



Purchasing and Invoice Matching Enhancements

Release 5.1

Purchasing Major Features Added

- **TabLink – connecting buyers to web-based supplier catalogs**
- **Email Official Copy of Purchase Order and Request for Quotes**

TabLink

Changes to:

- **Security**
- **Setup**
- **Supplier Notebook**
- **Requisition Notebook**

TabLink - Security



Two new buttons appear on the PowerPanel

TabLink - Security

The buttons appear based on two new security settings

Define Window Access

Group		Module	
Plant	Group	Module	Has Access
&1	All Access	Security	Yes
1	AllAccess	Setup	Yes
B3	B3-AllAccess	Shipping Orders	Yes
CSR	All Access	Template Planning	Yes

Window/Action			
Window Description	Action	Has Access	Window Name
Copy Security Access	Update	<input checked="" type="checkbox"/>	w_se_copy_group
	Update	<input checked="" type="checkbox"/>	w_se_copy_from
Define Security Groups	Update	<input checked="" type="checkbox"/>	w_se_define_groups_eu
Define User Accounts	Update	<input checked="" type="checkbox"/>	w_se_define_user_accounts_eu
eCatalog Setup	Update	<input type="checkbox"/>	w_se_ecatalog_setup
eCatalog User Access	Update	<input type="checkbox"/>	w_se_ecatalog_user_access
Logout Connected user	Update	<input checked="" type="checkbox"/>	w_se_logout_user
Plant Registration	Delete	<input checked="" type="checkbox"/>	w_se_plant_reg_eu
	Inquiry	<input checked="" type="checkbox"/>	w_se_plant_reg_eu
	New	<input checked="" type="checkbox"/>	w_se_plant_reg_eu
	Update	<input checked="" type="checkbox"/>	w_se_plant_reg_eu
Security PowerPanel	DisableUsers	<input checked="" type="checkbox"/>	w_se_powerpanel_security

TabLink - Security

The screenshot shows the TabWare Security 5.1.00 PowerPanel interface. The window title is "TabWare Security 5.1.00" and the menu bar includes "File", "Edit", "Advanced", "Window", and "Help". The main panel is titled "TabWare Security PowerPanel" and contains several sections:

- Groups & Access Permission:** Contains buttons for "Define Groups", "Define Window Access", and "Define Table/Element Access".
- Plant Registration:** Contains a button for "Plant Registration".
- User Accounts:** Contains buttons for "Define User Accounts", "Assign User Access", and "Grant Super User Access".
- eCatalog:** Contains buttons for "Define Catalog" and "Assign Catalog User Access".
- Disable ALL User Access:** Contains a checkbox.

Two orange arrows point from a yellow callout box to the "Define Catalog" and "Assign Catalog User Access" buttons in the eCatalog section. The callout box contains the text: "Define Catalog and Assign Catalog User Access".

At the bottom left of the window, the status bar shows "Ready". At the bottom right, it shows "Oracle-Rel5.1".

TabLink - Security

Define Catalog

Plant: ROF

Catalog Name: Quadrem **Active**

Catalog URL: https://catalog.quadrem.net/servlet/BugsEye?ForceTarget=YES&~OkCode=ADDI&TAR

Return URL: http://tablink/brainquadrem.asp

Launch ASP: http://tablink/oralcquadrem.asp

Activation Code: 09939456

Notify Employee: Jane

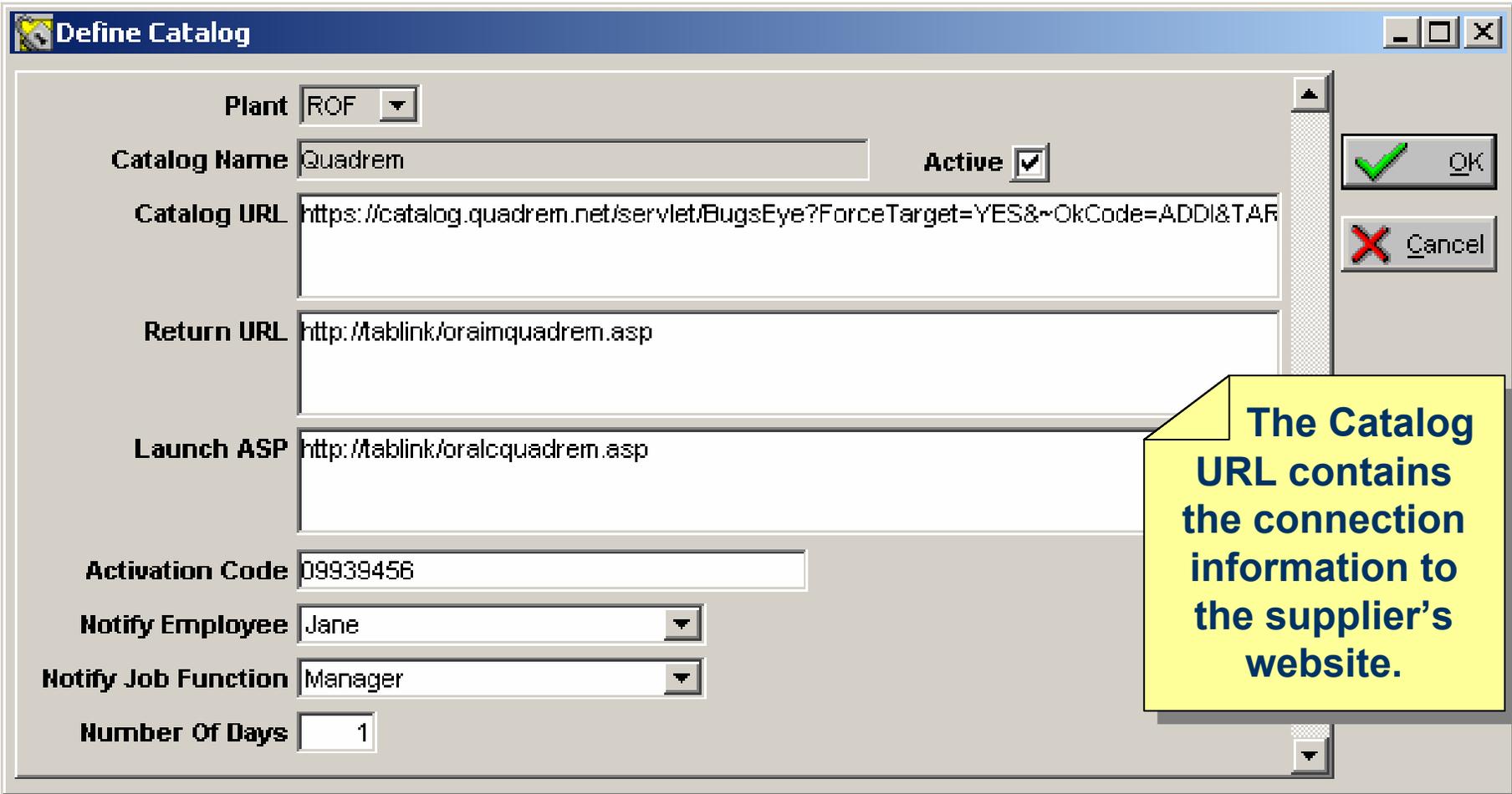
Notify Job Function: Manager

Number Of Days: 1

OK Cancel

TabWare is delivered with the catalog entries that are supported

TabLink - Security



Define Catalog

Plant: ROF

Catalog Name: Quadrem **Active**

Catalog URL: <https://catalog.quadrem.net/servlet/BugsEye?ForceTarget=YES&~OkCode=ADDI&TAR>

Return URL: <http://tablink/brainquadrem.asp>

Launch ASP: <http://tablink/oralcquadrem.asp>

Activation Code: 09939456

Notify Employee: Jane

Notify Job Function: Manager

Number Of Days: 1

OK **Cancel**

The Catalog URL contains the connection information to the supplier's website.

