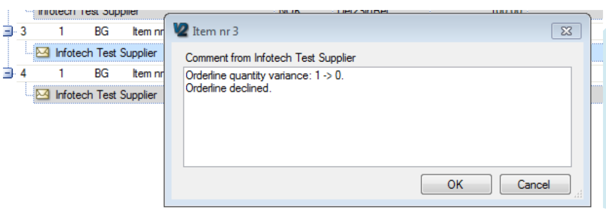

## The suppliers add Freight and Packaging costs




Packaging and freight costs will be summarized in the "Shipment cost" column, and the variance comment can be found by double clicking on the envelope to the left of the supplier name on the "after quotation" tab.

## The supplier declines to quote on order lines

If the supplier declines an order line, this is indicated with an envelope to the left of the supplier name on the order



line in the “After quotation” tab. Double click on the envelope to see the variance.

### The supplier declines to quote an order.

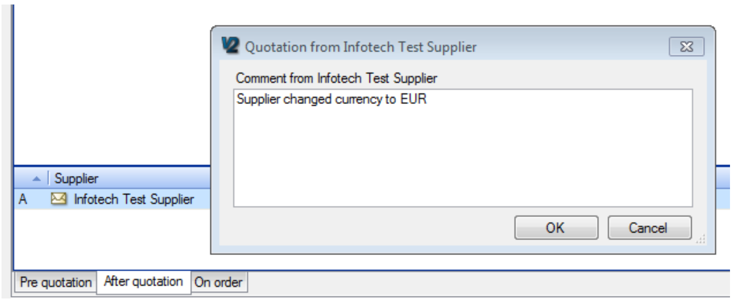
TM Master v2 doesn’t receive information about declined quotes, so the variance is only in the received e-mail from ShipServ

### The supplier declines to receive a purchase order

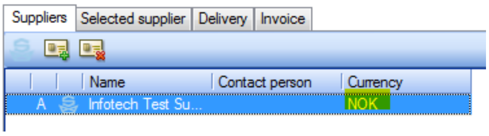
TM Master v2 doesn’t receive information about declined orders, so the variance is only in the received e-mail from ShipServ

### The supplier changes the order currency

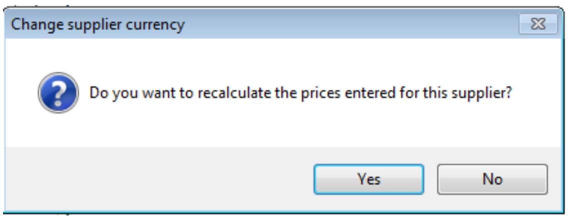
Double click on the envelope to the right of the supplier name in the “After quotation” sub tab




Select the “General” tab and double click on the currency of the supplier




Select the correct currency for the quotation, and click “OK”. When questioned if you want to recalculate the prices, select “No”.




### The supplier changes price on order lines for direct purchase orders

If you send a direct purchase order without sending a request for quotation first, the variance of the order line price will be added as an orderline comment

### The supplier sends purchasing information

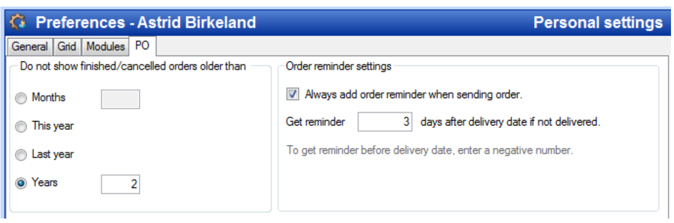
Purchasing information, such as Terms of payment and terms and conditions will be imported in the “Messages” tab.

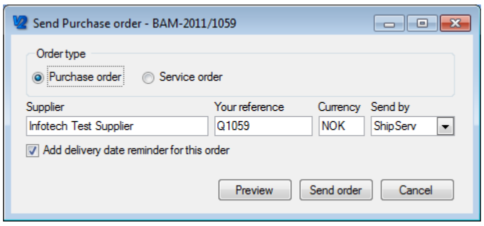
## Handle reminders

### Automatic reminders

If you want a reminder if the order has not been delivered (The order has not attained the status of “Received”) within XX days after the agreed delivery date, you can set this up automatically.

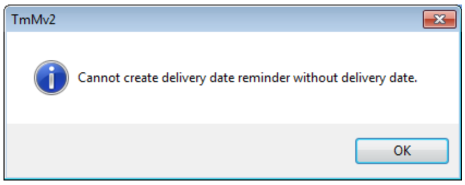
[My Place] – [Preferences]

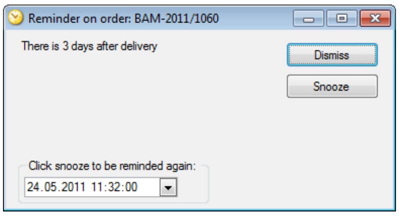





You will notice when sending the order, that “Add a delivery date reminder for this order” is preselected.

If you do not have a delivery date, you get a notification that the reminder can’t be set:

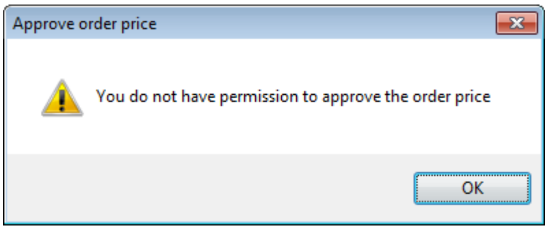



You then get a popup when the order is overdue. You can dismiss this reminder, or select to snooze it to a time of your choice.

