

AssetOptics Quick Start Maintenance, Repair & Operations (MRO) Purchasing Training Exercises

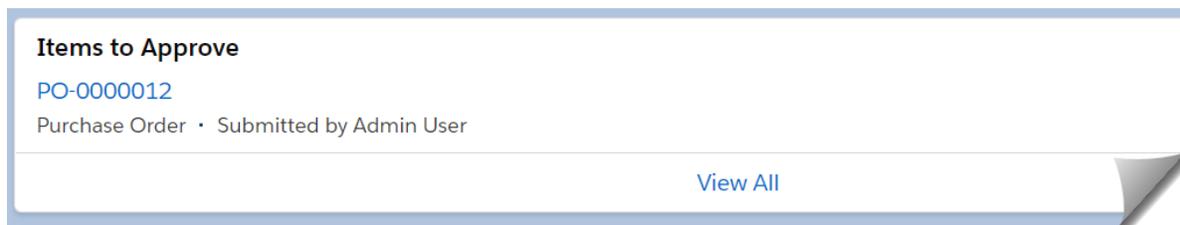
Prior to completing these training exercises, please ensure that you have a user account in an AssetOptics training environment or sandbox. If you do not have a user account, please submit a case via the Support Community at www.assetoptics.com

For these exercises you will be acting as a maintenance supervisor in a fictional brewery. Partial data have been preloaded into a demo org for this purpose. You will be instructed to both review existing records and create new ones to familiarize yourself with the concepts being presented. Save your work as you go.

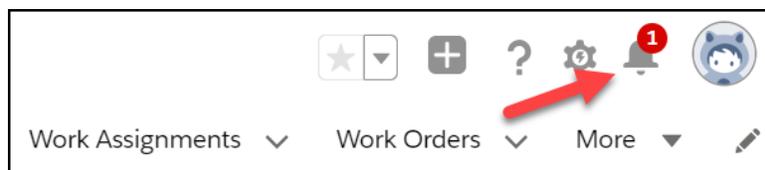
In this exercise you will learn about the following: approving Purchase Orders (PO), updating statuses of POs, and receiving items to a PO.

Exercise: In the MRO Inventory Management exercise you created and submitted for approval a Purchase Request (or Purchase Requisition) with a single PO Line Item for one Canning Widget. Approval Processes, whether simple or complex, are defined under *Process Automation* in Setup. As a student user (with System Administrator privileges) in a training environment, you can approve your own requests.

Clicking on the **Home** tab in AssetOptics will display the Dashboard associated with your user profile, and any Items to Approve will appear on this page.



Also, while working within Salesforce you may receive a Notification in the upper right-hand corner of your screen telling you there is an item waiting for your approval. You can also setup e-mail alerts.



1. Select the Purchase Order and use the action button in the upper right-hand corner to **Approve** the PO (you may optionally add comments).
2. Again, open the Purchase Order and observe that the Status field now reads Approved, but this is a read only field. To release the PO, use the action button in the upper right-hand corner to

Update Status to Released.

Update Status for Purchase Order # PO-0000012

Current Status: Approved

* New Status

Canceled

Canceled

Ready to Release

Released

Select cancel to return.

* Continue / Cancel

Continue

Scenario: A few days have passed, and your shipment of new canning widgets has arrived.

- From the **Quick Links** Pane or **Related** Tab, select the PO Stock Item line. Use the **New Receipt** action button in the upper right-hand corner and enter the received quantity for this PO Stock Line.

 **PO Stock Items**

1 item • Sorted by PO Stock Item • Updated a few seconds ago

PO Stock Item ↑	Order Qty	Purchase UOM	Stock Item	Description	Unit Cost
1 PSI-0000021 	3	EA - Each	J20148	SCREW - Set	\$29.9900

An inventory transaction (i.e., Purchase Order Stock Receipt) is created for each receipt, and the On Hand Qty is increased on the Stock Item record. If your order were only partially fulfilled, you would create additional new receipts as your parts were received into inventory.

 **PO Stock Receipts**

2 items • Sorted by PO Stock Rcpt ID • Updated a few seconds ago

PO Stock Rcpt ID ↓	Transaction Type	Transaction Qty	Unit Cost	Transaction Amount	Tran
1 PSR-0000008	Receipt	3	\$29.9900	\$89.97	3/3
2 PSR-0000007	Receipt	2	\$29.9900	\$59.98	

[View All](#)

*A Purchase Order's Status should be **In Progress** when you are receiving PO Stock Items. If the Status does not update automatically, you can launch the **Update Status** flow to do so manually.*

The screenshot displays the AssetOptics interface for a purchase order. At the top, there is a navigation bar with buttons: '+ Follow', 'Edit', 'New Task', 'New Event', 'Add PO Stock Item', 'Update Status' (highlighted with a red box), and 'Print PDF'. Below this, the 'Owner' is identified as Joseph Edwards. The main content area is split into two columns. The left column shows details for the purchase order: Owner (Joseph Edwards), Buyer, Status (highlighted with a red box and labeled 'In Progress'), Release Date (6/23/2021), Storeroom ID, Plant 1, and Storeroom Description (Plant 1 - Maintenance Parts Storeroom). The right column contains several sections: 'Quick Links' with tabs for 'Chatter' and 'Activity', a 'Related List Quick Links' section with links for PO Stock Items (9), PO Misc Cost (0), Notes (0), Files (0), Purchase Order History (7), and Approval History (2); a 'Notes' section with a 'Notes (0)' button; and a 'Recent Items (3)' section showing a recent item with PO number PO-0000001 and Vendor SPX Corp.

4. Once you have received all PO Stock Items into inventory, use the action button in the upper right-hand corner to **Update Status to Completed**.