TabLink - Security

Define Catalog

Plant: ROF

Catalog Name: Quadrem Active

Catalog URL: <https://catalog.quadrem.net/servlet/BugsEye?ForceTarget=YES&~OkCode=ADDI&TAR>

Return URL: <http://tablink/brainquadrem.asp>

Launch ASP: <http://tablink/oralcquadrem.asp>

Activation Code: 09939456

Notify Employee: Jane

Notify Job Function: Manager

Number Of Days: 1

Buttons: OK, Cancel

The Return and Launch entries designate the location of the .net applications that are installed on the client's webserver.

TabLink - Security

Define Catalog

Plant: ROF

Catalog Name: Quadrem Active:

Catalog URL: https://catalog.quadrem.net/servlet/BugsEye?ForceTarget=YES&~OkCode=ADDI&TAF

Return URL: http://tablink/oraimquadrem.asp

Launch ASP: http://tablink/oralcquadrem.asp

Activation Code: 09939456

Notify Employee: Jane

Notify Job Function: Manager

Number Of Days: 1

OK Cancel

An activation code is required to enable access to the catalog from TabWare. This is obtained from TabWare Support.

TabLink - Security

Define Catalog

Plant: ROF

Catalog Name: Quadrem Active:

Catalog URL: https://catalog.quadrem.net/servlet/BugsEye?ForceTarget=YES&~OkCode=ADDI&TAR

Return URL: http://tablink/oraimquadrem.asp

Launch ASP: http://tablink/oralcquadrem.asp

Activation Code: 09939456

Notify Employee: Jane

Notify Job Function: Manager

Number Of Days: 1

OK

Cancel

An employee or job function can be notified of any errors that occur during a catalog shopping session from TabWare.

TabLink - Security

Define Catalog

Plant: ROF

Catalog Name: Quadrem

Active:

Catalog URL: https://catalog.quadrem.net/servlet/BugsEye?ForceTarget=YES&~OkCode=ADDI&TAF

Return URL: http://tablink/oraimquadrem.asp

Launch ASP: http://tablink/oralcquadrem.asp

Activation Code: 09939456

Notify Employee: Jane

Notify Job Function: Manager

Number Of Days: 1

OK

Cancel

The length of time that any errors logged are maintained on the system is designated with the Number of Days value.

TabLink - Security

Assign Catalog User Access

Catalogs

ROF	Quadrem
RON	Quadrem

Users Assigned

BLAC1077	Jane Black
FREEFLOW	Free Flow User
WAIN8967	Jackey Waingart

Users Not Assigned

BCUR2025	Bill Curtis
BIL1	bill
CURT2025	Bill Curtis
FETZ9855	Jeff F
FETZ9855SU	Jef
FOGL4433	Bo
GLOBAL	glo
GRAN5363	joe
JOHN3287	Lor
KAMI4893	Kar

Catalog User Name: USERNAME

Catalog Password: *****

Default Item Type: Nonstock

Buttons: Apply, OK, Cancel

Access to the option to use TabLink from the Requisition Notebook is granted on the Assign Catalog User Access window.

TabLink - Security

Assign Catalog User Access

Catalogs

ROF	Quadrem
RON	Quadrem

Users Assigned

BLAC1077	Jane Black
FREEFLOW	Free Flow User
WAIN8967	Jackey Waingart

Users Not Assigned

BCUR2025	Bill Curtis
BIL1	bil1
CURT2025	Bill Curtis
FETZ9855	Jeff Fetzer
FETZ9855SU	Jeff Fetzer
FOGL4433	Boyden Fogle
GLOBAL	global user
GRAN5363	joegrant
JOHN3287	Lorie Johnson
KAMI4893	Karen Kaminski

Apply OK Cancel

USERNAME

Nonstock

Only users that currently have access to create requisitions will appear in the list.

TabLink - Security

Assign Catalog User Access

Catalogs

ROF	Quadrem
RON	Quadrem

Users Assigned

BLAC1077	Jane Black
FREEFLOW	Free Flow User
WAIN8967	Jackey Waingart

Users Not Assigned

BCUR2025	Bill Curtis
BIL1	bil1
CURT2025	Bill Curtis
FETZ9855	Jeff Fetzer
FETZ9855SU	Jeff Fetzer
FOGL4433	Boyden Fogle
GLOBAL	global user
GRAN5363	joegrant
JOHN3287	Lorie Johns
KAMI4893	Karen Kamir

Catalog User Name USERNAME

Catalog Password *****

Default Item Type Nonstock

Apply OK Cancel

Security information required to access the catalog is defined here.

TabLink - Security

Assign Catalog User Access

Catalogs

ROF	Quadrem
RON	Quadrem

Users Assigned

BLAC1077	Jane Black
FREEFLOW	Free Flow User
WAIN8967	Jackey Waingart

Users Not Assigned

BCUR2025	Bill Curtis
BIL1	bil1
CURT2025	Bill Curtis
FETZ9855	Jeff Fetzer
FETZ9855SU	Jeff Fetzer
FOGL4433	Boyden
GLOBAL	global us
GRAN5363	joegrant
JOHN3287	Lorie Jo
KAMI4893	Karen K

Catalog User Name USERNAME

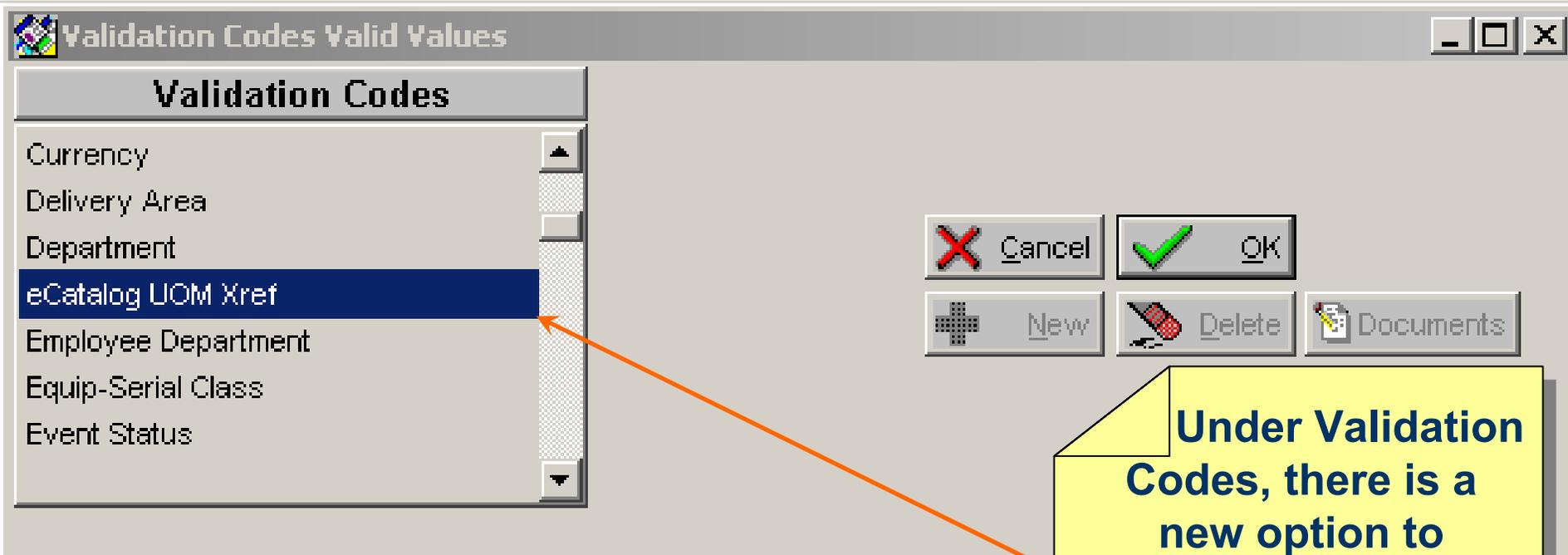
Catalog Password *****

Default Item Type Nonstock

Apply OK Cancel

The default item type is for items added to the requisition as a result of shopping on the catalog

