

# integrated



# minds

# solutions



## Purchasing

- ▶ Purchasing automatically creates suggested transfer orders or suggested purchase orders, eliminating time-consuming replenishment management activities
- ▶ Supports warehouse and branch orders and shipments of several products at once, saving time and simplifying order management for branch and warehouse
- ▶ Transfer products from one location to another easily and quickly using an automated process that is custom-designed for warehouse and branch personnel
- ▶ Matching to purchase orders avoids over-payments on supplier invoices and saves time on data entry
- ▶ Calculation of landed costs allows you to keep track of variable costs, such as shipping, duty, and exchange rates and build these into the price of your products
- ▶ Receivers confirm receipt of an entire transfer order in one step and then record quantity/status changes in AXIS Inventory
- ▶ Purchase orders progress through several statuses (Initiated, Open, Approved, Issued, Received, and Cancelled), maximizing control over who completes specific tasks
- ▶ Transfer orders progress through several statuses (Awaiting Approval, Approved, Shortage Checking, Closed, and Cancelled) maximizing control over who completes specific tasks



The AXIS Purchasing application enables clubs to reap the benefits of integrating purchase and transfer activities into one application. It tracks purchases of inventoried and consumable products, updates inventory levels and handles shipping requests. Your club can more easily keep track of inventory levels in your branches and warehouses, monitor and control product movement, and produce informative reports for management and accounting personnel.

Purchasing is tightly integrated with the AXIS Inventory, Accounts Payable and General Ledger (GL) applications to streamline updating and viewing on hand and on order information, and for updating GL inventory accounts.

### Types of Orders

With purchase order processing, your club can replenish inventory from outside suppliers using an automated request system. With transfer order processing, your club can transfer products from one location to another easily and quickly, using an automated process custom designed for branch and warehouse personnel.

Using inventory level data and order policies, Purchasing automatically creates suggested transfer orders or suggested purchase orders, eliminating the need for time-consuming replenishment management activities. New purchase and transfer orders can also be entered manually.

Purchasing also calculates back order quantities, based on a vendor's, club's, or branch's back order policy for a product. Users can also enter a new back order quantity, when necessary.

### Suggested Purchase/Transfer Orders

Purchasing has a Suggestions feature that automates the creation of purchase and transfer orders. Based on current inventory levels, supply and demand, and the ordering policies set up for products, Purchasing automati-

cally suggests what products need to be transferred or purchased. When Purchasing determines that products need to be purchased or transferred, it initiates an order.

## Purchase/Transfer Order Templates

You can create an unlimited number of purchase and transfer order templates to standardize content and simplify the creation process for new purchase orders. Among other information, a purchase order template might include terms, special instructions, or even a list of usual products. You can base a template on the information contained in an existing purchase order, change a purchase order template, or create a new template.

## Purchase/Transfer Order Maintenance

With Purchasing, users can perform all types of maintenance tasks on purchase and transfer orders. Specifically, users can Change order information, Delete unissued orders, Cancel orders, Add comments, Print orders, and Purge orders.

## Purchase/Transfer Order Receipts

Once a purchase/transfer order shipment is physically received at a branch, users can complete a purchase/transfer order receipt.

While entering purchase receipts, users record the status, quantity received and applicable reference numbers.

While entering transfer receipts, users confirm receipt of the entire shipment in one step and on an exception basis, adjust quantities and status by product in AXIS Inventory.

When all products on the purchase/transfer order have been received, or when remaining or outstanding quantities are cancelled (that is, all products have either been received or cancelled), the purchase order's status changes to received.

When your accounting staff make entries in the Payable Entry screen, they will be able to review outstanding purchase order receipts. These receipts can then be matched with the appropriate supplier invoices. In addition, accounting staff can:

- identify variances between invoice amounts and quantities received
- track receipts that haven't been invoiced
- factor in landed costs (exchange rate, duty, custom broker fees and shipping) and vendor cost fluctuations.

## Security and Authority Levels

Your club's System Administrator defines security for each Purchasing activity to control which Purchasing users can perform which activities. Each Purchasing activity has a minimum authority level assigned to it. To perform an activity, Purchasing users must have an equal or greater authority level than the minimum level that is set for the activity.



Related product sheets:

- Inventory
- Accounts Payable
- General Ledger

## Reporting

A variety of management reports are provided to monitor outstanding purchase and transfer orders, in-transit orders, shortages and expected shipments (orders can be released for allocation, to be picked and shipped).

Purchasing keeps statistical information about purchase order receipts, purchase orders issued and cancelled purchase orders. Users can analyze past purchasing activity, such as annual purchases from a specific vendor, using AXIS' Make Your Own Report application. With Make Your Own Report, users can generate customized reports and export files of various formats (including CSV files) to Windows, UNIX, Word or Excel.