

## OFORS Ordering steps:-

### **For profile based orders:**

1. Go to Virtua
2. Log in using user ID and password
3. Go to search
4. Search by LCCN number or title for which order is to be created
5. Record will be open -> Press edit button -> Right click on the record -> click on "save/create purchase order"
6. "Add PO request" screen will be open -> input the vendor name -> Select the "approval copy received button" if approval copy is supplied by the vendor -> click on retrieve button
7. New order screen with the order number will be open->Edit the line item if discount/service charge is to be enter -> Save in need approval status
8. Approving person will check the order and changed the status to "Approved"->Save
9. Send all the orders by going to : Acquisitions->order->send orders

### **For manual orders:**

1. Go to Virtua
2. Log in using user ID and password
3. Go to search
4. Search by LCCN number or title for which order is to be created
5. Go to Acquisitions -> orders -> Add
6. "Add PO request" screen will be open -> input the vendor name -> Select the "approval copy received button" if approval copy is supplied by the vendor -> click on retrieve button
7. New order screen with the order number will be open
8. Drag marc record in to the order screen -> Double click on the line item -> Input price, Discount or Service charge if any-> Select participant-> Save in need approval status
9. Approving person will check the order and changed the status to "Approved"->Save
10. Send all the orders by going to : Acquisitions->order->send orders

### **OFORS Invoicing steps:-**

1. Go to Acquisitions-> Invoice-> Add
2. "Add invoice request" screen will appear -> Input invoice number -> Input vendor name-> Press on request button
3. New invoice screen will open-> Press "Insert" button -> Input PO number -> Press "Ok" -> Repeat this step as per number of line items of the invoice
4. Modify line item of the invoice by double clicking on the line item-> For example inputting Discount or Service charge of the invoice
5. Save the invoice in "Draft" status by clicking on Add button
6. Approving person will open the invoice and changed the status to "Approved" after checking

### **OFORS Credit steps:-**

1. Go to Acquisitions-> Credit-> New
2. Select "prepaid" and input the credit number -> press on "request" button
3. "Add credit screen" will open-> Input these fields:-
  - ⇒ Currency
  - ⇒ Amount of the credit to be given for the PO
  - ⇒ Credit status "Draft"
  - ⇒ Change expiry date
  - ⇒ Input Vendor Name of the credit
  - ⇒ Input PO number for which credit is to be given
  - ⇒ Input line number '1'
  - ⇒ Save
  - ⇒ Approving person will approve the credit by changing the status to "Need Approval"-->Approved
4. Now these credits will be applied to the voucher of the vendor

### **OFORS Vouchering steps:-**

1. Go to Acquisitions -> Voucher -> New
2. New screen will open -> Input "vendor name" -> Click on "request' Button
3. Voucher screen will open -> Input voucher number and Date -> Work in "draft" status -> Select the invoices for which voucher is to be created -> press "Insert invoice to voucher" button -> All the invoices will be moved to the voucher
4. Now if any credit is there for the vendor apply here with the voucher with the following steps:-
  - ⇒ Expand credit
  - ⇒ The available credits of the vendor will be showed
  - ⇒ Select the particular credit if want to apply that
    - Or
  - ⇒ Use 'Apply all credits" button to use all the credits
5. Voucher total will be reduced by the credit amount -> check with the upper right corner of the voucher
6. If Ok, " save" in Draft status
7. Now the voucher will be approved by the approving person by changing the status to "need approval" -> "approved"
8. Now the voucher will be send to the " FMC" for further processing by Changing the Status " Sent to payer"
9. When the voucher will paid, Change the status to "paid in full" and input the exact amount of the voucher (as per the VADR)