

FREQUENTLY ASKED QUESTIONS

PURCHASING



BEEES *escm*

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Processing Step & Flows

1. Can BEEES Approval Flow be Customized?

Requisition Approval Work Flow Order or Purchase Order Approval Work Flow can be customized according to the organizational needs.

2. Can we use different approval flows for different types of items?

Different work flows can be setup for different types of items. But it is not necessary to setup a workflow for each item.

3. Can we use different approval flows for same item but order from different Stores(Cost Centres)?

BEEES has you covered on this requirement. The approval flow can be setup separately for different Stores(Cost Centres) for the same item.

4. Is it necessary to setup Work Flow for each Item of each Store(Cost Centre) if they are using the same Flow?

If they are all using the same Flow, we can easily setup the Approval Flow at Category Level. (If some item has a specific Flow, we can just override the Flow for that specific item and others will inherit the Flow setup in Category Level.

5. If we use only 1 Flow for every item, do we need to setup for each Category?

If there is only 1 flow, we can simply setup the Flow in Business Unit and all Items will inherit the Approval Flow from Business Unit. But this can be overridden by Category Level or Item Level of each Store(Cost Centre)

6. Can we setup an Optional Approval Step in the Flow i.e.: to be approved by General Manager if the Amount is over a certain value?

An Optional Approval Step can setup based on the certain value of Total Order or certain value of Total Amount of same Vendor per Order.

7. Can we send a notification to the next person for the approval by email?

Setup can be customized to notify next person by email when work is approved and dispatched to next person for next level approval.

8. Can we setup to display the electronic signature on the Print Purchase Order?

Setup can be customized whether to display electronic signature of each approval step on the Purchase Order. (i.e.: we can setup not to display Dept Head Signature for Market list Order but display Dept Head Signature for all other Orders etc.)

Multi Currency

1. Does system support Multi Currencies?

Multiple Currencies are fully supported and multiple Exchange Rates can also be setup based on the effective date.

2. Can we use currencies and numbers without decimals?

It is not necessary to use a decimal value in some country (i.e. Vietnam, Indonesia) and the display format can be defined as per the Local Requirement. (i.e. 1,000,000.000 or 1000000.00 or 1,000,000 or 1.000.000 etc.)

Costing Method

1. What costing method can be used in the system?

Weighted Average Price is the most widely used costing method and standard in the hospitality industry. We fully support Weighted Average Price. We can define Weighted Average Price for the whole system or Weighted Average Price per Business Unit or Weighted Average Price per Store(Cost Centre) based on the organization's requirement.

For more information of Weighted Average Price, please visit http://en.wikipedia.org/wiki/Average_cost_method

2. Does BEEES System support FIFO method for costing?

Weighted Average Price is most widely used costing method and standard in the Industry, There are not any plans for the FIFO costing method at this time.

Business Unit

1. How many Business Units can be setup?

An unlimited amount of Business Units can be setup with the additional purchase of Licenses required.

2. Can we use different Address, Billing Instruction, Terms & Conditions, Delivery Terms and Payment Terms for each Business Unit?

Each Business Unit can be defined; each Address, Billing Instruction, Terms & Conditions, Delivery Terms and Payment Terms can be set-up independently.

3. Can we use different Logos for each Business Unit?

Each Business Unit can use its own logo which will then appear on the Purchase Order.

Delivery Point

1. Can we define multiple Delivery Points?

An unlimited number of Delivery Points can be setup and displayed on the Purchase Order so that vendors will have delivery information for each order (i.e.: Receiving Area, Gas Storage Area, Head Office, Pre Opening Office etc.).

Tax

1. Can we setup multiple Taxes?

An unlimited number of Taxes can be setup and each Tax can be defined for the Account Code used for the Interface with Back Office (Accounting System).

2. Can we define Account Code of Back Office (Accounting System) for each Vendor?

Each Vendor can be defined for Account Codes to be used for Interface with Back Office (Accounting System).

Vendor

1. Can we use different Payment Terms and Delivery Terms for each Vendor?

Each Vendor can be set-up with unique Payment Terms and Delivery Terms.

Quotation

1. Can a Quotation be attached with the Original Document from Vendor?

An Original Document from Vendor can be attached to Each Quotation and then input into system for reference.

2. Which type of Document can be attached for Quotation and how many documents can be attached?

Any type of document can be attached and an unlimited number of documents can be attached.

3. Can one quotation be shared by Multiple Business Units?

Quotations can be shared by all Business Units or Limited only to a Single Business Unit to be exclusively used by that Business Unit.

4. Can Discounts be setup in the Quotation?

Either Discount Amount or Discount Percentage can be setup in the Quotation.

5. Can the Quotation be setup separately for different Quantity (i.e: 1 - 10 Unit for 1 Price and Over 10 Unit for different Price etc.)?

Quotations can be setup based on "Quantity From" and "Quantity To" Range.

6. Can Tax be setup separately for each Quotation?

Different Tax can be setup for each Quotation (i.e.: Quotes from Local Vendors may have Tax while Quotes from Oversea Vendor may not have Tax etc.,).

