

## Purchase Order Generator Module

The PULSE DASHBOARD & REPORTING SOFTWARE is revolutionary software that lets you leverage your Macola® ERP software investment in a new way—with a real-time display of your vital business metrics, and detailed analysis with the click of a mouse. Modules include Executive, Customer Service/Shipping, Inventory, Purchasing, Production, Material Requirements, Financial Control and Designer.

### **PULSE Dashboard adds value to your Macola® ERP software investment**

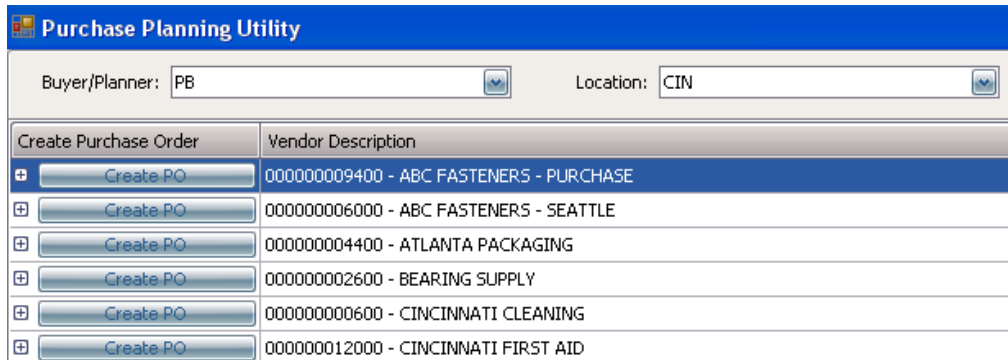
- Manage with real-time information, on-screen, company-wide, all the time
- All reports are in one place – no more looking for copies of paper reports
- Important metrics not found in your standard ERP software such as inventory aging
- One-click drill-down to view details & One-click report writer generates custom reports
- Installation & training in a day

### **Purchase Order Generator eliminates manual keying of purchase orders**

- The most tedious, labor intensive and error-prone area of your ERP software has been eliminated.
- Use the P/O Generator to place orders based on reorder levels, for MRP Computer Planned Orders (CP orders); and/or for Shop Floor outside operations (ex. heat treating).
- P/O Generator suggests what items need to be purchased based on your unique rules.
- Click on the items you want to order and it automatically creates the purchase order.
- Use Event Manager to optionally automatically e-mail or fax purchase orders to your vendors.

### **In three easy steps, you can create your purchase orders with no manual keying:**

**Step 1:** Select the buyer/planner code and/or location. Items to be purchased are grouped by vendor.



The screenshot shows the 'Purchase Planning Utility' interface. At the top, there are two dropdown menus: 'Buyer/Planner' with the value 'PB' and 'Location' with the value 'CIN'. Below these is a table with two columns: 'Create Purchase Order' and 'Vendor Description'. Each row in the table contains a 'Create PO' button and a vendor description.

Create Purchase Order	Vendor Description
<input type="button" value="Create PO"/>	00000009400 - ABC FASTENERS - PURCHASE
<input type="button" value="Create PO"/>	00000006000 - ABC FASTENERS - SEATTLE
<input type="button" value="Create PO"/>	00000004400 - ATLANTA PACKAGING
<input type="button" value="Create PO"/>	00000002600 - BEARING SUPPLY
<input type="button" value="Create PO"/>	00000000600 - CINCINNATI CLEANING
<input type="button" value="Create PO"/>	00000001200 - CINCINNATI FIRST AID

**Step 2:** Items to be purchased are displayed based your selection rules. Click on the checkbox next to each item to be ordered. You can override the recommended order quantity, if needed.