TabLink – TabWare Setup



Under Validation Codes, there is a new option to cross reference existing UOM codes to the UOM codes that the web catalog uses.

TabLink – TabWare Setup

The screenshot shows a window titled "eCatalog UOM Xref". At the top, there is a dropdown menu for "eCatalog" with "Quadrem" selected. Below this is a table with two columns: "eCatalog Unit Of Measure" and "Unit Of Measure". The first row shows "CT" in the first column and "carton" in the second. The second row shows "EA" in the first column and "each" in the second. A yellow callout box with a hand icon pointing to the "CT" entry contains the text: "The catalog's unit of measure is associated to an existing UOM. This alleviates adding more codes to the standard list." To the right of the table are four buttons: "OK" (with a green checkmark), "Cancel" (with a red X), "New" (with a green plus sign), and "Delete" (with a red eraser icon).

eCatalog Unit Of Measure	Unit Of Measure
CT	carton
EA	each

The catalog's unit of measure is associated to an existing UOM. This alleviates adding more codes to the standard list.

TabLink – TabWare Supplier

The screenshot shows a software window titled "Supplier :JBlack". It features a notebook-style interface with two tabs: "Catalog" and "Catalog Supplier". The "Catalog" tab is active and shows a dropdown menu with "Quadrem" selected. The "Catalog Supplier" tab is also active and shows a dropdown menu with "ACBgXE" selected. A yellow callout box with a hand icon pointing to the "Catalog" dropdown contains the text: "The supplier code sent by the catalog can be associated to an existing supplier number on the new Ecatalog Xref tab of the Supplier notebook." An orange arrow points from the callout box to the "ACBgXE" dropdown. On the right side of the window, there is a vertical toolbar with buttons for "Supplier" (with a green checkmark and "OK"), "Terms" (with a red X and "Cancel"), "Custom", "Contacts", "Comments", "Addresses", "EDI/Fax", "Ecatalog Xref", "Actions ...", "New" (with a green plus sign), and "Delete" (with a trash can icon). At the bottom of the window, there are "New" and "Delete" buttons.

TabLink – TabWare Supplier Search

 **Supplier Search**

Supplier

Name

Query Base

Startup Query

Supplier	Name	Ecatalog Xref Catalog Name	Ecatalog Xref Catalog Supplier	Plant
JB	Jane Black			ROF
JBlack	Jane's Firing Range	Quadrem	AexbcD	ROF
JBlack-2	Jane's Distributing Company			ROF

Purchase Order Search

Supplier

New Supplier

Reports

The cross reference values are available to the Supplier Query Wizard

TabLink – TabWare Requisition Window

The screenshot shows the 'Requisition: 000029r5' window. The 'Work Order Description' is 'test cancel'. The 'Delivery No.' is 1, 'Area' is 'Door', 'Date' is 8/6/03, and 'Time' is 'noon'. A table lists items with columns for 'Item' and 'Type':

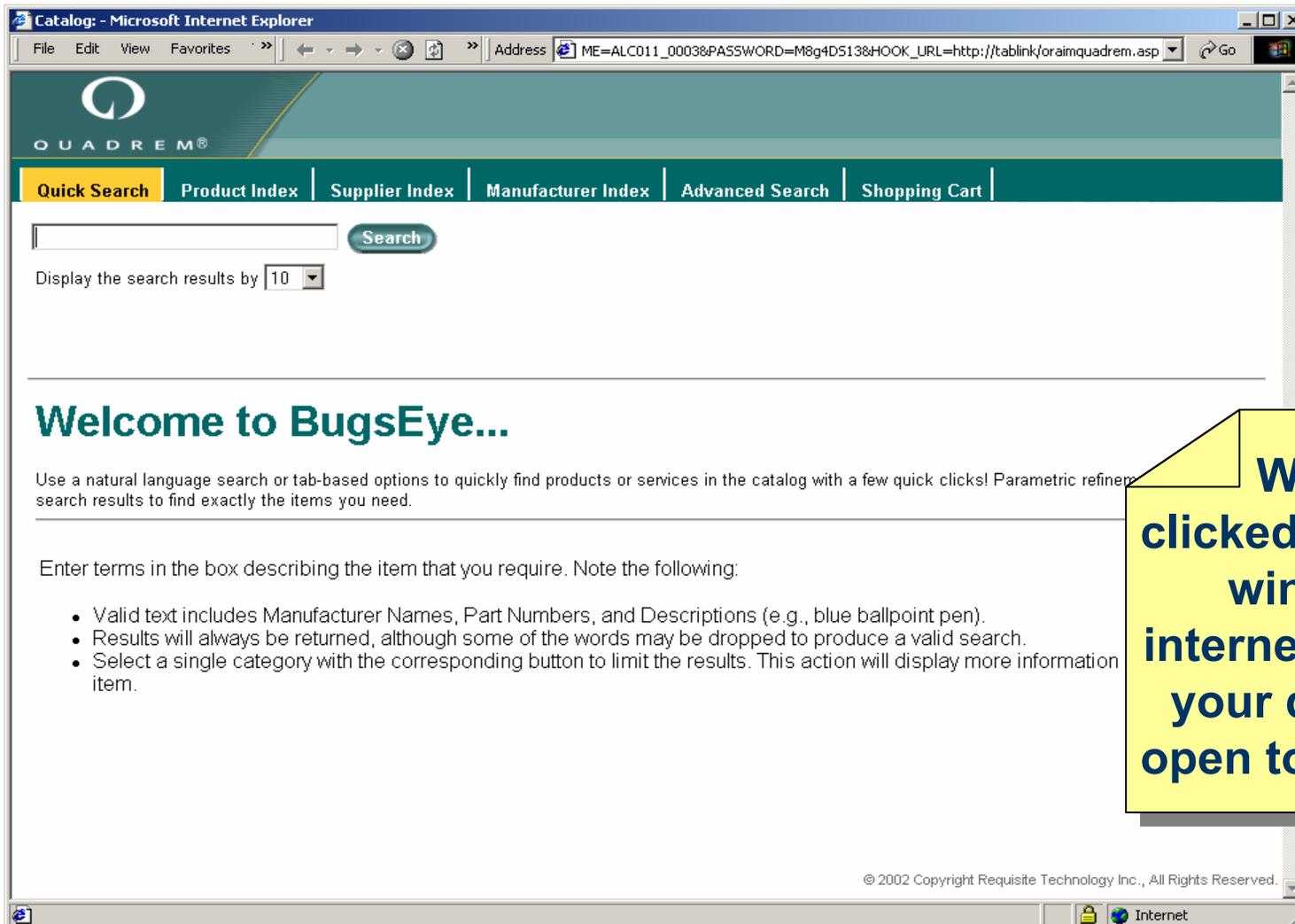
Item	Type
JBJIT	JIT
JBJIT	JIT
000029r5-01	General
000029r5-02	General
000029r5-03	General
000029r5-04	Nonstock

The 'Copy' dialog box is open, showing three radio button options: 'Copy from Hierarchy', 'Copy from Item Search', and 'Copy from ECatalog'. The 'Copy from ECatalog' option is selected, and a list of catalogs is displayed below it, with 'MotionMRO' highlighted. An orange arrow points from the yellow callout box to this list.

