

PO Archive Viewer Transcript

The Purchase Order Archive viewer is a very useful feature associated with the Eagle software. This tool gives you the ability to view up-to-date detailed information right on your screen.

In this course, I'll show you how to access and view the purchase order archive viewer and review some related features available with Buyers Purchasing as well as the Eagle N Series . We will also review how to utilize viewer functionality to locate data for specific purchase orders and SKUs.

Topics

- Finding a Received PO
- PO Archive
- Scanned PO

Finding a Received PO

Let's start by reviewing how to find a received purchase order.

Open Purchasing & Receiving from the Eagle Browser.

Next, click View PO to open the viewer.

The Purchase Order Viewer opens with a list of all your open Purchase Orders and you can easily sort or filter them as needed.

If you are unsure of a purchase order's status, you can begin your search here.

If you want to review the Purchase Orders for a specific vendor, enter the vendor code in the Vendor box and click Refresh or press Enter.

A list of all open purchase orders for the vendor you selected is now displayed. Remember, if you don't know the vendor number, you can type an equal sign in the Vendor box, followed by the vendor name. Then just select the correct vendor and press enter.

Like other Eagle viewers, the Purchase Order viewer allows you to quickly locate POs that match certain criteria. When you press Change Lookup, for instance, you can select different options for looking up open purchase orders.

Enter the SKU or Manufacturer number, to review all Purchase Orders with a specific item on them.

Or, enter the PO# to quickly locate a specific PO.

You can also use the Alternate PO number to find purchase orders such as those created in Point of Sale.

PO Archive

If you are unable to locate your purchase order here, it is most likely because it has begun or completed the receiving process, and it is now located in the Purchase Order Archive.

Simply click the P.O. Archive hotlink to the right of the Store field, to use the already entered search parameters.

Or, you can enter new ones.

If you do not see this link, check your options for ID #858, "Purchase Order Archiving on System".

You will also need Security Bit #717 enabled to access this function.

Once the archived snapshots are displayed in the archive Purchase Order Viewer, you are able to drill down into each to see details. Highlight the PO you want to review and click Drill, or simply double-click the line item.

The system takes two snapshots of every purchase order. The first one occurs when you press the Receive button in the Purchasing and Receiving window, creating an archive record of your PO before any receiving activity has taken place. This will have a status of 'Open' in the PO Archive Viewer as it has not been finalized yet and changes may still occur. If you transmit and receive purchase orders electronically from certain vendors, This snapshot also happens if you run "ERP".

The second snapshot occurs right before every status R purchase order is finalized by the Receiving Report (RRP), with option F. This will have a status of 'In Receipt', since at the time it was captured; the system was in the process of finalizing receiving.

The 'How Received' column will display the letter that references the method used when Receive was selected from MPO. Using method All or Finalize produce a letter 'A' in this field and the selection of method Only will populate it with an E.

To view the detailed SKU information for any PO snapshot, simply double click on the line or right click to add check boxes and then select Drill.

The Archived Purchase Order Detail Viewer contains a column called Receipt Status. The word "Changed" will be populated here if changes are made to the Quantity, Cost, or Retail of an item prior to it being finalized by the Receiving Report, or RRP.

There are some additional columns to view here that contain further valuable information. For example the 'Added in Receiving' denotes any item that was not originally on the order but was added manually during the receiving process prior to running RRP with option F.

If you transmit and receive purchase orders electronically from certain vendors, the ERP'd Date column will be populated to identify when ERP was run to pull in your order confirmation.

Scanned PO

If you're currently using Document Scanning and want to review a scanned purchase order, just open the Miscellaneous Menu and select View Scanned PO Documents. This opens the Document Archive viewer so you can search the Document Scanning archive.

As you can see, the Eagle purchasing archive viewer contains a great deal of valuable information. Accessing this tool allows you to make informed purchasing decisions, and to keep close tabs on the integrity of your data. You can save time, money, and printer ink by utilizing these enhanced viewer features.

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