

# Sage Timberline Enterprise



## Purchasing

When it comes to controlling the bottom line, careful monitoring of material acquisition is critical to success.

With **Sage Timberline Enterprise Purchasing** you'll have everything you need to maintain complete control from generating requisitions and purchase orders to entering PO receipts, tracking PO change orders, and more.

That's because Purchasing lets you streamline how you purchase and then restock inventory items with tight Inventory integration so you can work from a single source of information. Plus, you can capture detailed information for all your material quickly and easily because it interfaces with Job Management, Service Management, Accounts Payable, and Accounts Receivable.

Generate POs for jobs, internal areas, work orders, and inventory rapidly by pulling data from a complete item database. And, support your company's brand identity with the ability to print customized purchasing documents that include all the details your suppliers need, including style elements such as your company logo.

Need better control over what's been delivered and what is still outstanding? Purchasing provides you with complete item receiving capabilities including back orders, over-receiving, and enhanced unit rate orders.

Get your current staff and new hires up and running quickly on the software using the Purchasing Process Map. With this visual representation of the purchasing process, you can click on any section of the diagram to complete your work.

How else can Sage Timberline Enterprise Purchasing help you maintain better control over your material acquisition process? Just look at this comprehensive list of features:

### Purchase order processing

- Customize the PO entry window to add and remove columns (for example, jobs, inventory items, and more).
- Automatically pre-fill the PO entry window with item pricing information or most recent vendor and price (override the pre-fill if necessary).
- Adjust column width as needed.
- Draw information from the item database to quickly generate POs for jobs, service work orders, and inventory.
- Copy existing POs to generate new ones.
- Create PO's via requisitions.

### Item tracking

- Track all vendors for each item including five most recent prices.
- Track vendor and job price information for each item (for example, vendor price lists, and quote number).
- Automatically update item record with the last vendor used and price paid during PO entry.
- Record a reorder point for each item and use reorder requisition generation.

### BENEFITS

- Tightly integrates with Inventory for the consolidation of purchases and replenishment of inventory items through one information source
- Ability for custom fields
- Customized purchasing documents

- Import and export items (items or item classes) using Microsoft Excel.
- Set up automatic quantity conversions (for example, automatically convert pallets to boxes, or boxes to units) using quantity unit of measure and buy-price unit of measure.
- Enter PO edits and change orders and track them separately.
- Commit one or several pending orders all from a single screen when processing orders.
- Use e-mail to send purchase orders and change orders.
- Create purchase orders or unit-rate orders.
- Set commit and approval limits by user to safeguard approval rights.
- Close orders by job in one screen.
- Approve/deny several orders in one screen.
- Store notes with up to 2,000 characters of information for each item.
- Edit uncommitted POs as needed.
- Record a separate ship-to address such as job, warehouse, etc.
- Choose different PO document formats prior to printing.
- Preview the purchasing document on the screen before printing and save that format with the purchase order.

### Reporting

- Include data fields from throughout Sage Timberline Enterprise in customized reports using Sage Report Designer.
- Add customized reports to the reports menu.
- Choose from several pre-designed Purchasing reports to calculate and print information at any time (for example, Order Status, Expected Shipments, Daily Receiving, Overdue Items).
- Use Sage Report Designer to modify the look and content of existing reports or to create entirely new reports.

### Workspaces

- 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.
- 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).
- Perform tasks with the shown information.

### Receiving

- Record add-on's to the invoice.
- Enter partial invoices based on partial receipts.
- 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).

### Additional features

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

Purchasing is a part of Sage Timberline Enterprise, a tightly integrated business management solution designed to simplify the complex needs of service and specialty contractors.