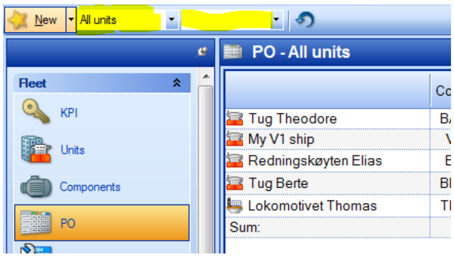
## Use approval level on a daily basis

When you have an order where the total price is below the approval level, you can approve the order as normal. If you try to approve an order with a total price more than your level, you are informed that you do not have permission to approve it.

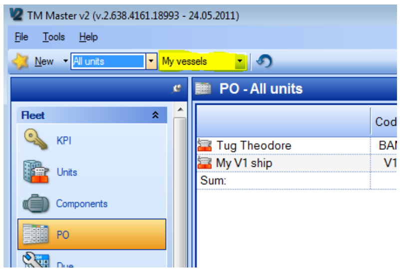



## Personal unit collections

It is possible to have your own collection of vessels, so you can view only “your vessels” in Fleet – PO”




As default you will see all vessels across the fleet, or the unit groups defined by the system administrators.



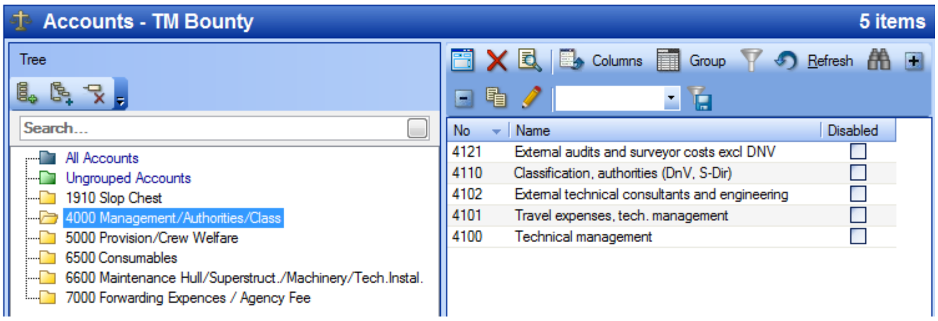

If you select your collection of vessels instead, you only see “your vessels”

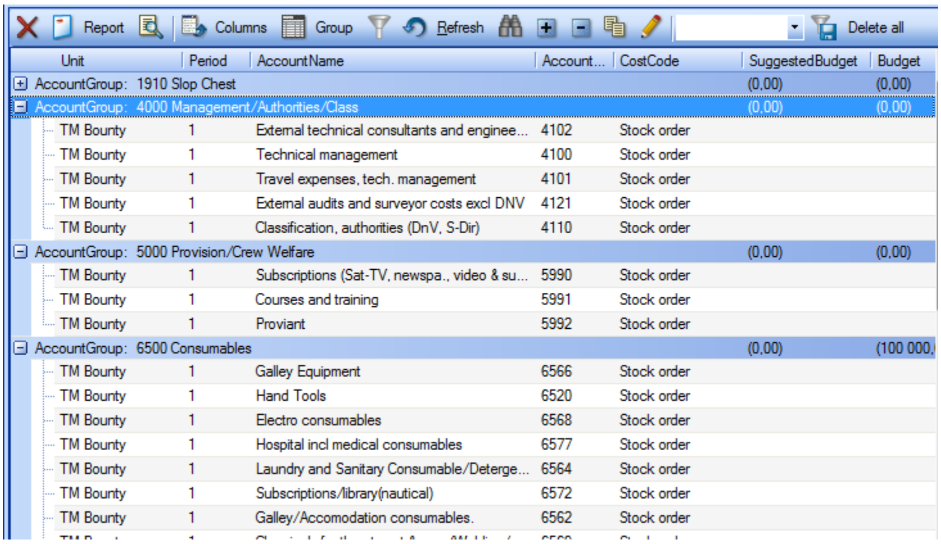
To set this up, select [My place] – [Preferences]. Select the “PO” tab. In the “Unit collection”, click on  (Add unit collection), and give a name to the collection. (“My vessels”)

In the left pane, select one of the vessels in the collection and move it to the right pane by clicking on >>. Repeat until all your vessels are moved. Remember to save your changes in the top left corner; otherwise the collection will be empty when you navigate to Fleet - PO.

## Budget and accounts

Accounts and budgets are connected. The “Account module” is where you add[46], disable and delete accounts. You organize the accounts into “Account groups”, and the budget will by default be grouped into these groups. [47]




The orders connected to the different accounts/cost codes will be listed below each account. The budget has to be entered at the office, but the vessel can suggest the amount on the different budget posts.

