

Purchase

The module Purchase allows you to process all purchases by and for ships in a central location and provides you with a clear overview of outstanding purchase orders.

The module Purchase can be configured to meet the user's requirements. This chapter uses the default settings. Texts or images may therefore differ from your situation.

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What is the difference between the types of orders?

Different orders can be created in the module Purchase.


A **purchase order** allows you to order products from stock. Free order lines are used if the product is not available from module Inventory.

A **local purchase order** is the same as a product order, with the exception that a different purchase process can be configured. A local purchase order offers the crew the opportunity to purchase local products and register them in MXSuite.

A **service order** allows you to request a service. In this case, it is not possible to add products from stock.

You can configure the process for all orders, but product orders may differ from service orders.

How do I create a purchase order?

1. Click on **New purchase order...**
2. Enter a search term in the column **own code** and click on  to open the list of parts.
3. Select one or more parts and click on **Ok**.
4. The selected parts will be added to the order.
5. Order lines can be automatically added to an order by clicking on **Insert required inventory**. This will add all parts to the order whose stock is lower than the minimum requirement and for which no previous order has been placed.
6. Enter the desired amount for all order lines.
7. Click on **Save & send** to save the order and forward it for further processing. Click on **Save as draft** to edit the order or to send it at a later date.

The same procedure can be used to create a local purchase order.

How do I create a service order?

- 1. Click on **New service order...**
- 2. Fill the details in the General tab.

Service order MT23-OSO-252

Order line status

Service requisition

General

Order lines

Suppliers

Unique id: MT23-OSO-252

Location: Mastex Trader

Status: Requisition

Creation date:

Created by: Administrator

Select urgency:

Next possible port

Delivery port:

ETA:

day/month/year

Budgeting year:

2025

Project:

Remarks:

Custom attributes

Assigned to:

Internal note:

Estimated price:

Delivery address

Invoicing address

Actions

Get suppliers prices

Reject

Order last modified at: 05/03/2025 14:26 by: Administrator

Save as draft

Save & send

- 3. Clearly indicate the necessary service in the order lines in the tab **Order lines**.
- 4. Click on **Save & send** to save the order and to forward it for further processing. Click on **Save as draft** to edit the order or to send it at a later date.

How do I add documents to an order line?

You can add documents per order line.

1. Click on + in front of the order line.
2. Click on **New** to add a new document or click on Link from documents... to link a document within MXSuite.

Service order MT22-OSO-145

Order line status: Service requisition

General **Order lines** Suppliers

Click to add new order line... Group by: Default supplier

	Pos no. ▲	Description	Price	Currency	Exchange rate	Total price	Budget code	Status
▼ No supplier	1		0.00	EURO	1.00	0.00		Service requ

Supplier: No supplier

Documents:

New... Link from documents... Actions...

Drag and drop documents in the box below

E-mail	Name	Size
No records available.		

Remarks:

Currency: EURO Exchange rate: 1.00 Total price: 0.00

Order line last modified at: 22/02/2023 09:00 by: Administrator

Save as draft Save & send Close

If the option Email is selected, the document will be included when the order will be emailed to the supplier.

How do I use Incoterms in my order?

The international Incoterms are used to determine the rights and duties of buyers and sellers during the international transport of goods.

The Incoterm of relevance to the order can be selected or changed at the top right of the order screen.

Budgeting year:

2023

Incoterm:

Delivered Duty Paid

Carriage Insurance Paid to

Carriage Paid To

Cost & Freight

Cost Insurance & Freight

Delivered At Frontier

Delivered Duty Paid

Delivered Duty Unpaid

Delivered Ex Quai Duty Paid

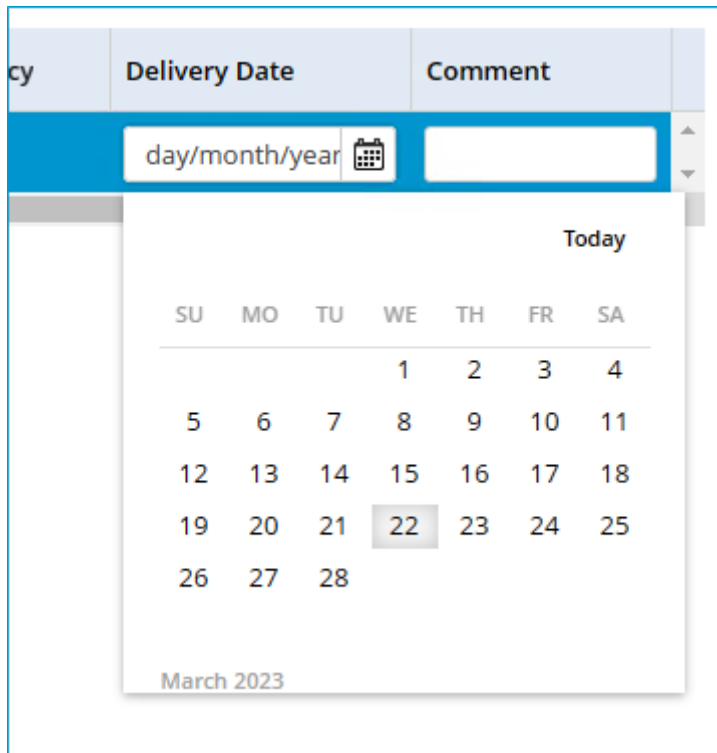
When an Incoterm is selected for which the transport costs are borne by the customer, MXSuite adds an extra order line to the order on which the order costs are mentioned.

