Sage 300 - Web Purchase to Pay Requisition

CAREWARE SYSTEMS SDN BHD
Sage 300 ERP Specialist

Key Benefits

Increase spending transparency

Faster and Monitored Approval Process

Budget Control

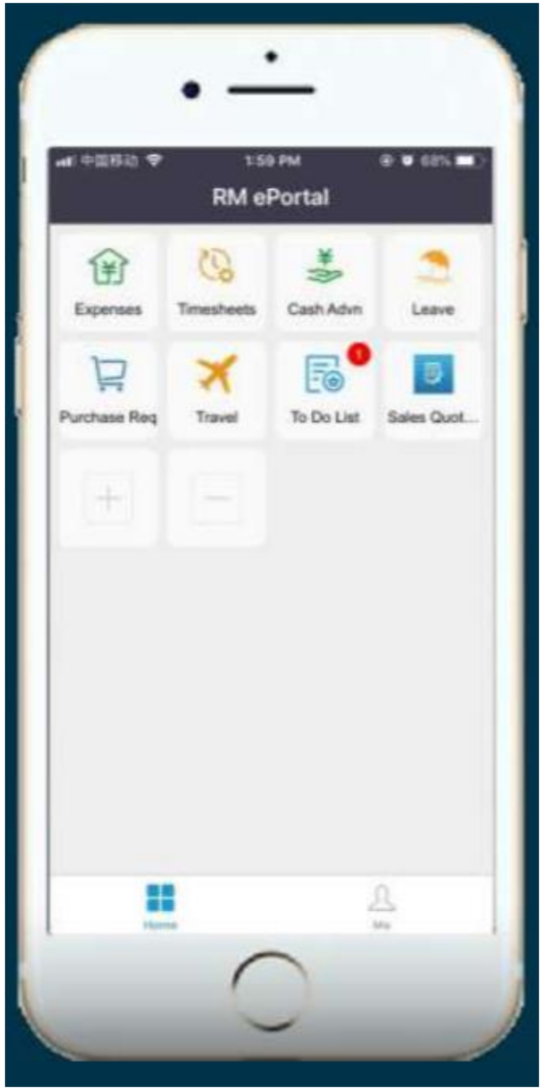
Policy Compliance

Reduced administrative costs

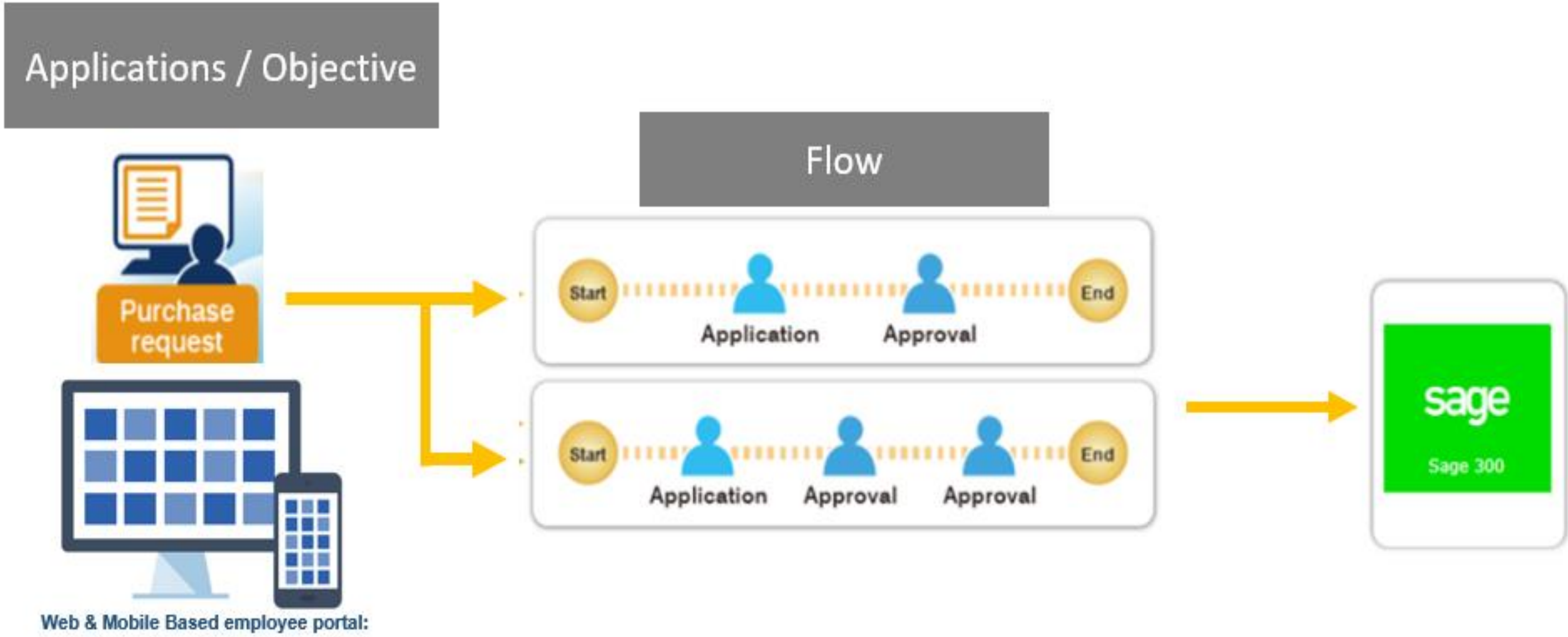
Highlights

- Web & Mobile Based
- Real Time
- Robust Workflow Engine
- Attachment Management Enabled
- Seamless Integration with Sage
- Affordable

