

Purchase Preferences

The Extra tab of Purchase preferences contains many important options.

| < Extra | Report | Addresses | Custom Fields | Mandatory Fields | Upper Case Fields | Fields To Clea | | | |
|--------------------------|----------|-------------|--|------------------|-------------------|----------------|--|--|--|
| Last Reques | t Numbe | r Assigned: | | | | | | | |
| Last PO Number Assigned: | | | Allow manual override of defaulted Request Number | | | | | | |
| | | | Allow manual override of defaulted PO Number | | | | | | |
| | | | Assign PO Number On First Approval | | | | | | |
| | | | Skip Purchase Approval Process | | | | | | |
| Purchase Ty | pe: | | | | | | | | |
| | | | Prompt to update Material price if default changed | | | | | | |
| | | | Include Part Number In Materials List | | | | | | |
| | | | Include C | ustom Column In | Materials List | | | | |
| Custom Column Title: | | | | | | | | | |
| Custom Colu | ımn Valu | ies: | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |

Last Request Number Assigned allows you to dictate the next number of the next purchase order request. The checkbox allows manual override of this number.

This same behavior applies to **Last PO Number Assigned**. You can also use the next checkbox to assign the PO Number once the first approval is complete.

Skip Purchase Approval Process allows new Purchase records to go directly to an Approved status type and assigns a PO Number. Keep in mind that when active, this feature bypasses **all** approval checks, meaning any permission group will be allowed to change Purchase records to an Approved status.

Purchase Type allows you to set a default Purchase Type for the Purchase capsule.

If **Prompt to update Material price if default changed** is checked, it will alert the user if they change the default price of a linked Material record.

Include Part Number in Materials List, Include Custom Column in Materials List, Custom Column Title, and **Custom Column Values** provide more flexibility in displaying Materials on a Purchase order's Materials tab. In the example below, "Extra" is a Custom Column Title and the checkbox has been selected to include part number on the far right.

| Material | Description | Extra | Quantity | Measure | Unit Cost | Extension | Account | Part |
|------------------|------------------------|-------|----------|---------|-----------|-----------|---------|------|
| ELEC-SOCKET #450 | Electrical Socket #450 | | 100.000 | ea | 9.2500 | \$925.00 | 08-1000 | 450 |



Purchase Single Report

The Purchase Single Report has many preferences and features to customize the appearance of Single Purchase Reports. These preferences take effect across **all** Divisions.

The Report tab displays checkboxes to control the appearance of certain aspects of a single purchase order report. For instance, if **Company Address** is selected, the address in the Property or Division record (see below) will appear centered under the words "Purchase Order". Checking **Header Text** and entering text in the field to the right will make that text appear as a header under the PO number of the report.

Checking off **Other Links** will show the Work, Contract, or Project records linked to the Purchase record.

The **Account Distribution Section** will include a summary by account section at the bottom of the PO report (based upon the details in the material list).

Additionally, the Addresses tab allows you to set a default Bill To and default Deliver To Address for all purchases.

You can also have a default header for each property. Found in the Property capsule under the Reports tab, this header will default onto any PO reports that link to that property. **This header takes precedence over the header in Purchase Preferences and in the Division record.** Check off "Use Address on Single Purchase Report" to default the Property record's address onto the Single Purchase Report.

| K Extra | Report Addresses | Custom Fields | Mandatory Fields | Upper Case | | | |
|--------------|------------------|---------------|------------------|------------|--|--|--|
| | | | | | | | |
| | Company Add | ress | | | | | |
| | Header Text | | | | | | |
| Header Text: | | | | | | | |
| | Purchase Type | e | | | | | |
| | Purchase Status | | | | | | |
| | Requested By | | | | | | |
| | Purchase Date | es | | | | | |
| | Vendor Code | | | | | | |
| | Vendor Contac | t Details | | | | | |
| | Other Links | | | | | | |
| | Notes | | | | | | |
| | Description | | | | | | |
| | Purchase Deta | ails | | | | | |

Account Distribution Section

| Custom Fields | Defaults Reports | Timestamps | External | Reminders |
|--------------------|------------------|--------------|-----------|-----------------|
| | | | | |
| Invoice Paragraph: | REMIT | | Remittar | nce information |
| Quote Paragraph: | QUOTE | | Quote | |
| Purchase Header: | | | | |
| | Use Address O | n Single Pur | chase Rep | oort |

This address takes precedence over the address in Division record (see below).



The Division capsule also contains preferences that affect the Single Purchase Report, with defaults for Purchase Header and the Address listed on the Division record (if there is one). This address will only be used on the single PO report if the purchase is not linked to a property or if the property does not have "Use Address on Single Purchase Report".

| < | Custom Fields | Number Source | Purchase | Schedule | Visitor | Work | Reminders |
|-----|----------------|------------------|-------------|------------|---------|------|-----------|
| | | | | | | | |
| S | ource For | Last Purchase F | Request Nur | nber Assig | ned: | | |
| S | ource For | Last PO Numbe | r Assigned: | | ſ | | |
| | | Purchase Type: | | | ſ | | |
| | | Purchase Heade | er: | | ſ | | |
| 🗆 U | se Address Or | n Single Purchas | e Report | | | | |
| S | kip Purchase / | Approval Process | | | | | |

