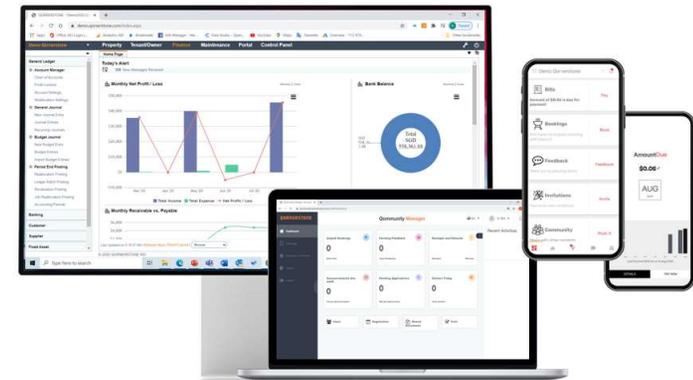




**QORNERSTONE**

Supported by:



Qornerstone Estate Platform

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## **Raising a Purchase Order**

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Version 1.2



# Agenda

The guide is for raising a Purchase Order (PO) in Cornerstone Estate (QE) Maintenance Module. The Guide will contain

1. Creation of a Work Costing.
2. Input work details , choose the work type/problem codes & others.
3. Assign personnel/supplier .
4. Optional : Tagged a Asset Code & Upload Documents ( Quotation, Documentation)
5. Appendix: Creation of a eFams Account for the Contractor

# Workflow 1. Create the Work Costing

## Step: Create a Work Costing

- Go to Work Order and click to on "Update Work Costing"^^
- The Work order is CSDEM/WO/22090026

^ This is assumed that quotation has been provided , user proceed to update the work costing

The screenshot displays a software interface for managing work orders. The top navigation bar includes tabs for Property, Tenant/Owner, Finance, Maintenance, Portal, and Control Panel. The main content area is titled 'Work Order : CSDEM/WO/22090026 x' and contains a table with the following data:

Work ID	Problem Code	Request Date/Time	Status
CSDEMWO/22090026	AHU faulty	08 Sep 2022 10:28	Work In-Progress

Below the table, there are several action buttons: Update Work Costing, Update Personnel Acknowledge, Update Work Status, Update Work Details, Update Rating & Remarks, Create Duplicate Work Order, Re-route Work Order, Copy Work Order, and Send Email. A hand cursor is pointing to the 'Update Work Costing' button.

The 'Update Work Costing' form includes the following fields:

- Property Name: CSDEMO
- Work Date/Time: 08 Sep 2022 10:28
- Valid Property Range: [Empty]
- Rating Remarks: [Empty]
- Requestor Details: Requestor <User> Catch780, Unit No #, Address [Empty]
- Fault Location: Administrative Office
- Email Address: catch780@gmail.com
- Send To Requestor: [Email Address] [Mobile Number] (unchecked)
- Send To Requestor on Work: [Email Address] [Mobile Number] (unchecked)

At the bottom of the form, there is a 'View' button and a status message: 'Last Updated by bigbird on 08 Sep 2022 14:01'. The bottom right corner has 'Edit', 'Other Actions...', and 'Close' buttons.

# Workflow 2. Input the Details

## Step: Summary View of Working Costing

- Click on the item Code and a drop option is provided
  - a) Select Item Code ( Created under
  - b) Select SOR item Code
  - c) Enter Item Code

For a & b, the former is referring to inhouse inventory and latter is referring supplier's schedule of rates.

For item C: this is free text enabling the using to manually input

The screenshot displays the 'Update Cost / Inventory Details' form in the QORNERSTONE application. A modal dialog box titled 'demo.qornerstone.com says' is open, prompting the user to 'Enter Item Code (Max 20 chars)'. The form includes the following fields and options:

- Item Code: A dropdown menu with a hand cursor pointing to it.
- SOR Item Code: A dropdown menu with a hand cursor pointing to it.
- Budget Code: A dropdown menu with a hand cursor pointing to it.
- Quantity/UOM: A text input field with a hand cursor pointing to it.
- Purchase Price/Adj%: A text input field with a hand cursor pointing to it.
- Selling Price/Adj%: A text input field with a hand cursor pointing to it.
- Chargeable: A checkbox that is checked.
- To Bill: A checkbox that is checked.
- Remarks: A text area with a maximum of 300 characters.
- Buttons: 'Add Item' and 'Cancel'.