At the bottom of the main window, the 'Item Information' section shows: Item: JBJIT, Unit Cost: \$100.00, Description: JIT Test, Type: JIT, Unit of Issue: each. There is also an 'Abnormal Demand' checkbox and a 'New' button.

From the Copy window the Copy from Catalog option appears. If multiple catalogs are available, a list to choose from will display.

TabLink – Catalog Site



When OK is clicked on the Copy window, the internet browser on your desktop will open to the catalog.

TabLink – Confirmation Window

The screenshot shows a Microsoft Internet Explorer browser window with the title "Confirmation - Microsoft Internet Explorer". The address bar displays "http://tablink/mro/import.asp". The main content area features the Tabware logo, which consists of a blue triangle followed by the word "tabware" in a bold, lowercase sans-serif font, with "an assetpoint product" in a smaller font below it. Below the logo is a dark green rounded rectangular box containing the text "Part Number Selection Confirmation". Underneath this box is a white rectangular box with a thin border containing the text "Part Number: 1/2 1800 D1152 TEFC 56(1/2 1800 D1152 TEFC 56) was sent to the Tabware Requisition System with a requested quantity of 1.000.". At the bottom center of the page is a button labeled "Return to TabWare". The status bar at the bottom left of the browser window shows "Done".

Once shopping is complete on the catalog, the shopping cart is returned to TabWare. This is the confirmation window of the items being returned.

TabLink – Requisition Notebook

Requisition: 000029r5

Work Order Description
test cancel

No Delivery Assigned

Item	Type	Req.	Issued	Options
JBJIT	JIT			<input type="checkbox"/>
JBJIT	JIT			<input type="checkbox"/>
000029r5-06	Nonstock			40 <input type="checkbox"/>
000029r5-07	Nonstock			40 <input type="checkbox"/>
000029r5-08	Nonstock			<input type="checkbox"/>
000029r5-09	Nonstock			<input type="checkbox"/>

Item Information Charges

Item JBJIT

Unit Cost

Description JIT Test

Abnormal Dema

Actions ... OK Cancel

Catalog Search

1 line(s) were selected from the catalog. Do you want to add these lines to the current requisition?

Yes No

You have the option to cancel the process or add the shopping cart to the requisition.

TabLink – Requisition Notebook

Requisition: 000029r5

Work Order Description
test cancel

Actions ... OK Cancel

No Delivery Assigned

Item	Type	Req. Qty.	Issued Qty.	Description	Options
000029r5-10	Nonstock	1	?	0 Black Welded Steel Standard Schedule 40	<input type="checkbox"/>
000029r5-11	Nonstock	1	?	0 Black Welded Steel Standard Schedule 40	<input type="checkbox"/>
000029r5-12	Nonstock	1	?	0 Compaq 128MB memory upgrade Evo D500	<input type="checkbox"/>
000029r5-13	Nonstock	1	?	0 Logitech Optical Trackman Wb	<input type="checkbox"/>
000029r5-14	Nonstock	5	?	0 110volt charger for rechargeable Stealth	<input type="checkbox"/>

Item Information Charges Purch. Desc. Recommendations PO Defaults

Item 000029r5-14 Type Nonstock

Unit Cost \$43.20 Unit of Purchase each

Description 110volt charger for rechargeable Stealth

The shopping cart is returned to the requisition notebook as a new line. Note that the item type defaults from the user setup.

TabLink – Requisition Notebook

Requisition: 000029r5

Work Order Description
test cancel

Actions ... OK Cancel

No Delivery Assigned

Item	Type	Req. Qty.	Issued Qty.	Description	Options
000029r5-10	Nonstock	1	?	0 Black Welded Steel Standard Schedule 40	<input type="checkbox"/>
000029r5-11	Nonstock	1	?	0 Black Welded Steel Standard Schedule 40	<input type="checkbox"/>
000029r5-12	Nonstock	1	?	0 Compaq 128MB memory upgrade Evo D500	<input type="checkbox"/>
000029r5-13	Nonstock	1	?	0 Logitech Optical Trackman Whe	
000029r5-14	Nonstock	5	?	0 110volt charger for rechar	

Item Information | Charges | Purch. Desc. | Recommendations | PO Defaults

Lead Days Do not allow subs

Supplier JBlack ? Jane's Firing Range

Part Number 3487125

Manufacturer ACME PARTS

The information from the shopping cart also appears on the Recommendations and Purch. Desc. tabs