Employee Portal



Web Purchase to Pay Requisition Workflow



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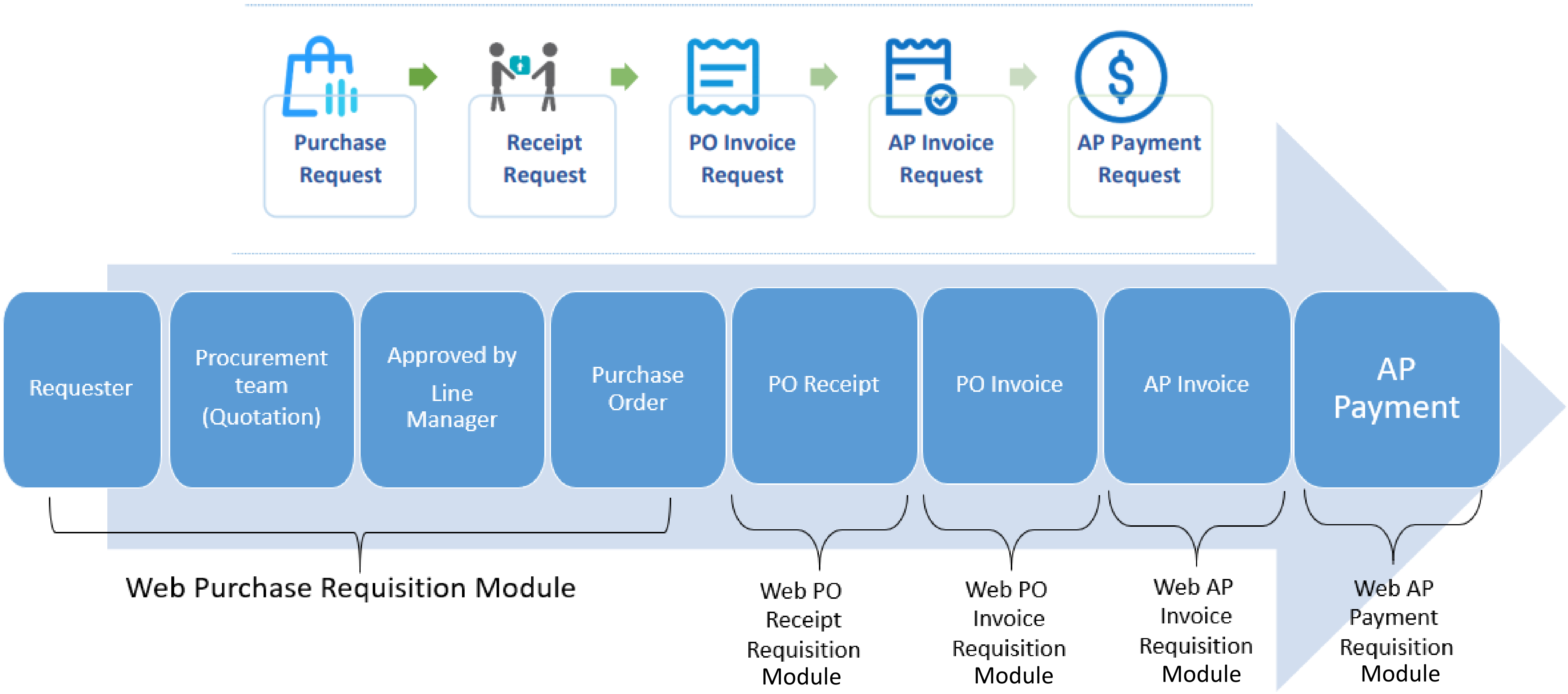
Purchase to Pay Modules



Purchase Request

Enables employees in the organization to initiate a purchasing request for items or services they need in a user-friendly platform

- **Auto PO Generation**
  POs can be auto-generated and send to the vendors.

- **Quote Management**
  Users can be notified with warning or error message if the purchase total exceeds the budget. Backed users can check the funds availability based on the GL or PJC budget.

- **Vendor Catalog**
  Allows vendor catalogs to be defined for a list of goods that are available from different vendors.

- **Contract Pricing**
  Item cost can be auto populated based on the vendor contract pricing. Your can set up contract pricing for different vendors at varying pricing.

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Purchase Receipt Request

Enables employees in the organization to initiate a goods receipt or items or services they need in a user-friendly platform

- **Over Receipt Checking**
  Over Receipt Checking based on the quantity or the cost.
- **Auto PO Invoice Generation**
  PO Invoices can be auto-generated upon the approval of receipts.
- **Multiple POs**
  Allows to receive goods ordered in multiple POs within one receipt request

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PO Invoice Request

Allows PO invoices for items or service received and additional costs billed.