The table at the bottom of the form has the following columns:

SN	Item Code / Description	Budget Code	Quantity / UOM	Purchase Price / Adj%	Amount (Cost)		
	Remarks	Parent Code / UOM	GST	To Bill	SOR Item Code	Selling Price / Adj%	Amount (Price)

At the bottom of the form, there are 'Sub-Totals (Cost) (SGD)' and 'Sub-Totals (Price) (SGD)' both showing '0.00'. The footer includes '© 2022 QORNERSTONE INC' and 'User : Demo (Administrator - Demo - Demo) | Friday, 9 Sep 2022'.

## Workflow 2 (Cont'd) Input the details

### Step: Creating the details for the Working Costing

- Enter the Item Code (Free Text)
- Update the Quantity
- Update the Purchase Price
- Input the description in the remarks
- Click on Items and the details are auto-populated in box (highlighted in Red)
- Click on Save (bottom right hand corner) once all the details are completed.

### Optional for inputs

- Budget Codes (if this is set up in Maintenance Finance)
- Selling Price (if this is to bill a customer)

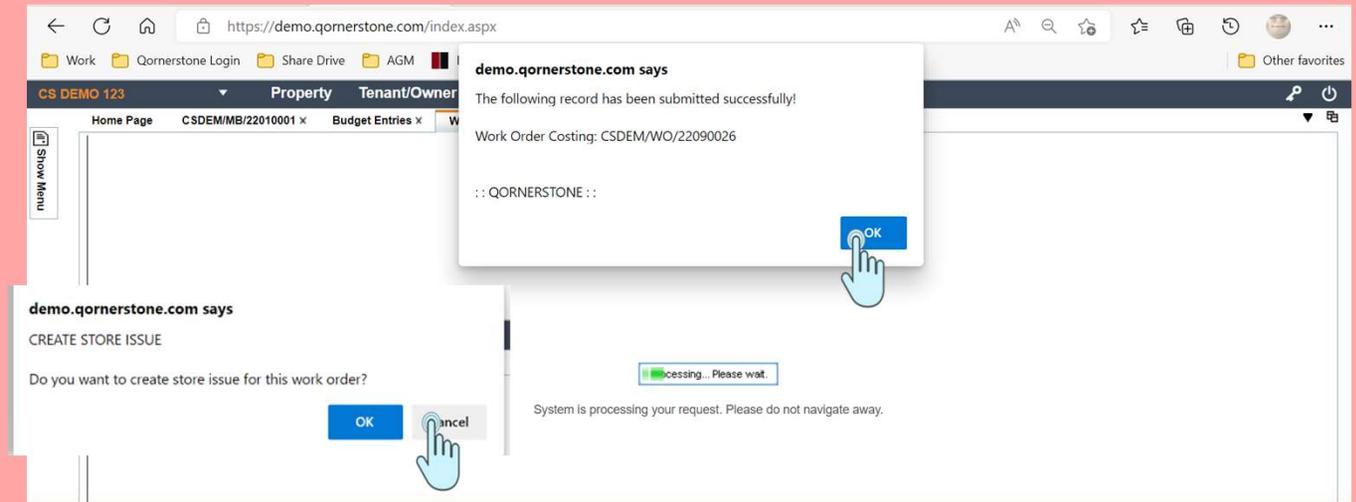
The screenshot shows the 'Update Cost / Inventory Details' form in the QORNERSTONE software. A modal dialog box is open for entering an item code. The form includes fields for Item Code, SOR Item Code, Budget Code, Remarks, Quantity/UOM, Purchase Price/Adj%, and Selling Price/Adj%. A table at the bottom shows a list of items with columns for SN, Item Code / Description, Budget Code, Quantity / UOM, Purchase Price / Adj%, and Amount (Cost). A red box highlights the table area.

SN	Item Code / Description	Budget Code	Quantity / UOM	Purchase Price / Adj%	Amount (Cost)		
	Remarks	Parent Code / UOM	GST	To Bill	SOR Item Code	Selling Price / Adj%	Amount (Price)
1	<Enter> Compressor Replace of Compressor	FM004 Aircon	1	2,000.00 0.00	2,000.00	0.00 0.00	0.00

