

# Requisitions & Purchasing

SMMS provides flexible options for implementing the requisitions & purchasing component of inventory. You can choose between a full or partial implementation, and easily link SMMS to your existing ERP or Financial system for seamless system integration.

When you implement purchasing, the system will automatically cut requisitions for your MRO parts by comparing your inventory rules with "on order" and "on hand" quantities. You can then convert these requisitions to purchase orders, or review and forward them to your Purchasing department for action in SMMS or a different purchasing system.

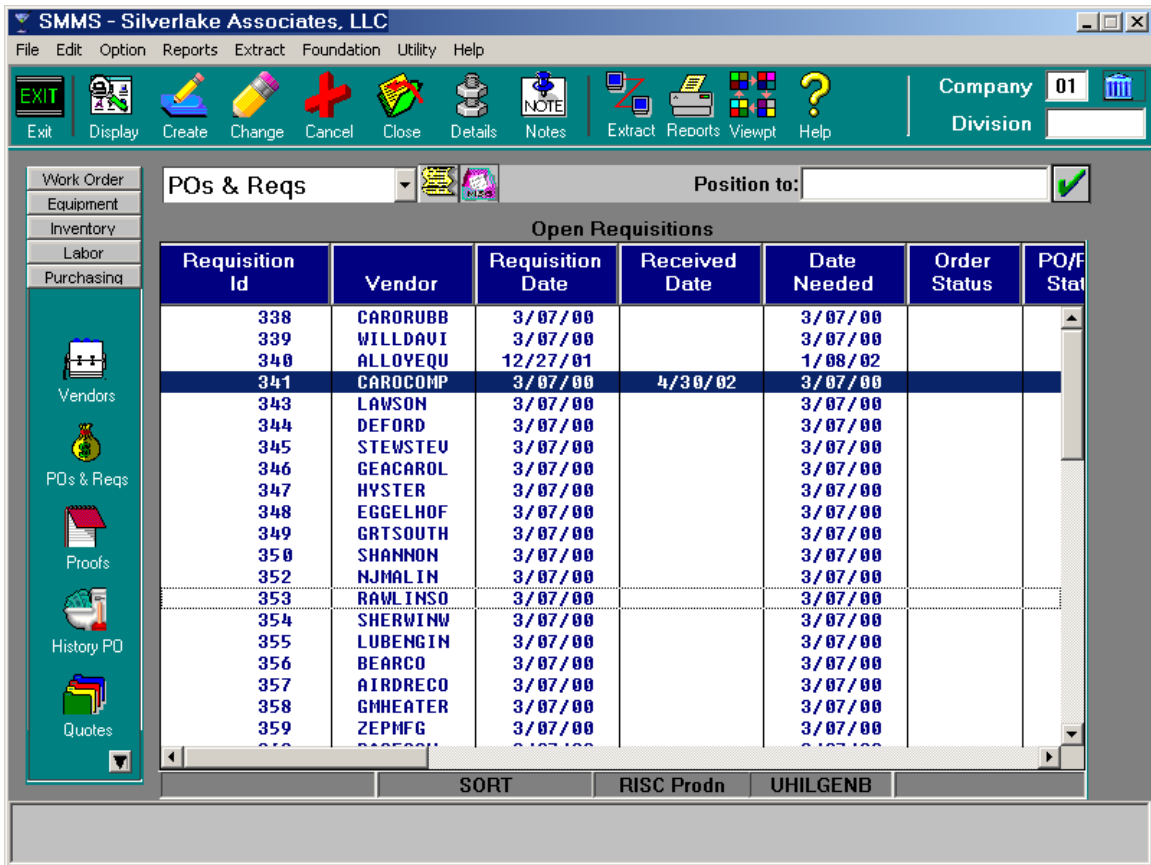
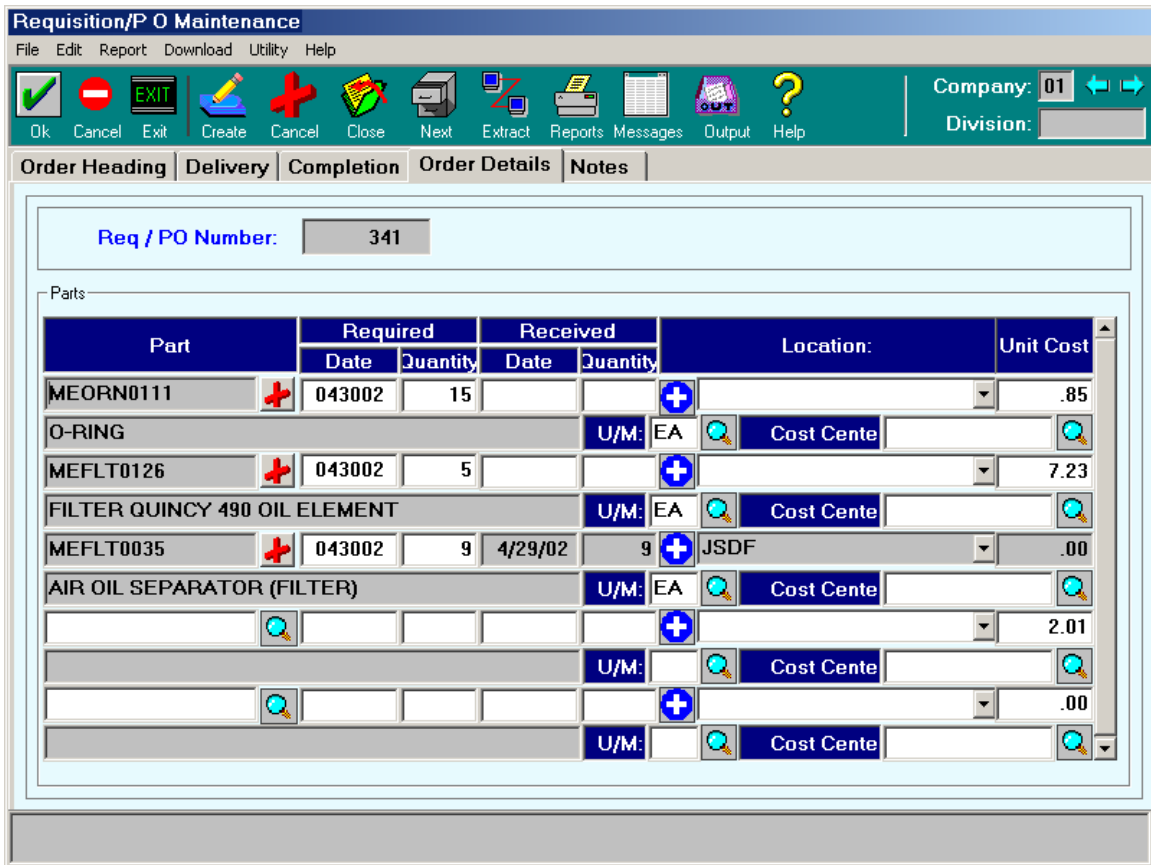