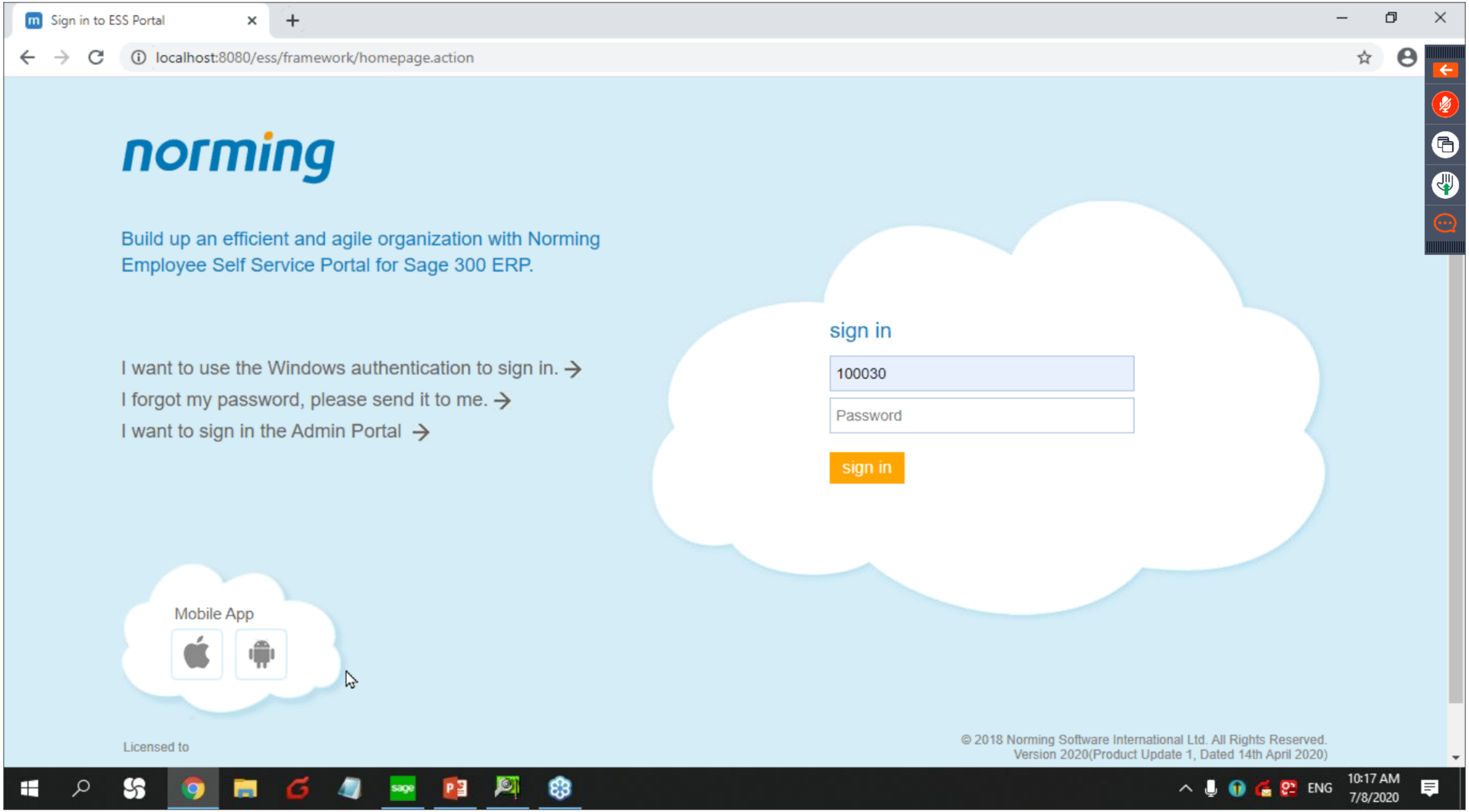
- **3-way Matching**
  3 Way PO Matching ensures the invoice is matched to the corresponding Purchase Order for quantity, amount with the receiving information.

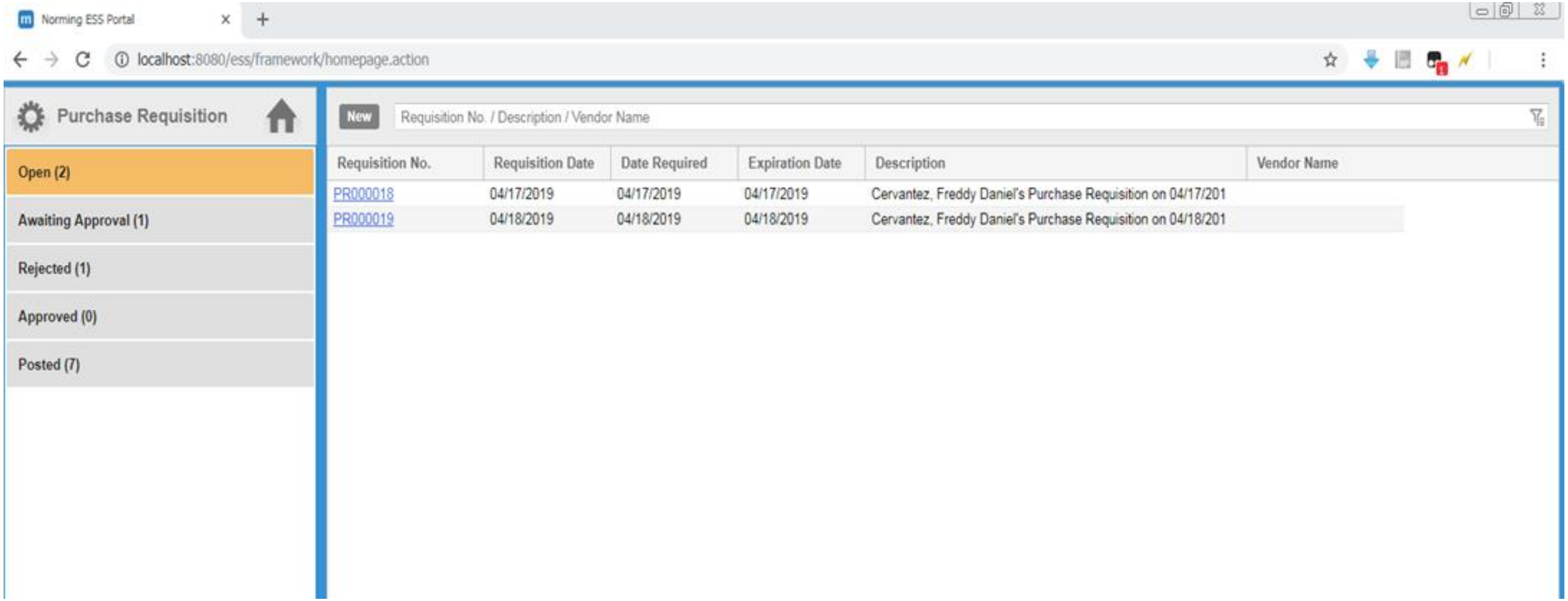
- **Additional Cost**
  Additional cost such as custom duties and freight charge can be entered in the PO Invoice request.

AP Invoice Request & AP Payment Request

- **AP Invoice Request**
  Non-PO purchasing is allowed through AP Invoice Requests with budget checking feature.