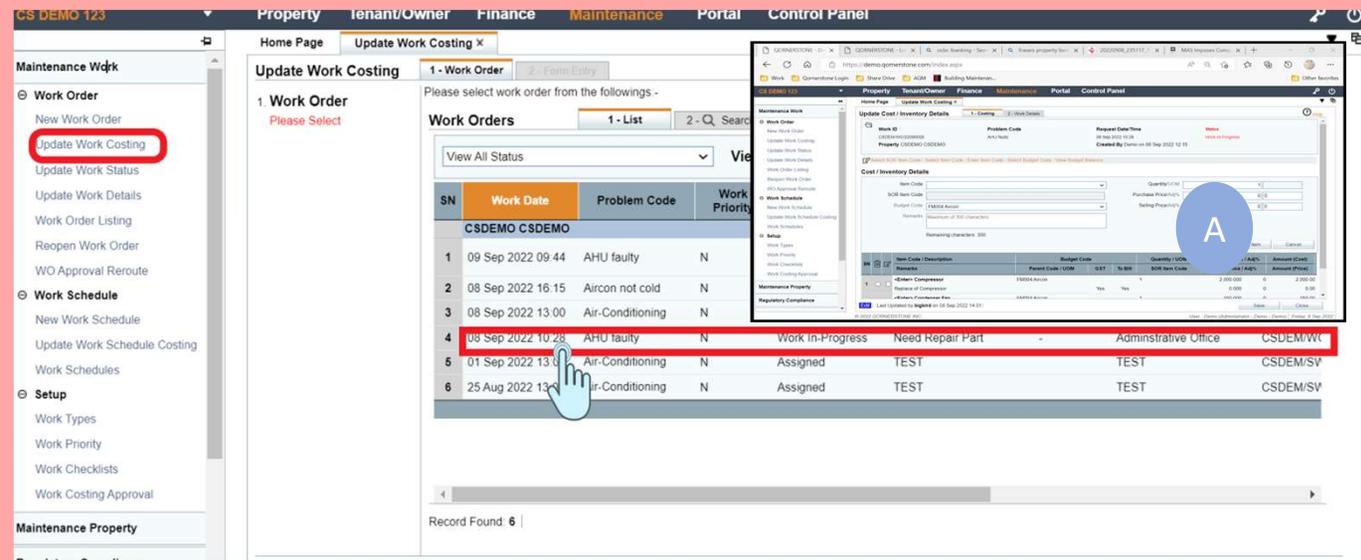
# Workflow 3. Saving the Work Costing

## Step: Saving the Work

- Upon clicking on save , a pop up box will appear, user can click on the Ok Button
- A second pop up panel will prompt user the need to create a store issue . User can click on the cancel button to ignore



- Go to Maintenance -> Maintenance -> Update Work Costing and click .
- The list of work orders will be shown.
- If user need to amend the details of work costing, select the work order to amend and click on it
- A new Page will be shown (A)



# Workflow 4. Raising the Purchase Order

Go to Maintenance -> Maintenance Supplier -> Purchase Manager -> New Purchase Order

- Click on New Purchase Order
- Search For the Supplier ( by keying in the name) or find by alphabetical order ( shown in A)

The screenshot displays the 'New Purchase Order' workflow in the QORNERSTONE application. The interface is divided into several sections:

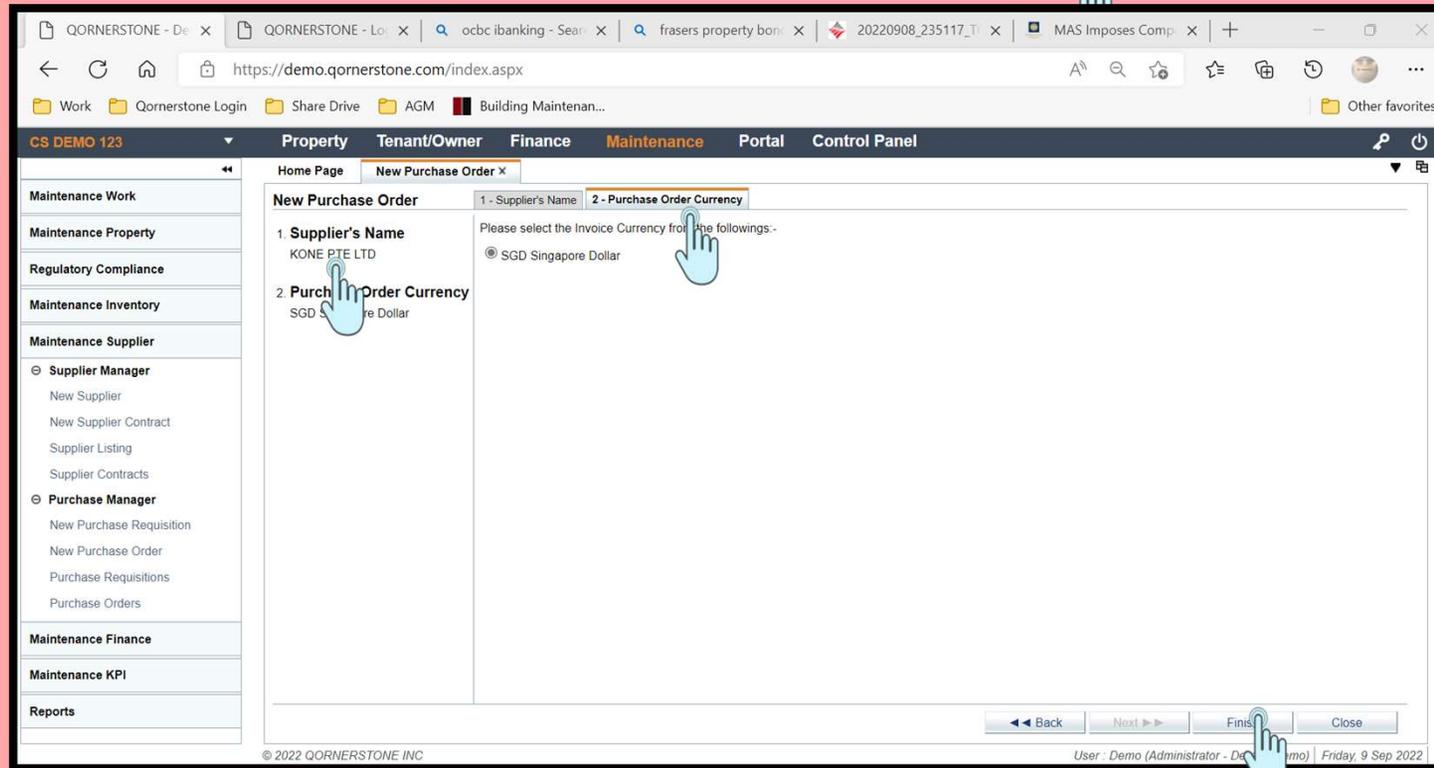
- Navigation Menu (Left):** Includes 'Maintenance Work', 'Maintenance Property', 'Regulatory Compliance', 'Maintenance Inventory', 'Maintenance Supplier', 'Supplier Manager', 'Purchase Manager', 'Maintenance Finance', 'Maintenance KPI', and 'Reports'. A hand cursor is shown clicking on 'New Purchase Order' under 'Purchase Manager'.
- Main Content Area:** Features tabs for 'Home Page', 'Approving Officer', 'User Roles', 'Purchasing Approval', and 'New Purchase Order'. The 'New Purchase Order' tab is active, showing two steps: '1. Supplier's Name' and '2. Purchase Order Currency'.
- Supplier Selection:** A search box labeled 'Find What:' contains the text 'Kone'. Below it is an alphabetical index 'All | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z'. A hand cursor is shown clicking on the letter 'K'.
- Supplier List Table:** A table with columns 'Contact Code', 'Supplier Name', and 'Phone'. The table contains the following data:

Contact Code	Supplier Name	Phone
CS/22003	test	
CS/22004	IRAS	
CS/22005	Ingenie M&E Services Pte Ltd	
CS/22006	Ah CHuan pte ltd	
CS/22007	TEST	
CS/22008	Gary & Lee Pte Ltd	98777777
CS/22009	Q Vendor Demo	
CS/22010	MARY	
GARY	Ah CHuan	1234567
S00001	IBASE TECHNOLOGY PTE LTD	65572516
S00003	BULLS-EYE SECURIRY SERVICES PTE LTD	6844-4704
S00004	ABJ PTE LTD	6255-5333 / 6382-2698
S00005	GREAT EASTERN GENERAL INSURANCE LIMITED	6346-2888 / 6227-2888
- Footer:** Includes '© 2022 QORNERSTONE INC' and 'User : Demo (Administrator - Demo - Demo) Friday, 9 Sep 2022'.

