

Who bought
this, and **why?**



Purchasing

www.TrackerSuite.com/Purchase



Automation Centre

www.Acentre.com

435 E. 9th Street
Tucson, AZ 85705
(520) 882 - 9287 (phone)
(520) 623-8721 (fax)



Purchase Tracker

www.TrackerSuite.com/Purchase



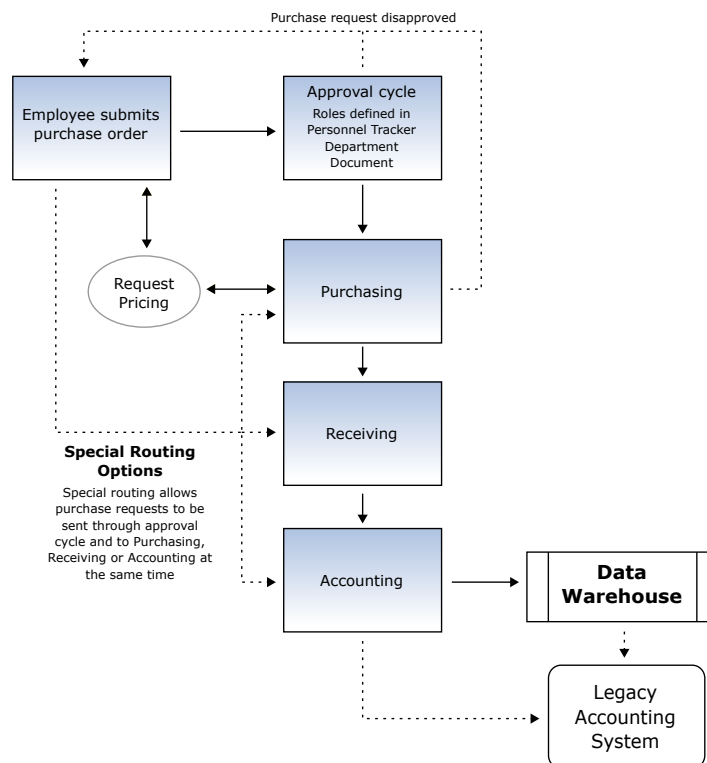
Simplify, streamline and secure your procurement using Lotus Notes and the Web

Purchase Tracker maximizes the efficiency and security of your organization's purchasing processes by simplifying the creation and submission of purchase orders, streamlining the approval process and providing security with approval routing and activity logs that track PO activity from creation to fulfillment.

Users can submit purchase orders from any location, through Lotus Notes or the Web. For organizations with a highly mobile workforce or international offices, Purchase Tracker offers currency rate conversions. These purchase orders are linked to vendor, project, IT and cost center databases, allowing users to quickly and accurately fill out their purchase orders with picklists. Purchase Tracker also supports charge backs between business units.

Purchase Tracker provides automatic email notifications throughout the purchase order lifecycle, speeding the purchasing process and keeping the responsible parties aware of the PO's status.

Submitted purchase orders are automatically routed based on spending limits, department rules and roles. Electronic signatures track the document's activity throughout its lifecycle: creation, editing, approvals and final processing, creating a trail of responsibility. Purchase Tracker can integrate with existing fixed asset and legacy systems, for a painless transition to a stronger, more secure procurement system.



www.TrackerSuite.com/Purchase

Purchase Request - IBM Lotus Notes

File Edit View Create Actions Applet Help

Address

Welcome Workspace Bizco Purchase Tracker Purchase Request

Copy Submit Save & Exit Save Close Validate Refresh

Purchase Request

Employee and PR Information

Employee: Joe User Employee ID: [blank]
 Supervisor: Mark Manager Cost Center: [blank]
 Division: Products Location: [blank]
 Approved For: [blank] ID: [blank]
 PR Number: JU1018 PR Originated: [blank]
 PO Number: [blank] PO Originated: [blank]
 Status: [blank] Routing: [blank]
 Purpose: **Not Submitted**
 X-Box 360 for employee lounge

