

Purchasing



PowerShift purchasing programs provide flexibility while enforcing good business practice and control, while supporting many methods for procurement of goods and services. From KANBAN purchase requisitions, MRP-generated requisitions or the use of Supply Chain tools, you can simplify communications with vendors and streamline the replenishment process. Purchase orders can also be created manually; an easily configurable Approval System ensures appropriate approval(s) before the order is communicated to the vendor. You can relate both vendor and manufacturer item numbers to your items and set up multiple price breaks based on the quantity ordered.

01 VR4 LP1 VSI Vendor Service Inquiry 01/12/2011

Vendor 05016 Tax type No tax Attn Jane Doe
 ABC, INC Phone 888-555-1212

Invoice info		Invoice history		AP aging by Due date	
MTD inv	.00	January	.00	Current	.00
YTD inv	.00	December	.00	30 Days	139780.64
YTD pay	98145.62	November	79554.06	60 Days	.00
YTD adj	.00	October	284839.03	90 Days	.00
YTD disc lost	.00	September	163423.84	120 Days	.00
Disc taken	.00	August	187210.54		

Invoice no	Tr cd	Invoice	Trans amount	Check no	Reg no
80477	BI	09/15/2010	\$25,658.41		01544
80477	CP	10/10/2010	(\$25,658.41)	63172	00883
80649	BI	09/24/2010	\$33,431.28		01558
80649	CP	10/2/2010			
80722	BI	09/2/2010			
80722	CP	10/2/2010			
80752	BI	10/0/2010			
80752	CP	11/1/2010			
80775	BI	10/0/2010			
80775	CP	11/1/2010			
80883	BI	10/7/2010			
80883	CP	11/10/2010			
80884A	BI	10/11/2010			
80884A	CP	11/10/2010			
80966	BI	10/18/2010			
80977	BI	10/19/2010			
80978	BI	10/19/2010			
80978	CP	01/11/2011			
81061	BI	10/25/2010			
81061	CP	01/11/2011			

Drill to statistics to see payment trends

Average days to pay	39	Total invoices	49	Unpaid	0
Average days late	66	Total late invoices	11	% late	22.4
Average days early	0	Total early invoices	38	% early	77.6
Weighted avg days to pay	34	Last payment amount	29136.84	Last payment date	01/11/2011

Period	1-30 days	31-60 days	61-90 days	+91 days	Totals	Avg days
1- 6 mths	16	16	4	0	36	34
7-12 mths	3	3	0	0	6	28
13-18 mths	0	0	0	0	0	
19-24 mths	0	0	0	0	0	
+24 mths	0	0	0	0	0	
Totals	19	19	4	0	42	

For/Rev Options Date Purchases PO inv Analysis Show box Page up Page down Restart
 Print Stats Exit

See invoice history

Check current aging

Vendors

- Vendor item prices per minimum order quantity can be updated by a percentage for a single item, a range of items or all items ordered from a vendor. Optionally update the associated incremental costs used in the cost roll application.
- Send a request for quote to a vendor or all vendors that supply a particular item.

Purchase Requisitions

- Outside service purchase requisitions are automatically generated as the corresponding manufacturing orders are released.
- Planning execution can result in the generation of purchase requisitions.
- A kanban purchase requisition application allows the stock room to scan empty bins and thereby generate restocking purchase requisitions. If you employ a two bin inventory system for any items, this option offers an effective way for restocking.
- Quickly convert groups of requisitions to purchase orders. Choose the requisitions for release and a corresponding purchase order is generated for each required vendor.

Automatic PO Creation

- PowerShift optionally generates a PO or requisition for an item's primary vendor during sales order entry to drop ship or obtain needed inventory.
- Planning generates purchase orders to provide supply for future demand.
- Purchase requisitions can be released by vendor.

