



Sage Pro ERP

Purchase Orders

Sage Pro Purchase Orders is a complete purchase order processing system with real-time tracking, automatic updating of vendors and inventory account balances, and extensive reporting capabilities. This module enables you to manage a broad array of vendor and inventory information, including purchases, balances, reordering, and much more. Purchase Orders integrates with Sage Pro Accounts Payable to deliver effective tracking of liabilities and invoice receipts.

Entering and Maintaining Purchase Orders

- Creates purchase orders and handles receiving.
- Supports blanket orders with individual purchase orders released against the master order.
- Generates recurring purchase orders, drop-ship orders, and special bids and quotes.
- Choose to ship a purchase order to a different address, including a customer, if you have the Accounts Receivable or Order Entry module.
- Print receiving documents when creating purchase orders.
- Unit-of-measure conversion allows purchase of items in different units of measure than you stock or sell.
- Records virtually unlimited notes and memos with any line item.
- Warns you when a vendor's balance exceeds available credit.
- Supports recurring purchase orders.
- Use standard comment text or create purchase order comments that are printed on the purchase order.
- Locates vendor records by full or partial phone numbers on pick lists.
- Allows cancellation of open quantities after a receipt is entered.
- New vendors and inventory items can be added during purchase order entry.
- Creates a Return Order when necessary and applies it to the original purchase order.
- Message Master option allows added capability to fax or e-mail purchase orders.

Receiving Purchase Orders

- Designate items to require inspection prior to receipt with report tracking for items pending or failing receipt.
- Tracks groups of items by the lot numbers entered when receiving items.
- Supports inventory tracking of individual items according to serial number.

- Automatically route purchase orders to reviewers for approval.

- Provides schedules for material receipts.
- Receives partial drop shipment purchase orders.
- Updates vendor and inventory balances in real time.
- Receives purchase orders by item.
- Customer invoicing can be deferred when receiving drop-ship purchase orders.

Item Cost Levels

- Cost tiers for vendors can be set up by item based on volume quantities or vendor specials.

Integration with Other Modules

- Supports Landed Cost estimates for each purchase order line item and allows estimates or actual costs to be assigned by inventory item.
- Works with Accounts Payable to track liabilities and invoice receipts.
- Allows multiple suppliers for each inventory item.
- Allows multiple remit-to addresses for vendors.
- Supports data entry in multiple modules at the same time, which allows processing of a purchase order and the corresponding sales order simultaneously.

Reporting

- Provides reports for inventory reordering and backorders, and purchase order status by item, vendor, and buyer.
- Displays or prints 24-month vendor purchase history and vendor balances, complete with graphs in Microsoft® Excel®.
- Real-time Business Status Report provides immediate status for open purchase orders, unbilled purchase orders, and period-to-date orders and receipts.

Each report can be customized from a matrix of user-selected options: Display, print, export to a spreadsheet, fax, send by e-mail, or save on disk. Some of the reports included are:

- Blanket Orders
- Business Status
- Drop Shipment Status
- Open Orders
- Pending/Completed Inspection
- Purchase Order Receipts
- Purchase Orders
- Recommended Reorders
- Recurring Purchase Orders
- Status Report (by Purchase Order, Vendor, Item and Requisition number, and Request Date and Department)
- Vendor File
- Vendor Labels

Document Routing (exclusively for Sage Pro 200)

Workflow and routing capabilities in the Purchase Order module simplify your order handling process. When you leverage these powerful features, the drudgery and monotony of tedious manual approvals and constant paper searches will be behind you forever. The best thing about the built-in routing is its unprecedented flexibility. Setup flexibility enables you to define how much or little control you want for each process. You can determine approval levels and limits, processes and routing, and configure routing to match the way you operate your business. You'll find that managing your workflow has never been easier.

- Automatically or manually route documents to reviewers for approvals, including purchase order printing and purchase order receiving.
- Define your own sequence of processes for routing various document types.
- Use the routing tree for easy setup of workflow and routing processes, defined at the document or process level.
- Choose from two routing types—responsibility or command.
- Switch routing OFF or ON, at company and document-type levels.
- Specify your own approval limitation codes.
- Flag documents as approved, rejected, or hold for more information.
- Reroute documents on the fly.
- Send routing notifications using either ProAlert or the Executive Dashboard Message Center.
- Cancel routing automatically or manually when documents are voided.



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Request for Quote (RFQ) (exclusively for Sage Pro 200)

Give your staff maximum flexibility while maintaining control over your quote creation process. Managed but flexible, the Request For Quote (RFQ) add-on module, exclusively for Sage Pro 200, allows your staff to use the tools they're already familiar with, while managing the entire quote creation process using Sage Pro. Moreover, RFQs can be automatically generated using Microsoft Word mail merge. Simplify your quote and bid process from start to finish.

- Control the process of generating and updating RFQs.
- Easily compare quotes from multiple vendors.
- Create purchase order bids for the selected vendor.
- Automatically or manually convert the winning bid into an order for that vendor.
- Define RFQ entry and maintenance screens.
- Build your own entry and maintenance screens by setting up an automated process to request quotes from multiple vendors.
- Edit RFQs with responses from vendors.
- Take advantage of inquiries and drill-downs for easy comparisons.
- Compare quotes in total by vendor.
- Evaluate costs by individual item.
- Create PO Bids for selected vendors automatically.
- Enter part numbers from a selected vendor.
- Automatically generate entire orders from bids by vendor.
- Use the manual order generation process to pick selected vendor items from bids.

Key reports include:

- RFQ Summary
- RFQ Detail by Vendor
- RFQ Detail by Item

Landed Cost

With support of landed costs, users can now include direct purchase expenses such as shipping, insurance, and more, in the cost of items after they have been received into inventory. The Landed Cost feature includes the following:

- Define landed cost codes for Duty, Freight, Insurance, and more, and associate them with a landed cost account.
- Set up landed cost estimates for inventory items using the landed cost codes.
- Estimates can be established by item or item and location and can be calculated based on quantity, percentage, weight, and fixed.
- Estimates can be set for each PO line during Purchase order entry. These estimates can be either defaulted from landed cost settings or entered on the fly.
- While receiving the PO, the items flagged for landed costs are received into a special restricted location.
- Actual costs can be distributed to items at a landed cost location using the Enter or Change Payables feature in the Accounts Payable module.
- Landed cost transfers allow you to roll up actual and estimated costs into the cost of items before they are transferred to their stock location.
- Landed cost receipts inquiry displays the cost details and allows you to drill down into source documents for the details.