- **AP Payment Request**
  Allows AP Payment Request for approval


Sign in to ESS Portal
localhost:8080/ess/framework/homepage.action
norming
Build up an efficient and agile organization with Norming Employee Self Service Portal for Sage 300 ERP.
I want to use the Windows authentication to sign in.
I forgot my password, please send it to me.
I want to sign in the Admin Portal
sign in
100030
Password
sign in
Mobile App
Licensed to
© 2018 Norming Software International Ltd. All Rights Reserved.
Version 2020(Product Update 1, Dated 14th April 2020)
ENG
10:17 AM
7/8/2020


Norming ESS Portal
localhost:8080/ess/framework/homepage.action
Purchase Requisition
Open (2)
Awaiting Approval (1)
Rejected (1)
Approved (0)
Posted (7)
New
Requisition No. / Description / Vendor Name
Requisition No.
Requisition Date
Date Required
Expiration Date
Description
Vendor Name
PR000018
04/17/2019
04/17/2019
04/17/2019
Cervantez, Freddy Daniel's Purchase Requisition on 04/17/201
PR000019
04/18/2019
04/18/2019
04/18/2019
Cervantez, Freddy Daniel's Purchase Requisition on 04/18/201

Purchase Requisition Entry

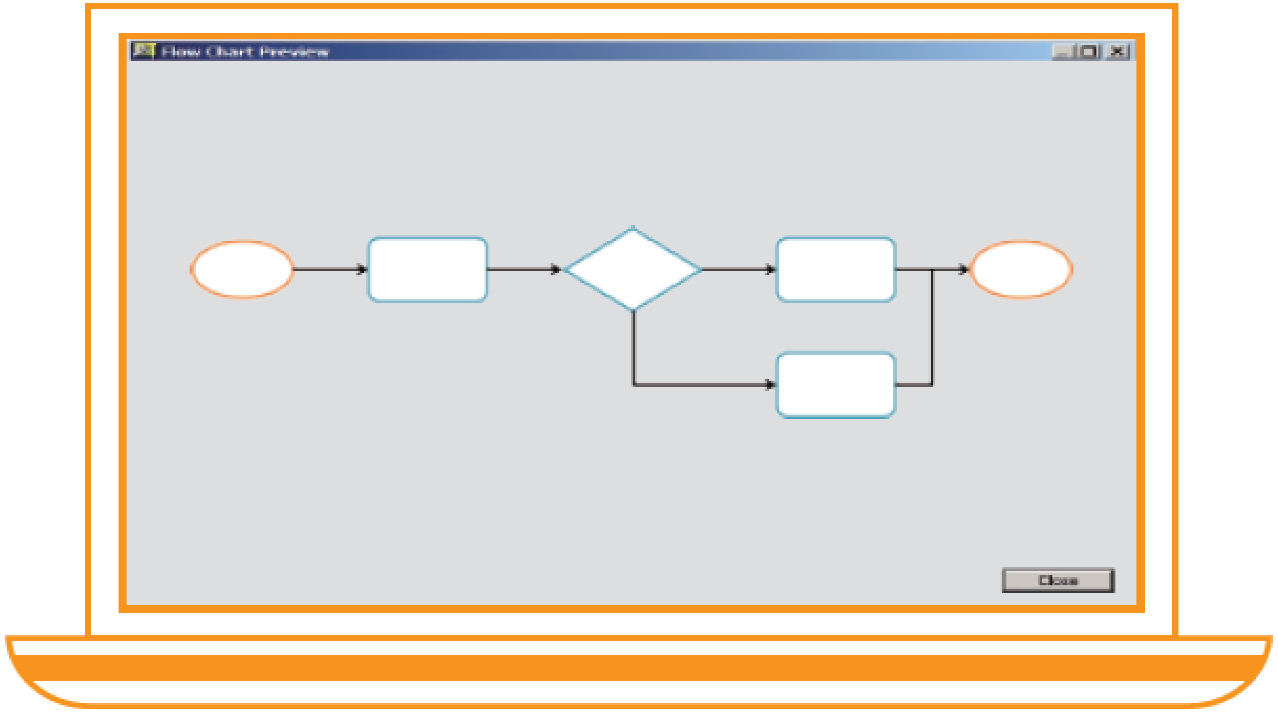
Purchase Type	[USEBUG] Use Budget	Status	Open
Requisition Totals	69.27		
Requisition Date	04/17/2019	Date Required	04/17/2019
Expiration Date	04/17/2019		
Vendor Number	1200	Chloride Systems	
Location			
Description	Cervantez, Freddy Daniel's Purchase Requisition on 04/17/201	Notes	
Reference	PR000018		

Purchase Requisition | Attachment

	Item Number	Item Description	Link	Vendor	Vendor Name	Currency	Location	Quantity	UOM	Unit Cost	Extended Cost	Expected Arrival Date	G/L Acc
1	A1-103/0	Fluorescent Desk Lamp		1200	Chloride Systems	USD	1	1	Ea.	20.297333	20.30	04/17/2019	1300
2	A1-105/0	13W Mini Fluorescen...		1400	Coastal Heating of Ot...	USD	1	1	Ea.	3.626400	3.63	04/17/2019	1300
3	A1-310/0	Halogen Desk Light		1350	Excide Industrial Batt...	USD	1	1	Ea.	25.438333	25.44	04/17/2019	1300
4	A1-320/0	50W/12V Halogen Bulb		1400	Coastal Heating of Ot...	USD	1	1	Ea.	3.670000	3.67	04/17/2019	1300
5	A1-400/0	Desk Note Book		1400	Coastal Heating of Ot...	USD	1	1	Ea.	10.013333	10.01	04/17/2019	1300
6	A1-401/0	Desk Calendar Pad		1450	Intercontinental Elect...	USD	1	1	Ea.	6.224167	6.22	04/17/2019	1300
7						USD		1		0.000000	0.00		
8						USD		1		0.000000	0.00		
9						USD		1		0.000000	0.00		
10						USD		1		0.000000	0.00		

Insert | Remove | Copy | Import

03 Approval Workflow



The powerful workflow engine can cover every scenario, no matter how complex your approval workflow is.