TabLink – Ecatalog Errors

eCatalog Errors Search

eCatalog Query

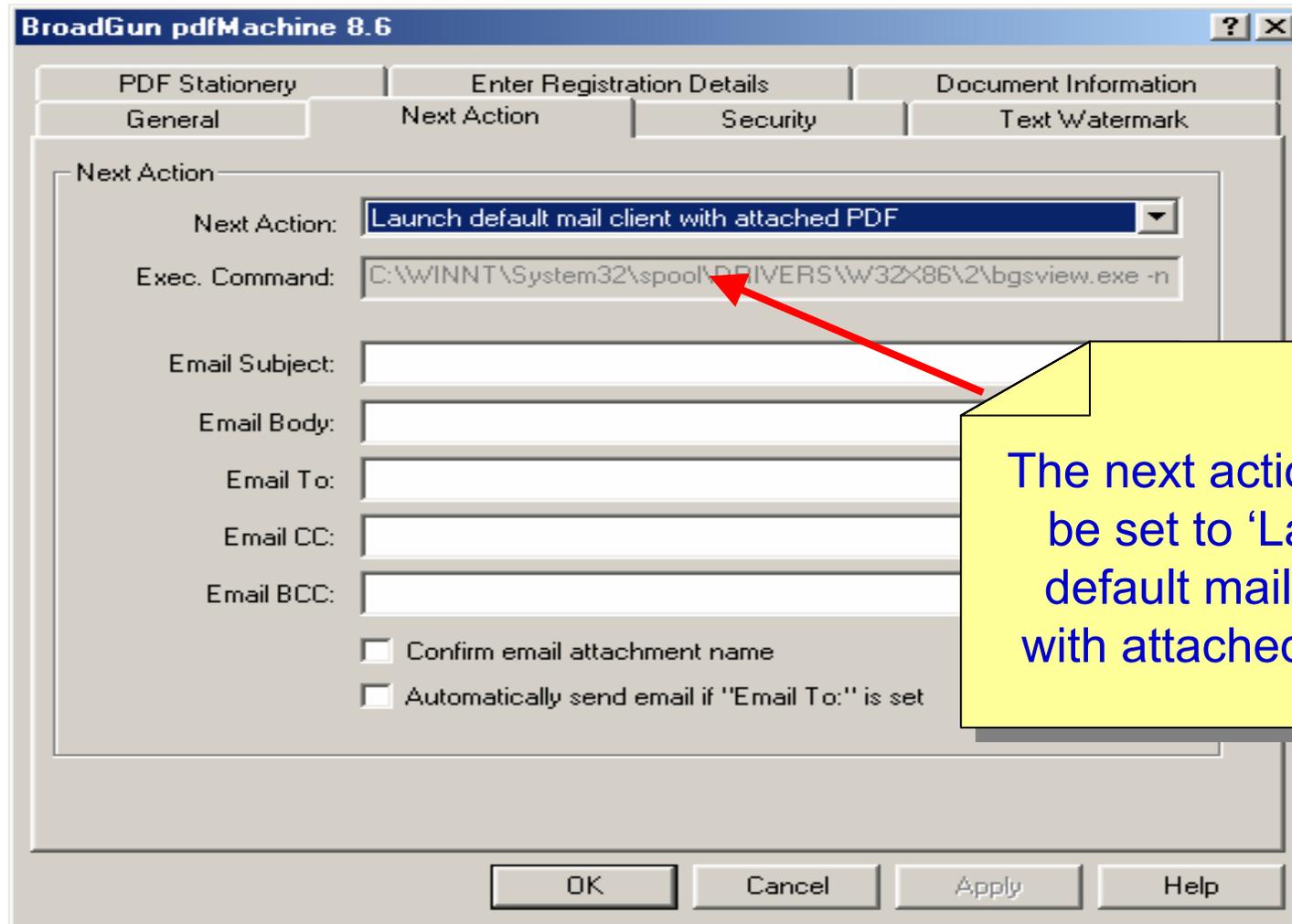
Date Entered Startup Query

Quantity Requested	Unit Cost	Unit Of Measure	Supplier	Error Message
1	4.94	EA		This supplier is not defined or associated with a TabWare supplier.

Any errors encountered with the shopping cart appear in the eCatalog Errors Search window. The error message identifies the specific problem.

Emailing PO's and RFQ's

- Requires an additional piece of software installed on the user's desktop, PDFMachine from BroadGun. Go to www.pdfMachine.com to purchase a copy. The software contains a print driver that converts a print stream from TabWare directly to a PDF file.
- Emails the Official Copy of either the Purchase Order or Request for Quote to the supplier's email address.



pdfMachine has its own configuration options

Emailing PO's and RFQ's - Setup

The screenshot shows the 'Purchasing Setup Options' window with the 'Email Setup' tab selected. The 'Plant Currency' is set to 'USD'. The 'Company' field contains 'THIS IS A TWENTY 20' and the 'Logo' field contains 'Q:\vogos\TOL.bmp'. The 'Email Setup' tab is active, showing options for sending official copies of RFQs and POs via email. A yellow callout box highlights the 'Email Setup' tab and its function.

Purchasing Setup Options

Plant Currency: USD

General | Purchase Order Numbering | Blanket Order Numbering | Request for Quote Numbering

Company: THIS IS A TWENTY 20

Logo: Q:\vogos\TOL.bmp

Logo Sample: TabWare online

Defaults | Unit Cost Variance | Tolerances | RFQ Setup | **Email Setup**

If either option is checked and supported PDF and email software is installed on the buyer's computer then allow use of email for:

- Official copy of the Request for Quote
- Official copy of the Purchase Order

On the Purchasing Setup Options window, a new tab, Email Setup enables the feature for RFQ's and PO's if the software is installed on the user's desktop.



Emailing PO's and RFQ's – Supplier Notebook

Supplier :JBlack
_ □ X

Send Purchase Order By Send RFQ by

<input type="checkbox"/> Manual Fax	<input type="checkbox"/> Phone
<input type="checkbox"/> Electronic Fax	<input type="checkbox"/> Mail
<input type="checkbox"/> EDI	<input checked="" type="checkbox"/> Email

Supplier	✓ OK
Terms	✗ Cancel
Custom	
Contacts	
Comments	
Addresses	Actions ...
EDI/Fax	
Ecatalog	+ New
Xref	📞 Delete

The EDI/Fax tab of the Supplier Notebook designates the default value for how the Purchase Order and Request for Quote are sent to the Supplier. This can be overridden at the RFQ and PO level. The Email flag has been separated from the EDI flag.



Emailing PO's and RFQ's – RFQ Notebook

Request for Quote: JB040902B - Approved to Send

Supplier	Status Entered
JBlack	Jane's Firing Range
Contact	Send By
Jane	<input type="checkbox"/> Manual Fax
Phone	<input type="checkbox"/> Electronic Fax
Contact Phone	<input checked="" type="checkbox"/> Email
Fax	<input type="checkbox"/> Phone
Contact Fax	<input type="checkbox"/> Mail
Email Address	<input type="checkbox"/> EDI
Contact E-mail	
Mail To North	

address, this can be expanded.

Request For Quote [OK] [Cancel]

Custom

Text

Line Items [Delete]

[New] [Delete] Supplier Note

The supplier or contact email address will come over from the Supplier Notebook. The Email Address is required if the Send by Email flag is checked and the Purchasing Setup option to use Email is checked.

Emailing PO's and RFQ's Purchase Order Notebook

Purchase Order JB011403E-0000-000 Open

Buyer: Jane - Code
Type: Open
Description:
Service Contract:

Supplier
Supplier: JBlack ? Jane's Firing Range
Contact: Jane Phone: 864 679-3464
Fax: Contact Fax
Mail To: North
address, this can be expanded.
Email Address: jane.black@assetpoint.com

Order Limit: USD \$5,000.00
Currency: USD

Initial Text

Purchase Order [OK] [Cancel] [New]

The supplier or contact email address will come over from the Supplier Notebook. The Email Address is required if the Send by Email flag is checked and the Purchasing Setup option to use Email is checked.

Emailing PO's and RFQ's Purchase Order Notebook

Purchase Order JB011403E-0000-000 Open

Ship Via: Train
Ship Point: Ship Point
Fob: Fob
Freight: Collect freight on delivery
Payment Terms: Net 30 Days Two Way Match
Ship To: test4 Bill To: Resp

test
Wheelabrator Falls Inc.
Attn: Purchasing Agent
1201 New Ford Mill Road
Morrisville, PA 19067