	<input checked="" type="checkbox"/>	Pos no. ▲	Own code	Part number	Order code	Description	Quantity	Unit	Price per unit
▼ No supplier									
+	✓	...	1						0.00

Using Incoterm **Ex Works**, a line with transport costs is added to the order.

How do I add the expected delivery date to an order line?

1. Open a purchase order.
2. Open the **Suppliers** tab.
3. Scroll to the right and click the cell **Delivery Date** for the required part.
4. Select a date.



The screenshot shows a software interface with a table. The table has columns labeled 'cy', 'Delivery Date', and 'Comment'. The 'Delivery Date' cell is selected, and a date picker calendar is displayed. The calendar shows the month of March 2023. The days of the week are abbreviated as SU, MO, TU, WE, TH, FR, SA. The dates 1 through 28 are visible. The date 22 is highlighted. The text 'Today' is visible in the top right corner of the calendar. The text 'day/month/year' is visible in the top left corner of the calendar. The text 'March 2023' is visible in the bottom left corner of the calendar.

5. Click **Save & close**.

You can select multiple order lines using Ctrl or Shift.

How do I change the exchange rate in an order?

1. Open a purchase order.
2. Select the desired order line and click on the 3 dots (...)
3. Click on **Select currency...**
4. Select the desired currency.
5. Open the tab **General**.
6. You can now change the exchange rate for this order. The exchange rate as configured in MXSuite module Administration is used by default.
7. Click on **Save as draft**.

GeneralOrder linesSuppliers

Unique id: MT22-OSO-145/Draft
Location: Mastex Trader
Status: Requisition
Creation date: 22/02/2023
Created by: Administrator
Remarks:

Select urgency: Regular
Delivery port:
ETA: day/month/year

Budgeting year: 2023
Category: 510 Anchor Winch

Delivery address
Select address

Invoicing address
Select address

Financial

Total amount: 125.00
Local currency: EURO

Currency	Total per currency	Exchange rate
COEFF	168,125.00	1,345.00

How do I enter the discount for an order?

1. Open an order
2. Enter the percentage or the discount price.

Currency: EURO	Exchange rate: 1.00	Total price: 1,405
Discount: 0.0000	Discount %: 0.00	Discounted total price: 1,405
		<button>Save & close</button> <button>Cancel</button>

3. Click on **Save & close**.

Only one value is necessary. If a discount percentage is entered, the discount price will be calculated. If a discount price is entered, the discount percentage will be calculated.

How do I change the status of multiple order lines?

1. Open a purchase order.
2. Select the order lines to be moved to another status.
3. Right-click on one of the selected order lines and select the desired status.

Order line status

Purchase requisition

Wait for supplier prices

Filtered results

View all

Actions

Get suppliers prices

Reject

It is possible to convert all order lines with the same status to the next status by using the action buttons to the left of the screen.

In the image, all order lines are first filtered by the status Purchase requisition, after which three action buttons will appear:

- Request prices
- Order
- Reject

Click on one of these buttons to move all orders to the selected status.

How can I check the status of my order?

There are two types of statuses in MXSuite:

- Order status
- Order line status

An order status can contain multiple order line statuses. For example, an order with the status 'Open' may contain the following order line statuses:

- Pending supplier prices
- Pending approval
- Approved
- Ordered

The status bars are visible to the left. You can select an order status and an order line status at the top of the screen.

Filtering on order status will only display the orders in the selected status to the right of the screen.

Filtering on order line status will display all orders with at least one order line.

When filtering by order line status, the order will be opened in the order status. Other order line status filters can be applied within the order.

How can I see the progress of an order line?

Right-click on an order line and select **View progress details...**

Progress details

Delivery details: 12

Packing list number: 23

Packing list: [Signature.png](#)

Delivered quantity: 40

Remarks: Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do...