Approval Trail

Action	Name	Action Time	Comments	Substituted By
To Approve	Bryan, Marilyn Alison	04/22/2019 11:30		
Submit	Cervantez, Freddy Daniel	04/22/2019 11:30	Cervantez, Freddy Daniel's Purcha...	

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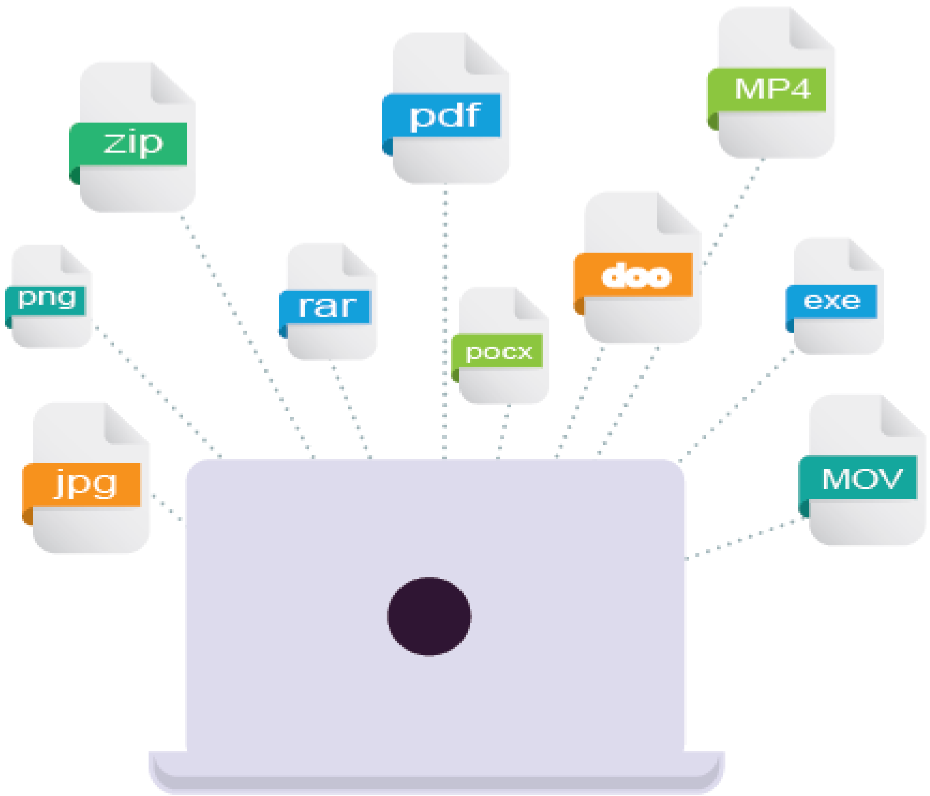
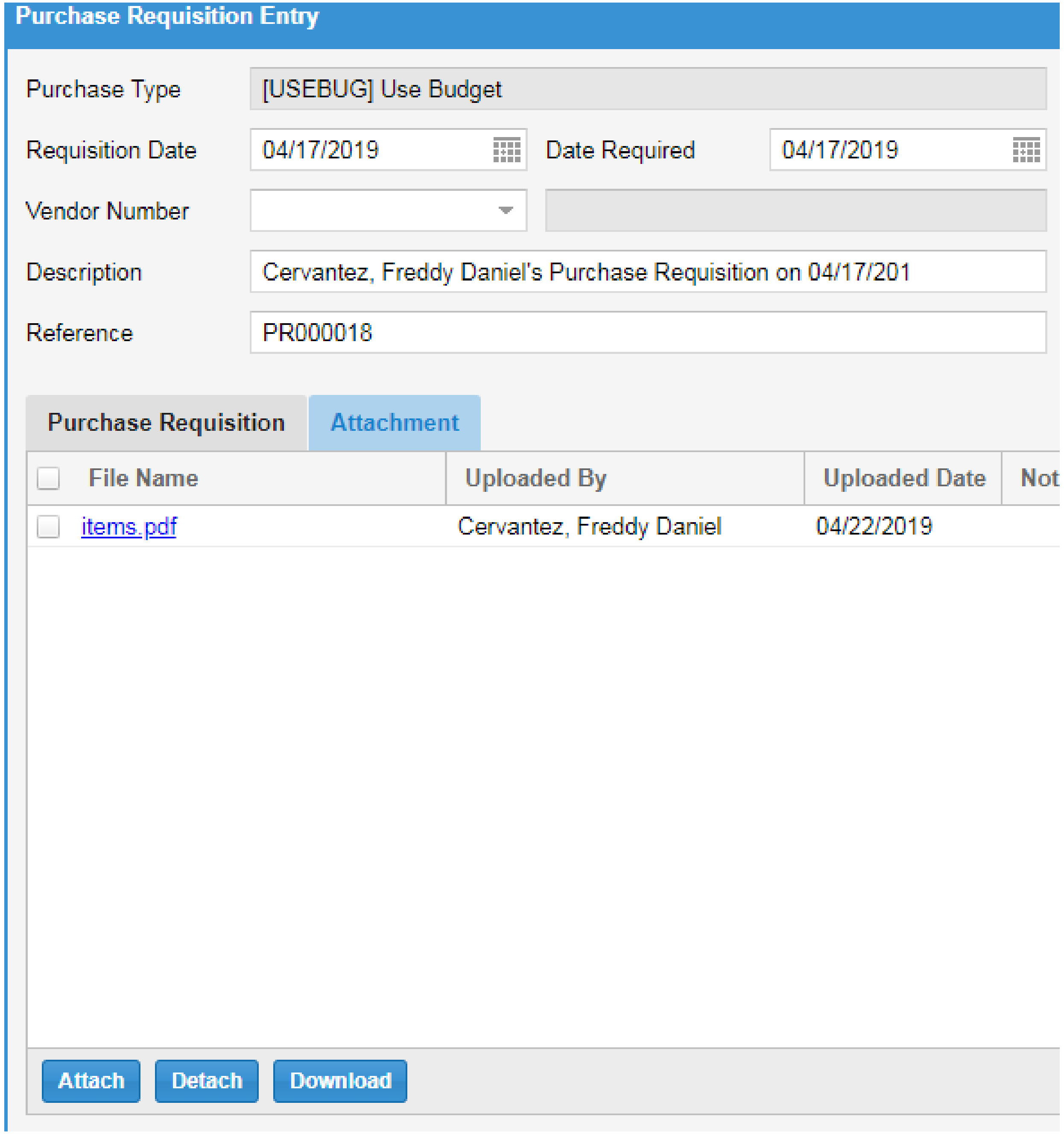
Attachment Features