Log: [blank]
 Workflow: Expense Approver Table

Vendor Information

Purchase Type: [blank] Priority: [blank]
 Suggested Vendor: Tucson Computer Deliver By Date: 12/25/2005
 Vendor Number: [blank] Company: Bizco
 Attention: Manager Attention: Joe User
 Street1: 500 W. Prince Street1: 123 E. Broadway
 Street2: Near Oracle Street2: [blank]
 City, ST Zip: Tucson, AZ 85705 City, ST Zip: Tucson, AZ
 Telephone: (520) 123-4567 Telephone: (520) 555-1212
 Extension: 39 Fax: (520) 555-1313
 Fax: (520) 111-1111 Applicable Sales Tax (%): [blank]

Ship To

ASAP
 12/25/2005
 Bizco
 Joe User
 123 E. Broadway
 Tucson, AZ
 (520) 555-1212
 (520) 555-1313
 Applicable Sales Tax (%): [blank]

Terms and Delivery Information

Terms: Net 10 Form to use: Local
 Ship Via: UPS Ground View: Form

Done

start BIZCO\demo: Lotus D... Purchase Request - I... Joe User 11:01 AM

Purchase orders in Lotus Notes

Bizco Tracker Portal - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites

Address http://localhost/Tracker/Bizcotrportal.nsf/ac_port_fs_mainweb?openframeset&login

Google PageRank 506 blocked AutoLink AutoFill Options

Search Web My Web Mail My Yahoo Shopping Games Music Personals

Mail Tracker Forms Inbox Outbox All Documents Change Requests People Projects Reports

Submit Save & Exit Save Close Validate Refresh Add Notes Export

Purchase Request

Employee and PR Information

Employee: Sally Sales Employee ID: [blank]
 Supervisor: Moses Marketer Cost Center: Marketing Staff
 Division: Marketing Location: Boston MA
 Approved For: [blank] ID: SSAS-ECGTEJ
 PR Number: SS1006 PR Originated: 12/21/2005 01:49 PM
 PO Number: [blank] PO Originated: [blank]
 Status: [blank] Routing: Not Submitted
 Purpose: **Not Submitted**
 Flyers for Houston tradeshow

Log: [blank]
 Workflow: Expense Approver Table

Vendor Information

Purchase Type: Marketing Priority: [blank]
 Suggested Vendor: RoadRunner Printing Deliver By Date: [blank]
 Vendor Number: [blank] Company: Bizco
 Attention: Rudy Ray Attention: Sally Sales
 Street1: 432 Broady Ave. Street1: 123 E. Broadway
 Street2: [blank] Street2: [blank]
 City, ST Zip: Houston, TX 44332 City, ST Zip: Tucson, AZ
 Telephone: (333) 333 - 2223 Telephone: (520) 555-1212
 Extension: [blank] Fax: (520) 555-1313
 Fax: (222) 111 - 2222 Applicable Sales Tax (%): 8

Ship To

ASAP
 [blank]
 Bizco
 Sally Sales
 123 E. Broadway
 Tucson, AZ
 (520) 555-1212
 (520) 555-1313
 Applicable Sales Tax (%): 8

Terms and Delivery Information

Terms: Net 30 Form to use: Local

Done

start BIZCO\demo: Lotus D... Bizco Tracker Portal - ... Trusted sites 2:26 PM

Purchase orders over the Web

Purchase Request - Lotus Notes

File Edit View Create Actions Applet Help

Address

Welcome Workspace Ashley Admin - Inbox Purchase Request

Approve Disapprove Close

Requested By: Joe User Employee ID: BZC1001
 Supervisor: Mark Manager Cost Center: Support Staff
 Approved For: JU1013 ID: JUSR-6HGT5C
 PR Number: PO Number: 10/24/2005 02:25 PM
 Status: Awaiting Approval PO Originated: In Approval
 Purpose: A coffee machine Routing:
 Log: 10/24/2005 : Purchase Request submitted by Joe User