# Workflow 5. Raising the Purchase Order

## Purchase Order Currency

- Once the current Intended Supplier is chosen, it will go to Tab 2. Purchase Order Currency
- Currently, the default currency is SGD
- Click on the Finish Button at the bottom right corner



# Workflow 6. Raising the Purchase Order

## Retrieve the Work Order Item

- Continuing from Workflow 5 after click on the “Finish” Button, a new purchase order will open.
- Under Tab 1-General , user can input the details manually and add items into the box or go to “Other Action”, The options are provided
- a) Get the Purchase Requisition Items
- b) Get the Purchase Order Items
- c) Get Work Order Items
- d) Get Inventory Items
- For this guide, user will click on the “Get Work Order Items”
- A pop up box (A) will open . The user can select the work order items under CSDEM/WO/22090026

select Work Order Item

1 - List 2 - Search

Find What

Work ID	Project ID	Item Code	Description	Bal. Qty.	UOM
CSDEMO	CSDEMO				
CSDEM/WO/22050037		Aircon	Aircon	1	
CSDEM/WO/22040001		CARPARK	CARPARK	1	
CSDEM/WO/22090026		Compressor	Replace of Compressor	1	
CSDEM/WO/22090026		Condenser Fan	Change of parts	1	
CSDEM/WO/22010004		Motor	Replacement of Motor ( non warranty)	1	
CSDEM/WO/22030006		TEest	TEest	1	
CSDEM/WO/22030002		TESTING	TESTING	1	

New Record

Record Found: 7

A

https://demo.qornerstone.com/index.aspx

Work Cornerstone Login Share Drive AGM Building Mainten...

CS DEMO 123 Property Tenant/Owner Finance Maintenance Portal Control Panel

Home Page New Purchase Order X

Maintenance - Purchase Order

Property ID CSDEMU CSDEMU

Manager ID 18 Benny Shum

Supplier Name KONE PTE LTD

PO Number New

PO Date 09 Sep 2022

Purchase Order Details

Description

Remarks

Budget Account

Account Code

Item Code/Supplier Code

Quantity/UOM 1

Unit Price (SGD) 0.00

Discount % 0.00

GST Category TX - Standard-Rated Purchase

Profit Centre

Add Item Other Actions Cancel

Other Actions

- Get Purchase Requisition Item
- Get Purchase Order Item
- Get Work Order Item
- Get Inventory Item

SN	Inventory Item Code	Item Description	Quantity/UOM	Unit Price	Parent Code/UOM	Acc Code	Budget Account	Requisition/Work Order No	GST
	SOR Item Code	Remarks							
Sub-Totals				0.00				0.00	
Tax Amount %				7				0.00	✓ Edit
Total Amount (SGD)								0.00	

Click Add item to add new row

Select All Move Down Move Up

New Last Updated By is Not Available

Save Back Close

# Workflow 7. Raising the Purchase Order

## Reviewing the Work Order Item

- Under Tab 1 general , after user has select the work items , the items will be populated into the description box.

**Note: The user can add in other work items non related to the work order but is worked on by the supplier**

Work ID	Project ID	Item Code	Description	Bal. Qty.	UOM
CSDEM/22050037		Aircon	Aircon	1	
CSDEM/22040001		CARPARK	CARPARK	1	
CSDEM/22090026		Compressor	Replace of Compressor	1	
CSDEM/22090026		Condenser Fan	Change of parts	1	
CSDEM/22010004		Motor	Replacement of Motor ( non warranty)	1	
CSDEM/22030006		TEest	TEest	1	
CSDEM/22030002		TESTING	TESTING	1	

Maintenance - Purchase Order

1 - General | 2 - Other Details | 3 - Upload Document

Budget Account:

Account Code:

Unit Price (SGD):

Discount %:

GST Category:

Profit Centre:

Add Item | Other Actions... | Cancel

SN	Inventory Item Code	Item Description	Quantity/UOM	Unit Price	Disc.%	Amount	GST
	SOR Item Code	Remarks	Budget Account	Parent Code/UOM	Account Code	Profit Centre	Requisition/Work Order No
1	Compressor	Replace of Compressor	1.00	2,000.00	0.00	2,000.00	Y
			FM004 Aircon		6600-1001 AIRCON - REPAIRS / PARTS		CSDEM/22090026
2	Condenser Fan	Change of parts	1.00	150.00	0.00	150.00	Y
			FM004 Aircon		6600-1001 AIRCON - REPAIRS / PARTS		CSDEM/22090026

Click Add Item to add new row

Select All | Move Down | Move Up

Sub-Totals: 2,150.00 | Tax Amount %: 7 | Total Amount (SGD): 2,300.50

Save | Back | Close

# Workflow 8. Raising the Purchase Order

## Other Details (A)

- The user need to insert the Purchase Category as the Purchasing Approval Is enabled. ( This will discussed in the next Guide)

