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1. Introduction

1.1 Overview
The screens and reports offered in the Purchasing Control module enable you to issue and track purchased parts within your system, including constantly changing delivery schedules and quantity information.

1.2 Procedures

The Purchasing Control module is triggered by the MRP module as well as by manually added information.

After the MRP Explosion Program has been requested, planned orders are created (Order Number = 400,000 series, Order Type Code = PL and Status Code = 1).

If the planner decides to purchase the part, he may approve it using Approve Planned Orders in the MRP module or approving it using the Purchasing Schedule. Approved Orders
are Status 2 400,000 series purchase requisitions. Alternatively, a planned order may be directly assigned to a purchase order using the Purchasing Schedule.

Orders to be purchased may then be printed as Purchase Requisitions, which authorize the purchasing department to procure the required materials. (Order Number = 600,000 series, Order Type Code = PR and Status Code = 3.) You can also directly release a planned order through the Release Orders option on the PR Schedule menu with the Purchasing Schedule active.

The PR triggers the purchasing department to review alternate sources of the needed materials. Consideration is given to vendor lead-time, price, quality, and other purchasing concerns. The purchasing department may then get quotes from all the alternative vendors.

The purchasing department assigns purchase requisitions or planned orders to new or existing Purchase Orders.

The system then prints the purchase order when you request Print Purchase Orders. (Order Number = 700,000 series, Order Type Code = PO and Status Code = 3.)

Up to 99 Line Items (unique parts) can be assigned to each Purchase Order with up to 99 deliveries per Line Number.

The receiving department posts receipts against the purchase order using Inventory Control > Transactions > Receipt (Purchase). The receipt may be edited and marked for vouchering. The voucher can then be edited by accounting and posted. Purchase order line items must be manually updated from Completed (Status=4) to Closed by Accounting (Status=5) using the Purchase Order line item detail dialog box.

Note: Subcontract POs must be updated to Status=5 using Costing > Post Order Closure.

1.3 Implementation

Purchasing Control should be implemented prior to running your first MRP Explosion. Purchase Orders that are outstanding should be entered so that MRP has an accurate statement of scheduled receipts.

Once the system is fully implemented, the Purchasing Control module is fed information generated by the MRP module. This data includes parts to be purchased, quantities needed, and required due dates. Before this information can be processed by Purchasing Control, the following data must be input and maintained.

Purchased parts must be assigned lead-times in Purchase Part Data.

Approved vendors must be entered, including contact name, address, and phone number. Once this has been accomplished, the system must be told which parts are available from which vendors. The system does not limit the number of vendors that can supply a given part; nor confine the number of parts that a given vendor can supply. Parts and vendor relationships are established in Vendor Part Data.

The Purchasing Control module provides the MRP module with information on scheduled receipts prior to the running of an MRP Explosion.

This is accomplished by entering already released Purchase Orders.
2. Conventions

2.1 Using Exact MAX 5.0 Browsers

When a dialog box appears yellow as the Vendor ID field in the following example:

![Vendor Master Form]

Exact MAX 5.0 users open a browser dialog box to select and display a value as follows:

1. Place the cursor in the field
2. Double click the left mouse button
3. A browser dialog box opens.
4. Double click an item in the browser dialog box to add the item to the field.

A specific browser that only lists items available for the selected field opens. For example, double clicking the Vendor ID field (as shown above) opens the Vendor Master browser. In some instances, it is of more benefit to the user to browse a different table for a part vendor. These instances are highlighted in the relevant section this user guide.

The term “browse and choose” appears throughout this user guide to reference this feature.

Note: This feature replaces the ellipsis button displayed in legacy (16-bit) Exact MAX 5.0 applications.

2.2 Associate

Exact MAX 5.0 users can associate “other” information files (such as bitmap, MS Word document, MS Excel files, etc.) to specific values displayed in Exact MAX 5.0 key or ID fields. Examples of such fields in the Purchasing Control module include the Order Number and Vendor ID fields on the Purchase Order Form, the Vendor ID field on the Vendor Master dialog box and the Part Number field on the Purchase Part Data dialog box.
To associate a file with a key field, right click an ID displayed in any field with a “raised” border. The following menu appears:

![Vendor Master](image)

Choose Associate.

In the Document Link browser, click New to associate a file with the chosen Customer ID.

![Document Link Browser](image)

Enter a path to the file and file name or click the browse button. If browse is chosen, the Open dialog box appears.
Choose the file to be associated. Windows must be set up to open the file type using a specified program (e.g., .DOC files open MS Word). Click Open to save the association.

Now users can right-click Associate when this Customer ID number displays in this field, then double-click the associated filename to open it using the associated program.

In the above example, the MS Word document And here.docx is associated with Vendor ID #V100.

2.2.1.1 Setting Up and Printing Exact MAX 5.0 reports and inquiries

Exact MAX 5.0 reports and inquiries may include all, one or a range of part IDs, order numbers, vendor numbers, etc. as specified by each user. The following example describes how to select part IDs for inclusion in an Exact MAX 5.0 report.

Note: This example shows how to select a part ID using the Exact MAX 5.0 Part Master browser. Exact MAX 5.0 automatically opens the appropriate browser necessary to select parts, orders, vendors, addresses, etc. required for each specific report or inquiry.

To Select All Parts:

Clicking the All button includes all Exact MAX 5.0 part IDs in the current report or inquiry.
To Select or Delete an Individual Part:

Clicking the Individual button changes the dialog box to display the buttons and fields below so that a user can specify a single part number to include in a report or inquiry.

1. Click the Add button to display the (Part Master) browser.
2. Double click a part ID in the browser to add the part to the Part Identifier List.
3. To delete the selected part number from the Part Identifier List, highlight a part number and then click the Remove button.
4. Click the Clear button to delete all displayed part numbers from the Part Identifier List.

To Select a Part Range:

Clicking the Range button changes the dialog box to display the range fields shown below so that a user can specify a range of part numbers to include in a report or inquiry.

1. Double click with the cursor in the Start With Part Identifier field to display a browser.
2. Double click a part ID displayed in the browser to display that part ID in the range field.
3. Repeat step #1 for the End With Part Identifier field.
The sentence: “Choose whether to list All, a Range, or Individual part numbers” refers to the above selection process throughout Exact MAX 5.0 user guides and help.

Crystal Reports Input File

The Input File box in each Exact MAX 5.0 report dialog box displays the default name of the Crystal report file used to generate the report. If customized report files have been installed, make sure that the desired source file matches the file name displayed.
3. New System Startup and Maintenance

You can create and issue purchase requisitions and purchase orders before your parts have been entered in the system by using the Non-Inventory PRs and POs, which do not use part identifiers. Some basic information must be in the system before you issue your first purchase order.

3.1 Setting Purchasing Module Preferences

To display the Purchasing Control module main window full size, select Options > Preferences when the main toolbar displays. In the Application Preferences dialog box, select (mark) the App Window Maximized box, then click OK.

3.2 Configuration

Note: The Configuration menu option no longer displays in the Purchasing module.

To configure Purchasing module keys, use System Manager as follows:

To set the Require Buyer ID Verification flag, select Activity > System Configuration > Shipping Address Key.

To set the A/P Default Account Type Code flag select Activity > System Configuration > Accounting Integration Key.

To set default values for each Vendor’s PO Terms, FOB destination and Ship Via carrier, use the Vendor Master dialog, as follows:

To set defaults for each vendor’s PO terms, select PO Data > Vendor Master.
To set defaults for each vendor’s FOB and ship via values click the More button.
3.3 **Terms Code Data**

Exact MAX 5.0 users must enter terms codes before entering vendor data in Vendor Master. Select Activity > Purchasing Data > PO Code Data > Terms.

<table>
<thead>
<tr>
<th>Terms Code</th>
<th>01</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>2% 10 Net 30</td>
</tr>
<tr>
<td>Net Days</td>
<td>30</td>
</tr>
<tr>
<td>Discount %</td>
<td>2.00</td>
</tr>
<tr>
<td>Discount Days</td>
<td>0</td>
</tr>
<tr>
<td>Discount Date</td>
<td>0</td>
</tr>
<tr>
<td>User Defined Key</td>
<td></td>
</tr>
<tr>
<td>User Defined Reference</td>
<td></td>
</tr>
</tbody>
</table>

**Terms Code**: A two digit alphanumeric code that defines a user designated set of discount and/or payment terms. If you are using Great Plains, any 2-character codes are acceptable, but Great Plains supports only one set of Terms codes for all of its modules, so AR and AP use the same codes.

**Description**: A twenty character field describing the discount terms, for example, 2% Net 10 Days.

**Net Days**: A number, up to 3 digits, indicating the number of days before which finance charges will begin to accrue. For example, Net 30 indicates that after 30 days finance charges would begin to accrue.

**Discount %**: A number indicating what the discount percentage would be. This number can be up to 3 digits including a decimal point. If the Discount Percent is not equal to zero, then you have the option to enter EITHER Discount Days OR Discount Date.

**Discount Days**: The number of days beyond the voucher date during which a discount is offered. This is a two digit number.

**Discount Date**: The day of the month through which a discount is offered. This is a two digit number.

**User Defined Key**: The 15-character user-defined key field writes to the Code Master file.

**User Defined Reference**: The 25-character user-defined reference field writes to the Code Master file.
3.4 Ship Via Code Data

Exact MAX 5.0 users must enter Ship Via codes before entering vendor data. Select Activity > > Purchasing Data > PO Code Data > Ship Via.

**Ship Via Code:** A two digit alphanumeric code that defines user designated shipping methods. If you are using Great Plains, any 2-character codes are acceptable, but Great Plains supports only one set of Ship Via codes for all of its modules, so AR and AP use the same codes.

**Description:** A 20-character field describing the particular shipping method, for example, UPS, UPS Red, or Federal Express Overnight.

**User Defined Key:** The 15-character user-defined key field writes to the Code Master file.

**User Defined Reference:** The 25-character user-defined reference field writes to the Code Master file.
3.5 Currency Code Data

This option is primarily designed to establish currency codes and exchange rates for the Multi-currency Option. However, all users must enter a base currency code with an exchange rate of 1. Exact MAX 5.0 users must enter at least one currency code before entering data in Vendor Master. Select Activity > Purchasing Data > PO Code Data > Currency.

Currency Code: A 3-character alphanumeric code used to describe a country's currency, such as USA for United States dollars or CND for Canadian.

Description: The name of the currency, such as dollars or pounds.

Exchange Rate: Enter the exchange rate. The highest number you can enter is 9,999,999. All users must enter a record for their domestic currency with an exchange rate of 1.

For users with the Multi-currency option: Exchange rates for foreign currencies should equal the factor that the domestic currency value must be multiplied by to equal the foreign currency value. For example, if the domestic currency value is 2 and the exchange is entered as 1.35, the foreign currency value will be calculated as 2.7 (2 x 1.35 = 2.7).

Symbol: The currency's symbol, such as $ for dollars. This symbol will print on purchase orders. This field may be left blank.

Decimal Places: Enter the number of significant places after the decimal point (up to 8). This value will be used by the system to round the results of any multiplication or division with exchange rates.

User Defined Key: The 15-character user-defined key field writes to the Code Master file.

3.6 Vendor Master

Exact MAX 5.0 requires information about each vendor with whom your company does business. Exact MAX 5.0 cannot process Purchase Requisitions or Purchase Orders without valid vendor information. Select Activity > Purchasing Data > Vendor Master.

Exact MAX 5.0 users must enter at least one valid Currency Code, Terms Code and Ship Via Code in PO Code Data prior to entering Vendor Data.

Use the drop down list boxes to select default values for each Vendor's Terms, Type, Currency Code and Status.

You can enter vendor ID, name and address information. It is possible to enter a separate address for remit to and for sending POs. Choose terms and currency code (Multi-Currency Option) to be the defaults on purchase orders for this vendor. Be sure to mark Vendor Type as Subcontract if this is a subcontractor (Subcontract Processing).

You cannot delete a vendor who has any existing part/vendor relationships defined in Part/Vendor data. You also cannot delete a vendor that has open purchase orders (status 3 or 4). Before deleting a vendor, display the PO Schedule by vendor and delete or close any open purchase orders.

**Status Code:** The Status Code for most vendors is Active.

A Suspended vendor retains their information within the system, but the system will not allow you to enter purchase orders for the suspended vendor. However, you will be allowed continue adding vendor part data and print outstanding purchase orders for the vendor.
You can mark a vendor as Deleted prior to deleting them from the system in order to be able to print outstanding orders for the vendor. No new orders can be created and no new information can be added to the Deleted vendor’s record.