PDF, Images, spreadsheet, any document can be attached at header or detail level of the requisition form for approver's review.



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Quotation

Quotation process can be managed easily. Requester can pick the favorable item through the quotations provided purchase specialist, the price, deliverable time and all other information from vendors can help the requester to make the smartest decision.

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Quotation

		Prefer	Vendor	Currency	UOM	Price	Functional Pric...	Lead Time	Comments	Comments 2
1		No	[1200] Chloride Systems	USD	Ea.	300.000000	300.00	5.0		
2		No	[1350] Excide Industrial ...	USD	Ea.	270.000000	270.00	2.0		
3		No	[1500] Gould Manufactu...	USD	Ea.	320.000000	320.00	4.0		

Save Insert Remove Use Vendor Price

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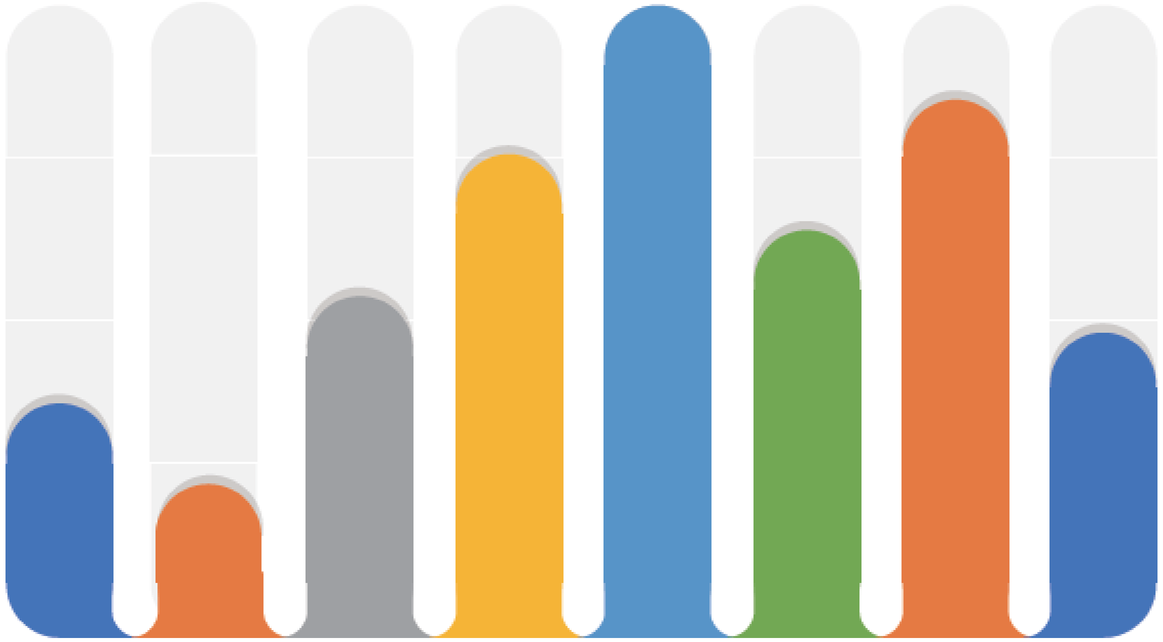
Real Time Budget Control



The requester or manager can be notified with warning or error message if the purchase exceeds the budget and Norming PR provides multiple ways to validate your purchase against the budget from different angels.

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Budget and Expenditure

G/L Account Budget

Period	G/L Account	Budget Amount	Actual Amount	Pending Amount	Available Amount	This Requisition
2019 ~ 04	1300	3,000,000.00	2,178,534.39	0.00	821,465.61	80,048.97

Close

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Budget and Expenditure

PJC Estimate

PJC Contract	Estimate Amount	Actual Amoun...	Committed P/O Amount	Pending Amount	Available Amount	This Requisition
120-1200-10	42,534.39	9,543.65	4,518.68	0.00	28,472.06	800.00

Close

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Purchase Requisitions (Requisition List)

Licensed to: , Norming
Dealer:
CC:

Requisition List | Requisition Entry | PJC Estimate Inquiry | G/L Account Budget Inquiry | Create PRs from O/E