## Upload Documents (B)

- User can uploaded the supplier's quotation in this tab,
- Once done, the user can click on the save button at the bottom right of the page

Maintenance - Purchase Order | 1 - General | 2 - Other Details | 3 - Upload Document

PO Currency: **Singapore Dollar**

Supplier Address: 30A KALLANG PLACE, SINGAPORE 339213

Shipping Address: [Empty]

Phone: 6424-6246 / 6424-6346

Fax: [Empty]

Contact Person: [Empty]

Reference: [Empty]

Purchase Category: **POTEST 1**

Purchaser: [Empty]

Remarks: [Empty]

Print Format: Purchase Order [View]

A

Maintenance - Purchase Order | 1 - General | 2 - Other Details | 3 - Upload Document

SN [Trash] | File Name

0 | [Empty] | [View] | [Browse...]

1 | [Empty] | [View] | [Browse...]

2 | [Empty] | [View] | [Browse...]

3 | [Empty] | [View] | [Browse...]

4 | [Empty] | [View] | [Browse...]

5 | [Empty] | [View] | [Browse...]

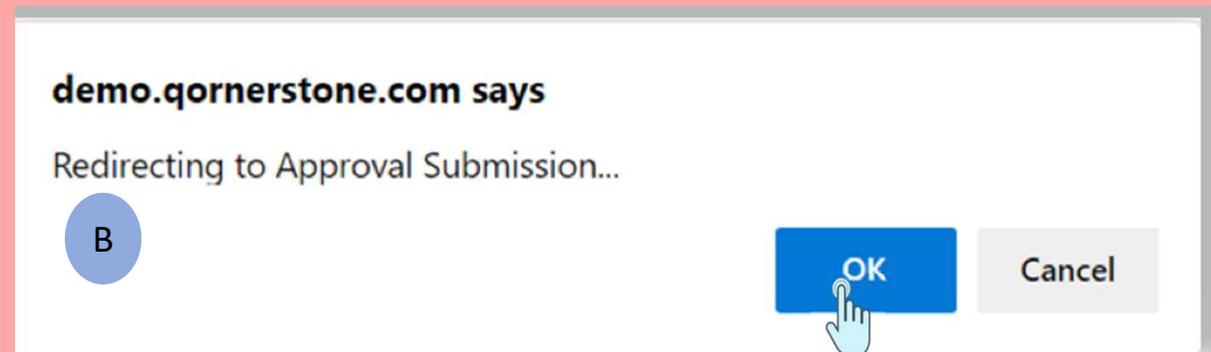
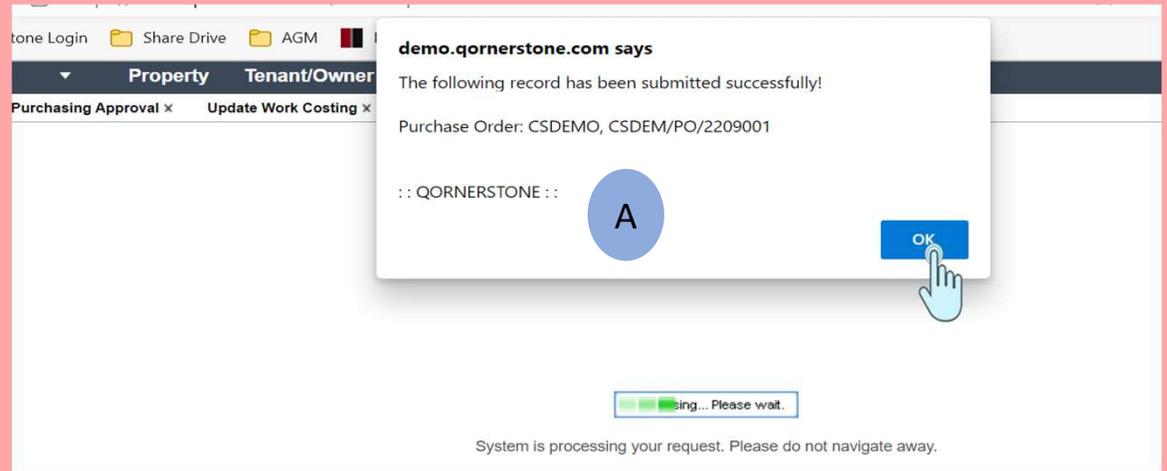
B