**Note:** You can add a 25-character note.

**PO Printing:** Select (mark) the Print Vendor Part ID checkbox to print the vendor part ID on purchase orders and dispatch reports. Select (mark) the Print Second Part Description checkbox to print description 2 on purchase orders regardless of the setting assigned in PO Notes. Clearing this box allows users to print description 2 in using the PO Notes dialog box for individual PO line items.

**FIM:** Click this button to view vendor information from your accounting package. If you have real time vendor integration turned on in your configuration, vendor information will automatically be saved to your Great Plains files when you save.

**More:** The More button takes you to additional shipping information, user defined fields, year to date totals for the vendor, tax codes and e-mail addresses.

### 3.6.1 More Vendor Data

You can reach this window from the Vendor Master window by clicking the More button.

**FOB Point:** You can enter a default FOB location for the vendor.

**Ship Via:** A 10-character field indicating the shipping method for purchased parts to be shipped from the vendor to your company. The shipping method specified here will appear as the default for all purchase orders for this vendor. Ship Via Codes are established in PO Code Data. The description of the Ship Via Code will appear next to the code automatically.
**Shipping Instructions:** A 20-character field in which you enter additional instructions for the shipping of your purchased parts.

**Carrier ID:** This field is used by the EDI module. It is used to identify the vendor's Carrier ID when transmitting data electronically. Refer to the EDI Module documentation.

**User Defined Key:** A 15-character user defined key field.

**User Defined Reference:** A 25-character user defined reference field.

**YTD Totals**

**Purchase Amount:** The system automatically tracks the year-to-date purchase dollar amount for each vendor. The field is user-maintainable.

**Receipt Amount:** The system automatically tracks the year-to-date received dollar amount for each vendor. The field is maintainable.

**Purchase Orders Cut:** The system automatically tracks the year-to-date purchase order activity for each vendor. The field is maintainable.

**Taxes**

Browse and choose the tax code for this vendor. You may also enter a country code specifying the source of the material from this vendor.

**E-Mail**

You can enter two e-mail addresses for the displayed vendor, using up to 200 characters each.

**Vendor VAT**

This screen is used to enter value added tax information for vendors. Tax can be applied by line item on the purchase order. Enter the vendor's Fiscal Code and Tax Number.

### 3.7 Vendor Master Reports

This report will list full vendor information for all vendors or a selected range of vendor IDs.

**Print:** Choose whether you want to print to a window (to view), directly to the current Windows printer, or to a file.
3.7.1 Sample Vendor Master Report

The Vendor Master Report lists full vendor information for all vendors or a selected range of vendor IDs.

### Vendor Master Report

<table>
<thead>
<tr>
<th>Vendor</th>
<th>Phone</th>
<th>Fax</th>
<th>Vendor PO</th>
<th>Vendor Notes</th>
<th>YTD PUR</th>
<th>YTD Rec</th>
<th>YTD PO</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vendor 1</td>
<td>312-123-456</td>
<td>312-123-456</td>
<td>123456</td>
<td>NOTES1</td>
<td>123456</td>
<td>123456</td>
<td>123456</td>
</tr>
<tr>
<td>Vendor 2</td>
<td>555-555-5555</td>
<td>555-555-5555</td>
<td>567890</td>
<td>NOTES2</td>
<td>567890</td>
<td>567890</td>
<td>567890</td>
</tr>
<tr>
<td>Vendor 3</td>
<td>987-987-9878</td>
<td>987-987-9878</td>
<td>908765</td>
<td>NOTES3</td>
<td>908765</td>
<td>908765</td>
<td>908765</td>
</tr>
</tbody>
</table>

#### 2nd Description Flag:
If the Print Second Description checkbox (in the Print POs section of the Vendor Master dialog box) is marked, the part description line 2 entered in Part Master will print on the purchase order.

#### Vendor Part Flag:
If the Print Vendor Part ID checkbox (in the Print POs section of the Vendor Master dialog box) is marked, the vendor part ID will print on the purchase order.

#### Notes:
A 25-character user definable note field entered in the Vendor Master.

#### YTD PUR:
The monetary total of all purchase orders issued to this vendor during the current year.

#### YTD Rec:
The monetary total that has been received from this vendor during the current year.

#### YTD PO:
The number of purchase orders that have been issued to this vendor during the current year.
3.8 Tax Code Data

This window is accessed through the Activity, Purchasing Data, Tax Codes menus. It is used to enter tax codes to be assigned to vouchers. Tax codes are not required if your purchases are not taxed.

If you have accounting integration, enter all necessary tax expense account numbers in the Chart of Accounts.

Tax codes entered in this screen MUST be different than those entered for sales taxes. Descriptions and rates may be the same but the codes themselves must be different.

**Tax Code:** Enter a user defined tax code of up to seven characters. This code will reference a particular rate. For Value Added Tax the code must begin with VAT and the remaining 4 characters are user defined.

**Description:** Enter a description of up to 30-characters that defines the tax code.

**Tax Rate:** Enter the percentage (%) tax rate using up to four places to the right of the decimal. (5% would be written 5, not .05.) This number is for reference only and will not automatically be used to calculate tax amounts on vouchers.

**Comments:** You can enter a 30-character comment.

**GL Account:** Enter a general ledger account number.
If you are integrated with Great Plains, the account should be entered without dashes with a maximum of 32-characters. Currently, Great Plains allows a maximum of 20-characters. You can also browse the Great Plains accounts and choose the correct account. If you enter an invalid account number, the record will not be saved.

**User Defined Key:** A 15-character user defined key field.

**User Defined Reference:** A 25-character user defined reference field.

**Rounding:** When the tax calculation is performed, you can specify how the result is rounded and to how many decimal places.

### 3.9 Buyer ID Table

This window is found under the Activity option of the menu, Purchasing Data, Buyer ID Table.

If "Require Buyer ID Verification" in System Manager > System Configuration > Shipping Address has been set to Yes, only Buyer IDs that have been entered in this program will be accepted for purchase requisitions and purchase orders. The Buyer Name will be printed on purchase orders.

**Buyer ID:** Enter or scroll and choose (by clicking or using the cursor and then pressing Tab to choose) a 3-character Buyer ID code.

**Buyer Name:** Enter the Buyer's name as it should appear on the purchase order.

The User Defined Key and User Defined Reference will be saved to the PO Note file.
3.10 Standard PO Notes for Orders
To create standard PO Notes for all purchase orders, select Activity > Purchasing Data > Standard Notes > Orders.

Use this window to create or edit standard notes which will be attached to every purchase order when it is created. The notes for a particular order can be edited or deleted in the purchase order notes window. Type in the desired information and save. Order notes are printed at the bottom of a purchase order.

3.11 Standard PO Notes for Vendors
To create standard PO Notes for all vendors, select Activity > Purchasing Data > Standard Notes > Vendors.

Use this window to create or edit standard notes which will be attached to a specific vendor. The notes will automatically attach to any purchase order for that vendor. The notes for a particular order can be edited or deleted in the purchase order notes window. Choose the vendor, type in the desired information and save. Vendor notes are printed at the bottom of the purchase order.
4. Purchasing Non-Inventory Parts

You can use the Purchasing Control module (before entering your bill of materials) to enter purchase requisitions and purchase orders for non-inventory parts and other non-inventoried items.

4.1 Purchasing Schedule

From the Activity menu choose Purchasing Schedule. Under Order Type choose Non-Inventory and click Query to view existing non-inventory purchase requisitions.

<table>
<thead>
<tr>
<th>Order Type</th>
<th>Non-Inventory</th>
</tr>
</thead>
</table>

4.2 Non-Inventory Purchase Requisition Detail

This window is used to enter a new purchase requisition or to make changes* to an existing purchase requisition for non-inventory items. To add a new non-inventory PR, with the Purchasing Schedule Active for Non-Inventory items, select the PR Schedule menu and choose Add Req Line.
To edit an existing PR, (*to do this, a user must have Read / Write access to the Purchasing Schedule. See section 8.1, Restricting Access to the Purchasing Schedule, for more information.) double click the line number for an existing purchase requisition displayed on the purchasing schedule grid.

**New Order:** Click the New button to open a blank form with the next available order number. You can also choose Add Req Line from the PR Schedule menu to open this window.

**Update:** Click the Update button to save any changes made to an order.

**Order Number:** You can browse to choose an order number to review or the next available order number will appear when you add a new order.

**Line Number:** You can add up to 99 line numbers to a non-inventory purchase requisition.

**Vendor ID:** You can browse and choose a valid vendor ID for the line item. You can also type in the vendor name under company if you do not want to add the vendor to your vendor master file.

**Price:** Enter the price per purchasing unit of measure.

**Description:** You have two lines of possible description of the item being purchased.

**Purchase UOM:** You may enter a purchasing unit of measure.

**Purchase Qty:** Enter/change the quantity to be purchased.

**Currency:** If you have the Multi-Currency module, you should choose a currency code. If you chose a vendor, that vendor's currency code displays.

**Due Date:** Enter the date the order is due from the vendor.

**Taxable:** Click the box if this line item is taxable. This will print on the purchase requisition and the purchase order. It is a reference field.

**Requisitioner:** A 20-character user-defined field for the requisitioner's name.

**GL Reference:** If you have implemented the general ledger accounting tables in the Costing module, you can choose an account from the Override GL Account Table by browsing on the field. If the chosen account is not changed when the purchase requisition turns into a PO and then a Voucher, the charges will go to that account.
4.3 Print Purchase Requisitions

You may print new PRs or reprint previously printed PRs using this option. They may be printed on pre-printed forms or on plain paper. From the Report menu, choose Print Purchase Requisitions.

Ranges: For a Specific range of new PRs, enter the beginning and ending order numbers.

NOTE: All PRs have Line Number 00. To print a Specific PR, enter the PR Number, 00 for the Line Number, and the PR Delivery Number (e.g., 6000090001).

Specific Requisitioner: Enter a requisitioner’s name to print all non-inventory purchase requisitions for that requisitioner. Leave this field blank to print all non-inventory purchase requisitions.

Print: Choose whether you want to print to a window (to view), directly to the current Windows printer, or to a file.

4.3.1 Sample Purchase Requisition

Non-inventory purchase requisitions may be printed on pre-printed forms or on plain paper.
4.4 Convert PR to PO

To automatically assign a purchase requisition to a new purchase order:

- **Highlight line**
- **Enter vendor**
- **Assign to new PO**
Non-Inventory PO

You can edit an existing non-inventory purchase order or create a new PO without going through the purchase requisition process. This is for non-inventory parts, and the Part ID field is skipped. The fields and buttons work the same as on an inventory purchase order. From the Activity menu choose Purchase Order. From the PO menu choose New and then Non-Inventory. The vendor master browse box will appear so you can choose a vendor.

Double-click to browse and choose vendor

Enter quantity

Enter description and price
4.5 Non-Inventory Line Item

This window is accessed by double-clicking the line number on a non-inventory purchase order, or by choosing Line Item Detail from the PO menu.

The order number, line number, vendor ID and vendor name are displayed. You can scroll through the line numbers. The status of the order can be changed.

Description 1 and 2: You can enter up to two 50-character descriptions for what is being purchased.

Curr Qty: The Current Order Quantity for this part on this purchase order.

Balance Due: The remainder of this part left to be received. It is a display only.

Price: The per unit price for the part being ordered, expressed in Purchasing Units of Measure.

Purchasing UOM: The Purchasing Unit of Measure. It is a 2-character alphanumeric value to specify how you buy this part.

Buyer ID: You can browse and choose the buyer's ID.

Tax Code: If the order was marked as being taxable, the tax code as entered in Vendor Master will display. You can browse and choose a tax code for this line item that will override the default. The tax amount is calculated and displayed.
Due Date: The date that this part is due in from the vendor. You can change the date by entering information, clicking the up and down arrows, or double-clicking to bring up a calendar.

GL Ref: If you have installed the General Ledger accounting tables in the Costing Module, you can use this entry to post this purchase order to a general ledger account number. The entry here is taken from the GL Override Accounting Table. Your Purchase Order Preferences can be set to require a GL Reference on all purchase orders.

Approved By: This allows you to identify the person who is approving the order or who approved the purchase requisition. If "Require Buyer ID Verification" in System Manager > System Configuration > Shipping Address has been set to Yes, a valid Buyer ID as entered in the Buyer ID Table must be used.

Receipt Flag: You can flag whether or not a receipt is required for this line item. In Purchase Order Preferences you can require this field to be filled before saving the purchase order.

Increment Order Rev# (Y/N): You are allowed to assign a Revision Number each time you make changes to an individual Purchase Order. This number is appears on the purchase order and can be changed on the purchase order form window.

In-Transit Date: You may enter the date that this line item was shipped from the vendor.

User-Defined: Click the User Defined button to bring up the user defined key field and reference field.
4.6 Print Purchase Orders

This window is used to print or reprint purchase orders. They may be printed on blank paper or on pre-printed forms. From the Report menu choose Print Purchase Orders.