Budget = The budget amount on that account

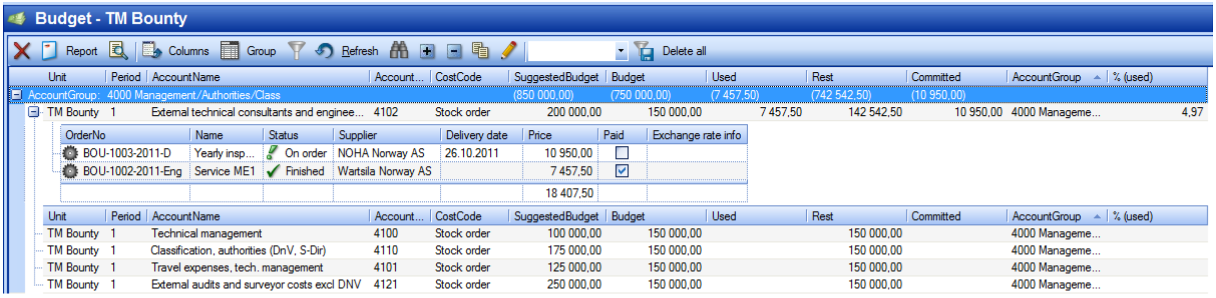
Used = The sum of the orders that has been paid

Rest = Budget – Used

Committed = The sum of the orders that are in the pipeline with status between OnOrder and Finished (An order is “Committed” the moment it is “OnOrder” and will be “Used” when it has the status “Paid/Finished”)

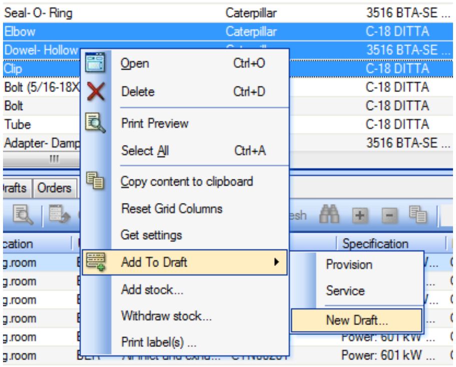
$$\% \, used = \frac{Used}{Budget} * 100\%$$

[46] It is possible to import accounts from Excel. Ask Tero Marine for a template.
[47] It is only possible to delete accounts that are not connected to active orders. You have the possible to disable accounts that are on active orders to avoid that anyone uses them.

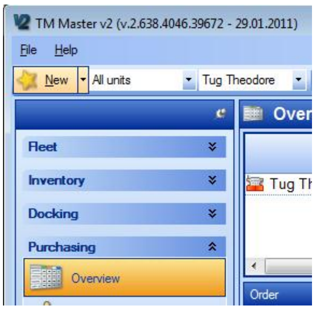

Budget - TM Bounty
Report
Columns
Group
Refresh
Delete all
Unit | Period | AccountName | Account... | CostCode | SuggestedBudget | Budget | Used | Rest | Committed | AccountGroup | % (used)
AccountGroup: 4000 Management/Authorities/Class (850 000,00) (750 000,00) (7 457,50) (742 542,50) (10 950,00)
TM Bounty 1 External technical consultants and enginee... 4102 Stock order 200 000,00 150 000,00 7 457,50 142 542,50 10 950,00 4000 Manageme... 4,97
OrderNo | Name | Status | Supplier | Delivery date | Price | Paid | Exchange rate info
BOU-1003-2011-D Yearly insp... On order NOHA Norway AS 26.10.2011 10 950,00
BOU-1002-2011-Eng Service ME1 Finished Wartsila Norway AS 7 457,50
18 407,50
Unit | Period | AccountName | Account... | CostCode | SuggestedBudget | Budget | Used | Rest | Committed | AccountGroup | % (used)
TM Bounty 1 Technical management 4100 Stock order 100 000,00 150 000,00 150 000,00 4000 Manageme...
TM Bounty 1 Classification, authorities (DnV, S-Dir) 4110 Stock order 175 000,00 150 000,00 150 000,00 4000 Manageme...
TM Bounty 1 Travel expenses, tech. management 4101 Stock order 125 000,00 150 000,00 150 000,00 4000 Manageme...
TM Bounty 1 External audits and surveyor costs excl DNV 4121 Stock order 250 000,00 150 000,00 150 000,00 4000 Manageme...

# How to….

## .. add a new draft




The easiest way to add a new draft when you want to purchase spare parts and consumables is to work in the Component/Spare parts/Catalogs module and highlight the items you want to buy.

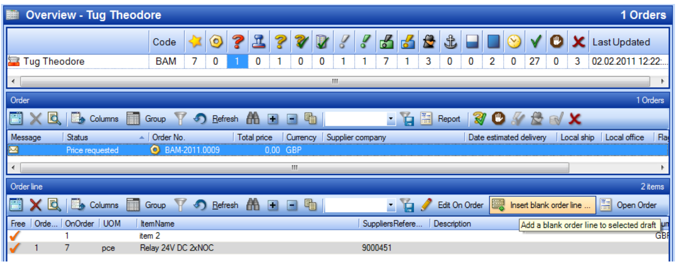



[Inventory]-[Spare parts ]. Select the spare parts you want, and right click in the highlighted area. Select "Add to draft" – New draft", and give a suitable name for the draft

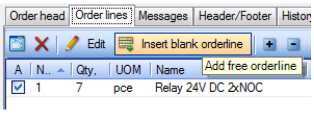
It is also possible to click add an empty new draft by select " New" in the Purchasing module

## .. add extra items to an order

For those not using TM Procurement, it is not possible to add extra order lines[48] in TM Master v2 after the draft has been approved. It has to be done in TM Procurement, TMPO, ShipNet or similar systems.