## Workflow 9. Saving the Purchase Order

- Once the user has saved, a pop up box (A) will appear. User need to click on the ok button .
- Once the button is saved , another pop up box (B) will appear to redirect this for Approval Submission . User can click on the ok button. ^

^ **Note:**

- ***This function is only enabled if the Purchase approval has been set up and approved.***



# Workflow 10. Routing the Approval

- The Approval function is opened for the user to choose the necessary approvers and update the remarks .

a) Select the Approver ( Note: if the approver is set up in a group. The list of approvers will be shown in a drop down

b) Update the Remarks

c) Click on Submit Button

d) A pop up box (A) will open and user can click on the "Ok" Button" . It will be routed to the approver for review.

The screenshot displays a software interface for managing purchase orders. The top navigation bar includes 'CS DEMO 123', 'Property', 'Tenant/Owner', 'Finance', 'Maintenance', 'Portal', and 'Control Panel'. The main content area is titled 'Approval Status' and shows a table with columns for 'Approval Status', 'Approving Officer(s)', 'Requestor', 'Submitted On', and 'Approved On'. Below the table, there is a section for 'Update Status To' with a radio button for 'Pending Approval' and input fields for 'Requestor', 'Approver #1', and 'Remarks'. A hand cursor is pointing at the 'Remarks' field. The bottom part of the screenshot shows a confirmation dialog box with the text 'demo.qornerstone.com says You have selected to update status to the following: [Pending Approval] Click OK to continue.' and buttons for 'OK' and 'Cancel'. A hand cursor is pointing at the 'OK' button.

# Workflow 11. Approving the Purchase Order

- Approver login into the Finance Module - Home Page and will see the message stating an approval is required . (A)
- Approver click and select the Purchase Order (B)

The screenshot shows the Home Page dashboard. At the top, there is a 'Today's Alert' section with a message: '2 Waiting for your approval.' A blue circle labeled 'A' is positioned over this message. Below the alert, there are sections for 'Calendar Events' (stating 'No Event Scheduled for the Next 5 Days') and 'Recent Transactions' (a table of approval updates). On the right side, there are 'Shortcuts' and 'Downloads' sections.

The screenshot shows the 'Approval Inbox' table. The table has columns for SN, Form Name, Record ID, Requestor, Status, and Last Updated On. The second row is highlighted, and a blue circle labeled 'B' is positioned over it. A hand cursor is pointing to the 'Record ID' of the second row. The table also includes a search bar and a 'Select All' checkbox.

SN	Form Name	Record ID	Requestor	Status	Last Updated On	
Next Approver : garytest123						
1	Customer/Supplier	CS/22011	Demo	Pending Approval	17 Jun 2022 10:30:41 AM	<input type="checkbox"/>
2	Finance Purchase Order 6	CS/DEM/PO/2209001	Demo	Pending Approval	09 Sep 2022 5:28:01 PM	<input type="checkbox"/>

# Workflow 12. Approving the Purchase Order

- Approver can have the 3 options

- a) Queried the requestor
- b) Approved the purchase order
- c) Rejected the purchase order

- Once the option is selected , the approver can click on the submit button.
- A pop up box will appear to validate the approver request (A) . Click Ok
- Another pop up box (B) will be shown that the approval is successful

The screenshot shows a web application interface for approving a purchase order. At the top, there are tabs for 'Home Page', 'Approval : CSDEM/PO/2209001 x', and 'Waiting for your approval. x'. Below this is a table for 'Approval Status' with columns for 'Requestor', 'Submitted On', and 'Approved On'. The current status is 'Pending Approval' for 'Finance Purchase Order 6 CSDEM/PO/2209001' by 'Demo' on '09 Sep 2022 5:28:01 PM'. The 'Update Status To' section has three radio button options: 'Pending Approval', 'Queried', and 'Approved' (which is selected). There is a 'Remarks' field containing 'Please approved' and another 'Remarks' field containing 'Approved'. Below this is a 'Form Fields to Approve' table with columns 'SN', 'Field Description', 'Existing Value', 'New Value', and 'Item No', showing 'No Record Found'. An 'Action History' table below that has columns 'SN', 'RecordID', 'Date', 'User Name', and 'Description', with one entry for '1 CSDEM/PO/2209001' on '09 Sep 2022 5:28:01 PM' by 'Demo'. At the bottom, there is a status bar with 'Pending Approval' and 'Last Updated by Demo on 09 Sep 2022 17:28'. A 'Submit' button is highlighted with a hand icon.

