

eBackOffice 7.3 Release Notes

Purchasing

New Features 1

- Expedite Check Box 1
- Standard PO Number Format Mask 1
- User-Definable Status Codes 2
- Purchase Order Categories 3
- Ability to Create Purchase Order Directly from Sales Order 4
- Vendor Sales Order Number 5
- Requested By and Approved By Fields 5
- Tolerance Checking for PO Lines 6
- Date and Amount Limitations for Blanket POs 6
- Receiving and Ship To Location by Line Item 6
- Receive Multiple POs on a Single Receipt 7

Open Issues 8

- Cannot Change Location Message 8
- Cost Does Not Change When Updating UOM 9
- Duplicate POs With Changed Location Do Not Print 9
- Drop Shipped POs Do Not Display Vendor SKU and Unit Cost 9



New Features

Overview

Description This section describes new features on the desktop of which you should be aware as you install and use this application.

Expedite Check Box

Description You can select the Expedite check box on the purchase order header to notify the supplier of the order's priority. This check box is for information purposes only.

Standard PO Number Format Mask

Description Purchase order numbers now have a format mask. The mask can be set in the Po Number Mask field on the Pur/Rcv tab of the Configuration List window.

Note: Although PO number mask can contain symbols and special characters, we recommend that you use only alpha-numeric characters in your mask, because special characters do not sort in any particular order.

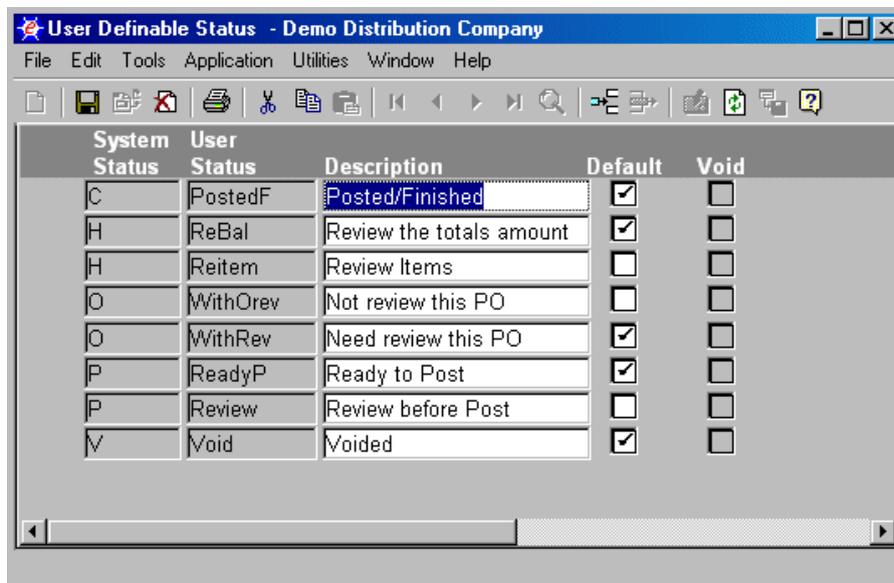
User-Definable Status Codes

Description

You can now add custom purchase order status codes to the system. Each status that you define is associated with a system status. One user-defined status must be selected as the default for a system status. When creating a purchase order, the default open status is assigned and can be modified as needed.

User Definable Status window

User-definable status codes are defined in the User Definable Status window, shown here. You can access this window from the Utilities > Maintain menu on the Purchasing window.



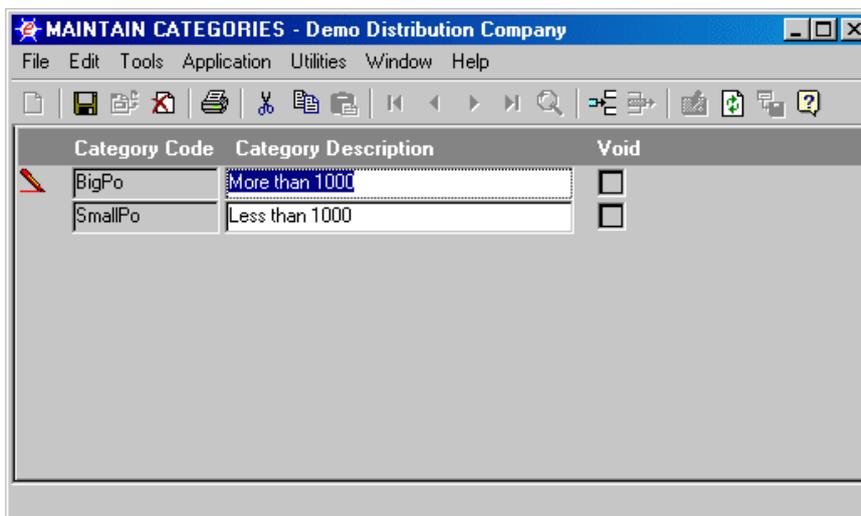
The screenshot shows a window titled "User Definable Status - Demo Distribution Company". The window contains a table with the following columns: System Status, User Status, Description, Default, and Void. The table lists several status codes, including "Posted/Finished", "Review the totals amount", "Review Items", "Not review this PO", "Need review this PO", "Ready to Post", "Review before Post", and "Voided".