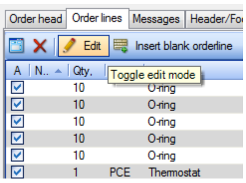



In TM Procurement, adding extra items to a requisition can be done:

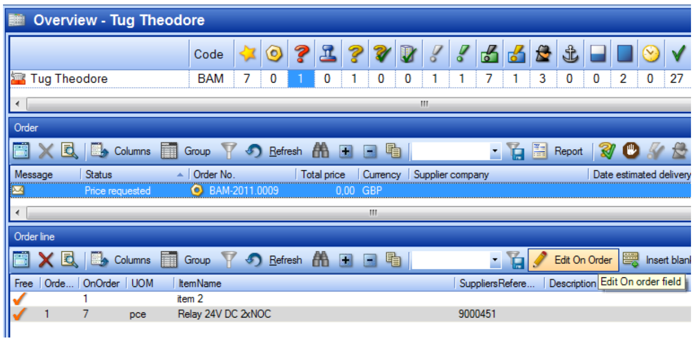



[Purchasing]-[Overview], double click on the order to open the detail window. Select the "Order lines" tab, on the "Requisition" sub-tab. Click on "insert blank orderline". It is also possible to do this in the overview window, by clicking on "Insert blank order line" in the "Order line" pane

## .. change quantity of order line items




If you want to change the quantity of how many items you want to order, it is possible to do so in both the detail window of the order, and in the overview window..

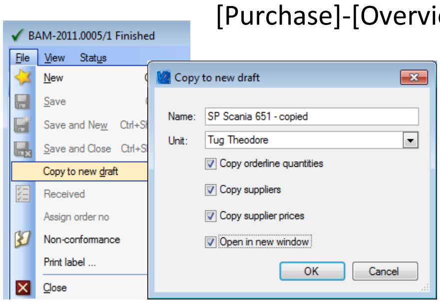



Select the "Order lines" tab, with the "Requisition" sub tab active, and click on "Edit"

It is also possible to do this directly in the overview window, without having to open the detail window of the requisition

48 Free order lines only

## .. copy order

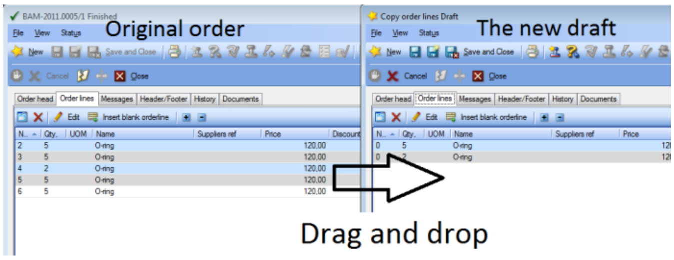



[Purchase]-[Overview]. Open the order you want to copy[49]. On the file menu of the order, select “File” – “Copy to new draft” and tick the information you want to include in the new draft.

## .. copy orderlines from one order to a new draft

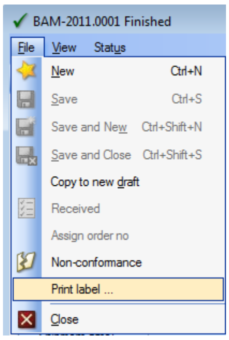
[Purchase]-[Overview]. Open the order you want to copy from, and select the “Order lines” tab.

Add a new draft (or open an existing draft) and select the “Order lines” tab. Organize the two draft-windows side-by-side. Select the items you want to copy, and use “drag-and-drop” from the original order to the new draft.



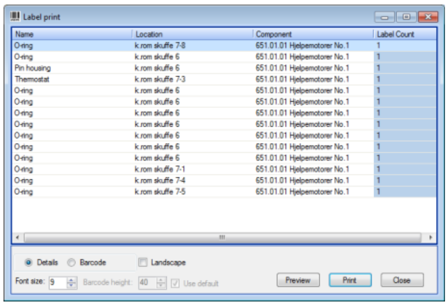

## .. print labels for the items

[Purchasing]-[Overview], open the order you want to print the labels from.




Click on “File” – “Print label....”

Choose what kind of label you want, with or without barcode


## .. add attachments like emails to history

[Purchasing]- [Overview]

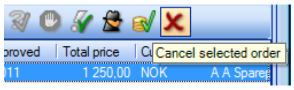

If you receive e-mails regarding the PO, it is possible to use “drag-and-drop” to import it into the “Document” tab. The “History” tab would be updated automatically.

## .. delete a PO

Everyone with access to “Delete” can delete his own drafts. Anyone with access to “DeleteAllDrafts” can delete drafts regardless of who has created the draft. If the draft has an assigned Order number, it cannot be deleted, regardless of the status, it needs to be cancelled. Select the PO in the overview window, and click on

[49] It is possible to copy from other vessels

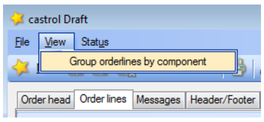
## .. cancel a PO

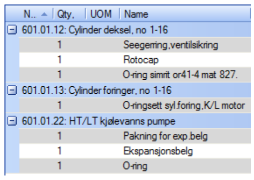



[Purchasing]-[Overview], select the order, and click on “Cancel” . Type in the reason for why you are cancelling the order, and click “OK”. The requisition changes status to “Cancelled”.