System-wide Features

- Standardized user interface is easy to learn, is streamlined for fast entry of data and accepts point-and-click or keyboard input.
- Lookups speed record or order retrieval; sorted the way you want and use the Restart or Find functions to locate the record you need.
- Each user can set and save sort and selection options for reports and inquiries, reducing the need for custom reports and programming.
- Print reports to a printer, email, fax, PDF, EDI, or Microsoft Excel.
- Information is accessible with pop-up windows, drill downs, and jumps to related programs, reducing the need to switch screens.
- The Data Dictionary supports ODBC, Report Generator, and QICLOOK™.
- F1 accesses online help for the program you are running.
- Security system allows users access to selected programs and accounts.

Standard Reports and Inquiries

Compliant Items By Manufacturer Inquiry
 Kanban Purchase Requisition Creation
 Manufacturer ID Inquiry
 Manufacturer ID Maintenance
 Material Release Schedule Inquiry
 Open PO Summary Report
 PO Approvals Inquiry
 PO Detail Inquiry
 PO Expedite Report
 PO Inquiry
 POs by Item by Vendor Inquiry
 POs by Vendor Inquiry
 POs by Vendor by Item Inquiry
 Parts on Order Inquiry
 Parts on Order Listing
 Purchase Order Approval Inquiry
 Purchase Order Report
 Purchase Price Variance Report
 Rejected Item Inquiry
 Vendor Contact Inquiry
 Vendor Contract Inquiry
 Vendor Contract Receipt Inquiry
 Vendor Document Profile Inquiry
 Vendor History Listing
 Vendor Inquiry
 Vendor Listing
 Vendor Non-Stock Item Inquiry
 Vendor PO Service Inquiry
 Vendor Performance Inquiry
 Vendor Performance Report
 Vendor Performance by Item Inquiry
 Vendor Price Inquiry
 Vendor Price Listing
 Vendor Purchases Inquiry
 Vendor Service Inquiry
 Vendor Ship-to Inquiry
 Vendor-AP History Inquiry

Document Management System

Material Release Schedule
 PO Print
 Vendor Quote Request

Executive Information Summary

Displays the value of:

- Inventory purchases
- Open PO lines
- Open supply requisitions
- Other purchases
- PO price variance
- PO receipts
- Purchased services
- Rejected material

Purchase Order Entry

- Purchase order fields default from vendor, item, and price records for quick and accurate entry.
- Previous orders for a vendor and item can be displayed during order entry.
- Drop ship directly from a vendor to a customer, branch, or another vendor.
- Non-stock items can be ordered just like inventory items.
- Blanket orders can be entered for specific intervals or days of the month.
- Purchasing units of measure can differ from the stocking and sales UOMs.
- A PO line can be closed even though it has not been completely filled.
- If you set up an approval cycle, POs can be placed on hold pending approvals.
- Vendor or manufacturer's item number can be utilized.
- Lines can be material or labor and can be associated directly to a manufacturing order.
- Add a "notify" user entry and that user will be e-mailed with the information at time of purchase order receipt.
- Notes entered associated with the item or vendor item can be automatically transferred to the purchase order line.
- In the event rejected material requires replacement, the system automatically generates a new purchase order.

Supply Chain Management

- The planning system generates requisitions based on vendor contracts and sales orders or forecasts.
- Sending your supply-chain business partners material release schedules generates a 'when needed' supply of components.
- When you receive vendor contract items, PowerShift creates a PO that accounts payable can match with the vendor's invoice to process payment.

Drop Shipments

- Indicate drop shipment for a sales order line and the entry of the corresponding vendor invoice for the purchase order line will confirm the sales order shipment. No more manually tracking to ensure these items are invoiced to the customer.

Surcharges

- Surcharges for an item and vendor can be a fixed amount per quantity ordered or a percent of the item's unit cost and included in its actual cost.
- Surcharges displayed during purchase order entry are added to the total cost of the item and order and can print on the PO.

Dates

- Purchasing and receiving are not limited to shop calendar dates.
- Dates on some or all order lines can be adjusted quickly by a number of days (plus or minus), to a specific date, or from one date to another.
- Adjust dates for the same item on multiple POs in a single process.

Document Management

- PowerShift can output multiple copies of the documents you want, using each recipient's preferred method (email, fax, EDI)—automatically or on demand.
- Print item descriptions in the vendor's language.
- The "electronic" signature of the buyer can be added to the purchase order.