



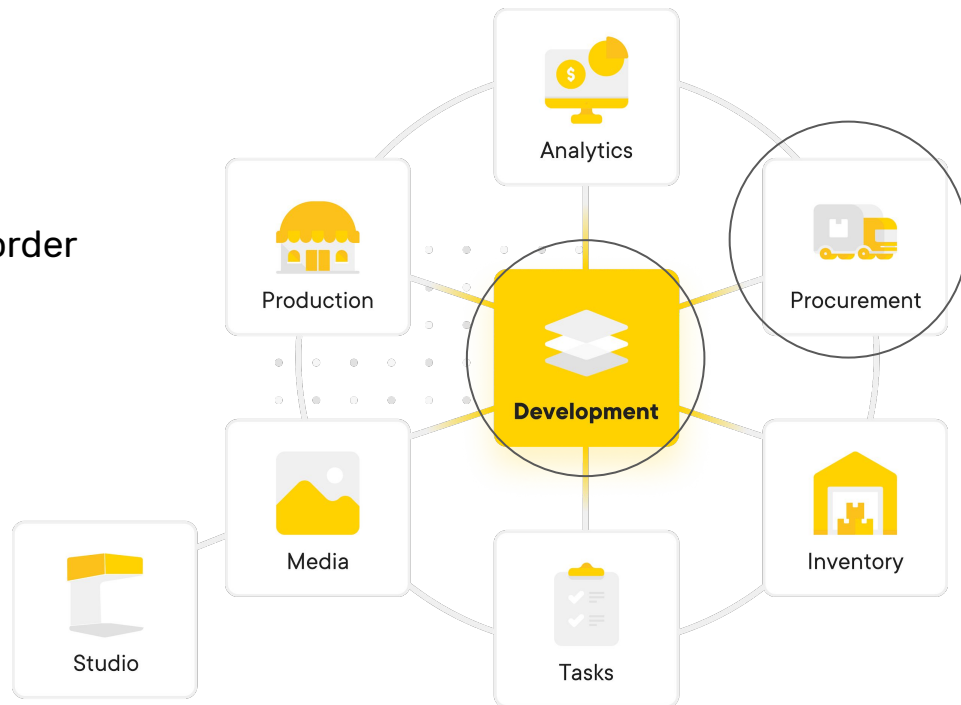
Webinar: Procurement

Ordering and registering deliveries in Apicbase



What do you need?

- Product + procurement module
- Type user: library user with edit permissions OR outlet user with order permissions.



How to ask questions during the webinar?

Webinar is one-way, but you can ask questions in the Q&A section below. This can be done anonymously or with your own name. We will answer the questions at the end of the webinar. Very specific cases, will be discussed afterwards.

Set supplier information

Minimum information required:

- E-mail address

Additionally (if applicable):

- Customer number per outlet
- Minimum order amount (only warning, no blocking)
- Fixed delivery days

Set delivery details per outlet

Is on the order overview for the supplier:

- Sender name
- Delivery address
- Procurement responsible (e-mail)

Create order + send

- Use filters to quickly find products, for example per supplier.
- You can create an order directly via “create order” or via “bill of materials” for a recipe or menu.
- Do you often order the same? Create an order list!
- Par = level to which you want to replenish the stock, maximum order quantity
- Minimum stock = critical stock
 - Turn on notifications when minimum stock is reached.
- Aggregated stock = all stock for this item, the orderable and non-orderable packages. For example, we have 0 crates of beer, but still 12 bottles of beer. I can only order a crate of beer, not a single bottle, the aggregated stock will be 0.5 crates of beer.

Register a delivery

- Important to check delivered quantities and prices.
- Invoice information can be added afterwards.
- Delivery date and time is only informative, no recalculation of stock in the past is made.
- Update price = Update price at ingredient level for the next order.
 - Not recommended for temporary promotions.
- Save delivery = add delivered items to stock at the price set, this cannot be undone!
- Procurement report = summary of the delivered orders over a certain period.

External order?

- If you want to enter a delivery in Apicbase so that it is added to your stock, without first sending an order email.
 - Important: stock item must be known to the selected supplier in the system!

Support links

[Change user permissions](#)

[Assign permission roles to outlet users](#)

[Set supplier information](#)

[Generate a bill of materials for a recipe](#)

[Generate a bill of materials for a menu](#)

[Create and send a purchase order](#)

[Register a delivery](#)

[Create order lists](#)

[Set par and minimum stock](#)

[Receive an external order](#)

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