Options: You can print non-inventory purchase orders by vendor or by order number and enter a specific range for your choice as well as a range of buyer IDs. If you enter order numbers, you must include the line and delivery numbers.

File: You can enter your own name for the report. The two names available are standard purchase orders in either portrait format (POPORT.RPT) or landscape format (POLAND.RPT). If you choose Landscape, you must also choose Landscape under the Print Setup when you go to print.

Exclude Duplicates: If the POs have already been printed, the word "duplicate" is printed on top of the PO. Click this box to not print duplicate POs.

Include Status 4 Line Items: Click this box to include Status 4 (Completed) line items on the purchase order.
Include Cancelled Line Items: Click this box if you want line items that have been cancelled (status 6) to be printed on the purchase order. The word "Cancelled" is printed next to any cancelled line items.

Unit Price Decimal Places: You can specify the number of decimal places you want printed on the PO for the unit price. Valid entries are 4, 5, 6, 7, and 8. The default is 4.

Export to Exact Synergy: Mark the box to create a corresponding Exact Synergy document when an Exact MAX 5.0 user posts an invoice using Exact MAX 5.0 FIM. Clear the box to post the Exact MAX 5.0 invoice without exporting to Exact Synergy.

See the Exact MAX 5.0 System Manager Help for more information about exporting Exact MAX 5.0 records to Exact Synergy.

Vendor Contact: You can specify whether you want the vendor's name, phone number, or fax number to print on the purchase order.

Print: Choose whether you want to print to a window (to view), directly to the current Windows printer, or to a file.

If the grand total and/or the extended price for any line items on a purchase order exceed $999,999,999, an error message appears "Error, PO #7000XX Total > 999999999". If the PO is printed, ***** will appear wherever the extended price or grand total exceeds $999,999,999.

The Buyer ID and Buyer Name that print on the PO come from the Buyer ID on the PO Form (POCODE.DAT) and not from the Buyer ID on line item 1 (ORDMST.DAT).

4.6.1 Sample Purchase Order

The purchase order may be printed on pre-printed PO forms. If the current PO was printed before, "Duplicate" will appear at the top.

```
\begin{verbatim}
BILINO ADDRESS

Hamilton Asset
LAX Annex
1601 Commons Blvd.
Costa Mesa, CA 92626

200
2% F0 3/0
97955

01 01 12 EA 11000 A Keyboard 10.0000 120.00 101002
01 02 20 EA 11000 A Keyboard 10.0000 200.00 302005
01 03 3 EA 11000 A Keyboard 10.0000 30.00 12005002

PO NOTE 01: On-Time Window for Hamilton Asset - 3 + 1
PO NOTE 02: All items subject to On-Time Window - 3 + 0
PO NOTE 03: unless otherwise noted

GRAND TOTAL: $ 650.00
\end{verbatim}
```
4.7 PO Schedule Inquiry

This inquiry lists the current Purchase Order delivery schedule. Choose PO Schedule from the Inquiry menu.

You may review this information by part, by vendor, by order, or by blanket PO. Choose whether you want to view inventory, non-inventory and/or subcontract POs, and if you want to see purchase order due dates. You can also choose to view status 4 (completed) orders.

Start/End With: Enter a range of values for the chosen review field.

Order-Line-Del: The order/line/delivery number associated with this transaction, or the order number/note number.

Vendor ID: Displays the Vendor ID for the part.

Part Identifier: If the displayed part is an Inventoried Part, the Part Identifier and Description of the part display in these columns.

Date: The MRP need date, or date the delivery is due, depending on the "Display PO Due Date" selection.

Order Qty: The order Quantity for the line.

Balance Due: The remaining balance on this delivery. This is the order quantity minus any receipts.

Cost/Unit: The purchase price for the part, or the price associated with an order note.
4.8 Purchase Dispatch Reports

This report lists Purchase Order status information. From the Report menu choose Purchase Dispatch Report.

Sort Sequences: You may sort by and choose specific ranges for:
- Vendor Identifier
- Part Identifier
- Part ID/Due Date
- Order Number (Order number plus line item and delivery number)

You can specify orders for inventory parts only, non-inventory only, or both. You can also choose a range of buyer IDs as well as the above sort ranges.

Print P.O. Due Date: You can print the PO Due Date (the MRP Need Date minus the Purchasing Stock Leadtime) rather than the MRP Need Date on the report.

Subcontractor Orders Only: If you have the Subcontract Processing module, you can choose to print only subcontract orders.

You can also choose to exclude status 4 (completed) and/or status 5 (closed) orders.

Print: Choose whether you want to print to a window (to view), directly to the current Windows printer, or to a file.
4.8.1 Sample Dispatch Report

The Dispatch Report lists Purchase Order status information.

<table>
<thead>
<tr>
<th>Part Identifier</th>
<th>Part Description</th>
<th>Value</th>
<th>S</th>
<th>P</th>
<th>Order Number</th>
<th>End Bus Qty</th>
<th>UN</th>
<th>Car Qty</th>
<th>PO Date</th>
<th>Perm Date</th>
<th>BUY</th>
<th>FNL</th>
</tr>
</thead>
<tbody>
<tr>
<td>13500</td>
<td>Bielet T6001-125°</td>
<td>1600</td>
<td>2</td>
<td></td>
<td>700000-01-01</td>
<td>80.00</td>
<td>SH</td>
<td>92.10</td>
<td>31/06/02</td>
<td>30/06/02</td>
<td>71</td>
<td>FL1</td>
</tr>
<tr>
<td>13510</td>
<td>Bielet STST Stored LTO</td>
<td>1600</td>
<td>3</td>
<td></td>
<td>700000-01-01</td>
<td>100.00</td>
<td>ST</td>
<td>100.10</td>
<td>31/06/02</td>
<td>30/06/02</td>
<td>71</td>
<td>FL1</td>
</tr>
<tr>
<td>13300</td>
<td>Printed Circuit Board</td>
<td>2000</td>
<td>3</td>
<td></td>
<td>700001-01-01</td>
<td>3.00</td>
<td>EA</td>
<td>3.00</td>
<td>30/07/01</td>
<td>30/07/01</td>
<td>71</td>
<td>FL1</td>
</tr>
<tr>
<td>13800</td>
<td>Printed Circuit Board</td>
<td>2000</td>
<td>3</td>
<td></td>
<td>700001-01-02</td>
<td>10.00</td>
<td>EA</td>
<td>10.00</td>
<td>16/05/00</td>
<td>16/05/00</td>
<td>71</td>
<td>FL1</td>
</tr>
</tbody>
</table>
5. Preparing to Purchase Inventory Parts

5.1 Purchase Part Data
This window is used to maintain purchasing information that is specific to a part identifier. This information is required by the implementation sequence before the MRP Explosion Program can be generated. It is also a prerequisite to issuing Inventory Purchase Requisitions and Purchase Orders.

Before a part can be purchased, information from this screen must be accurate, along with vendor and vendor part data.

From the Activity menu, choose Purchasing Data and Purchase Part Data.

**Part Identifier:** The name or number of the purchased part you wish to examine. Part identifiers are entered in the Bill of Materials module. The two description fields will display.

**Planning Lead Time:** The Purchasing Planning Lead-time. It is an optional entry for the number of days required for the inventory planners to plan the purchase requisition, and for the purchasing department to obtain quotes, and place the purchase order. All due dates for orders for purchased parts are based on the total Purchasing Lead-time which is the sum of the Planning, Buying and Stocking Lead-times.

**Buy Lead Time:** The Purchasing Buying Lead-time. This field is optional. It is the vendor's actual lead-time, including the time from mailing the purchase order to the vendor, to receiving the material into the shipping room.

**Stock Lead Time:** The Purchasing Stock Lead-time. This field is optional. It is the number of days necessary to inspect and stock the purchased material including the "dock to stock" time.

**Buyer ID:** The name or identifying number of the individual in charge of purchasing this part.

**Primary Vendor:** The recommended vendor for this part is saved to the part master file. The units of measure and the conversion factor are also displayed.
5.2 Vendor Part Data

Information regarding specific part/vendor or part/vendor/manufacturer’s part number relationships may be stored within the system. This allows the user to define an unlimited number of vendors for a part, and an unlimited number of parts to a vendor.

The system requires at least one part/vendor relationship assignment BEFORE purchase orders may be entered for that part.

Parts and vendors must already exist in the system. If you own the Manufacturer’s Part Control module, the manufacturer’s parts must have been entered using BOM > Part Master > MPN tab. You can have an unlimited number of manufacturer’s part numbers for a vendor/part relationship. You are not allowed to CHANGE a Manufacturer’s Part Number or Manufacturer on an existing vendor/part/relationship; you must add another record with the desired manufacturer’s part.

When a purchase requisition is printed, a list of all approved vendors is printed on the PR for each part.

In order to delete a part/vendor relationship, a purchase order or purchase order receipt for this part/vendor must not exist in the system. If it does, a message will appear: “Open orders exist for this vendor.”

Choose an existing vendor/part relationship and vendor master and part information will be displayed.

From the Activity menu, Purchasing Data, choose Vendor Part Data.

Vendor: Double click the Vendor field to select a Vendor using the Vendor Master browser.

Part Number: Double click the Part Number filed to select an Exact MAX 5.0 Part Number using the Part Vendor browser. You can set a flag in Vendor Master to print the vendor part number on purchase orders.
Part Master: Double click the Part Master field to select an Exact MAX 5.0 Part Number using the Part Master browser.

Manufacturer's P/N: Double click the Manufacturer's P/N field to select a Manufacturer's Part Number using the MPN browser.

MPN String: Double click the MPN String field to select a parent-component relationship represented by a Manufacturer's Part Number using the MPN String browser.

Tax Code: Browse and choose a tax code for this vendor part. This will be the default tax code for any purchase order line item for this part/vendor relationship.

User Defined: A 15-character user-defined key and 25-character user-defined reference field are available. Information is stored in the Part Vendor file.

Service Charge
Base Charge: Enter a positive number (or zero) which will apply to the displayed service ID.

Service ID: Select a service ID for this vendor.

Please see the Subcontract Routing Method User Guide for more information.

Price Break Information: The system allows up to 3 price breaks per part/vendor relationship. At least one entry in this section is required for the system to recommend purchase order prices based on quantity when an order is created. If you do not want recommendations from the system, this information can be omitted.

Quantity 1, 2, 3 and Price/Unit 1, 2, 3: A vendor may quote a price of $10.00 per unit for the first ten units, a price of $8.00 for units 11 through 25, and a price of $6.00 for any purchase of 26 or more units.

The resulting price break information would appear as follows:

QUANTITY 1 = 1, PRICE/UNIT 1 = 10.00; QUANTITY 2 = 11, PRICE/UNIT 2 = 8.00; QUANTITY 3 = 26, PRICE/UNIT 3 = 6.00

Status: This field determines if this part can be ordered from this vendor. Status can be set to “A” for active to allow orders to be created or “D” for deleted or inactive in which case no orders can be created for this vendor/part.

Vendor Type: This field reads from the Vendor Master. The vendor can either be an N – Normal or S- Subcontract vendor.

Vendor Status: The Status Code for most vendors is Active.

A Suspended vendor retains their information within the system, but the system will not allow you to enter purchase orders for the suspended vendor. However, you will be allowed to continue adding vendor part data and print outstanding purchase orders for the vendor.

You can mark a vendor as Deleted prior to deleting them from the system in order to be able to print outstanding orders for the vendor. No new orders can be created and no new information can be added to the Deleted vendor's record.
5.3 *Standard PO Notes for Parts*
Select **Activity > Purchasing Data > Standard Notes > Parts.**

Use this window to create or edit standard notes which will be attached to a specific part. The notes will automatically attach to any purchase order containing the part. The notes for a particular order can be edited or deleted in the purchase order notes window. Choose the part, type in the desired information and save. Part notes are printed on the purchase order just below the relative line item.

5.4 *Standard PO Notes for Parts and Vendors*
Select **> Activity > Purchasing Data > Standard Notes > Part > Vendor.**

Use this window to create or edit standard notes which will be attached to a specific part and vendor combination. The notes will automatically attach to any purchase order for that vendor and containing the part. The notes for a particular order can be edited or deleted in the purchase order notes window. Choose the part and vendor, type in the desired information and save. Part and vendor notes are printed on the purchase order just below the relative line item.
6. Purchase Order
Select Activity > Purchase Order.

To create a new PO, select the PO Menu > New.

Type purchase order information in the PO form fields.

If the cursor displays as a magnifying glass over any field, double-click to browse and choose a value for that field.

More: Clicking the More button opens the Additional PO Information window.

Order Notes: Clicking the Order Notes button opens the purchase order notes dialog box.