Saved changes

Print

Email

Default view

Drag a column header and drop it here to group by that column

Location	User	Operation	Performed by office	Date	Comment
Mastex Trader	Administrator	Create	✓	03/11/2017 10:18	Order line was created.
Mastex Trader	Administrator	Edit	✓	03/11/2017 10:18	Order line was moved to s...
Mastex Trader	Administrator	Edit	✓	16/01/2018 14:29	Order line was moved to s...
Mastex Trader	Administrator	Order	✓	16/01/2018 14:29	Order line was moved to s...
Mastex Trader	Administrator	Deliver	✓	16/01/2018 14:30	Order line was moved to s...
Mastex Trader	Administrator	Edit		12/06/2018 11:48	Synchronisation overwrite
Mastex Trader	Administrator	Edit	✓	12/06/2018 15:56	Order line was edited. Re...
Mastex Trader	Administrator	Edit		29/06/2018 16:58	Synchronisation overwrite
Mastex Trader	Administrator	Edit	✓	06/10/2018 11:48	Synchronisation overwrite

1

50

items per page

1 - 22 of 22 items

Close

How do I create a backorder?

When an order has not been delivered in full, a backorder can be created for the non-delivered parts.

- 1. Mark an order line as **Delivered** (status name depends on the configuration).
- 2. Enter the number of delivered parts and any additional delivery comments.

Command actions

General

Packing lists

Delivery details:

Pos no. ▲	Description	Supplier	Quantity	Remarks
1	Pakking / O-ring blz.452	Airtec	123.00	
2	ring M16	Airtec	39.00	
3	Pakking	Airtec	8.00	
4	Mobilgard HSD 15W40, bulk	Airtec	10.00	
5	Pump GP oil	Airtec	10.00	
6	O-ring	Airtec	688.00	

Save & close

Close

- 3. Click on **Ok**.
- 4. Click on **Make backorder**.
- 5. A new order line will be created in the existing order with the number of non-delivered parts.

In addition to creating a backorder, you can also skip the difference. This option allows you to move the order to the next status without creating a backorder.

How do I link a supplier to an order line?

1. Open a product order.
2. Select the order lines you want to link to a supplier.
3. Right-click on a selected order line and select **Select supplier...**
4. Select the suppliers used for the order line by using the buttons < and >

Select suppliers

Default view

Search...

Name ▾ ▲ 1	Country ▾ ▲ 2	Port ▾ ▲ 3
2L International Ltd		
A & A Thorpe		
A Propos Produkties B.V.		
A. Nobel en Zn		
A.J. Steenkist-Rooijmans b.v.		
A7 snelkoerier.nl		
ABB BV		
Abeln Project Stoffering		
Absorbit		

1

2

3

...

50

1 - 50 of 521 items

Selected suppliers

Name ▲	Country	Port
No records available.		

>

<

Save & close

Clos

5. Click on **Save & close.**

How do I copy an order?

1. Right-click on the order you want to copy

The screenshot shows the Mastex software interface. On the left, there is a sidebar with an 'Order status' dropdown menu. The 'Open' status is selected. To the right, there is a table of orders. The table has columns for 'Status' and 'Unique Id'. The order PO19-OFF-097/383 is highlighted. A right-click context menu is open over this order, showing options: 'Edit...', 'Copy...', and 'Mark as unread'.

Status	Unique Id
...	PO19-OFF-096
...	PO14AC0000017/459
...	PO19-OFF-102/325
...	PO19-OFF-097/383
...	7-O062/6948
...	2-
...	-130/20020102
...	MT21-OSO-126

2. Select **Copy...**
3. Select the location you want to copy the order to, from the dropdown.



The screenshot shows the 'Copy purchase order' dialog box. The dialog has a title bar 'Copy purchase order' and a close button. The main text says: 'You are about to copy order PO19-OFF-097. Please make the right selection below.' Below this, it says 'Copy from location Mastex Trader to:'. There is a dropdown menu showing 'Mastex Tanker'. Below the dropdown, there is a list of locations: 'Mastex Cruiser', 'Mastex General Cargo', 'Mastex Guard', 'Mastex Tanker', 'Mastex Trader', 'Mastex Trader II', and 'Mastex tug'. The 'Mastex Tanker' option is selected. At the bottom, there are two buttons: 'Save & close' and 'Close'.

4. Click **Save & close.**

You may receive a warning when copying an order, if the part in the order is not linked to the destination location. MXSuite will automatically link the part to the location.

How do I send an image of a part with the order?

1. If there is not yet an image linked to the part, add it following the instructions in the paragraph [How do I add a document to an order line?](#)
2. If you want to send the image with the order, tick the box in front of the image under the header **E-mail**.

Documents:				
New... Link from documents... Actions... ⌵ Drag and drop documents in the box below				
<input type="checkbox"/>	E-mail	Name	Size	Linked
<input type="checkbox"/>	<input checked="" type="checkbox"/>	 R.jpg	 255.51 KB	