Vendor Information		Ship To	
Purchase Type:	Facilities	Priority:	By Delivery Date Shown
Suggested Vendor:	Ace Hardware	Company:	Bizco
Attention:	George Strait	Attention:	Joe User
Street1:	789 W. Covina	Street1:	123 E. Broadway
Street2:	Suite 350	Street2:	
City, ST Zip:	Tucson, AZ 85705	City, ST Zip:	Tucson, AZ
Telephone:	520-789-1234	Telephone:	(520) 555-1212
Extension:	35	Fax:	(520) 555-1313
Fax:	520-789-4321		

Terms and Delivery Information		Billing Information	
Terms:	Net 10	Expense Type:	Expense
Ship Via:	UPS Ground		
FOB:	Destination		
Deliver By Date:	01/12/2005		

Project	Acct Code	Qty	Unit of Measure	Part	Unit Price	% Tax	Total	Description
Administration Staff		1	Ea		20	7.5	20.00	Mr. Coffee
							Subtotal:	20.00
							Freight:	
							Tax:	1.50
							Total:	21.50

Company: Bizco

Done

start Purchase Request - L...

Ashley Admin 2:28 PM

Supervisors automatically receive approval notifications

Purchase Request Processed Successfully - Lotus Notes

File Edit View Create Actions Link Help

Address

Welcome Mark Manager - Inbox Purchase Request Processed...

New Memo Reply Reply To All Forward Delete Follow Up Folder Copy Into New Chat Tools Tracker

Ashley Admin/demo
01/07/2005 01:08 PM

To: Mark Manager/demo@demo, Mark Manager/demo@demo,
 Carlos Computer/demo@demo, Victor Vicepresident/demo@demo
 cc:
 bcc:
 Subject: Purchase Request Processed Successfully

A purchase request has been processed successfully
 Please follow the doclink to access the request →

4 unread document(s) remaining

start BIZCO/demo: Lotus D...

Mark Manager 10:46 AM

Automatic notifications of approvals and processing, with doclink

Bizco Purchase Tracker - IBM Lotus Notes

File Edit View Create Actions Help

Address

Welcome Workspace Bizco Purchase Tracker Purchase Request

TRACKER

- Employee
- Accounting
- Reports
- Blanket Purchase Orders
- Help
- Report An Issue