Due Date: To change the due date of a PO, highlight the due date column in the PO grid and double left click, then select a date using the Exact MAX 5.0 Shop Calendar.

To de-expedite a PO line item, highlight the due date column in the PO grid and double right click. PO line items can also be de-expeditied using the Purchasing Schedule grid. Double right click again to display the system date as the PO due date.

Purchase Orders for Outside Vendors

Exact MAX 5.0 users may view vendor orders (VOs) using the Purchase Order form. When the user selects an Outside Vendor order, the form displays Service Order at the upper right. Users may modify the Due Date and Price for the order, using the Purchase Order Line Item Detail dialog box to modify the Cost and Due Date of each line item.

Exact MAX 5.0 users may select valid MPN parts by double clicking the Part ID field. If the Allow Entry on Form box is selected in PO Preferences, the Manufacturer's Part Number dialog displays, prompting the user to select using the MPN browser or the MPN string browser.
6.1 Browse Purchase Orders
To open existing purchase orders, double-click the Order Number field. The Purchase Orders browser displays.

Scroll and choose the existing purchase order you want to open. The scroll box shows the purchase order numbers, vendor ID, and marks the line if a PO is taxable. Designate whether you want to see a list of inventory, non-inventory, or blanket POs. Double-click an order number to display the PO using the Purchase Order form.

6.2 Vendor Information
Double-click the Vendor box on the left side of the purchase order form to display the vendor contact name and phone numbers from the vendor master file.

Click the Vendor Master button to open the vendor master dialog box.
6.3 Ship To Address

Double-click the Ship To box on the purchase order form to open the Ship To Address dialog box.

You can enter an alternate ship to location or choose a customer for a drop shipment. An alternate ship to location can be entered for the current purchase order only, or multiple ship to locations can be saved under address codes.

Choose either a pre-existing address code or a drop ship customer ID, or enter a new address and code. The name and address display on printed purchase orders. After marking the Drop Ship to Customer checkbox, double click the box below to browse and choose a customer ID. Double click the Address Code box to choose a ship to address.

**OK:** Updates only the open PO with information displayed in the Ship to Address dialog box.

**Note:** Clicking OK does not modify the Address Master file.

**Clear:** Removes all characters from the Ship To dialog box fields.

**Add:** Saves the displayed name and address information as a new record in the Address Master file.

**Update:** Saves the displayed address information, updating the Address Master record.

**Delete:** Deletes the highlighted address code and related information from the Address Master file.
6.4 Part Quantity Discount

The Part Quantity Discount dialog box displays when a user double-clicks the quantity column of a purchase order line item, after selecting a part ID. Vendor part information displays as well as the quantity, discount, and price table entered using Vendor Part Data.

![Part Quantity Discount dialog box]

6.5 Tax Information

To open the Tax Information dialog box, select the PO menu > Tax Information, while a purchase order form is active.

![Tax Information dialog box]

Select whether or not the purchase order is taxable. If it is not taxable, enter a tax exempt number. Browse and choose tax codes that apply to the order using the Tax Code 1-3 boxes. See Tax Code Data for information about defining Exact MAX 5.0 tax codes.
6.6 Purchase Order Preferences

To set Preferences for the Purchase Order form, open the purchase order form, select the Options menu > Preferences.

**Line/Delivery:** While entering a new purchase order, you can have the next line number appear automatically. If you designate Multiple Deliveries, the system will automatically enter the same line number and next delivery number rather than the next line number.

**Non-Inventory:** Mark Require GL Reference if you want non-inventory purchase orders to require a GL Reference. If the Require Receipt Flag box is marked, the user will be required to mark either Yes or No in the Receipt Flag field before saving the purchase order. If the box is not marked, then the Receipt Flag may be left blank and the non-inventory PO saved.

**Warnings:** You can have the system give you a warning message if you enter a line item for the same part number as an existing line item.

**Saving:** You can have the system automatically save a line item as soon as you move to the next line item. You can also have new part vendor relationships saved while entering a purchase order.

**Manufacturer's Part Number:** If the Allow Entry on Form box is not marked, then the manufacturer's part number can only be entered in the purchase order detail screen. If this box is marked, then the Manufacturer's Part Number dialog box opens when you enter a part under MPN control in the Part field on the PO Form. You may browse and choose or type the manufacturer's part number using either the MPN browser or the MPN string browser.
Vendor Info: Select whether or not to allow users to edit vendor contact name and phone number information from the PO form, using the Vendor Information dialog box.

New POs: You can choose whether new purchase orders are to default as taxable POs and whether or not the POs should be firm planned.

Quantity Field: Enter the number of decimal places displayed for order quantities.

Custom Logo: You can designate any logo to appear on the purchase order form on your computer screen. Browse and choose or enter any raster-based picture file such as .BMP files.

6.7 Additional PO Information

The Additional PO Information window appears when you click the More button on the purchase order.

Payment Method: Indicate whether the PO is collect (to be billed) or prepaid.

Inspection Code: This field is user defined, and will accept any code of up to 8-characters. The inspection of goods can be identified as:

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Y</td>
<td>Yes</td>
</tr>
<tr>
<td>N</td>
<td>Not Inspected</td>
</tr>
<tr>
<td>S</td>
<td>Source (ID for positive inspection)</td>
</tr>
</tbody>
</table>

PO Printed: This field determines whether or not the word "Duplicate" displays on printed purchase orders. When a purchase order is first created, this flag will be set off. Therefore, the first time this purchase order is printed, it will not have the word "duplicate" printed on it. Printing the PO automatically changes turns the flag on. Therefore, any future printing of this PO will have the word "duplicate" printed on it. If you want to reprint the PO without the word "duplicate" on it, you can change the flag to off before you print it.

User Defined: You can enter your own user-defined key and reference information.
6.8 Purchase Order Line Item Detail

You can access this window by double-clicking the line number on a PO or by choosing Line Item Detail from the PO menu with a purchase order active.

You can use this window to review, edit, delete line items/deliveries or add new line items/deliveries.

The purchase order number, vendor ID and vendor name are displayed across the top.

You can type in another line/delivery number or use the scroll bar and select one.

**Part Number:** Double click to select a part using the Part Vendor browser.

**Part Description:** The first 50 characters entered in the Exact MAX 5.0 Part Master to describe the part display.

**Manufacturer's Part Number:** If you have Manufacturer's Part Control, type or double click to select a manufacturer's part number for this purchase order, using the MPN browser. The manufacturer's part number entered here must be associated with a valid part ID/vendor/MPN/Manufacturer relationship.
MPN String: Double Click to select a Manufacturer’s Part Number that represents a parent-component relationship, using the MPN String browser.

Status Code: The Order Status Code for this order. Valid Codes include: 3 = Released, 4 = completed, 5 = Closed by Accounting, 6 = Cancelled.

Del. Stockroom: The Stockroom to which the order is to be delivered. The primary stockroom location is entered in Inventory Part Data. If desired, you may override the deliver to stockroom.

Revision Level: The revision level for the part as entered in Maintain Part Master. It can be changed for the order.

Purchase Qty: Type the current number of the selected part ordered, using Purchasing Units of Measure.

Exact MAX 5.0 Inventory displays a warning message if an Exact MAX 5.0 user processes a receipt transaction while an order’s current receipt quantity is greater than it’s purchase quantity (depending on the Exact MAX 5.0 Switch > Allowable Excess setting). If an order line item’s purchase quantity displays less than it’s current receipt quantity, Exact MAX 5.0 sets the order's due quantity to zero and records the excess receipt quantity. See the Exact MAX 5.0 Inventory module User Guide for more information.

Balance Due: The Balance Due Quantity for this order is the amount left from the Current Due Quantity (in Purchasing Units of Measure). If the Balance Due Quantity is at zero, then all purchased parts due have been received.

BOM Qty: The quantity in the bill of materials unit of measure.

Buyer ID: Three-digit buyer ID code. Default is the Buyer ID from the Part Master file. If "Require Buyer ID Verification" System Manager > System Configuration > Shipping Address has been set to Yes, the Buyer ID must be a valid code entered in the Buyer ID Table.

Planner ID: The name or number of the individual responsible for planning this part. This information was originally entered in MRP Part Data.

Firm Planned: If an order is Firm Planned, then it will not be rescheduled by the MRP Explosion Program.

Cost: This lists the Cost Per Unit (Purchasing Unit of Measure) for this part on this Purchase Order. You can modify this information.

Reference: A 25-character user defined reference field which can be edited using the purchase requisition detail dialog or directly in the purchasing schedule reference column. The information entered with a purchase requisition transfers into the purchase order detail record when a PR is converted to a PO.

Recommended Cost: Recommended Cost defaults to Material Cost

Discount: The percentage discount comparing the price on this line item with the recommended cost. You may enter a discount percentage and the cost will be adjusted for the line item.

BOM/PUR UOM: The Bill of Materials and Purchasing Units of Measure. The BOM unit is entered in the Part Master and the Purchasing Unit is entered in Cost Data.

Increment Order Rev#: You are allowed to assign a Revision Number each time you make changes to an individual Purchase Order. This number is located on the Purchase Order
form and indicates that the PO has been updated or changed. This number can be changed on the PO.

**Tax Code:** If the order was marked as being taxable, the tax code as entered in Vendor Master will display. If a tax code was assigned to the vendor/part, it will display instead of the vendor master tax code. You can browse and choose a tax code for this line item that will override the default. The tax amount is calculated and displayed.

**PO Due Date:** The date the PO must be in house to fill the requirement (the MRP Need Date minus the Purchasing Stock Leadtime). The date may be changed. If an order has been de-expedited, "De-Exp'd" displays in this field.

**MRP Need Date:** The date needed by MRP. This field may be maintained. If an order has been de-expedited, "De-Exp'd" displays in this field.

**In-Transit Date:** Enter or edit the date the line item was shipped by the vendor.

**Current Promise:** The vendor's delivery commitment for a purchase order. The field originally defaults to the MRP Need Date.

**Blanket PO:** For a blanket PO, the total quantity for the line item as well as the scheduled quantity, which is the total for all deliveries entered on the PO so far, display. The total line item quantity can be changed.

**User-Defined:** Click the User Defined button to bring up the user defined key field and reference field.

### 6.9 New Purchase Order Currency

This window is accessed from the PO menu Currency option. For a new purchase order, the default currency and exchange rate for the vendor will display, but you can change them. Currency codes are set in Currency Code Data.

**Rate Type:** If you have the Multi-Currency module and wish to use the exchange rate that is in your system at the time you post vouchers rather than the rate entered here, set this flag to Variable Rate. The default is Fixed Rate.
6.10 Line Item Currency Information

With the cursor on a line item for a purchase order, choose Multi-Currency from the PO menu (if you own Multi-Currency). This screen is for information only and cannot be edited. Line item, part, and quantity information are displayed along with the currency type, exchange rate, and foreign and domestic values for the line item.

![Image of Line Item Currency Information]

6.11 Manufacturer's Part Number

If Manufacturer's Part Number: Allow Entry On Form in Purchase Order Preferences is not marked, then the manufacturer's part number can only be entered in the purchase order detail dialog box. If the Allow MPN entry box is marked, then the Manufacturer's Part Number dialog box opens when users type a MPN controlled part identifier on the PO form, Part ID column, then press the Tab key.

![Image of Manufacturer's Part Number]

Double click the raised border box to browse and choose a different manufacturer's part number using the MPN master browser. Double click the MPN String button to select an MPN that represents a parent-component part relationship.
If you enter a new MPN in this box and Create Part Vendor Record in the PO Preferences is marked, Exact MAX 5.0 creates a new vendor/part record automatically.

Choosing an MPN for a PO line item sets that MPN as the default MPN for additional delivery numbers under the same line item.

### 6.12 Purchase Order Notes

There are two types of purchase order notes, Order Notes and Part Notes, which may be saved with a specific purchase order.

1. Order Notes may be added to a purchase order to include information or instructions specific to an order. The order notes appear at the bottom of a printed purchase order, if the Print on PO checkbox is checked.
2. Part Notes are specific to each Exact MAX 5.0 part number. Part Notes can be displayed by double-clicking the description/comments field of the purchase order, or by selecting Part Notes in the Order Notes dialog box. Part Notes print after the last delivery line item for a part identifier if the Print on PO checkbox is checked.

To edit purchase order notes, click the Order Notes button at the bottom of the PO Form dialog box.

Any standard Order, Part or Vendor notes that exist display in the Purchase Order Notes dialog box and may be updated specifically for this order.
**PO Line #**: For a part note, this identifies which Line Item on the purchase order you wish to examine. Use the scroll bar to change line items. The Line Item is between 01 and 99. Each part on the purchase order is assigned a Line Item. The Part Identifier and description for the line item is displayed below.