Order ?	Loc	Rec Ord Qty	O/H	Alloc	O/O	Min Qty	Max Qty	EOQ	P/O mult	Last P/O	Last sale	3-mon	6-mon	12-mon	Last Yr	Unit Cost
<input type="checkbox"/>	CIN	41	41	0	0	74	111	0	0	5/20/13		263	3,398	3,439	3,307	\$0.00
<input type="checkbox"/>	CIN	30	30	0	0	54	81	0	0			0	0	0	0	\$0.00
<input type="checkbox"/>	CIN	35	35	0	0	63	94	0	0			0	0	0	0	\$0.00
<input type="checkbox"/>	CIN	115	115	0	0	207	310	0	0			0	0	0	0	\$0.00
<input type="checkbox"/>	CIN	35	35	0	0	63	94	0	0			0	0	0	0	\$0.00
<input type="checkbox"/>	CIN	50	50	0	0	90	135	0	0			0	0	0	0	\$0.00

**Step 3:** Click the 'Create PO' button to create the draft purchase order. Make any changes needed (you can even change the vendor number). Click the 'SAVE' button to create the released or unreleased purchase order. Purchase orders can now be printed and mailed to the vendor or optionally e-mailed/e-faxed using the Event Manager software.

### Create Purchase Order

**Order Number 017431**

Vendor: 3400 ABC FASTENERS - PURCHASE Buyer/Planner: PB PENNY BAER Order Date: 2/10/2016

Address: 2900 WESTCHESTER AVENUE PURCHASE NY 10577

Main Contact: DAWN RAFFAELI Tel 9142519100 Fax 9142511656

Options: Payment Terms: NET 60 DAYS Status: Unreleased Ship Via: UPS Collect/Prepaid: Add Landed Cost: Confirmation: Acknowledgement

Line #	Item #	Vend Item #	Desc 1	Desc 2	Job Number	Stk Loc	Move-To	Request Dt	Promise Date	UOM	Unit Cost	Unit Weight	Quantity	Notify	Cmt Cd 1	Cmt Cd 2	Comments
1	C635	...	LABELS			CIN	CIN	2/10/16		YD	\$2.68	0.00	41				
2	F603	...	FRONT HOUSING			CIN	CIN	2/10/16		YD	\$6.25	0.00	30				
3	F604	...	FRONT HOUSING			CIN	CIN	2/10/16		YD	\$6.25	0.00	35				
4	F605	...	FRONT HOUSING			CIN	CIN	2/10/16		YD	\$6.25	0.00	115				
5	F606	...	FRONT HOUSING			CIN	CIN	2/10/16		YD	\$6.25	0.00	35				
6	F607	...	FRONT HOUSING			CIN	CIN	2/10/16		YD	\$6.25	0.00	50				

Record 1 of 6

Shipping: Ship-To: EW EASY WAY FOB: CI Cincinnati

Totals: Currency: 0 Total Cost: \$1,766.00 Total Weight: 0.00 Total CBM: 0.00

**Save**

## **We tailor the software to follow your unique business rules**

Included in the software are quick and convenient set-up options to customize the software to meet your unique business rules, such as:

- When do I select an item to be reordered (ex. use the reorder level or some other formula)?
- What locations need to be included or excluded?
- How to I prevent ordering something if I have an excess quantity at another location?
- What is my company's definition of 'Recommended Order Quantity'?
- Do I want to incorporate my 'Order Up-To Level' and 'Order Multiple' quantities?
- What 'P/O Request' date do I want to use?

### **For more information or a demonstration, call (513) 723-8091**

In one afternoon, we can have PULSE installed and running at your office with your data. On-going enhancements as well as unlimited set-up, training and phone support are all included as part of our annual maintenance.

Leahy Consulting is an independent ERP consulting company with over 25 years of experience supporting and optimizing Macola® ERP systems. Leahy Consulting is not Macola® software reseller or associated with ECI® Software.

Visit [www.PulseDashboard.com](http://www.PulseDashboard.com)

Copyright © 2020 by Leahy Consulting, Inc. Cincinnati, Ohio USA

4-20