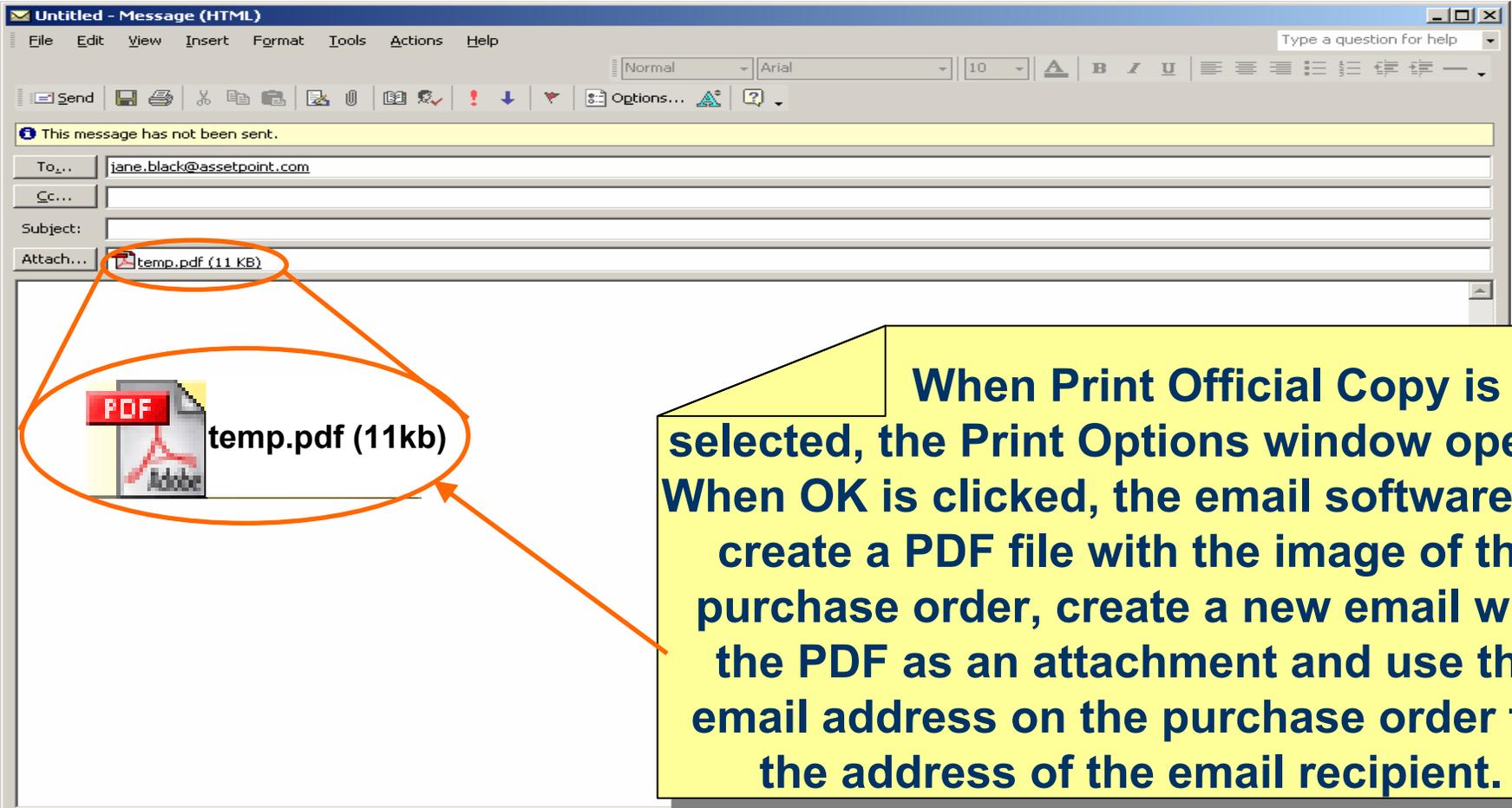
Send Purchase Order by

Manual Fax Phone EDI
 Electronic Fax Mail Email

Purchase Order: OK
Terms: Cancel
Custom
Line Items: New
Totals

The Email flag has been separated from the EDI flag.

Emailing PO's and RFQ's Print Official Copy



The screenshot shows an email client window titled "Untitled - Message (HTML)". The menu bar includes File, Edit, View, Insert, Format, Tools, Actions, and Help. The toolbar contains icons for Send, Print, Copy, Paste, Undo, Redo, Bold, Italic, Underline, Text Color, Background Color, and a Help icon. A yellow status bar at the top of the message area reads "This message has not been sent." The "To:" field contains "jane.black@assetpoint.com". The "Subject:" field is empty. The "Attach:" field shows a PDF icon and the text "temp.pdf (11 KB)". Below the attachment list, a preview of the PDF file is shown, featuring a red "PDF" label and the Adobe logo. An orange oval highlights the attachment list, and another orange oval highlights the PDF preview. A yellow callout box with a black border and a pointer to the PDF preview contains the following text:

When Print Official Copy is selected, the Print Options window opens. When OK is clicked, the email software will create a PDF file with the image of the purchase order, create a new email with the PDF as an attachment and use the email address on the purchase order for the address of the email recipient.

More Purchasing Enhancements

Purchase Order Expediting Backlog

Responsible Person ? Supplier ?

From Date ? To Date ?

Buyer

Search Actions ... Close

Purchase Order	Line	Supplier	Supplier Name	Item	Issued Date	Milestone	Origin
00001-0000-000	1	Fanuc	Fanuc Robotice	50152	6/27/00		6/30/00
00007-0000-000	1	AIT/Rice	AIT/Rice	2202	6/29/00		6/30/00
00072501-0000-000	1	Paragon	Paragon Technologies	cccccccc			7/25/00
01060501-0000-000	1	Paragon	Paragon Technologies	010605001-01	6/5/01		6/7/01
02040402-0000-000	1	jackey	Jackey Waingart	jw4402			4/4/02
	2	jackey	Jackey Waingart	jw4402B			
	3	jackey	Jackey Waingart	jw4402C			
	4	jackey	Jackey Waingart	jackey408			
	5	jackey	Jackey Waingart	jw4402D			

Expediting Details Expediting Notes Purchase Order Details

The Expediting Backlog Report can now be printed from the menu, File/Print option

More Purchasing Enhancements Auto Issue JobCop Program

Supplier :JBlack

Ship Via: Train
Ship Point: Ship Point
Fob: Fob
Freight: Collect freight on delivery
Tax: S.C. 6.00%
Payment Terms: Net 30 Days
Currency: US Dollars
Duns#: Duns#
1099 ID: 1099 ID

Two Way Match
Auto Issue

Supplier OK
Terms Cancel
Custom
Contacts
Comments
Addresses
EDV/Fax
Actions ...

	USD
Credit Limit	\$5,000.00
Minimum Order	\$0.00

A new flag on the Terms tab of the Supplier Notebook will default to the auto-generated PO for the supplier.

More Purchasing Enhancements Auto Issue JobCop Program

Purchase Order JB031803A-0001-000 Open

Buyer

Type

Description

Service Contract

Auto Issue Flag

Auto-Generated

Supplier

Supplier JBlack Jane's Firing Range

Contact Jane Phone

Fax Contact Fax

Mail To North

address, this can be expanded.

Email Address

Order Limit USD \$0.00

Currency USD

Initial Text Final Text

Purchase Order OK

Cancel

Terms

Custom

Line Items New

Totals Delete

The Auto Issue flag defaults from the supplier, but can be overridden at the PO level.

More Purchasing Enhancements Auto Issue JobCop Program

Purchasing Setup Options

Plant Currency: USD

General | Purchase Order Numbering | Blanket Order Numbering | Requisition

Company
THIS IS A TWENTY 20

Logo
Q:\vogos\TOL.bmp

Defaults | Unit Cost Variance | Tolerances | RFQ Setup | Email Setup

Automatically issue system-generated PO's if total PO value falls between the Supplier Minimum and this Maximum Value

Maximum Value: \$0.00

On Report of Unneeded Purchases, Show items which, if purchased, will exceed Maximum Inventory Value by this amount

Maximum Inventory Value: \$0.00

An auto-created purchase order will be issued if the total value of the Purchase Order falls between the Supplier Minimum and the Maximum Limit specified under Purchasing Setup Options **AND** the flag on the purchase order header is set to Auto Issue.

More Purchasing Enhancements Auto PO JobCop Program

If the blanket order limit or blanket item quantity limit is exceeded then the reorder will not be added to the release, but will be approved by the system. The line will appear on the Buyer's Backlog under the Ready for Purchase activity, to be dealt with by the buyer.