**Note Text**: A maximum of 50-characters of text can be typed for your note.

**Print Flags**: You can flag this PO to print description 2 of each part and/or to print the vendor’s part number on the PO.

**Due Date**: The due date is displayed. It is not maintainable.

**Price**: You can make a note of any additional charges for this purchase order and by line item. These prices will be added to the total purchase order when the PO is printed. These charges will not be passed to accounting unless they are added to the voucher.

**GL Ref**: If there is an additional cost, you may want to associate that with a General Ledger Account Number. The GL Reference is a 3-character code for a GL Account. Only valid GL References as entered in the Override GL Accounting Table may be entered.

### 6.13 Print Purchase Orders

This window is used to print or reprint POs that were converted from PRs or entered as unplanned purchase orders. From the **Report menu** choose **Purchase Orders**.

![Print Purchase Order window](image)

**Options**: You can choose sort sequences and enter a specific range for your choice as well as a range of buyer IDs. If you enter order numbers, you must include the line and delivery numbers.
Report Name: You can enter your own name for the report. The two names available are standard purchase orders in either portrait format (POPORT.RPT) or landscape format (POLAND.RPT). If you choose Landscape, you must also choose Landscape under the Print Setup when you go to print.

Exclude Duplicates: If the POs have already been printed, the word "duplicate" is printed on top of the PO. Click this box to not print POs that have been printed previously (duplicates).

Include Status 4 Line Items: Click this box to include Status 4 (Completed) line items on the purchase order.

Include Cancelled Line Items: Click this box if you want line items that have been cancelled (status 6) to be printed on the purchase order. The word "Cancelled" is printed next to any cancelled line items.

Subcontractor Orders Only: If you have the Subcontract Processing module, you can click this box to print only subcontractor purchase orders.

Export to Exact Synergy: Mark the box to create a corresponding Exact Synergy document when an Exact MAX 5.0 user prints a purchase order using Exact MAX 5.0 Purchasing. Clear the box to print the Exact MAX 5.0 PO without exporting to Exact Synergy. The Exact MAX 5.0 System Manager help contains more information about exporting records to Exact Synergy.

Print Manufacturer's Part Numbers: If you have the Manufacturer's Part Control module, you can request the manufacturer's part numbers to be printed on the report.

Print Discount Detail: Mark this option if you want the recommended cost and discount percentage to print for each line item.

Unit Price Decimal Places: You can specify the number of decimal places you want printed on the PO for the unit price. Valid entries are 4, 5, 6, 7, and 8. The default is 4.

Vendor Contact: You can specify whether you want the vendor's name, phone number, or fax number to print on the purchase order.

Print: Choose whether you want to print to a window (to view), directly to the current Windows printer, or to a file. See Print Window for more information.

Sample PO: Click the sample PO button to print a sample PO to help you line up your forms. It will print to the destination specified under Print To.

If the grand total and/or the extended price for any line items on a purchase order exceed $999,999,999, an error message appears "Error, PO #7000XX Total > 999999999". If the PO is printed, ***** will appear wherever the extended price or grand total exceeds $999,999,999.

The Buyer ID and Buyer Name that print on the PO come from the Buyer ID on the PO Form (POCODE.DAT) and not from the Buyer ID on line item 1 (ORDMST.DAT).

6.13.1 Sample Purchase Order
The purchase order may be printed on pre-printed PO forms. If the current PO was printed before, "Duplicate" will appear at the top.

<table>
<thead>
<tr>
<th>BILLING ADDRESS</th>
<th>700120</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>000</td>
</tr>
<tr>
<td></td>
<td>9420062</td>
</tr>
<tr>
<td></td>
<td>1</td>
</tr>
</tbody>
</table>

Hamilton Avenue
Los Angeles
1441 Commerce Blvd
West Covina, CA 91790

1063 S. HILLSDALE BLVD
Suite 511
Beverly Grove
California 90211

<table>
<thead>
<tr>
<th>200</th>
<th>2% 10 Net 30</th>
<th>UPS Ground</th>
<th>X</th>
<th>Destination</th>
<th>NO</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

PO: 833-367-2003

01 01 12 EA 11000 A Keyboard 10.00 10.00 100.00
01 02 20 EA 11000 A Keyboard 10.00 10.00 100.00
01 03 3 EA 11000 A Keyboard 10.00 10.00 100.00

PO NOTE 01: One-time window for Hamilton Avenue: S = 1
PO NOTE 02: All orders subject to one-time window = < 40
PO NOTE 03: unless otherwise noted

GRAND TOTAL: $ 90.00
6.14 PO Schedule Inquiry

This inquiry lists the current Purchase Order delivery schedule. Choose PO Schedule from the Inquiry menu.

You may review this information by part, by vendor, by order, or by blanket PO. Choose whether you want to view inventory, non-inventory, and/or subcontract POs, and if you want to see purchase order notes and/or status 4 (completed) orders.

**Start/End With:** Enter a range of values for the chosen review field.

**Order-Line-Del:** The order/line/delivery number associated with this transaction, or the order number/note number.

**Vendor ID:** Displays the Vendor for the part.

**Part Identifier:** If parts displayed are Inventoried Parts, the Part Identifier and Description of the part displays in these two columns.

**Date:** The MRP need date, or date the delivery is due, depending on the “Display PO Due Date” selection.

**Order Qty:** The order Quantity for the line.

**Balance Due:** The remaining balance on this delivery. This is the order quantity minus any receipts.

**Cost/Unit:** The purchase price for the part, or the price associated with an order note.
6.15 Purchase Dispatch Reports

This report lists Purchase Order status information. From the Report menu choose Purchase Dispatch Report.

Sort Sequences: You may sort by and choose specific ranges for:

- Vendor Identifier
- Part Identifier
- Part ID/Due Date
- Order Number (Order number plus line item and delivery number)

You can specify orders for inventory parts only, non-inventory only, or both. You can also choose a range of buyer IDs as well as the above sort ranges.

Print P.O. Due Date: You can print the PO Due Date (the MRP Need Date minus the Purchasing Stock Leadtime) rather than the MRP Need Date on the report.

Subcontractor Orders Only: If you have the Subcontract Processing module, you can choose to print only subcontract orders.

You can also choose to exclude status 4 (completed) and/or status 5 (closed) orders.

Print: Choose whether you want to print to a window (to view), directly to the current Windows printer, or to a file.

6.15.1 Sample Dispatch Report

The Dispatch Report lists Purchase Order status information.
Blanket PO

A blanket PO allows you to enter a purchase order for a large quantity in order to benefit from quantity/price breaks for a particular item without taking delivery on the total quantity until later. Incremental delivery quantities are entered and processed as the material is needed. When you choose New from the PO menu, you have a choice of type of purchase order. Choose Blanket PO.

For the first delivery on each new line item on the blanket PO you are asked for the total order quantity for the line item.

The quantity you enter will be shown as the default quantity for the line/delivery of the PO. Change to the quantity desired for this line delivery. When you enter the next delivery for the same line, the default will show the quantity remaining open for the line (line item quantity minus quantities entered for deliveries).

A shift-double click on the line item or the delivery number will also bring up the total quantity dialog box. This box will also display the Scheduled Quantity, which is the total quantity for all deliveries already entered on the PO for the line item.
As blanket POs are opened a check mark is written to the schedule flag field in the order master file. It can be used to distinguish blanket POs from standard POs.
6.16 Purchase Order Line Item Detail

You can access this window by double-clicking the line number on a PO or by choosing Line Item Detail from the PO menu with a purchase order active.

You can use this window to review, edit, delete line items/deliveries or add new line items/deliveries.

The purchase order number, vendor ID and vendor name are displayed across the top.

You can type in another line/delivery number or use the scroll bar and select one.

Manufacturer's Part Number: If you have the Manufacturer's Part Control module, the approved 25-character manufacturer's part number for this purchase order. The manufacturer's part number entered here must be associated with a valid part/vendor relationship.

MPN String: Click to select a Manufacturer's Part Number that represents a parent-component relationship.

Status Code: The Order Status Code for this order. Valid Codes include: 3 = Released, 4 = completed, 5 = Closed by Accounting, 6 = Cancelled.

Del. Stockroom: The Stockroom to which the order is to be delivered. The primary stockroom location is entered in Inventory Part Data. If desired, you may override the deliver to stockroom.

Revision Level: The revision level for the part as entered in Maintain Part Master. It can be changed for the order.

Purchase Qty: This specifies the current quantity ordered for a Purchase Order, in Purchasing Units of Measure. If the Balance Due Quantity is at zero, then all purchased parts due have arrived.
A warning message appears if you enter a quantity less than the receipt quantity. If you leave the quantity at less than the receipt quantity, the due quantity sets to zero and the excess receipt quantity is recorded.

**Balance Due:** The Balance Due Quantity for this order is the amount left from the Current Due Quantity (in Purchasing Units of Measure).

**BOM Qty:** The quantity in the bill of materials unit of measure.

**Buyer ID:** Three digit buyer ID code. Default is the Buyer ID from the Part Master file. If “Require Buyer ID Verification” in System Manager > System Configuration > Shipping Address has been set to Yes, the Buyer ID must be a valid code entered in the Buyer ID Table.

**Planner ID:** The name or number of the individual responsible for planning this part. This information was originally entered in MRP Part Data.

**Firm Planned:** If an order is Firm Planned, then it will not be rescheduled by the MRP Explosion Program.

**Cost:** This lists the Cost Per Unit (Purchasing Unit) for this part on this Purchase Order. You can modify this information.

**Reference:** A 25-character user defined reference field which can be edited using the purchase requisition detail dialog or directly in the purchasing schedule reference column. The information entered with a purchase requisition transfers into the purchase order detail record when a PR is converted to a PO.

**Recommended Cost:** The cost per vendor part data.

**Discount:** The percentage discount comparing the price on this line item with the recommended cost. You may enter a discount percentage and the cost will be adjusted for the line item.

**BOM/PUR UOM:** The Bill of Materials and Purchasing Units of Measure. The BOM unit is entered in the Part Master and the Purchasing Unit is entered in Cost Data.

**Increment Order Rev#:** You are allowed to assign a Revision Number each time you make changes to an individual Purchase Order. This number is located on the Purchase Order form and indicates that the PO has been updated or changed. This number can be changed on the PO.

**PO Due Date:** The date the PO must be in house to fill the requirement (the MRP Need Date minus the Purchasing Stock Leadtime). The date may be changed. If an order has been de-expedited, "De-Exp’d" displays in this field.

**MRP Need Date:** The date needed by MRP. This field may be maintained. If an order has been de-expedited, "De-Exp’d" displays in this field.

**In-Transit Date:** Enter or edit the date the line item was shipped by the vendor.

**Current Promise:** The vendor's delivery commitment for a purchase order. The field originally defaults to the MRP Need Date.

**Blanket PO:** For a blanket PO, the total quantity for the line item as well as the scheduled quantity, which is the total for all deliveries entered on the PO so far, display. The total line item quantity can be changed.

**User-Defined:** Click the User Defined button to bring up the user-defined key field and reference field.
7. After MRP

By using the Purchasing Schedule you can review orders that were created for purchased parts by MRP, approve them and convert them to purchase requisitions or assign them directly to purchase orders.

7.1 Restricting Access to the Purchasing Schedule (while allowing users to Create Purchase Requisitions)

Exact MAX 5.0 users can create Purchase Requisitions (series 600000 order type PR records) using the Purchasing Schedule. You may also restrict (some) users from changing, approving or deleting PRs, using the Purchasing Schedule. To restrict user access to the Purchasing Schedule from System Manager, select Activity > User Security > Purchasing Schedule.

Set the Security Level for the Purchasing Schedule to Read Only.

To allow users to create unplanned purchase requisitions, even with the above restricted access, set the Security Level for Create Purchase Requisitions to Read / Write. Users with these access restrictions cannot Approve, Release, Assign, Drag-Drop or Auto-Assign Purchase Requisitions using the Purchasing Schedule. Those buttons will display grey (disabled) to users with Read Only access to the Purchasing Schedule.
7.2 Purchasing Schedule Preferences

With the Purchasing Schedule active, choose Preferences from the Options menu.

Auto Save Line Items: Automatically save changes to line items when you move to another line item.

Save Schedule Format: The column sizes can be changed. If this option is on, your latest format will be saved upon exiting.

Create Part Vendor Record: With this option on, if you add a vendor to the schedule and there was no vendor/part relationship in the system, a vendor/part record is automatically added.

Warn on Past-Due Items: With this option on, if the shop due date is earlier than today, the due date will be displayed in red.

Warn on Items Due Within X Days: The due date displays yellow if it falls within the specified days from today or earlier.