## .. view/group orderlines by the component

[Purchasing]-[Overview]. Double click on the order to open the detail window, and select the “Order lines” tab.

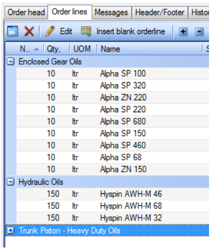


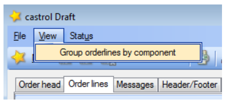

As default, all items are listed regardless of which component they belong to:

Open the menu and select “View” –“Group orderlines by component”

## .. view/group consumables orderlines by the catalog name




[Purchasing]-[Overview]. Double click on the order to open the detail window, and select the “Order lines” tab.

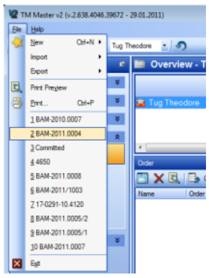



As default, all items are listed without information about the catalog groups.

If you want to have the order lines grouped by the catalog name, open the menu and select “View” –“Group orderlines by component”.

## .. find the last 10 opened POes

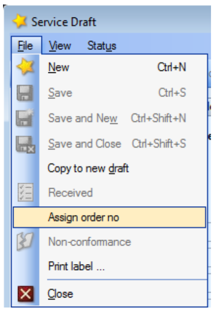
[Purchasing] – [Overview].




Click on “File”. The last 10 POs that you have worked with, will be listed

## .. assign order number to a draft

Some vessels prefer to use one “Open PO” in order to deal with the ship chandler, where items are added and received during the month, and by the end of the month, the PO is approved as a local ship order, and received.



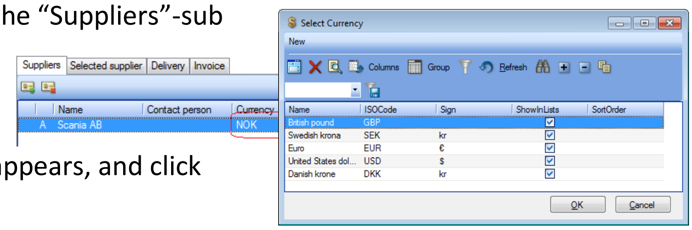

The ship chandler would than need a PO number, and to be able to add further items, the PO number needs to be assigned to a draft.

[Purchasing]-[Overview]. Open the draft, or add a new one.

From the file menu: File – Assign order no

## .. change the currency of a supplier for one order only

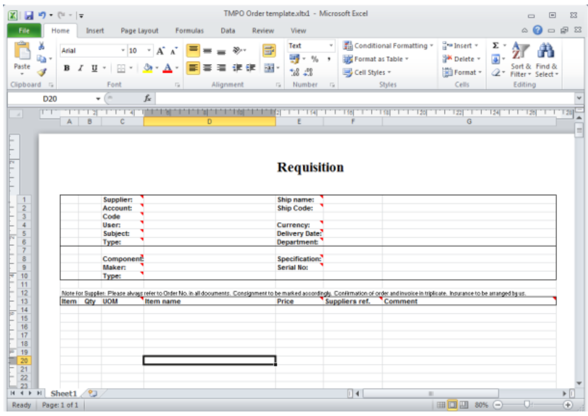
[Purchasing]-[Overview]. Open the requisition. In the “Suppliers”-sub tab. Double click on the “Currency” field of the supplier




Select the new currency in the new window that appears, and click OK[50]

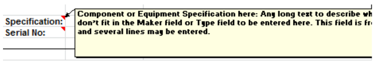
## .. import a requisition from a Microsoft Excel Spread sheet[51]

In cases where you want to order items for a new build where there is not yet a TM Master v2 database with spare parts and components, it is possible to order items via a Microsoft Excel spread sheet, where you manually type in the necessary information.




Open the “rfqecom.xls” template[52].

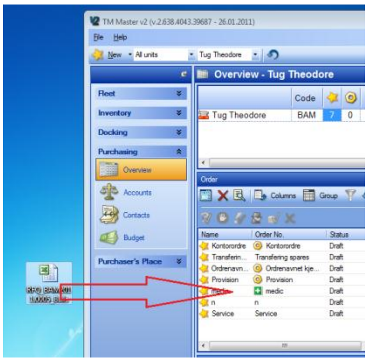
Fill in the necessary information and save the Excel sheet.



If you move the mouse over the comment label, you will see a description of what information is expected in the cell.

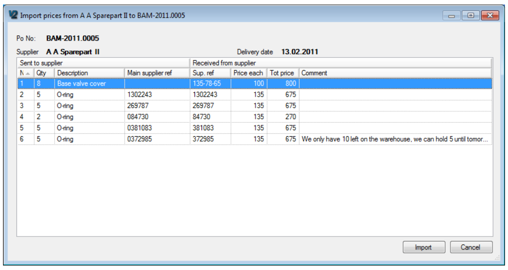
When you are finished filling out the excel worksheet, save it, and select [Purchasing]-[Overview]. Use “Drag-‘n-drop” of the Excel spread sheet onto the “Order”-pane in the overview window. TM Master v2 automatically generates a new draft based on the information.

