



# Microsoft® Small Business Manager



## Purchasing

Manage vendor relationships, control costs, and replenish inventory efficiently with streamlined purchasing processes that give our business flexible options for buying and receiving items. Small Business Manager include automated purchasing, payment, and vendor tracking processes, while seamless integration ensures that information across your business is consistent, current, and free of errors.

*Easily create and process purchase orders with streamlined processes that eliminate the need to re-enter data.*

**Track PO status at a glance.**

**Hold POs for approval before releasing for processing.**

**Automatically calculate sales tax to appear on the order as well as the supplier invoice.**

**Automatically transfer PO details without additional data entry.**

The screenshot shows the 'Purchase Orders' window with the following details:

- PO Number:** PO00001
- Date:** 01/01/2002
- Vendor ID:** ACETRAVE000
- Vendor Name:** Ace Travel
- Address:** 1234 Main St, Chicago, IL 44444
- Ship To:** 1234 Main St, Fargo, ND 32801
- Item List:**

Description	Quantity Ordered	Unit Cost	Extended Cost
B1100 Children's Bike Helmet	10	\$15.96	\$159.60
B1110 Adult Bike Helmet	5	\$19.96	\$99.80
Subtotal			\$259.40
Trade Discount			\$0.00
Freight			\$0.00
Miscellaneous			\$0.00
Tax			\$18.17
<b>PO Total</b>			<b>\$277.57</b>

The 'POP Purchase Order Blank Form' window shows the following details:

- Wide World Importers (Sample)**  
1234 Main St.  
Fargo ND 32801
- Vendor:** Ace Travel, 1234 Main St, Chicago IL 44444
- Ship To:** Wide World Importers (Sample), 1234 Main St, Fargo ND 32801
- Purchase Order Table:**

Purchase Order No.	Date
PO00001	1/1/2002

### Streamline purchasing processes

Increase productivity with integrated purchase orders, item receipts, invoices and payments. Improve productivity by entering a purchase order, then receive and invoice the goods in one easy step.

### Customize vendor information

Record unique payment terms, enter multiple addresses, and add customized fields and notes for an unlimited number of vendors.

### Manage vendor relationships

Track vendor performance and negotiate better prices and contracts, with a complete view of vendor transactions, as well as queries and reports that monitor vendor activity.

### Enter data efficiently

Ensure fast invoice entry with flexible default settings for vendors, yet maintain control over changing fields on a per-transaction basis.

### Simplify check processing

An intuitive check wizard lets you process checks quickly and make full or partial payments at your discretion.

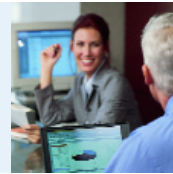
### Improve cash flow

Optimize cash control with aging reports and alert tools that ensure you pay vendors according to terms.

### Integrate across your business

Entries, payments, and corrections automatically update inventory costs, general ledger accounts and banking tasks.

*Small Business Manager can be purchased affordably and maintained as a long-term investment, with free software updates and new releases, and full reimbursement if you upgrade to a higher-end Microsoft Business Solutions application.*



## Features List: Purchasing

### Setup/Master Records

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|--|--|
| Vendor maintenance                                   | <ul style="list-style-type: none"> <li>Set up and maintain vendor records with unique payment terms, multiple addresses and phone numbers, general ledger accounts for posting, and customized fields and notes.</li> </ul>                    |
| Bill entry   | <ul style="list-style-type: none"> <li>After choosing a vendor, multiple fields are automatically populated from vendor setup, saving time and ensuring consistency. Default information can be changed on a per-transaction basis.</li> </ul> |
| Import transactions                                  | <ul style="list-style-type: none"> <li>Easily import transactions from third-party applications into Accounts Payable.</li> </ul>  |
| Integration with tasks across Small Business Manager | <ul style="list-style-type: none"> <li>Checks recorded in the Purchasing area are automatically updated in the check-book register and posted to the appropriate general ledger accounts.</li> </ul>   |

### Periodic

- |                           |   |
|---------------------------|---|
| Sales taxes               | <ul style="list-style-type: none"> <li>Applicable taxes are calculated automatically and can be tracked with an electronic audit trail.</li> </ul>  |
| Purchase Orders           | <ul style="list-style-type: none"> <li>Enter a purchase order and receive and invoice the goods, record required and promise date, automatically calculate tax, place a purchase order on hold, and auto-receive purchase orders that will automatically update inventory costs.</li> </ul> |
| Discounts                 | <ul style="list-style-type: none"> <li>Record and automatically apply unique discounts per vendor.</li> </ul>   |
| Returns and credit memos  | <ul style="list-style-type: none"> <li>Apply returns and credit memos to other documents at the time they're entered, or automatically during check runs.</li> </ul>  |
| Check writing             | <ul style="list-style-type: none"> <li>Print checks during bill entry, record individual manual payments later on, or run batch payments for multiple bills and vendors using the flexible Check-Writing Wizard.</li> </ul>   |
| Void checks and documents | <ul style="list-style-type: none"> <li>Void bills before payment and void payments during or after the computer check-printing process. The void process preserves a full audit trail.</li> </ul>   |
| Reminders                 | <ul style="list-style-type: none"> <li>Set up reminders so you know when to post recurring batches, make payments for invoices, or perform user-defined tasks.</li> </ul>   |

### Reporting/Inquiry

- |                               |  |
|-------------------------------|--|
| 1099 tracking                 | <ul style="list-style-type: none"> <li>Automatically calculate 1099 year-to-date information for the appropriate vendors and print 1099 forms at year end.</li> </ul>  |
| Complete purchasing reporting | <ul style="list-style-type: none"> <li>View un-posted, posted, and historical transactions to analyze purchasing activity: Payables Aging, Period Purchasing Analysis, Cash Requirements, Daily Purchases, YTD Purchases, and more.</li> </ul> |
| Track Purchase Order Status   | <ul style="list-style-type: none"> <li>Keep purchasing data current and accurate by changing the status of your orders as they move through the buying and receiving process.</li> </ul>   |
| Vendor history analysis       | <ul style="list-style-type: none"> <li>Review complete vendor activity by period, year, or lifetime buckets using inquiry windows and reports.</li> </ul>  |

To sign up for a free 60-day trial of Small Business Manager, visit  
[www.microsoft.com/smallbusinessmanager](http://www.microsoft.com/smallbusinessmanager)