System Status	User Status	Description	Default	Void
C	PostedF	Posted/Finished	<input checked="" type="checkbox"/>	<input type="checkbox"/>
H	ReBal	Review the totals amount	<input checked="" type="checkbox"/>	<input type="checkbox"/>
H	Reitem	Review Items	<input type="checkbox"/>	<input type="checkbox"/>
O	WithOrev	Not review this PO	<input type="checkbox"/>	<input type="checkbox"/>
O	WithRev	Need review this PO	<input checked="" type="checkbox"/>	<input type="checkbox"/>
P	ReadyP	Ready to Post	<input checked="" type="checkbox"/>	<input type="checkbox"/>
P	Review	Review before Post	<input type="checkbox"/>	<input type="checkbox"/>
V	Void	Voided	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Purchase Order Categories

Description A new maintenance form allows you to add purchase order categories to the system. The category can be added to a purchase order on the Purchasing window's Main header tab.

Maintain Categories window Purchase order categories are defined in the Maintain Categories window, shown here. You can access this window from the Utilities > Maintain menu on the Purchasing window.



Ability to Create Purchase Order Directly from Sales Order

Description When there is a need to link a purchase order to a specific sales order line, you can check the Create PO box on the line.

Example For example, an item that a customer is purchasing may be out of stock. The Create PO check box allows the creation of a purchase order automatically. The information on the sales order will be used to create a purchase order with the same detail. These two transactions are then associated with each other for tracking and reporting purposes. For example, if the sales order is cancelled, the purchase order is cancelled as well.

Procedure The following procedure illustrates how to automatically create a purchase order directly from a sales order:

Step	Action
1	When creating a sales order, select the Create PO check box on a line item.
2	From the Purchasing window's Utilities menu, select Drop Ship Auto PO.
3	In the Options window, verify enter a Stop date and select a Date Range option.
4	In the Location field, enter the location from the Location field in the Sales Order window.

Step	Action
5	Click Ok. Result: All sales orders where the Create PO box was checked and a matching location are listed in the Drop Ship Auto PO window.
6	Assign a Vendor and check the Buy box for each order needed.
7	Save your work. Result: A new purchase order is created with the information from the sales order.

Vendor Sales Order Number

Description You can now enter the vendor's sales order number in the Vendor SO field on the Purchasing window's Main header tab. This field is for information purposes only.

Requested By and Approved By Fields

Description You can now enter the names of people who requested and approved a purchase order in the Purchasing window's More header tab. Any name can be entered into the fields. These fields are for information purposes only.

Tolerance Checking for PO Lines

Description Tolerance checking can be performed on each purchase order line. Either type in or double-click to find and select a valid tolerance code in the Tolerance field on the Purchasing window's Main detail tab.

Date and Amount Limitations for Blanket POs

Description Blanket purchase orders can now be limited by time and amount. When a user selects the Blanket check box on the Purchasing window, the following fields appear and must be completed:

- From
- Through
- Through Amount

Blanket purchase orders cannot be modified before the From date, after the through date or when the Through Amount has been reached.

Receiving and Ship To Location by Line Item

Description To help buyers order parts for multiple locations, ship to address information can be added to each purchase order line. Thus, if a buyer wanted to order the same part but ship it to several locations, they could create one PO and enter as many lines as needed for the same part and designate a different address for each.

Receive Multiple POs on a Single Receipt

Description A new Receiving utility allows you to select multiple purchase orders for receipt. See the Receiving application's Release Notes for more information.

Open Issues

Overview

Introduction This section lists unresolved issues that you should be aware of as you use this application.

Issue tracking Epicor Software Corporation uses a tracking system for reporting and noting resolutions of software issues. Each issue is assigned a number called an SCR (system change request).

You can search a database of existing and resolved application issues, including workarounds where available, from the Epicor Software Corporation internet site at <http://www.epicor.com>.

Cannot Change Location Message

Description If you change the PO Location on a new purchase order and then immediately use the mouse to click in the detail section's Main tab, the system displays the following message: "You Can Not Change Location On PO's With Line Items."

Workaround: Close the message box and either press TAB on your keyboard or use the mouse to click another field.

Cost Does Not Change When Updating UOM

Description If you change the unit of measure on a purchase order line from the stocking UOM to the purchasing UOM, the system does not update the amount in the Unit Cost field.

Workaround: Manually update the cost of the item in the Purchasing window.

Duplicate POs With Changed Location Do Not Print

Description If you duplicate a purchase order, change the location, and save, the system will not print the order. The system will print duplicate orders where the location is unchanged.

Workaround: Only duplicate orders when the location will remain unchanged. Otherwise, enter a new order.

Currency Displayed Incorrectly in Inventory Replenishment

Description Inventory Replenishment displays vendor quotes in U.S. dollars regardless of the currency used by the vendor.

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