## .. import prices via Microsoft Excel Work sheet from a supplier



When you have sent a price request to a supplier with XLS type, you receive a filled in excel sheet from the supplier which can be imported into TM Procurement.

Select [Purchasing]-[Overview]



Use “Drag-‘n-drop” of the Excel sheet onto the “Order”-pane in the overview window. TM Master v2 automatically updates the requisition with the prices in the Excel sheet.

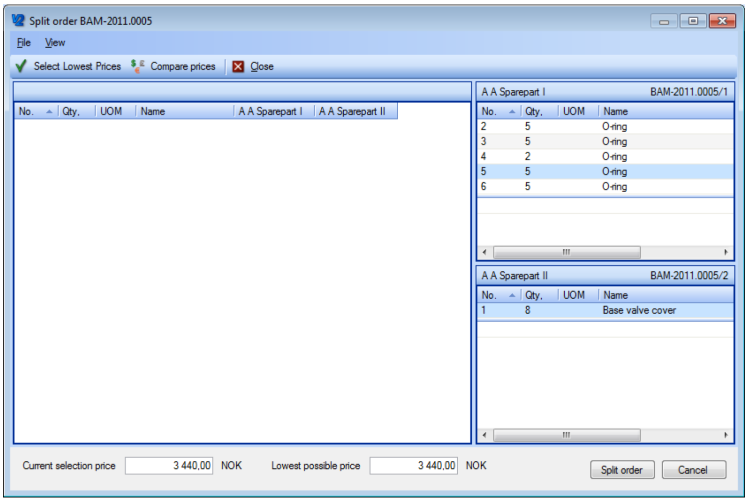
## .. change status without opening the detail window

Sometimes, it can be timesaving to change the status of the order without having to open the detail window of the order. Based on the

[50] Only currencies that have exchange rates, would be listed

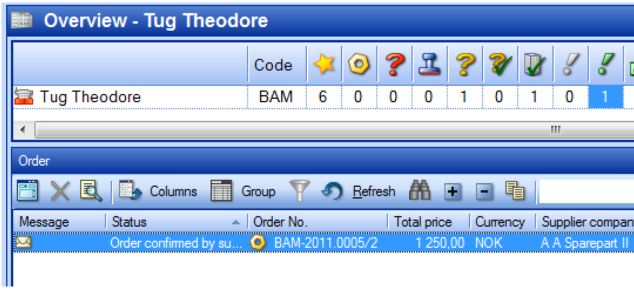
[51] All items will be imported as “Free orderlines”, and therefore there will not be aby automatic stock update

[52] For those using TMPO earlier, the file can be located in the common file\reports folder, or you can contact Tero Marine at support@teromarine.no and we will send it to you.



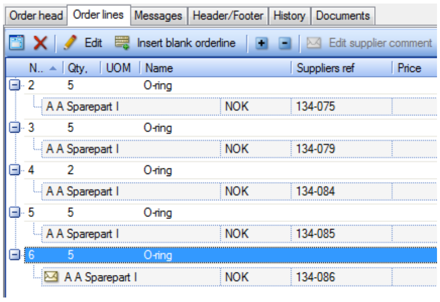

status it has, different possibilities are active.

## ...Print out the order from the overview window.




[Purchase]-[Overview]. Click on the order you want to print out, and click on "Report"

## ... Enter comments from a supplier

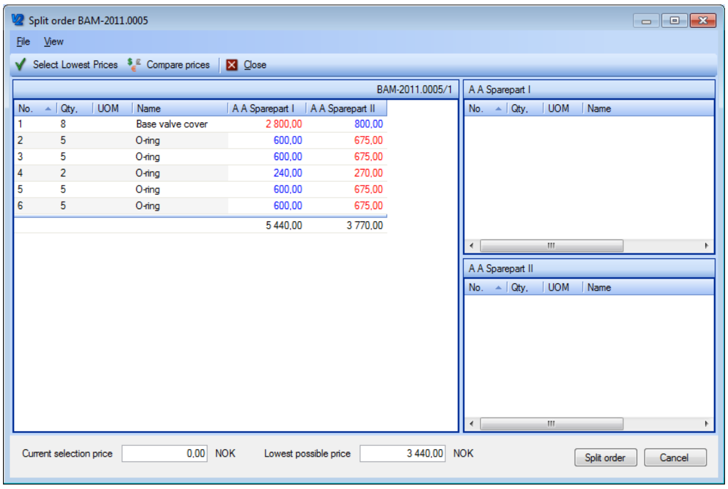



[Purchasing]-[Overview].

Open the order, and select the "Order lines"-tab, and the "After quotation" sub-tab.

If you see a in front of an orderline, it means that there is a comment from the supplier. You can read or edit the comment by selecting " Edit Supplier comment" from the horizontal toolbar.

## ... Split an order




It is possible to split an order. It can be because the items should be on different accounts, or maybe the supplier has high prices on some items, and lower prices on other items.

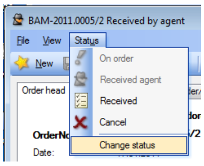
[Purchasing]-[Overview], double click on the order to open the detail window.