More Purchasing Enhancements Initial/Final Text

Purchasing Setup Options

Plant Currency: USD

General | Purchase Order Numbering | Blanket Order Numbering | Request for Qu...

Company
THIS IS A TWENTY 20

Logo
Q:\logos\TOL.bmp

Logo Sa...
Tabware

Defaults | Unit Cost Variance | Tolerances | RFQ Setup | Email Setup

Unit Cost Variance between Purchase Order and Requisition

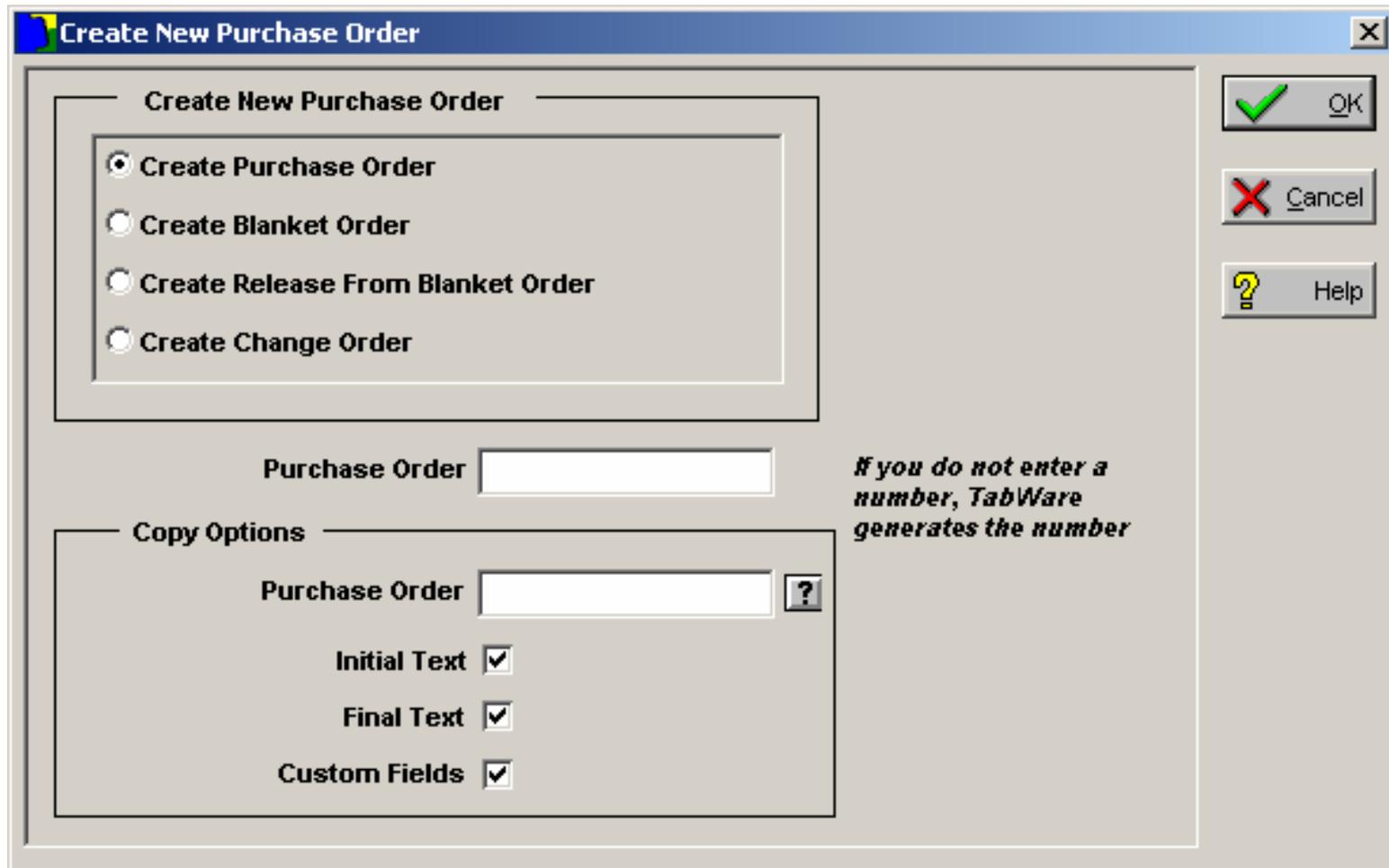
Evaluation Minimum: \$10.00

Variance Percentage: 50.00%

Copy Text for Change Orders:

When a change order is created, the Initial Text and Final Text can be copied from the original PO. This setting indicates the default option when the change order is created.

More Purchasing Enhancements Initial/Final Text



Create New Purchase Order

Create Purchase Order

Create Blanket Order

Create Release From Blanket Order

Create Change Order

Purchase Order

If you do not enter a number, TabWare generates the number

Copy Options

Purchase Order ?

Initial Text

Final Text

Custom Fields

OK

Cancel

Help

More Purchasing Enhancements

Purchase Order Notebook

Purchase Order New

Buyer [dropdown]
Type [dropdown]
Description [text field]
Service Contract

Supplier

Supplier JBlack [dropdown] ? Jane's Firing Range
Contact Jane [dropdown] Phone Contact Phone
Fax Contact Fax
Mail To North [dropdown]

address, this can be expanded.

Email Address Contact E-mail

Order Limit USD
\$0.00

Currency USD

Initial Text Final Text

Purchase Order [OK] [Cancel]
Terms
Custom
Line Items [New] [Delete]
Totals

The contact's phone number has been added to the Purchase Order tab

More Purchasing Enhancements – Buyer's Backlog

The screenshot shows the TabWare 5.1.00 Buyer's Backlog window. At the top, there are search filters for Buyer, Supplier, Requisition, and Request for Quote, along with an Activity dropdown set to 'Ready for Purchase'. The main table displays a list of requisitions with columns for Requisition, Req Line, Rush Order, Request for Quote, RFQ Line, Supplier, Blanket Change Order, Blanket Line No, Stores Account, and Catalog Name. The 'Ready for Purchase' header row is highlighted in yellow. An orange arrow points to the 'Catalog Name' column header, which is also highlighted in yellow. A callout box with a yellow background and a drop shadow contains the text: 'The catalog name has been added. The backlog can be sorted by double-clicking on the column heading.' At the bottom of the window, there are buttons for 'Transfer to PO', 'Transfer to RFQ', and 'Reassign Buyer', and a status bar indicating '40 Rows returned.'