Purchase Single Report

Access this report from either the Operations menu on the Purchase List and select Purchase Single Report, or by selecting the print icon on a Purchase record in form view. Operations ᅌ

| | Create Work Record |
|----|---------------------------|
| | Create Inventory |
| | Update Work Materials |
| | Generate Letters |
| | Generate Emails |
| | Approve Purchases |
| Q | Purchase Materials Report |
| Q | Purchase Vs Work Report |
| Q, | Partial Receipt Report |
| | Print Single Records |



Purchase Single Report:

| Aware | Manager | jxt | Purchase C | Drder | Bill To: Database 50 Congre Boston, M Deliver To Database 50 Congre Boston, M | PO Number 13 International Group, Inc. ess Street, Suite 630 IA 02109 D: International Group, Inc. ess Street, Suite 630 IA 02109 |
|----------|---|---------------------------------|------------|--------------|--|---|
| | Electrics for 1 Maki Ave boston, MA | or You! ≩ A 2155 | | | | |
| Quantity | Measure | Part Number Description | | Cost | Extension | Material Account |
| 211125 | ea | 1 asdfa sdf asdfaend | | \$9.25 | \$1,952,906.25 | ELEC-SOCKET #450 |
| 2133555 | ea | 3 Electrical Socket #510 | | \$11.12 | \$23,725,131.60 | 08-1000 ELEC-SOCKET #510 08-1000 |
| 999111 | ea | 4 Wall Switch - double creat | m | \$2.45\$2 | ,447,822,76 | ELEC-SWITCH-D-C 08-1000 |
| | | | Su | ubtotal: \$2 | ,473,500,803. | |
| | | | | | 70 | |
| | | | | | Adminst | trative Fee: \$247,350,080. 3 |
| | | | | | \$ | Total 2,720,850,884.07 |



Purchase Order Single Report with Preferences:

| | | | Purcha | se Order | | PO Number |
|--|--|---|--|--|---|--|
| Aware | Manager | jxt | 100 Beacon S 100 Bea Boston, Phone: 6 Fax: 61 | Incen Street MA 02109 17-888-4646 7-767-3467 | 100 Beaco P-Header Requested Phone: 61 Email: fd@ Date Enter | I By: Frank Dividemo 7-888-8555 2awaremanager.com ed: November 22, 2010 |
| Vendor: | ELECTRIC | s | | | Date Appr | oved: November 22, 2010 |
| | Sparky Plu Electrics fo 1 Maki Ave boston, M/ Phone: 9' Email: s. | ig r You! ≩ A 2155 78-555-5555 plug@electric.com | | | Bill To: Database 50 Congre Boston, M <u>Deliver To</u> Database 50 Congre Boston, M | International Group, Inc. ss Street, Suite 630 A 02109 <u>x</u> International Group, Inc. ss Street, Suite 630 A 02109 |
| Descriptio | n: This is th | ne DESCRIPTION | | | | |
| Departme Delivery: Tenant: A Tracking N | nt: ENG TEST ALLPWR Number: trk | # | | | | |
| Quartity | Marrie | Part Number | | 0 | Extension | Material |
| Quantity 211125 | ea | 1 asdfa sdf asdfaend | | \$9.25 | Extension \$1,952,906.25 | ELEC-SOCKET #450 |
| 2133555 | ea | Electrical Socket #45 3 | 0 | \$11.12 | \$23,725,131.60 | 08-1000 ELEC-SOCKET #510 |
| 999111 | ea | Electrical Socket #51 | 0 | \$2 4452 | 147 822 76 | 08-1000 ELEC-SWITCH-D-C |
| 555111 | ca | - Wall Switch - double | cream | φε.43φ2,4 | TTI,UZZ,10 | 08-1000 |
| | | | | | Adminst | rative Fee: \$247,350,080. 37 Total 2,720,850,884.07 |
| Notes: | These are | the NOTES | | | | |
| | Account 08-1000 | Distribution | \$2,473,500 | .803 .70 | | |
| | Approval | s R-IOHN Ma | w 22 10 12-14 | _ | | |
| Printed Mar | Nov 22 12:14 | 44 EST 2010 | | Number 13 | | Dana 1 of 3 |
| | 1100 12 10.111 | | | | | |
| | | | Purc | hase Orde | r wer | PO Number 13 |
| O Aw | XO vareManaş | ger jxt | 100 Beaco 100 Bos Phon Fax | Beacon Street ton, MA 02109 e: 617-888-4646 : 617-767-3467 | 100 B P-Hea | eacon North Property der |
| O Aw Purcha | vareManaq ase Order Te | ger jxt | 100 Beaco 100 Bos Phon Fax | Beacon Street ton, MA 02109 e: 617-888-4646 617-767-3467 | 100 B P-Hea | eacon North Property der |
| Purcha 1. The 2. A sig 3. Item | ase Order Te purchase oi gned copy o is that are ur | erms and Conditions for rder number must app f the purchase order n avaiable must be con | or Vendors ear on all invoice: nust be submitted nmunicated prior | Beacon Street ton, MA 02109 e: 617-888-4646 617-767-3467 s. Via fax 617-542-8 deliverv | 100 B P-Hea 860. | eacon North Property der |

endor Contact Details come from:

- If there is a Contact record linked to the Vendor, it will be the Contact's Name, Address, Phone and Fax
- Otherwise it will be Vendor's address, phone and fax. If there is a free form text Person on the Vendor record, that will print as the name.