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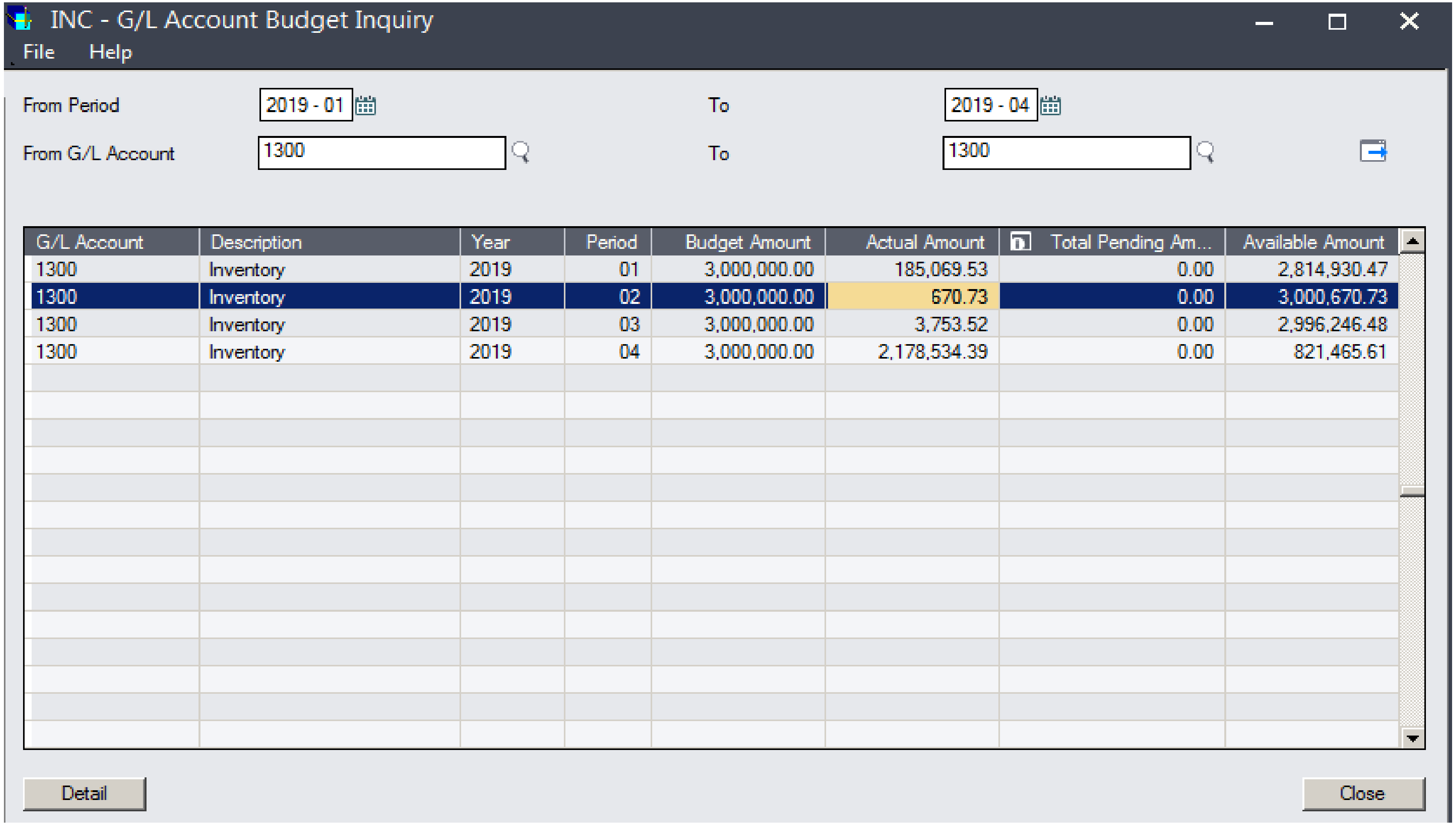

G/L Account	Description	Year	Period	Budget Amount	Actual Amount	Total Pending Am...	Available Amount
1300	Inventory	2019	01	3,000,000.00	185,069.53	0.00	2,814,930.47
1300	Inventory	2019	02	3,000,000.00	670.73	0.00	3,000,670.73
1300	Inventory	2019	03	3,000,000.00	3,753.52	0.00	2,996,246.48
1300	Inventory	2019	04	3,000,000.00	2,178,534.39	0.00	821,465.61

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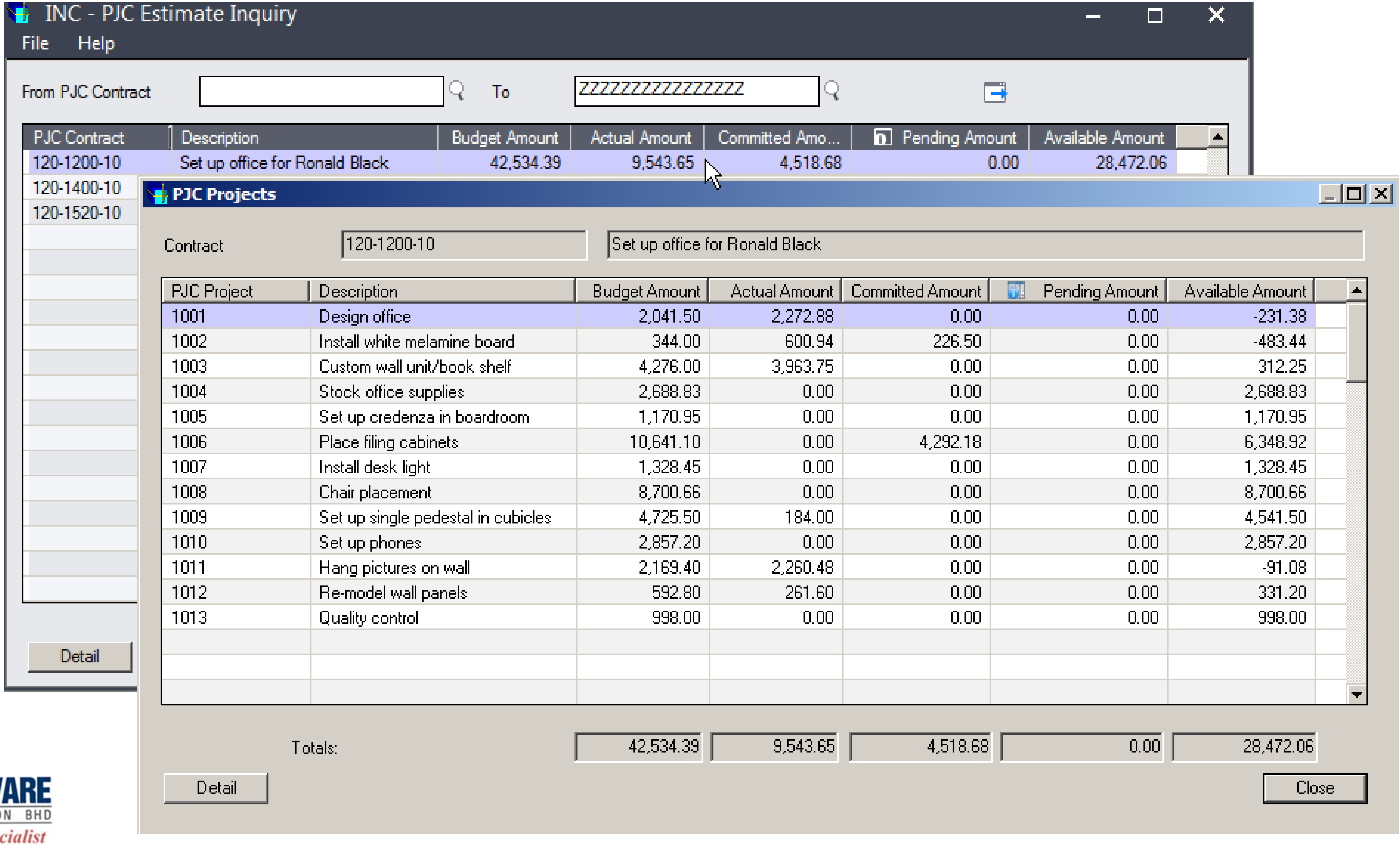