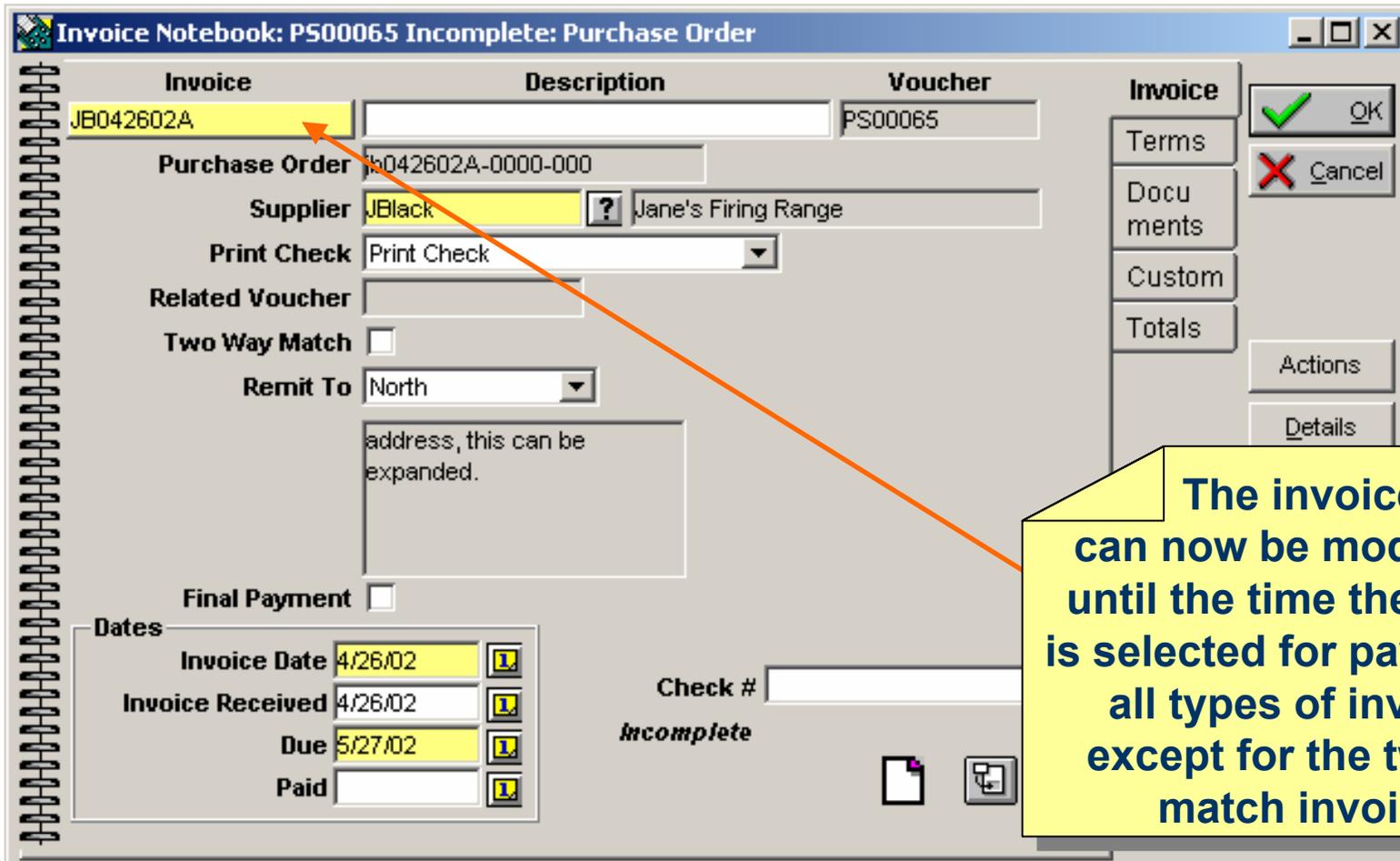
Requisition	Req Line	Rush Order	Request for Quote	RFQ Line	Su	Blanket Change Order	Blanket Line No	Stores Account	Catalog Name
<i>Ready for Purchase</i>									
		<input type="checkbox"/>	JB010203A	1	JB		0		
		<input type="checkbox"/>	JB062201 A	3	potential		0		
		<input type="checkbox"/>	iw705	1	jackey		0		
		<input type="checkbox"/>	iw705	2	jackey		0		
		<input type="checkbox"/>	iw705	4	jackey		0		
		<input type="checkbox"/>	iw705	5	jackey		0		
000029r5	10	<input type="checkbox"/>			CED011				Quadrem
0206180001	1	<input type="checkbox"/>							
JMFVW003	1	<input type="checkbox"/>							
JMFVW003	2	<input type="checkbox"/>							
iw510	1	<input type="checkbox"/>							
iw702a	1	<input type="checkbox"/>			jackey				
kbjtt1	2	<input type="checkbox"/>							
kbjtt2	1	<input type="checkbox"/>							
kbjtt3	1	<input type="checkbox"/>							
kbjttx	1	<input type="checkbox"/>							
kbjttx	2	<input type="checkbox"/>							

The catalog name has been added. The backlog can be sorted by double-clicking on the column heading.

40 Rows returned.

Oracle-Rel5.1 : ROF

Invoice Matching Enhancements Invoice Number Update



Invoice Notebook: P500065 Incomplete: Purchase Order

Invoice	Description	Voucher
JB042602A		PS00065

Purchase Order JB042602A-0000-000

Supplier JBlack ? Jane's Firing Range

Print Check Print Check

Related Voucher

Two Way Match

Remit To North

address, this can be expanded.

Final Payment

Dates

Invoice Date	4/26/02
Invoice Received	4/26/02
Due	5/27/02
Paid	

Check #

Incomplete

Invoice OK

Terms Cancel

Documents

Custom

Totals

Actions

Details

The invoice number can now be modified up until the time the invoice is selected for payment for all types of invoices, except for the two-way match invoices.

Invoice Matching Enhancements – Credit Memo Voucher entry

Create New Credit Memo Voucher

Create New Voucher

Voucher Number *If you do not enter a number, TABWARE generates the number*

Credit memos now allow manual entry of the voucher based on the invoice voucher numbering setup option

Invoice Matching Enhancements – Zero Cost items

Invoice Notebook: JB042902A: P500066 Incomplete

Supplier: JBlack Purchase Order: JB042902A-0000-000

Item: JB2 desc Type: General

Unit Of Purchase: each Package Quantity: 1

Purchase Order					
Line	Invoiced	Ordered	Received	Cost	Extended Cost
2	0	5	0 X	\$10.0000 =	\$50.0000

Invoice					
Line	Quantity	Cost	Extended Cost	Unit Variance	Tax Code
1	5 X	.0000 =	.0000	\$10.0000	test4
USD Non Taxable Cost \$.0000				Tax	
				Tax Accrual	

%	Amount	Account	Area	Department
100.0	\$0.00	100	10	100

\$0.00 Total Charges

Buttons: OK, Cancel, Help, New, Delete

A zero cost item can be processed. If a repair is done under warranty, the cost of zero can be entered on the invoice.

Invoice Matching Enhancements – Service Contracts

Work Order Setup Options

General **Options** Numbering Defaults Messaging Interface Barcode

Work Order Setup Options

Graph Hours Per Week

Follow-Up Work Order Entry

Via Quick Work Order Window
 Via Work Order Notebook

Print with the Work Order Report

<input checked="" type="checkbox"/> Permits	<input checked="" type="checkbox"/> Instructions
<input checked="" type="checkbox"/> Resources	<input checked="" type="checkbox"/> Last Page
<input checked="" type="checkbox"/> Requisition	<input checked="" type="checkbox"/> Analysis Codes
<input checked="" type="checkbox"/> Document List	<input checked="" type="checkbox"/> Custom Elements

Allow Service Contract Purchase Orders to be Received Separately from the Invoice

Ok
Cancel

A new setup option has been added to Work Order Setup Options: 'Allow Service Contract Purchase Orders to be Received Separately from the Invoice'.

Invoice Matching Enhancements – Service Contracts

This setup option allows clients using the Invoice Matching module to use a separate receiving process. Once this option is selected, the service can be received on the Service Contract Receipts window. The invoice will be matched to the amount received.

Those clients using the service contract process in TabWare today, can continue to process the invoice which will also be acknowledgement of the receipt.