Assign PO Number: If you mark the Approved by Required checkbox, characters (that should represent a buyer ID) must display in the Approved By column before converting a purchase requisition into a purchase order. Double click the Approved By column to browse and choose an existing Buyer ID or type one and then save the line item. You can choose whether new purchase orders are to default as taxable POs and whether or not the POs should be firm planned.

Use PO Due Date: Click on this option if you want to use the PO Due Date rather than the MRP Need Date.

Synergy Integration: Enter the Synergy document ID to upload purchase requisition reports to Synergy when printing requisitions.
7.3 Review Planned Orders and Purchase Requisitions

The purchasing schedule can display planned status "1" and approved status "2" 400,000 series planned orders as well as released status "3" 600,000 series purchase requisitions for either inventoried or non-inventoried items.

From the Activity menu choose Purchasing Schedule. Choose Inventory order type and mark the statuses you want to view and click Query.

Choose Sort by

Choose Order Type and Status

Click Query to fill grid

Scroll to view fields

The following fields in the grid can be maintained: vendor, quantity, due date, price, reference and approved by. Use the Enter key to move from field to field. The system may highlight due dates in red or yellow to warn on past due items if so set in Purchasing Schedule Preferences.

Note: Planned orders in the Purchasing Schedule show quantities in purchasing units of measure.

Sort By: You can choose to have the orders sorted by
**Inventory/Non-inventory:** Choose whether you want to see orders for inventoried parts or non-inventory orders.

**Range:** To bring in all orders, leave the order range blank. You can request only one vendor at a time. You can also set a **due date range** by clicking the enable box and entering the range of dates.

**Planned/Approved/Released:** Check the boxes to bring in status 1 planned orders (400000000), status 2 approved purchase requisitions (600000000), status 3 released purchase requisitions (600000000), or any combination of these.

The Purchasing Schedule displays PRs parts identified using Manufacturer's Part Numbers. MPN and Manufacturer columns display at the grid's right side as shown below.

This grid is **read-only.** MPN parts on PRs may be edited using the Purchase Requisition Detail dialog box.

**Gray Text:** The text will appear gray instead of black if the query was not done in the current session or if the query selection criteria have been changed since the query was done.

**Columns:** You can resize a column by placing your cursor on the lines between the column headings and dragging the line to the new size position.

**MRP Due Date:** To de-expedite a purchase requisition, highlight the Due Date column and double right click. Double right clicking “De’Expd” in the Due Date column opens the Shop Calendar for selecting a due date.
7.4 Approve Planned Order

Planned orders may be approved using the MRP module, which turns them into Status 2 Purchase Requisitions. You can also turn a PL planned order into a status 2 PR purchase requisition using the Purchasing Schedule.

If you double-click on the line item containing the planned order, the Purchase Requisition Detail screen will appear with that order's information. Change the Order Type from PL to PR and click Update. The order will now be a 40,000,000 series PR purchase requisition.
7.5 Release Purchase Requisitions
A status 2 approved PL type purchase requisition becomes a status 3 PR when it is printed.

7.5.1 Print Purchase Requisitions
You may print new PRs or reprint previously printed PRs using this option. They may be printed on pre-printed forms or on plain paper.

The report creates the Purchase Requisition (PR) with all the delivery information for the part, including alternate vendor information.

From the Report menu choose Print Purchase Requisitions.

Options: If you select Reprint Released Orders, the word "Reprint" will print at the top of the purchase requisition indicating that it has been previously printed. (If you released the order from the Purchasing Schedule without printing it, you will still need to select Reprint to print the purchase requisition.)

The two options that include vendor history will print the vendor history information from the last five completed (Status 4) purchase order receipts for the part identifier, based on due date on the purchase requisition.

Ranges: For a Specific range of new PRs, enter the beginning and ending names or numbers of the range of parts you desire.

For a Specific range of previously printed PRs, enter the beginning and ending order numbers for the range you desire.

Note: All PRs have Line Number 00. To print a Specific PR, enter the PR Number, 00 for the Line Number, and the PR Delivery Number (e.g., 6000090001).
All Buyers: If you wish to print purchase requisitions in Buyer ID sequence, click the box. If you select to print in Buyer ID sequence, enter the beginning and ending Buyer IDs for a desired range.

Specific Requisitioner: Enter a requisitioner's name to print all non-inventory purchase requisitions for that requisitioner. Leave this field blank to print all non-inventory purchase requisitions.

Specific Approved By: Enter a 3-character Approved By code to print only non-inventory purchase requisitions with that approved by code. Leave this field blank to print all approved purchase requisitions.

Subcontractor Orders Only: If you have the Subcontract Processing module, you can click this box to print only subcontractor purchase requisitions.

Print: Choose whether you want to print to a window (to view), directly to the current Windows printer, or to a file

7.5.2 Sample Purchase Requisition
This report creates the Purchase Requisition (PR) with all the delivery information for the part, including alternate vendor information.

<table>
<thead>
<tr>
<th>Part Identifier</th>
<th>Revision Level</th>
<th>Description</th>
<th>Requisition</th>
</tr>
</thead>
<tbody>
<tr>
<td>30024</td>
<td>A</td>
<td>Tank, 1.3 Liter</td>
<td>607398</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Planner ID</th>
<th>Buyer ID</th>
<th>Date</th>
<th>Order Quantity</th>
<th>Order Due Date</th>
<th>Approved Quantity</th>
<th>Approved Due Date</th>
<th>Approved (status)</th>
<th>FDC</th>
</tr>
</thead>
<tbody>
<tr>
<td>FL3</td>
<td>300</td>
<td>01/01/2003</td>
<td>2.00</td>
<td>1/1/2003</td>
<td></td>
<td></td>
<td>10</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Vendor</th>
<th>Vendor Name</th>
<th>Manufacturer's PN</th>
<th>PO Number</th>
<th>Order Quantity</th>
<th>Cost</th>
<th>Rev</th>
</tr>
</thead>
<tbody>
<tr>
<td>MC60</td>
<td>Making Specialties</td>
<td>70001-05-01</td>
<td>65.00</td>
<td>129000 A</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
7.5.3 Purchasing Schedule: Release an Order

You can turn either a planned order (PL status 1) or an approved purchase requisition (PR status 2) into a released purchase requisition (PR status 3) directly from the Purchasing Schedule grid.

Highlight the PL status 1 and/or PR status 2 40,000,000 series orders that you want to change to a status 3 released PR purchase requisition. From the PR Schedule menu, choose Release Orders. The orders become 60,000,000 series PR purchase requisitions. If you want to print any of these purchase requisitions, you will need to choose the Reprint option on Print Purchase Requisitions.
7.6 Purchase Requisition Reports

The Purchase Requisition Report is used to verify information on Purchase Requisitions. From the Report menu choose Purchase Requisition Report.

You can enter ranges for your chosen sort sequence and/or for buyer IDs. Dates should be entered in the year, month, day format. Order numbers require the line and delivery numbers: 600010001.

**Print P.O. Due Date:** You can print the PO Due Date (the MRP Need Date minus the Purchasing Stock Leadtime) rather than the MRP Need Date on the report.

**Subcontractor Orders Only:** If you have the Subcontract Processing module, you can request to print only the purchase requisition information for subcontractors.

**Print:** Choose whether you want to print to a window (to view), directly to the current Windows printer, or to a file.

### 7.6.1 Sample Purchase Requisition Report

The Purchase Requisition Reports option is used to verify information on Purchase Requisitions.
7.7 Convert to Purchase Orders

You can convert a PL status 1 planned order, a PR status 2 planned order, and/or a status 3 PR released purchase requisition to a new purchase order or assign them to an existing purchase order using the Purchasing Schedule.

Query to display your orders on the Purchasing Schedule grid.

7.7.1 New PO

A vendor identifier must be entered before you can convert the orders to purchase order(s). Highlight the lines that you want to convert and click the Auto-Assign button. A new purchase order will be created for each vendor. The PO number and the number of purchase requisitions assigned to it will be displayed in a message.
7.7.2 Assign to an Existing PO

Select an order or orders using the Purchasing Schedule grid.

You can click the Assign button on the grid, choose Assign from the PR Schedule menu or press Alt-A. If a vendor ID has been entered for the line item, outstanding purchase orders for that vendor will be displayed. If no vendor ID has been entered, you can browse and choose a vendor and review existing POs for that vendor.
**Information:** The number of purchase requisitions selected is displayed.

Choose the vendor (if not already populated) to be assigned to the purchase requisition(s).

Available purchase orders for the vendor will be listed. You can choose a purchase order and click **Assign** to assign the selected purchase requisitions to that purchase order.

If a line item already exists on the chosen PO for the same part, the new purchase requisition will be assigned to the next delivery number for that line item.

### 7.7.3 Drag and Drop

You can assign a planned order or purchase requisition to a purchase order by dragging a highlighted line from the purchasing schedule and dropping it onto the PO form. Point your cursor to a line on the purchasing schedule to highlight the line. Then, press and hold the **right** mouse key and drag the line item from the purchasing schedule to the PO form. You can create a new PO by dropping the order(s) onto a blank open PO or add orders to an existing PO for the appropriate vendor. A vendor ID must be assigned either to the open PO or to the chosen purchase requisition to allow drag and drop assignment.

In the example shown below, planned orders 400000455 and 40000456 have been dragged and dropped onto PO number 70000077 to create line 01, delivery 01 and line 02, delivery 01. Planned orders 40000457 through 40000462 remain displayed on the purchasing schedule.
7.8 Purchasing Schedule

7.8.1 Double-click Fields

<table>
<thead>
<tr>
<th>Double Click:</th>
<th>Displays:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Order:</td>
<td>Detail window</td>
</tr>
<tr>
<td>Part ID:</td>
<td>Vendor/Part window</td>
</tr>
<tr>
<td>Vendor:</td>
<td>Vendor contact and phone number</td>
</tr>
<tr>
<td>Due Date:</td>
<td>Calendar (Double-right click for the shop calendar)</td>
</tr>
<tr>
<td>Approved:</td>
<td>To put in initials for selected lines</td>
</tr>
<tr>
<td>Approved column heading:</td>
<td>Set column</td>
</tr>
</tbody>
</table>

7.8.2 Menu

The PR Schedule menu option appears when the Purchasing Schedule is active.

Query: Search the data files for records that match the selected criteria and display the data.

Assign: Brings up the Assign Purchase Requisitions window.

Undo Drag/Drop: Un-assigns a purchase requisition or planned order from a PO.

Fill Approved By: You can highlight several orders, choose this menu option, and type in the "approved by" once to enter it in all the highlighted orders.

Add Req Line: To create a new purchase requisition, choose Add Req Line and the purchase requisition detail window will come up with the next purchase requisition number.

Save Line: Saves the highlighted line item information.

Delete Line: Deletes the highlighted line item.

Reset Schedule: Clears the schedule screen.

Print Schedule: Sends the schedule table to the default Windows printer.

Release Orders: Highlight planned orders you want released to purchase requisitions, then choose this menu option and the orders will be changed to 600000 series purchase requisitions.

Note: Only users with Read / Write access to the Purchasing Schedule may change, assign or delete Purchase Requisitions. See Section 8.1, Restrict Access to the Purchasing Schedule, for details.
### 7.9 Purchase Requisition Detail

This window is used to enter a new purchase requisition, make changes on an existing purchase requisition or planned order, or to approve a planned order. To open the Purchase Requisition Detail dialog box, double-click a line item displayed in the Purchasing Schedule.

**New (button):** Click the New button to bring up a new order number and a blank screen. You can also choose Add Req Line from the PR Schedule menu to bring up this window with a new blank order.

**Order Number:** You can browse to choose an order number to review or the next available order number will appear when you add a new order.

**Delivery:** This number usually defaults to 01, but up to 99 deliveries for order number may be entered. This field only appears for a purchase requisition.

**Type:** When the Purchase Requisition dialog displays a 40,000,000 series order, a drop down list box displays and allows the user to change the order type from PL=planned order, to either PR=purchase requisition or MF=manufacturing order. *Users cannot change the order type back to PL or from PR to MF after making a "make-buy" decision.* The order status changes from status 1 to status 2 when the user clicks Update after selecting a new type.

**Note:** Users cannot change the order type when the Purchase Requisition Detail dialog displays a 60,000,000 series purchase requisition. The Type drop down list box does not display.

**Part Number:** For an existing order, the Part ID will be greyed and cannot be changed. For a new order, you can browse by Part ID or by Part Description and choose the part.

The part description and BOM and purchasing units of measure are displayed.

**Vendor ID:** Browse and choose the vendor ID for the line item. If a vendor/part record doesn't exist for the chosen vendor for this part, when you save the changes you will either
be prompted to add the part/vendor relationship and Exact MAX 5.0 will chain to vendor/part data, or it will create a new part/vendor record in the background with no message, depending on how you have your preferences set. See Purchasing Schedule Preferences.