INC - PJC Estimate Inquiry

File Help

From PJC Contract To ZZZZZZZZZZZZZZZZ

PJC Contract	Description	Budget Amount	Actual Amount	Committed Amo...	Pending Amount	Available Amount
120-1200-10	Set up office for Ronald Black	42,534.39	9,543.65	4,518.68	0.00	28,472.06
120-1400-10						
120-1520-10						

Detail

PJC Projects

Contract 120-1200-10 Set up office for Ronald Black

PJC Project	Description	Budget Amount	Actual Amount	Committed Amount	Pending Amount	Available Amount
1001	Design office	2,041.50	2,272.88	0.00	0.00	-231.38
1002	Install white melamine board	344.00	600.94	226.50	0.00	-483.44
1003	Custom wall unit/book shelf	4,276.00	3,963.75	0.00	0.00	312.25
1004	Stock office supplies	2,688.83	0.00	0.00	0.00	2,688.83
1005	Set up credenza in boardroom	1,170.95	0.00	0.00	0.00	1,170.95
1006	Place filing cabinets	10,641.10	0.00	4,292.18	0.00	6,348.92
1007	Install desk light	1,328.45	0.00	0.00	0.00	1,328.45
1008	Chair placement	8,700.66	0.00	0.00	0.00	8,700.66
1009	Set up single pedestal in cubicles	4,725.50	184.00	0.00	0.00	4,541.50
1010	Set up phones	2,857.20	0.00	0.00	0.00	2,857.20
1011	Hang pictures on wall	2,169.40	2,260.48	0.00	0.00	-91.08
1012	Re-model wall panels	592.80	261.60	0.00	0.00	331.20
1013	Quality control	998.00	0.00	0.00	0.00	998.00

Totals: 42,534.39 9,543.65 4,518.68 0.00 28,472.06

Detail Close

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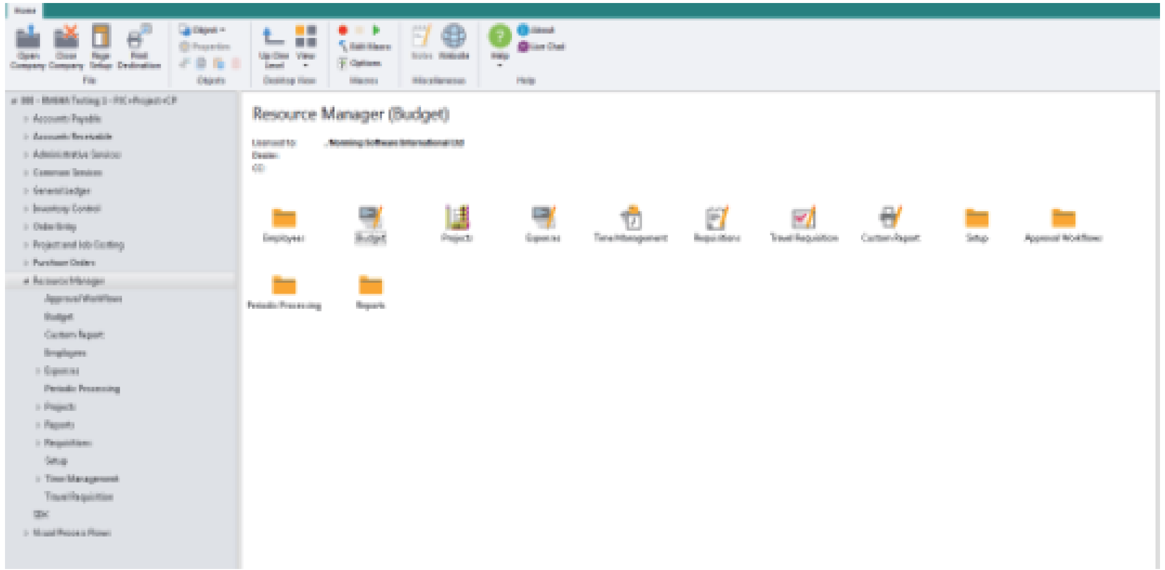
Full Integration with Sage 300



Approved document from ESS portal can seamless flow to the Sage 300 without manual data entry or export/import.

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Web Purchase to Pay Requisition with Project Job Cost

For more information, please contact us at sales@careware.com.my; 03 2714 3855

Web: www.careware.com.my