

Sage Timberline Office



Purchasing

Purchasing gives you the tools to stay on top of material acquisition while keeping an eye on the bottom line.

Purchasing handles everything from generating requisitions and purchase orders, to tracking PO change orders, to issuing receipts, return authorizations, invoices, and more.

Through tight integration with Inventory, Purchasing gives you the ability to consolidate purchasing and the replenishment of inventory items through one information source. And interfaces to Job Cost, Equipment Cost and Accounts Payable allow you to efficiently capture all your material details.

Draw from a complete item database to quickly generate POs for jobs, equipment, and inventory. Then print customized purchasing documents that include all the detail suppliers need, as well as style elements—like your company logo—that enhance your professional image.

Purchasing also helps you keep track of what has been delivered and what is still outstanding with complete item receiving capabilities. And you can automatically generate vendor invoices based on receipts to maximize workflow efficiency.

Following is a detailed list of the features Purchasing offers to help you keep tight control over material acquisition:

Item tracking

- Track items in a shared database with Inventory to consolidate purchasing and the replenishment of inventory.
- Record and track item class, most recent cost and more.
- Set up automatic quantity conversions (for example, automatically convert pallets to boxes, or boxes to units).
- Track all suppliers for each item including the most recent price offered by each.
- Track contract pricing information for each item (for example, supplier, contract price, start and end dates, and quote number).
- Automatically update item record with the last supplier used during PO entry.
- Record a reorder point for each item and use reorder reporting to monitor status.
- Import and export items using Microsoft Excel.

Purchase order processing

- Draw information from the item database to quickly generate POs for jobs, equipment, and inventory.
- Copy existing POs to generate new ones.
- Automatically pre-fill the PO entry window with item pricing information or most recent vendor and price (override the pre-fill if necessary).
- Customize the PO entry window to add and remove columns (for example, jobs, equipment, inventory items, GL accounts, retainage and more).
- Adjust row height and column width as needed (for example, expand row height to view all the text for a long PO description).

BENEFITS

- Customized purchasing documents created with the touch of a button
- Automatically generate vendor invoices from receipts for maximized efficiency
- Integrates with Inventory for the consolidation of purchases and replenishment of inventory items through one information source

- View current item statistics with a status bar at the bottom of the PO entry window (for example, see budget by cost code, quantity on order, quantity on hand, and a running total of the order amount and taxes).
- Enter PO change orders and track them separately in Job Cost.
- Track PO amounts against budgeted amounts and set security to control operators' ability to enter POs that exceed budget.
- Store notes with up to 2,000 characters of information for each item.
- Edit uncommitted POs and void as needed.
- Record a separate ship-to address.
- Choose different PO document formats prior to printing.
- Preview the purchasing document on the screen before printing.
- Commit one or several pending orders all from a single screen.
- Use e-mail to send purchase orders and change orders.
- Create purchase orders, subcontracts, unit-rate or blanket orders.

Receiving

- Enter receipts to multiple POs in the same entry session.
- Click a "receive all" button to automatically receive all displayed items, or receive items manually using an interactive checklist.
- Enter partial receipts and cancel or backorder the rest.
- Record delivery conditions using a customizable list (for example, damaged, returned, good order).
- Segregate receiving and invoicing functions, or combine them into a single step to streamline operations.
- Record add-on charges, such as freight, while receiving.

Invoice entry

- Generate invoices automatically using receipt information.
- Optionally override receipts to edit invoices as needed.
- Record add-on's to the invoice and optionally prorate costs over multiple jobs (for example, record a freight charge that wasn't included in the original PO).
- Enter invoices for items that don't have associated POs (for example, enter an invoice for an item that was ordered over the phone).
- Enter partial invoices based on partial receipts.

Inquiry

- View stored information on the screen through an interactive purchasing inquiry.
- Use Previous and Next buttons to quickly scan through POs, receipts and invoices.
- Drill down from summary information to supporting detail (for example, drill down on a PO to see if items have been received).
- Apply filters to display exactly the information you want to see (for example, display all receipts for a particular day).
- Search for specific information using exact match or partial match criteria.

Reporting

- Choose from several pre-designed Inventory reports to calculate and print information at any time (for example, PO Approval Status, Expected Shipments, Daily Receiving, Overdue Items).
- Use Crystal Reports® to modify the look and content of existing reports or to create entirely new reports (Crystal Reports must be purchased separately).
- Include data fields from throughout Sage Timberline Office in customized reports using Crystal Reports.
- Add customized reports to the reports menu.

Additional features

- Define security rights by employee or group for PO approval limit, PO change order limit, receipt add-on approval limit, and estimate override limit.
- Enter electronic notes to document additional information in POs, receipts and invoices.
- Change field descriptions to match your company's terminology.

Purchasing is a part of Sage Timberline Office, fully integrated software created to streamline work and connect the people you depend on to build your business.