The vendor name will be displayed as well as any part identifier that was entered in Vendor Part data.

**Mfg Part Number:** If you have Manufacturer's Part Control, you may type or double click to select a manufacturer's part number.

**MPN String:** Click to select a Manufacturer's Part Number that represents a parent-component relationship.

**Deliver Stock:** The stock ID where the material is to be delivered upon receipt. The default is the primary stockroom for this part.

**Due Date:** The date needed by MRP. If an order is not firm planned, the MRP Explosion may change this date. If an order has been de-expedited, "De-Exp'd" will appear in this field.

**PO Due Date:** The vendor’s due date. This is the MRP need date less the purchasing stock lead-time. You can edit either date and the system will calculate the other date based on purchasing stock lead-time. If an order has been de-expedited, "De-Exp'd" displays in this field.

**Current Promise Date:** You can enter or change the vendor’s delivery commitment date for the purchase requisition.

**Firm Plan:** Check the box if you want the MRP Explosion to not be able to change the Due Date on the order.

**BOM Qty:** Displays the quantity in Bill of Materials units of measure.

**Purchase Qty:** Enter/change the quantity to be purchased in purchasing units of measure. The quantity in BOM units of measure will display at right.

**Cost:** The initial entry is the suggested price per unit based on the price break information entered in Vendor Part Data. You can change the price if required. This is expressed in purchasing units of measure. If you own the Multi-Currency module, the currency symbol will appear in front of the cost.

**Planner ID:** The identifier for the person responsible for planning this part. It was entered in MRP Part Data.

**Buyer ID:** The name or number of the individual responsible for buying this part. Buyer ID information can be changed only for each particular purchase order. If "Require Buyer ID Verification" in System Manager > System Configuration > Shipping Address has been set to Yes, the Buyer ID must be a valid code entered using Purchasing Data: Buyer ID Table, and you can browse to choose.

**Approved By:** A 3 letter code that identifies the person responsible for approving purchase requisitions.

**Reference:** A 25-character user defined reference field which can be edited using the purchase requisition detail dialog or directly in the purchasing schedule reference column. The information entered with a purchase requisition transfers into the purchase order detail record when a PR is converted to a PO.

**User-Defined:** Click the User Defined button to bring up the user defined key field and reference field.
8. In-Transit

You can enter the date a line item/delivery number on a purchase order left the vendor. Purchasing provides both an inquiry and a report that will show in-transit dates.

You can access this window by double-clicking the line number on a PO or by choosing Line Item Detail from the PO menu with a purchase order active.

**In-Transit Date:** Enter or edit the date the line item was shipped by the vendor.
8.1 In-Transit Inquiry

This option is used to display purchase orders which have been shipped by the vendor but are in-transit and have not been received at your location. From the Inquiry menu choose PO In-Transit.

You may review purchase orders by order number, part ID or vendor ID for both inventoried and non-inventoried parts.

In-Transit dates are entered in line item detail.

You can include purchase order notes in the display inquiry.

Greyed text means the displayed inquiry does not match the current selection criteria.

**Order-Line-Del:** The order/line/delivery number associated with this transaction.

**Vendor ID:** For Inventoried Parts, this is the Vendor for the part.

**Part Identifier:** If Inventoried Parts are being displayed, this is the Part Identifier and Description of the part being displayed.

**Order Qty:** The Quantity on order.

**In-Transit:** The date the order was shipped from the vendor.

**Due Date:** The MRP need date.

8.2 PO In-Transit Reports

This option is used to print a report of outstanding purchase orders which have been shipped from the vendor but haven’t reached your location yet. These in-transit purchase orders can be printed for inventoried, non-inventoried or both types of purchase orders.
From the Report menu choose PO In-Transit Report.

Sort Sequences: You may sort by and choose specific ranges for:

- Vendor Identifier
- Part Identifier
- Part ID/Due Date
- Order Number (Order number plus line item and delivery number)

Print P.O. Due Date: You can print the PO Due Date (the MRP Need Date minus the Purchasing Stock Lead-time) rather than the MRP Need Date on the Report.

Print: Choose whether you want to print to a window (to view), directly to the current Windows printer, or to a file

8.2.1 Sample In-Transit Report

The In-Transit Report lists outstanding purchase orders which have been shipped from the vendor but haven't reached your location yet.
9. Accounting

9.1 Purchase Order Preferences
With a purchase order form active, select the Options menu and choose Preferences

![Purchase Order Preferences](image)

**Line/Delivery:** While entering a new purchase order, you can have the next line number appear automatically. If you designate Multiple Deliveries, the system will automatically enter the same line number and next delivery number rather than the next line number.

**Non-Inventory:** Mark Require GL Reference if you want non-inventory purchase orders to require a GL Reference. If the Require Receipt Flag box is marked, the user will be required to mark either Yes or No in the Receipt Flag field before saving the purchase order. If the box is not marked, then the Receipt Flag may be left blank and the non-inventory PO saved.

**Warnings:** You can have Exact MAX 5.0 display a warning message if you enter a line item for the same part number as an existing line item.

**Saving:** You can have Exact MAX 5.0 automatically save a line item as soon as you move to the next line item. You can also have new part vendor relationships saved while entering a purchase order.

**Manufacturer’s Part Number:** If this box is not marked, then the manufacturer’s part number can only be entered in the purchase order detail screen. If this box is marked, then a box will pop up when you enter a part that is under MPN control on the purchase order form where you can browse and choose or enter the manufacturer’s part number.

**New POs:** You can choose whether new purchase orders are to default as taxable POs and whether or not the POs should be firm planned.
**Custom Logo:** You can designate any logo to appear on the purchase order form on your computer screen. Browse and choose or enter any raster-based picture file such as .BMP files.

**Allow Editing:** Selecting the Allow Editing preference allows Exact MAX 5.0 users to edit the vendor contact and phone number fields of the Vendor Information dialog box. Clearing this preference disables editing of these fields and they display grey. If the Allow editing preference is cleared, Exact MAX 5.0 users must open the Vendor Master dialog box to edit all vendor information.

### 9.2 Tax Code Data

This window is accessed through the Activity, Purchasing Data, Tax Codes menus. It is used to enter tax codes to be assigned to vouchers. Tax codes are not required if your purchases are not taxed.

![Tax Code Maintenance](image)

If you have accounting integration, enter all necessary tax expense account numbers in the Chart of Accounts.

Tax codes entered in this screen MUST be different than those entered for sales taxes. Descriptions and rates may be the same but the codes themselves must be different.

**Tax Code:** Enter a user defined tax code of up to seven characters. This code will reference a particular rate. For Value Added Tax the code must begin with VAT and the remaining 4 characters are user-defined.

**Description:** Enter a description of up to 30-characters that defines the tax code.

**Tax Rate:** Enter the percentage (%) tax rate using up to four places to the right of the decimal. (5% would be written 5, not .05.) This number is for reference only and will not automatically be used to calculate tax amounts on vouchers.

**Comments:** You can enter a 30-character comment.

**GL Account:** Enter a general ledger account number.
If you are integrated with Great Plains Great Plains, the account should be entered without dashes with a maximum of 32-characters. Currently, Great Plains allows a maximum of 20-characters. You can also browse the Great Plains accounts and choose the correct account. If you enter an invalid account number, the record will not be saved.

**User Defined:** You can enter a user defined key field and a user defined reference field.

**Rounding:** When the tax calculation is performed, you can specify how the result is rounded and to how many decimal places.

### 9.3 Tax Information

This window is accessed through the **PO** menu, **Tax Information** option while a purchase order is active.

You can designate whether or not the purchase order is taxable, and whether to tax each line item individually. If an order is not taxable, you should enter the tax exempt number. Choose the tax codes that apply to the order which were entered under **Tax Code Data**.
9.4 **PO Transaction Inquiry**

This option allows you to review purchase order receipt information to approve purchase orders for payment. This option does not update the system; it is for user reference only. Choose PO Transactions from the Inquiry menu.

Access Mode: You can display information by Date, Order Number, or Part Identifier.

Process Type: You can display Inventory orders, Non-Inventory orders, or Subcontractor orders.

Start With / End With: If you are accessing the display by Date, enter the beginning and ending Date range. If you are accessing the display by Part, enter the beginning and ending part ID range. If you are accessing the display by Order Number, enter the beginning and ending order number/line/delivery range.

To open an order you can either double-click a displayed order line or highlight it and click the Open Order button.

Part ID / Desc: If Inventoried Parts are being displayed, this is the Part Identifier and Description of the part being displayed.

Date: The date of the receipt.

Order-Line-Del: The order/line/delivery number associated with this transaction.

Vendor: For Inventoried Parts, this is the Vendor for the part.

Quantity: The Quantity of the transaction.

UOM: For Inventoried Parts, this is the Cost Unit of Measure. For Non-Inventoried Parts, this Unit of Measure was entered in the purchase order.

Price/EA: The purchase price for the part.

Extended: The Extended Price of the order, calculated by multiplying the Quantity by the Price/EA.
9.5 Cash Requirements Reports

This option is used to request a listing of the costs and scheduled deliveries for outstanding Purchase Orders. Outstanding Purchase Orders are Released (Status 3).

From the Reports menu choose Cash Requirements.

You can choose sort sequences, request a range of the chosen sort sequence and/or a range of buyer IDs, and designate whether you want to see inventory, non inventory, or both kinds of purchase orders.

Add Terms Days to Due Date: You can have a vendor’s terms days (net days) added to the due date.

Use Prevailing Rate: This prompt only appears if you have the Multi-currency option. Click this box and the monetary values of all receipts are recalculated based on the current exchange rate. For additional information please refer to your Multi-currency Module User Reference Guide.

Cost: You can choose whether the Price Per Unit is the Actual Cost (actual order price per unit) for the order, or the Standard Cost (calculated in the cost rollup) used by the system.

Report Name: This is the name of the format file for the current report. If you own Crystal Reports you can modify the report and save the settings under a different report name.

Print: Choose whether you want to print to a window (to view), directly to the current Windows printer, or to a file.
9.5.1 Sample Cash Requirements Report
The Cash Requirements Report lists of the costs and scheduled deliveries for outstanding Purchase Orders. Outstanding Purchase Orders are Released (Status 3).

**Overdue Total:** The sum of the overdue purchase orders prior to today's date.

**Grand Total:** The sum of all the purchase orders.

9.6 Unposted Receipts Report
This option is used to print a listing of unposted Purchase Order Receipts. This report will reflect any changes you may have made to your PO Receipts. You may include marked, in addition to unmarked, PO Receipts on this report.

Purchase Order Receipt information must exist in the system. Purchase Order receipts are created when a Receipt to Stock on a Purchase Order is made but only if the Voucher Receipt flag set to Yes in Configuration Data.

Choose Unposted Receipts Report from the Report menu. You can choose your sort sequence and a range of receipts based on the sort sequence, and specify inventory, non-inventory, or both types of orders.
Use Prevailing Rate: This prompt only appears if you have the Multi-currency option. If you respond Yes, the monetary values of all receipts are recalculated based on the current exchange rate. For additional information please refer to your Multi-currency module User Reference Guide.

Include Vouchered Receipts: You can specify to include PO Receipts that have been marked for vouchering.

Print: Choose whether you want to print to a window (to view), directly to the current Windows printer, or to a file. See Print Window for more information.

9.6.1 Sample Unposted Receipts Report

The Unposted Receipts Report is used to print a listing of unposted Purchase Order Receipts. This report will reflect any changes you may have made to your PO Receipts.

Mark: A Y means the receipt was marked for vouchering which also creates the voucher.

Date/Receiver: The date of receipt and the receiver number which was assigned at the time of the receipt.

Qty Received: The quantity of the receipt.

Stock ID: For an inventoried part, the stock location where it was stocked upon receipt.

GL Reference: When non-inventoried parts are received, a GL reference is assigned to the receipt. If a GL reference was assigned to an inventoried part receipt, it will be printed.

Invoice Cost: The invoice cost for the receipt. This will be the original invoice cost unless a corrected cost has been entered.

Ext Cost: The extended invoice cost which is equal to the invoice cost times the receipt quantity.

Ext PPV: The extended purchase price variance for the PO receipt. The purchase price variance is calculated by multiplying the quantity received times the difference between the standard cost and the invoice cost for the receipt.

Sub-Total: The total of the extended cost and the extended purchase price variance for the order.

Grand Total: The total of all extended costs and purchase price variances for the report.
9.7 Vendor Performance Analysis Report

The Exact MAX 5.0 Vendor Performance Analysis Report lists delivery performance information for Exact MAX 5.0 vendors. This information includes the number and monetary value of all order line items received early, on time, and late, as well as each vendor’s average number of delivery days.