Sort by

- Date
- Department
- Requestioner
- Vendor
- PR Number
- PO Number

PR #	PO #	Ordered	Received	Processed	Total
CC1006	1	\$234.35	\$0.00	\$234.35	\$234.35
JU1011			\$0.00	\$0.00	\$81.54
Aerospace		\$0.00	\$0.00	\$0.00	\$3,321.25
Carlos CC1006		\$0.00	\$0.00	\$0.00	\$3,106.25
Carlos CC1010		\$0.00	\$0.00	\$0.00	\$216.00
Greyhound Business		\$0.00	\$0.00	\$0.00	\$107.50
Computer, Carlos CC1009		\$0.00	\$0.00	\$0.00	\$107.50
IBM		\$3,481.50	\$0.00	\$1,100.80	\$4,575.13
Computer, Carlos CC1008	2	\$3,481.50	\$0.00	\$1,100.80	\$3,481.50
User, Joe JU1003		\$0.00	\$0.00	\$0.00	\$1,093.63
December, 2005		\$2,746.25	\$2,477.50	\$0.00	\$2,811.11
Argo Macine		\$107.50	\$0.00	\$0.00	\$107.50
Computer, Carlos CC1021	5	\$107.50	\$0.00	\$0.00	\$107.50
Automation Centre		\$0.00	\$0.00	\$0.00	\$40.13
Computer, Carlos CC1007		\$0.00	\$0.00	\$0.00	\$40.13
Carl's Contact Catalog		\$1,075.00	\$1,075.00	\$0.00	\$1,075.00
Marketer, Moses MM1016	4	\$1,075.00	\$1,075.00	\$0.00	\$1,075.00
Galco Printers		\$161.25	\$0.00	\$0.00	\$161.25
Marketer, Moses MM1015	6	\$161.25	\$0.00	\$0.00	\$161.25
Happy Days Printing		\$1,402.50	\$1,402.50	\$0.00	\$1,402.50
Marketer, Moses MM1014	7	\$1,402.50	\$1,402.50	\$0.00	\$1,402.50
Office Depot		\$0.00	\$0.00	\$0.00	\$24.73
Sales, Sally SS1005		\$0.00	\$0.00	\$0.00	\$24.73
In Process		\$0.00	\$0.00	\$0.00	\$4,043.51
Argo Macine		\$0.00	\$0.00	\$0.00	\$1,635.50
Manager, Mark MM1004		\$0.00	\$0.00	\$0.00	\$1,635.50
Dell Computers		\$0.00	\$0.00	\$0.00	\$1,290.00
User, Joe JU1018		\$0.00	\$0.00	\$0.00	\$1,290.00
No Vendor Specified		\$0.00	\$0.00	\$0.00	\$107.50
Computer, Carlos CC1000		\$0.00	\$0.00	\$0.00	\$107.50
Office Depot		\$0.00	\$0.00	\$0.00	\$553.63
User, Joe JU1013		\$0.00	\$0.00	\$0.00	\$483.75
User, Joe JU1020		\$0.00	\$0.00	\$0.00	\$63.88
Tucson Computer		\$0.00	\$0.00	\$0.00	\$376.25

start BIZCO\demo: Lotus D... Bizco Purchase Trac... Boris Beancounter 6:34 PM

Purchasing reports

Purchase Request - Lotus Notes

File Edit View Create Actions Applet Help

Address

Welcome Victor Vicepresident - Inbox Purchase Request Processed... Purchase Request

Close Export to Word Print

Purchase Request

Requested By: Carlos Computer Employee ID: BIZCO1008
 Supervisor: Mark Manager Cost Center: Research & Development Staff
 Approved For: 3,461.50 ID: CCOR-JAFWJ
 PR Number: CC1008 PR Originated: 12/22/2004 00:30 PM
 PO Number: 2 PO Originated: 12/22/2004 12:38:50 PM
 Status: PROCESSED Routing: Processed
 Purpose: New workstations
 Log: 12/22/2004: Purchase Request submitted by Carlos Computer
 12/22/2004: Purchase Request approved by Carlos Computer
 12/22/2004: Purchase Request disapproved by : Mark Manager, Reason : Are you sure we need this many?
 12/22/2004: Purchase Request submitted by Carlos Computer
 12/22/2004: Purchase Request approved by Carlos Computer
 12/22/2004: Purchase Request approved by Mark Manager
 12/22/2004: PO# 2 assigned by Pablo Purchasing
 12/22/2004: Purchase Request forwarded from Purchasing by Pablo Purchasing
 12/30/2004: Purchase Request processed by: Ashley Admin

Approver Table

Vendor Information		Ship To	
Purchase Type:	IT	Priority:	Rush/Urgent
Vendor:	IBM	Company:	Bizco
Attention:	Lou Gerstner	Attention:	Carlos Computer
Street1:	111 Peachtree	Street1:	123 E. Broadway
Street2:		Street2:	
City, ST Zip:	Atlanta, GA 22222	City, ST Zip:	Tucson, AZ
Telephone:	404.222.2222	Telephone:	(520) 555-1212
Extension:		Fax:	(520) 555-1313
Fax:			
Terms and Delivery Information		Billing Information	
Terms:	Net 30	Expense Type:	Expense
Ship Via:	UPS Ground	View:	Form
FOB:	Destination		
Deliver By Date:			

