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PURCHASING WORKFLOW

PURCHASING WORKFLOW PROVIDES A SOPHISTICATED WORKFLOW ENGINE WITH CONFIGURABLE RULES, ROUTING AND APPROVAL FUNCTIONS. AN EASY-TO-USE REQUISITION INTERFACE CREATES DOCUMENTS THAT ARE CONTROLLED THROUGH THE WORKFLOW PROCESS. PURCHASING WORKFLOW ENABLES ORGANIZATIONS TO TIGHTLY CONTROL & MANAGE THEIR PROCUREMENT SYSTEM.

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Purchasing Workflow provides a simple and efficient requisitioning interface; setup options are available to optimize or restrict the interface depending on configurable user roles or specific user settings.

Requisitioning Features

- » Ability to default all information (other than item number and quantity), including vendor, GL code and cost
- » Handling of stock and non-stock items
- » Templates can be used to load a list of standard items
- » Allows different vendors on different lines
- » Vendor selection is controlled at the item and user level
- » Ability for the requisitioner to view the progress / status of a document through the workflow
- » Integrated with PJC, allowing Job Related requisitions to be entered

Notification Engine

A critical component of Purchasing Workflow is the Notification Engine which delivers timely information to parties involved in the requisition / approval process. Source documents can be automatically attached to notification emails.

The Notification Engine supports major email platforms including Gmail, Office 365, Exchange, Lotus Notes and GroupWise.

Workflow Management

Purchasing Workflow provides the ability to monitor and manage documents that are either within or have completed the workflow process:

- » Approval Console, to present and collect approvals from individual users
- » Management Console, allows managers to review documents currently in the workflow process for their assigned cost-centers
- » Ability to escalate overdue user approvals

Workflow Engine

Unlimited workflows can be designed to handle different requisitioning requirements. The workflow engine centrally manages each requisition based on a collection of rules and routing decisions:

- » Document value and Authority Level values
- » A documents contents, for example, the presence of capital items or non-stock items
- » Date based User substitutions
- » Support of multiple authorizations on a single transaction
- » Event Log of all workflow & approval events

Once a requisition document is fully approved, the workflow engine can further process the document in several different ways - create PO, pool & consolidate PO's, or use Internal Issues to fulfill requisitions directly from an inventory store.

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Cost Centers

Cost Centers are a pivotal feature in Purchasing Workflow providing the organizational purchasing structure, management and GL segment override settings.

User Configuration / Security

At the time of Requisition or Purchase Order the user can select from their restricted list of Cost Centers and Workflows that determine the handling of the source document.

Substitutions

The substitution facility allows users to nominate another user to carry out their approvals while they are on leave.

AVAILABILITY & SYSTEM REQUIREMENTS

300 Editions:

Standard, Advanced and Premium

Databases:

Microsoft SQL Server

Languages:

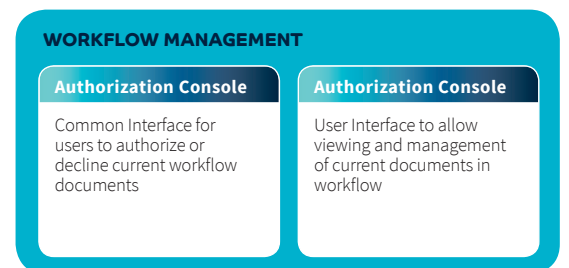
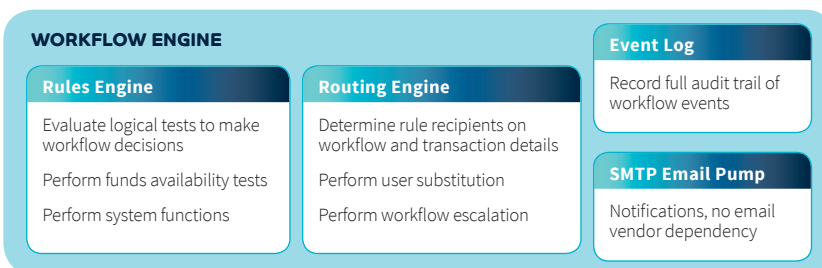
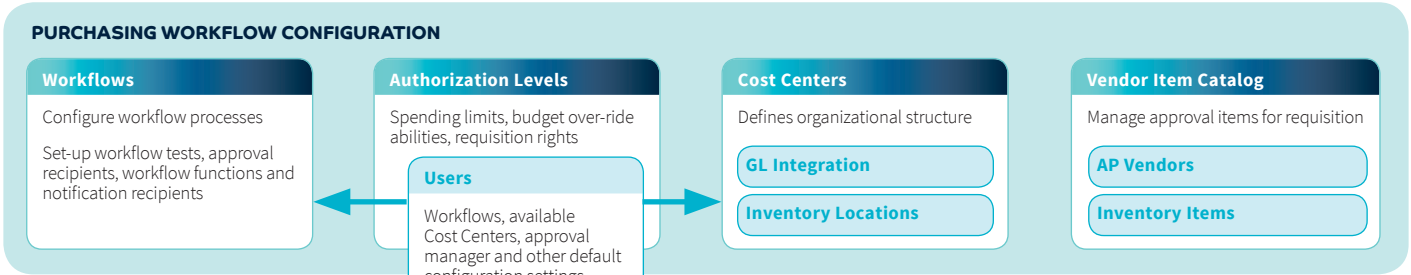
English, Spanish, French, Simplified Chinese

Required Modules:

- + GENERAL LEDGER
- + ACCOUNTS PAYABLE
- + PURCHASE ORDERS

Integrated Modules (optional):

- + INVENTORY CONTROL
- + PROJECT & JOB COSTING
- + INTERNAL ISSUES (Pacifitech)
- + FUNDS AVAILABILITY (Pacifitech)
- + WORKFLOW DOCUMENTS (Pacifitech)
- + VENDOR CATALOGS (Pacifitech)



sage ISV Developer



Pacifitech has a long and successful history as a Sage ISV Developer (Development Partner) developing Sage 300 solutions that enhance the functionality and capability of Sage 300.

Please visit our website www.pacifitechsol.com for further information on products and services that Pacifitech provides to the Sage 300 community around the world.

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