Click on . 

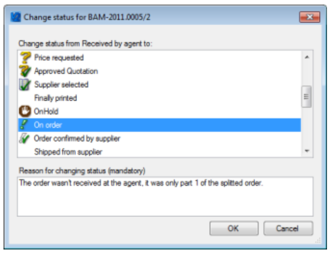

Use "Drag-and-drop" of order lines to assign the different order lines to the different suppliers.

When you click on "Split order", the original order is seperated into two new orders, with a new suffix to the ordernumber (BAM-2011.005/1 and BAM-2011.005/2). Continue with the order processing as usual.

## … Change status to a previous status




Sometimes you need to change the status to an earlier status in the order flow, either because you made a mistake, or you have forgotten some information on fields that are locked for editing in a later status.




[Purchasing]-[Overview]. Double click on the order to open the detail window, and select "Status" from the File menu. You must type in a reason for why you have changed the status.

## … Toggle the "OnHold" status

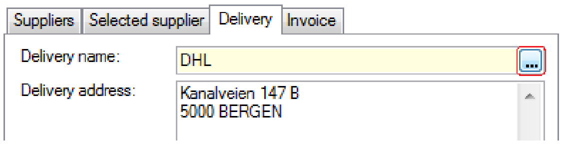
"On hold" is a status used for those requisitions where you want to have them inactive/passive until it is time to buy them. An example can be in situations where the budget for this year is overspent, and you want to wait until the next budget year to purchase the items in the order.

[Purchasing]-[Overview], select the order, and click on . The requisition changes status to "On hold", and is moved into the "On Hold" category in the "overview" window.

When you want to reset the "On hold" status and activate the order again, select the "On Hold" category, and click on  again. The requisition is then activated again with the same status as it was before it was put "on hold".

## … Change delivery address

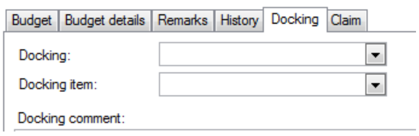
[Purchasing]-[Overview], select the order




If you have a default delivery address[53], the address is automatically filled in. If you have to change it, open the order, and select the "Delivery" sub tab, and click on 

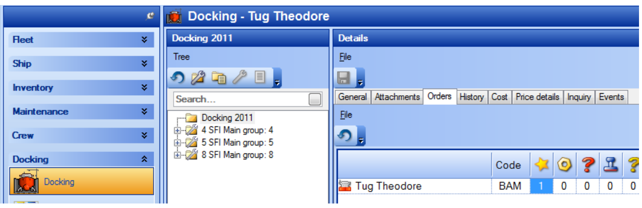
## … Connect a PO to a docking

[Purchasing]-[Overview], select the order and double click on it to open the details window




In the "Order head" tab, select the "Docking" sub tab.

Select "Docking" and "Docking item" from the drop down lists.



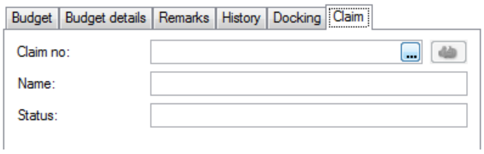

The PO will now be available in the docking module

[Docking]-[Docking], select the "Orders" tab in the right pane.

[53] This is setup in [Fleet]-[Units], Select the address in "Default delivery" on the "General" tab.

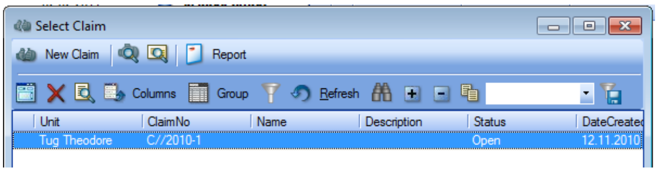
## … Connect a claim to a PO

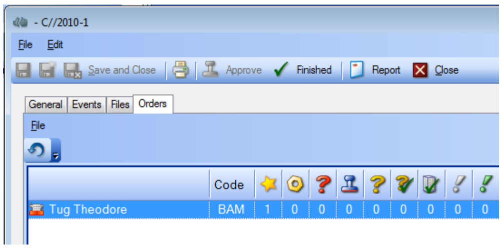
[Purchasing]-[Overview], select the order and double click on it to open the details window




In the “Order head” tab, select the “Claim” sub tab.

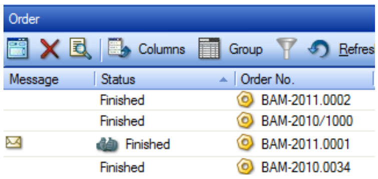
Click on and select the claim you want to connect it to[54]




The PO will now be connected to the claim

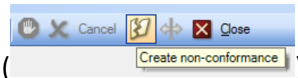
[Inventory]-[Claims]. Double click on the claim to open the details window and select the “Orders” tab

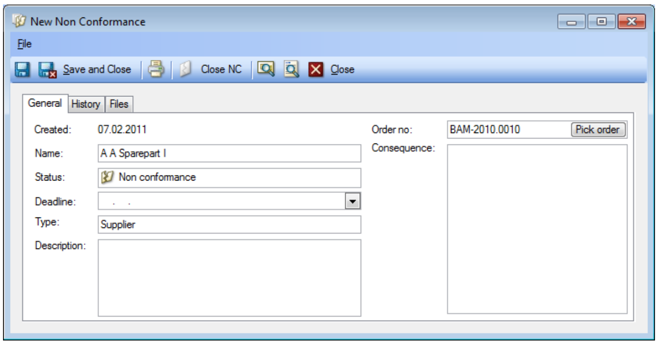



You can visually see if an order is connected to a claim in the overview window.