FIGURE 1

When you manually enter a purchase order or requisition, the system will link the parts on order to the work order for you. Likewise, when you receive an order, the vendor history and vendor pricing files may also be updated automatically.

Printed purchase orders/requisitions are fully bar coded for speedy and accurate input of items received. It's easy and inexpensive to start printing with bar codes in the SMMS system – you only need an "entry level" laser printer attached to your computer via IBM Client Access.



**FIGURE 2**

Shown in Figure 2 is the Order Details screen. Use this screen to add items to the orders, receive items, cancel or change line items. You can look up location, part id, unit of measure, and cost center.

Receiving is easy using this screen. Simply add the quantity received and location --- the date will default to today's date unless you enter otherwise. If you need to do additional receiving for an order line, press the "+" an a window pops up allowing you to add additional quantities received and locations.

**Enter Inventory Receipts**  
 File Edit Report Extract Utility Help

Ok  Cancel  Exit  Next  Extract  Reports  Messages  Output  Help

Company **01**  
 Division

**Receiving**

Part Id: **CNBRG0027** **BEARING BALL 65081-21**

U/M = EA	Quantity	Current Cost	Amount	Location	Quantity
On Hand	192	Replacement	13.50	M486	54
On Order	11	Wgtd Average	13.50	M487	62
Committed	0	Average	13.50	M488	30
Available	192	Standard	14.00	M489	24
				M490	1

Enter Inventory Receipts

Date: **5/28/02**

Quantity / Unit Cost:  0 (+/-)  8.16

From Location: **M486**

Description:

Vendor	GRAINGER
GRAINGER OF TEXAS	
Requisition	634
Line#	2
Qty Ordered	25
Qty Received	14
Balance	11

**FIGURE 3**

An alternative screen for receiving is shown in Figure 3. This screen is customized for clients using scanners at the Receiving department to receive orders and deliveries, as well as for clients who choose not to implement the Purchasing module.

Note that this screen shows the current inventory and order status for the part to be received.

## Vendors

The Vendor Maintenance screen is shown in Figure 4. In addition to vendor address and shipping information, this screen also tracks vendor notes, contacts, part quotations, sub-contract quotations, and orders placed.

The screenshot displays the 'Vendor Maintenance' application window. At the top, there is a menu bar with 'File', 'Edit', 'Report', 'Extract', 'Utility', 'Notebook', and 'Help'. Below the menu is a toolbar with icons for 'Ok', 'Cancel', 'Exit', 'Create', 'Delete', 'Copy', 'Next', 'Extract', 'Reports', 'Messages', 'Output', and 'Help'. On the right side of the toolbar, there are fields for 'Company' (set to '01') and 'Division'. Below the toolbar is a tabbed interface with tabs for 'Vendor', 'Miscellaneous', 'Notes', 'Contacts', 'Parts', 'Quotes', and 'Orders'. The 'Vendor' tab is active, showing a form with the following fields:

- Vendor Id:** AAA
- Address Information:**
  - Vendor Name:** AAA ELECTRIC MOTORS
  - Address 1:** (empty)
  - Address 2:** 2405 S. HARWOOD
  - City State Zip:** RALEIGH NC 27658
- Supplier Class:**
  - MRO Parts
  - Combined
  - Sub-contractor
  - Miscellaneous
- Website Url:** WWW.MOTORSRUS.COM

FIGURE 4



## Sub-contract Quotations

**Vendor Id:** AAA AAA ELECTRIC MOTORS

**List #:** 1 Test List Description XXXX

**Contract:** 0

**Effective Date:** 1/31/01

**Expiration Date:** 5/31/02

**Lead Time:** 4

**Preferred Vendor?** No

Quoted Costs	
Material:	25.00
Labor:	15.00
Cost Code 1:	444.00
Cost Code 2:	434.34
Cost Code 3:	433.33
<b>Total Estimate:</b>	<b>\$1,351.67</b>

**FIGURE 6**

Often you want to sub-contract certain maintenance tasks to outside vendors. These sub-contract jobs can be for one-time work, or repetitive and issued on a standing contract.

When you want to collect vendor quotations for a contract maintenance job, the first step is to develop the quotation task list. This identifies the specific job to be completed and itemizes your standards for completion.

Then print the vendor task list and send it out to your vendors for quotation. As the quotations are returned, enter them on the Vendor Quotation screen (Figure 6), indicating the preferred vendor.

When a work order is scheduled for a procedure that includes a vendor task, the work order system automatically creates a requisition for that task list using the preferred vendor.

You can mix in-house tasks with vendor tasks, or enter the work order schedules for vendor tasks on a “stand alone” basis. Either way, when the requisition and work order are closed, the cost of the outsource requisition becomes part of the permanent maintenance cost history for that work order and equipment item.