**demo.qornerstone.com says**  
You have selected to update status to the following:  
[Approved]  
Click OK to continue.

**A**

OK Cancel

**demo.qornerstone.com says**  
The following record has been submitted successfully!  
Approval Status: CSDEM/PO/2209001  
:: QORNERSTONE ::

**B**

OK

# Workflow 13. Final Approved Purchase Order

The status of the Purchase Order will be shown approved and will appear in

- a) Maintenance Module -> Maintenance  
Supplier-> Purchase Manager -> Purchase  
Order
  
- b) Finance Module -> Reports -> Supplier  
Reports -> Open Purchase Order

The screenshot shows a web application interface for an approval workflow. At the top, there are tabs for 'Home Page', 'Approval : CSDEM/PO/2209001 x', and 'Waiting for your approval. x'. Below this is the 'Approval Status' section, which includes a table with columns for 'Approval Status', 'Approving Officer(s)', 'Requestor', 'Submitted On', and 'Approved On'. The status is 'Approved', the officer is 'garytest123', the requestor is 'Demo', and the dates are '09 Sep 2022 5:28:01 PM' and '09 Sep 2022 5:49:35 PM' respectively. Below the table is an 'Update Status To' section with radio buttons for 'Queried', 'Approved', and 'Rejected'. The 'Approved' option is selected. There are also fields for 'Requestor', 'Approver #1', and 'Remarks'. The 'Form Fields to Approve' section is empty, showing 'No Record Found'. The 'Action History' section contains a table with columns for 'SN', 'RecordID', 'Date', 'User Name', and 'Description'. The history shows two actions: one submitted for approval and one approved.

SN	RecordID	Date	User Name	Description
1	CSDEM/PO/2209001	09 Sep 2022 5:28:01 PM	Demo	Submitted for Approval to Approver #1 : garytest123 Remarks : Please approved
2	CSDEM/PO/2209001	09 Sep 2022 5:49:35 PM	garytest123	Approved

# Workflow 14. Status of the Purchase Order

The status of the Purchase Order will be shown approved .

If user need to locate the purchase order , The PO can be found as below

- a) Maintenance Module -> Maintenance Supplier-> Purchase Manager -> Purchase Order (A)
- b) Finance Module -> Reports -> Supplier Reports -> Open Purchase Order (B)

Home Page Approval : CSDEM/PO/2209001 x Waiting for your approval. x

**Approval Status**

Approval Status	Approving Officer(s)	Requestor	Submitted On	Approved On
Approved	garytest123 Finance Purchase Order 6 CSDEM/PO/2209001	Demo	09 Sep 2022 5:28:01 PM	09 Sep 2022 5:49:35 PM

Update Status To  
 Pending Approval  
 Approved  
 Rejected

Requestor: Demo  
 Approver #1: garytest123  
 Remarks: Please approved

**Form Fields to Approve**

SN	Field Description	Existing Value	New Value	Item No
No Record Found				

**Action History**

SN	RecordID	Date	User Name	Description
1	CSDEM/PO/2209001	09 Sep 2022 5:28:01 PM	Demo	Submitted for Approval to Approver #1 : garytest123 Remarks : Please approved
2	CSDEM/PO/2209001	09 Sep 2022 5:49:35 PM	garytest123	Approved

CS DEMO 123

- Maintenance Property
- Regulatory Compliance
- Maintenance Inventory
- Maintenance Supplier
  - Supplier Manager
    - New Supplier
    - New Supplier Contract
    - Supplier Listing
    - Supplier Contracts
  - Purchase Manager** (A)
    - New Purchase Requisition
    - New Purchase Order
    - Purchase Requisitions
    - Purchase Orders
- Maintenance Finance
- Maintenance KPI
- Reports

CS DEMO 123

- Supplier Reports (B)
  - Supplier Aging Summary
  - Supplier Aging Detail
  - Supplier Aging by Item
  - Supplier Ledger
  - Supplier Invoice/CN Listing
  - Supplier Invoice/CN Details LI...
  - Open Purchase Orders
  - Closed Purchase Orders
  - AP Invoice On-Hold Report
  - Purchase Order Documents
  - Cancelled Purchase Orders
  - Cancelled Purchase Requisiti...
  - Supplier Listing
- Banking Reports
  - Receipt Listing
  - Payment Listing
  - Receipt Application Listing