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<th>Definition</th>
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<td>Early Receipt</td>
<td>Receipts into stock are determined early if received into Inventory one or more days before the Purchase Order (PO) due date.</td>
</tr>
<tr>
<td>On Time Receipt</td>
<td>Receipts into stock are determined on time if received into Inventory on or after the PO due date AND within a (user defined) number of Work Days in the On Time Window.</td>
</tr>
<tr>
<td>1 Week Late</td>
<td>Receipts into stock are determined 1 week late if received into Inventory up to 1 week after the last day specified by the (user defined) number of Work Days in the On Time Window.</td>
</tr>
<tr>
<td>Over 1 week late</td>
<td>Receipts into stock are determined Over 1 week late if received into Inventory at least one week later than the last day specified by the (user defined) number of Work Days in the On Time Window.</td>
</tr>
<tr>
<td>Average Delivery Days</td>
<td>The average number of days between the release date of a purchase order to a Vendor and receipt date of that order into Inventory. The release date is defined as the date the original purchase order is printed. Negative values indicate that the average delivery for a specific Vendor is received before the due date.</td>
</tr>
</tbody>
</table>

To generate a Vendor Performance Analysis Report, select Reports > Vendor Performance Analysis.
User may select to list vendor performance for All, a Range or Individual Vendors, Buyers and Purchase Orders.

9.8 Report Type
Exact MAX 5.0 users may select to list one of two levels of performance details, Summary or Detail.

- Summary VPA Report - This is the default report, which lists each Vendor, together with a summary analysis of early, on time and late Purchase Order receipts.
- Detail VPA Report - This report lists each Vendor together with a list of all Purchase Order line receipts sorted into early, on time and late. The Detail report includes a summary of all receipt lines for each vendor.

9.9 On Time Window
Exact MAX 5.0 users may specify a number of days within which receipts are considered “on-time”. The default value is 5 days. The maximum number of days is 999. This field allows entry of positive integers only, and no decimals. If entered number is greater than 30, Exact MAX 5.0 displays a warning message "This window is a month or greater. Is this correct? Y/N". Numbers higher than 30 but less than 999 are accepted.

9.10 Date Selection
Use the Date Selection drop down list box to specify how to sort the report. The choices are No selection (which displays all line items for a selected date range), by order creation date, order due date, or order receipt date. The default is No Selection. Use the date boxes to enter a From Date and To date. The From date cannot be after the To date and vice versa. Double click each date box to select a date using the Exact MAX 5.0 Shop Calendar.

9.11 Include Non Inventory
The default is marked which lists non-inventory POs. Clearing this box excludes all non Inventory Purchase orders from the performance analysis report.

9.12 Include Status 5 Orders
The default is cleared, which excludes status 5=closed orders from the vendor performance analysis report. Marking this checkbox includes status 5 (Closed) orders.

9.13 Use Current Promise Date
The default is cleared, which compares line item receipt dates with the line item’s current due date. If marked, performance calculations compare the order line item’s receipt date with the Current Promise Date rather than the Current Due Date.

9.14 Restrict Vendor select by ZIP/Post Code
The default is unmarked. If marked, the user can enter a starting zip/post code string of 1 to 30 characters and an ending string. Vendor selection is then filtered to only use Vendors that have a zip code within the specified range. If both starting and ending string are blank, then Exact MAX 5.0 displays a warning message. If blank when the user presses the OK button, Exact MAX 5.0 ignores the zip code filter. Users may enter a starting zip code only. Exact MAX 5.0 does not allow entry of an ending zip code until the user enters a starting zip code.

The Input File box displays the name of the report source file. Select a Print destination and click the Report button to generate the Vendor Performance Analysis report.

9.15 Sample Vendor Performance Analysis Report.
The following example shows a vendor performance analysis report by order due date, with a 5 day on time window, for orders placed between 7/3/2000 and 7/29/2002. Only one vendor, ID#200, displays. This is page 3 of an 8 page report.

### 9.16 Subcontract PO Paperwork

To create a part Pick List specific to subcontract order bills of materials, select: Shop Floor Execution > Reports > Subcontract PO Paperwork.

Choose whether to list All, a Range, or Individual order numbers
Mark your pick list options, select a report destination and then click the Report button to generate the pick list.
10. Glossary

Approved By
A 3-character code that identifies the person who is approving the PR.

Bill To
The bill to address is entered in Maintain Purchasing Data. Five lines of 30 characters each are provided.

Bill of Materials Unit of Measure (BOM UOM)
The Bill of Materials Unit of Measure (BOM UOM) is a two-character, user-defined reference that describes part measurements for design and build purposes entered using the Bill of Materials module > Part Master > BOM tab.

Buyer
The name or number of the individual responsible for buying this part. Buyer ID information can be changed only for each particular purchase order. If "Require Buyer ID Verification" in System Manager > System Configuration > Shipping Address has been set to Yes, the Buyer ID must be a valid code entered using Purchasing Data: Buyer ID Table.

Class Code
The ABC class code for the part as entered in inventory part data. This is a user-defined code. A parts are usually the higher priced parts that need closer inventory control.

Collect/Prepaid
Provides a place to write in collect or prepaid to be entered on the purchase order.

Commodity Code
The Commodity Code for this part as entered in the Part Master. It is a free form code used for categorizing parts, and many reports can be sorted on this code.

Confirming
A 15-character field identifying the person(s) who confirmed a particular purchase order.

Currency Description
A currency description relating to the currency code and symbol.

Currency Exchange Rate
The exchange rate for the foreign currency. Purchase orders are entered in the foreign currency. The foreign currency is divided by this exchange rate to calculate the domestic currency value.

Currency Symbol
The symbol for this currency as entered in Maintain PO Code Data - Currency.

Current Order Quantity
The current quantity ordered. This may be different from an original order quantity first entered when the order was created. It is in purchasing units of measure.

Date
You can type in the date, or place the cursor next to month, day, or year and click on the up or down arrow to increment month, day, or year. Double-click to bring up the Shop Calendar.
**Delivery Number**
The system automatically assigns this number. However, you can override the assigned number. It defaults to 01. Valid Delivery Numbers are between 01 and 99.

For the initial entry of a blanket purchase order, you must enter 01. This will allow you to enter the Total Line Amount. If you override the Delivery Number of 01, you will bypass this entry.

**Description 2**
The second 50-characters entered using the Part Master to describe an Exact MAX 5.0 part.

**Description/Comments**
The description of the line item. On the PO, double-click the field to bring up the purchase order part notes.

**Domestic Value**
The cost, based upon the price that is entered on the purchase order and the vendor currency exchange rate, is automatically calculated and displayed in the domestic currency. The calculation is cost divided by the exchange rate.

**Drawing Number**
The engineering drawing number for the part as entered in the part master.

**Due Date**
The date goods are required from the vendor.

**Due Quantity**
The current quantity less any quantities already received leaves the quantity still due on the order. This is expressed in purchasing units of measure.

**Extended Price**
The Extended Price of the order, calculated by multiplying the Quantity by the Unit Price.

**Firm Plan Code**
Firm planned orders are indicated with a Y for yes. If an order is firm planned, then it will not be rescheduled by the MRP Explosion program.

**Fixed/Variable Rate**
If you wish to use the exchange rate that is in your system at the time you post vouchers rather than the rate entered at the time the order is created, set the flag to Variable when entering the first line/delivery on a purchase order.

**FOB**
The Free On Board delivery point as entered in Vendor Master. It may be changed.

**Foreign Value**
The value as entered in the foreign currency used by the vendor.

**GL Ref**
The GL override that tells the system what account the transaction will affect.

**In Transit Date**
The date the order was put in transit from the vendor.
Inspection Required
This provides a place to write in user-defined inspection required codes to be entered on the purchase order.

Lead Time
The total purchasing lead-time.

Line Number
The system automatically assigns this number if you have your preferences set up to do so. However, you can override the assigned number. It defaults to 01. Valid Line Numbers are between 01 and 99.

On the PO Form you can double-click the line number to bring up the Purchase Order Detail window.

Manufacturer’s Part Number
If you own Manufacturer’s Part Control, you can enter up to 25 character part identifiers for a particular vendor/part relationship.

Order cost
The calculation of how much the total order will cost. The system multiplies the order quantity times the price per unit.

The price per unit may either be the standard cost as calculated in Recalculate Cost Rollups in Bill of Materials, or the actual cost for the order.

Order Number
Order numbers for unapproved purchase requisitions are in the 40,000,000 series. Approved purchase requisitions are in the 60,000,000 series. Purchase orders are in the 70,000,000 series.

Order Status
Order status codes are:
1 = Planned
2 = Approved
3 = Released
4 = Completed
5 = Closed

Order Type
Inventory orders are for inventory parts and require valid part IDs.
Non-Inventory orders are for non-inventory parts and do not use part IDs, but only a description.

Original Date
The date the order was originally due.

Original Quantity
The quantity when the order was first created.

Part Description
The first 50-characters entered using the Part Master to describe an Exact MAX 5.0 part.

Part Identifier
A user-defined, alphanumeric character string of up to 30 characters used to “name” a part as entered in Bill of Materials Part Master.
Planner ID
The individual responsible for planning this part. This information was entered in MRP Part Data.

PO or MRP Date
The MRP date is the date needed by MRP. The PO Date is the date the PO must be in house to fill the requirements (the MRP Need Date minus the Purchasing Stock Lead-time).

PO Quantity
The quantity being ordered. Double-click the field to bring up price break information.

PO Vendor
The vendor's name and billing address. Double-click the field to bring up vendor contact name and phone number and a button for moving to the Vendor Master.

PR Description
The description of the item to be ordered.

PR Quantity
The quantity of the line item to be ordered.

Price
The per unit price for the part being ordered, expressed in Purchasing Units of Measure.

Primary Stock ID
The primary stock ID for the part as entered in inventory part data.

Print Date
The date that the report was printed.

Promise Date
The vendor's delivery commitment for a purchase order. It is originally the MRP need date, but may be changed.

Purchase Order Vendor
A double-click in the Vendor field will access the Purchase Order Vendor window, or it comes up automatically for a new purchase order. Browse and choose a vendor for a new purchase order. Use the scroll bar to browse or enter the first letter of the desired Vendor ID. You can also enter one or more characters in the Search For window and click the Search button to move to the relevant Vendor ID. Press OK to choose the vendor.

Purchasing Unit of Measure (PUR UOM)
The Purchasing Unit of Measure is a 2-character, user-defined reference entered on the Bill of Materials Part Master Planner Tab that describes units of measure for purchased goods or parts. The Purchasing Unit of Measure is also referred to as the Cost Unit of Measure.

Reference (PR Detail, Purchasing Schedule and PO Line Item Detail)
A 25-character reference field which can be entered in a purchase requisition and will be carried over into the purchase order detail when a PR is converted to a PO.

Remarks
A user-defined field used for any additional comments or information relevant to the order.

Requisitioner
A 20-character user defined field for the requisitioner name.
Revision Level
There are two revision levels:
Part: The revision level for the part as entered in the Part Master. It can be changed for the order.
Order: The order revision number can be assigned whenever an order is changed.

Ship Instructions
A 20-character field allowing you to enter additional instructions for the shipping of your purchased parts. It is first entered in the Vendor Master but may be overwritten here.

Ship Via
If you double-click on the Ship Via field in the purchase order, the Ship Via window appears. Choose the ship via for this order. All ship vias are entered in Purchasing Data, PO Codes, Ship Via.

Start Date
The date needed by MRP minus the total purchasing lead time.

Taxable
A Y means the item is taxable. This was entered when the purchase requisition was entered or maintained.

Total
Total dollars. Quantity times Unit Price for all line items. The total includes any dollars attached to PO Notes. The notes do not display on the purchase order form, but they do print on the purchase order.

Unit
The Purchasing Unit of Measure for this part. This unit of measure is the same as the Cost Unit of Measure.

Unit Price
The initial entry is the suggested price per unit based on the Price Break information entered in Vendor Part Data. You can change this price if required. This is expressed in Purchasing Units of Measure.

For non-inventory items, the price that is entered.

User Defined Fields
You can enter a 15 character user-defined key field and/or a 25 character user-defined reference field.

Vendor Contact
The contact name at the vendor as entered in Vendor Data.
Vendor ID
A 20 character (maximum) user defined, alphanumeric vendor identifier for a part as entered in Purchase Part Data.
If Exact MAX 5.0 is integrated with Great Plains, the Vendor ID must be no more than 15 characters.

Vendor Status
Valid status codes are:
A = Active
S = Suspended
D = Deleted

Vendor Type
The vendor type is used to identify a vendor as a subcontractor or a normal vendor. N=normal vendor, S=subcontract vendor.
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