

Features and Functions: Purchase and Receiving Module

Overview

* Purchase Orders have several inputs to create "Line Details" on the PO.

1. A "Suggested Re-order" sub-system uses the Re-Order points and Re-Order Quantities to create a "Suggested" Requirement. The user may alter this information before creating a real Purchase Order.
2. (←) Both the "Point-of-Sale" and "Service" modules allow the user to add a "Line Detail" on an open PO that will track the Customer#, Sales# / Repair Order# on PO for "Receiving" purposes and flags the origin with the PO. (Note: When the inventory is received, the user may print labels that identify the inventory for a Customer or Repair Order).
3. Purchase Orders may be "Manually" created.

- * Purchase Orders are tracked by "Status" (New, Printed, Released, Received, Complete).
- * Purchase Orders are interfaced to Vendor's system (where allowed such as Mercury, OMC, Barley, Kimpex, etc. – this list is constantly growing as Vendors make this option available).
- * Purchase Orders may be "Partial" received.

Features

- * Automatic conversions for Purchased Unit of measure to Inventory Unit of Measure.
- * Uses "Origin Cost" (if available) and Import Costing Matrix.
- * "Available stock" popup (Includes multiple Locations, "On Order" quantities).
- * Find Inventory quickly using Bar Codes and Scanner, "Lookup Groups/Subgroups", Lookup by Description or Lookup by Vendor.
- * Track Serial numbers for selected Inventory Items (Item is flagged as "Full Tracking").
- * Bar Code generator (Built-in) allows printing of "User Defined" Bar Code Labels (for Received Inventory) directly from the Purchase Order.
- * Special Sales Back Order Release function linked to PO Receiving function. Allows the user to select which Back Orders are filled from the received PO.
- * Purchase Order Lookups by Sales#, by Project#, by Repair Order# (Service), by Work Order# (Manufacturing), by Item# and Item History(→).

Reporting

- * Most reports are available by Purchase Order# or Item# ranges with additional filters (such as Vendor# and Received Date).
- * Over 25 Reports include "Suggested Re-Order", Availability, Item Re-order Information, Actual "On Order", Expected Delivery, Received, Item PO History, PO Final Costing reports plus many more.

PO#	Line#	Vendor	Total RecvdQty	Line Status	Receipt Date	UnitCost	TotalCost	Converted:*
7285	20	OMC	1.00	R	05/06/2008	10.00	10.00	CDN
7288	5	OMC	3.00	R	06/12/2008	10.00	30.00	CDN

F9:View details SF9:Veiw Header F5:Reposition Seq: Item#, Rec'd Dat PODT:4C
 Item#: 001086 Size: 0.00 DateRange: 01/01/2008 to: 09/18/2009
 Total Recv'd Qty: 4.00 Total Recv'd Costs: 40.00

Interface to Other Modules

- * Integrated to Inventory Module, Order Entry Module and Service Module
- * Integrates to the "Notes" subsystem allows for printing of standard note information on all documents including picking slips, sales orders, purchase orders and invoices. Notes may be attached to customers, products and vendors as well as system notes.

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Sample Image of Purchasing Header and Detail Input Images

Header identifies Vendor information such as PO#, Vendor# and Address.

Your preferences and promises are recorded.

Special Notes and Instructions (Print on Purchase Order).

Inventory Lookups by Item#, Description, Lookup Group. Lookups are also available to all other modules (such as RO#). (Available Lookups are marked *)

Reminder of PO data.

Line# allows for multiple orders of the same item for different Sales#, Repair#, Work Order# and/or Delivery Dates.

Up to 9999 Lines per PO.

Line#	Item#	Qty	Unit Cost	Promised
5 R	001044	1.0000	35.8700	02/25/2006