## … Add a Non Conformance (NCR) to the order

[Purchase]-[Overview]. Open the order you want to connect to the NCR. Click on “Create non-conformance”

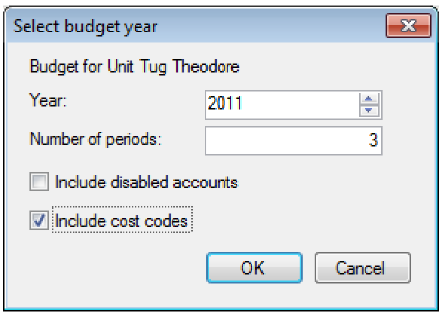
(  ).


The “New Non Conformance” window opens where you can handle the NCR further[55].

## … Enter a new budget

[Purchasing]-[Budget]. Click on “New”




Select the year you want to add, and tick if you want to include disabled accounts and cost codes

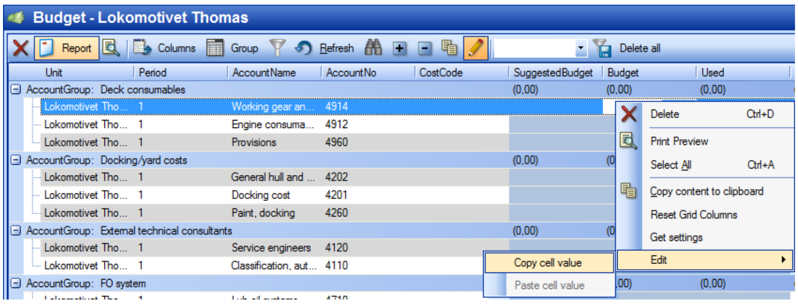
Click on , and start typing in the amount in the “Budget” column. [56]

---

[54] You can also add a new claim from this window.
[55] See TM Master v2 user manual for further information about dealing with NCR.
[56] If you have used anything from the budget not included in orders from TM Procurement, you can enter the amount in “Used”

## ... Mass update the budget

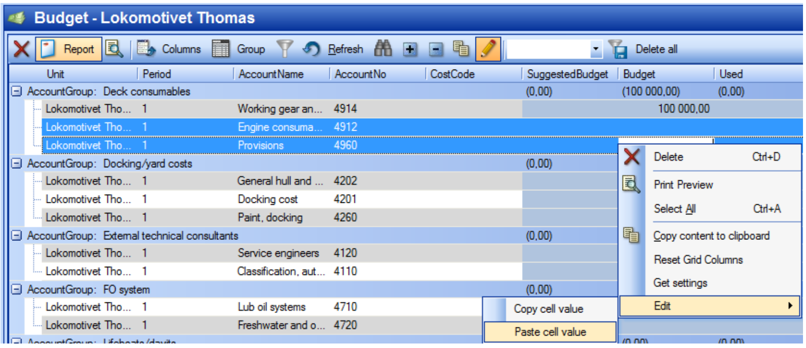
If you have a montly budget, you then usually have the same amount for each period, or you may have the same amount for several budget enteries. It can then be timesaving to mass update the budget instead of having to type in every budget entry.

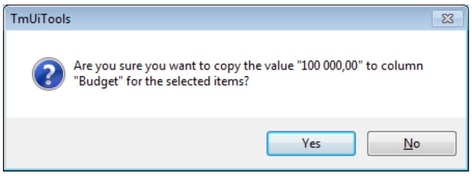


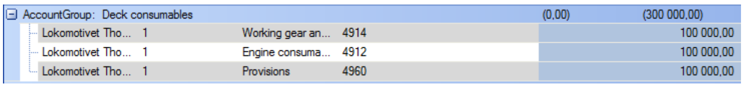

Click on the  and type in the budget value in the entry you want to copy from..

Select the entries you want to update with the cell value, right click on the high lighted area and select “Edit” – Paste cell value”

Click “Yes” to confirm that you want to copy the cell value. The values are updated in the budget



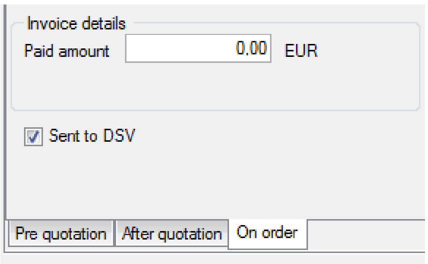




## ... Rectify an order that has been withdrawn from wrong account

Open the order and untick “Paid”. Click “Yes” to confirm that you want to set the order as not paid. The “Set order paid” function is activated again.


Click on the “Paid” button and select the correct account/sum, and next the correct cost code and budget period for the order.

### … Resend an order to DSV




Open the purchase order and select the “Order lines” tab, and the “On Order” sub tab. Remove the tick to the left of “Sent to DSV”, and the purchase order will be sent to DSV in the next replication loop.