Done Victor Vicepresident 10:46 AM

Activity logs

Purchase Request

Employee: Joe User Employee ID: BZC1001
 Supervisor: Mark Manager Cost Center: Support Staff
 Approved For: ID: JUSR-68B09G
 PO Number: JU1012 PR Originated: 01/04/2005 11:58 AM
 Status: Not Submitted
 Purpose: New IBM X series server for internal network

Log:
 Approver Table

Approver Table -- Web Page Dialog

Level	Approver	Amount	Proxy Approver 1	Proxy Approver 2
Level 1	Carlos Computer	2000		
Level 2	Mark Manager	5000		
Level 3	Victor Vicepresident	1000000		

Ok

Set approval limits and assign proxy approvers

Purchase Request

Employee: Moses Marketer Employee ID: MMAR-6KAIYB
 Supervisor: Mark Manager Cost Center: Marketing
 Division: 161.25 Location: In Purchasing
 Approved For: ID: MMAR-6KAIYB
 PO Number: MM1015 PR Originated: 12/21/2005 10:52 AM
 Status: APPROVED
 Purpose: Trade Show

Log:
 Workflow:

Vendor Information

Purchase Type: Marketing
 Suggested Vendor: Gelco Printers
 Vendor Number:
 Attention: Harry Slate
 Street1: 412 Prince Ave
 Street2:
 City, ST Zip: Flagstaff, AZ 8
 Telephone: (602) 222 - 332
 Extension:
 Fax: (602) 222 - 339

Terms and Delivery Information

Terms: Net 30

Email/Fax option

Please select one option

- Send Email to Vendor
- Send Fax to Vendor

OK Cancel

Send

Pablo Purchasing

To: Harry@GelcoPrinters.com
 cc:
 bcc:
 Subject: Bizco - Purchase Order for Gelco Printers

12/21/2005 05:08 PM

Purchase Order.

- DFC054D59AEC7C4F072570DE007FABCA.doc

Fax or email POs from Notes

Document1 - Microsoft Word

Purchase Request for Bizco
Purchase Order:

Vendor		Ship To	
IBM Attn: Lou Gerstner 111 Peachtree Atlanta, GA 22222 Phone: 404.222.2222 Fax:		Attn: Joe User Bizco 123 E. Broadway Tucson, AZ Phone: (520) 555-1212 Fax: (520) 555-1313	

Line #	Acct Code	Part #	Description	Qty	Unit Cost	% Tax	Exch. Rate	Total Approved
1			IBM X Series Server	1	5000	7.5	1	5,000.00
								Subtotal
								Freight
								Tax
								Total

Terms: Net 30	Ship Via: UPS Ground	FOB: Destination
	Deliver By: ASAP	
Requested by: Joe User		Request Date: 01/04/2005 11:58 AM

Export POs to Word

Purchase Request - IBM Lotus Notes

File Edit View Create Actions Applet Help

Address

Welcome Workspace Bizco Purchase Tracker Purchase Request

Save Close Add Notes Forward Forward to AP Cancel Export Email/Fax

Purchase Request

Invoices and Vendor Payments

Posted Invoices:

Undo Posted Invoices

Line #	Rec'd Qty	Rec'd Date	Inv #	Inv Date	Inv Amt	Inv Due Date	Disc.	Disc. Due Date	AP Trans. #	Amt Paid

Received Invoices:

Add Row Receive All Send Note To Accounts Payable AP - Post All

Del Line #	Rec'd Qty	Rec'd Date	Inv #	Inv Date	Inv Amt	Inv Due Date	Disc.	Disc. Due Date	AP Trans. #	Amt Paid
1	1	1/3/2006	1020	12/26/2005	1075	1/26/2006			1200	1075

Refresh

Totals

Ordered: 1,075.00

Received: 1,075.00

Balance: 0.00

Employee and PR Information

Requested By: Moses Marketer Employee ID:

Supervisor: Mark Manager Cost Center:

Division: Marketing Marketing Staff

Tucson AZ

Done

Pablo Purchasing

Manage invoices and vendor payments