7. Can Quotations be setup for Quote Price with Included Tax?

Each Quoted Price can be defined as Include Tax or Exclude Tax (i.e.: - One Vendor may be quoted with Inclusive Tax and another Vendor may be quoted with Normal Price + VAT).

8. Can Firm Order Commitment (FOC) Quantity be setup for the Quotation?

If Quotation has FOC Items, those items can be setup in Quotation. (i.e.: Buy 10 and Get 1 Free etc.)

9. Can we easily create a Quote for New Period or same Quote from Other Vendor?

If you already have existing Quote, it can easily be copied to New Quote and the Quote Effective Date and/or change to new Vendor.

10. Does Quote support Multi Currency?

Quote can be in Local Currency or any other Currency.

11. Can we check all the Old Expired Quotations?

All Expired Quotation can be easily accessible and filtered by Vendor, Date From, Date To etc.

Item Category

1. How Many Levels can we define for Item Category?

There are 3 Category Levels: Higher Category, Secondary Category and Primary Category (i.e.: Food -> Seafood -> Fish Fresh)

2. How Many Numbers of Categories can be created in each Level?

There is no limit for the Number of Categories in each Level.

3. Can we Limit Access to a User for some Item Categories?

The User can be Limited so not to be able to access some Item Categories (i.e.: - User from Engineering may not have access to any Food or Beverage Category)

Item

1. How Many Types of Units can be defined for each Item?

There are 4 Types of Units that can be defined for each Item as follows:

- Order Unit -> To be used for the Purchase Order, Receiving
- Stock Unit -> To be used for Internal Movement, Stock Control etc.,
- Recipe Unit -> To be used for the calculation of Recipe
- Inventory Count Unit -> To be used for the Physical Inventory Taking

The Calculation Factor for each Unit must be defined.

2. Is there any limit for the number of characters for the Item Name?

There is no limit for the number of characters for the Item Name.

3. Can we use Local Language for the Item Name?

Local Language can be used as Item Names. However, the best practice is to use English for Item Name and then Use Alternate Item Name in the Local Language

4. Can we copy an existing Item to create a new Item?

A new item can easily be made by copying an existing Item to create new Item. All the associations of the original item can be brought along as well. (i.e.: Link to Store, Template etc.)

Budget

1. Can we input Budget Amount into system?

Monthly or Yearly Budget Amount can be input to system for the Budget Amount by Item or Budget Amount by Category so that it can control the expenses.

2. Is the Budget Period same as Calendar Year?

Budget Period can be define whether Calendar Year or Fiscal Year based on the Organisation Requirement.

3. Can Budget be defined for each Store(Cost Centre)?

Budget can be defined for each Store(Cost Centre)

1. Are Access Rights controlled by a User Role?

User Rights can be control by assigning a User Role. And User Rights can also be given special permission directly to the Users if Users need additional Access Rights among the Users who have the same User Role, thus eliminating the need for creating multiple User Roles with similar Access Rights.

2. Can we attach a unique Signature for each of the Users?

Each User (especially a User who needs to do Approval / Authorization) can attach a signature directly to the User profile so that their electronic signature will appear on the POs which they have approved.

3. Can we define which User is authorized to approve for specific departments?

Assigning authorized department approvals can be created so that Department Heads of each Section will be able to approve the Order / Requisition created by their own department.

4. Does system support a Complex Password Policy?

A Complex Password policy is supported with features as follows:

Each Password must include at least

- One Lowercase Letter (a - z)
- One Uppercase Letter (A - Z)
- One Numeric (1 - 9)
- A Minimum of 6 Characters

Password must be changed every 60 Days

The same password cannot be used repeatedly.

6 attempts of a login with a wrong password will lockout the user.

1. What are the methods for creating an order?

Orders can be created by using one of the following methods:

1. Create Order from Empty -> User can directly choose Store(Cost Centre) and Item to create Order.
2. Create Order from Template -> User can choose a predefined Template to create an Order.

2. Are there any other methods to create an order?

In the future, there will be more methods for creating an order (i.e.: Create Order From Min/Max, Create Order from Requisition, Create Order from Recipe, Create Order from Budget)

3. Can I order from different Stores Cost Centres) in same Order?

During the Order Creation, you can save your work and it will be saved as Pre Order. And the work can be resumed by opening the saved Order from the Pre Order Screen which is easily accessible from the Dashboard.

4. I've started making an order but I need to go to a meeting. Can I save my work and resume sometime later?

If you have access to more than one Order Store, you can order from multiple Stores(Cost Centres) within the same Order.

5. Can an order use more than one Template in that same Order?

More than one Template can be used to create an Order.

6. Can more Items be added manually when creating Orders from Templates?

Items which are not yet input into a template can easily be added directly into the order.

7. I have more than 20 Items in the Template but I need to order only 5 items, do I need to remove them manually?

It is not necessary to remove each unneeded item manually. When orders are dispatched, every item with a zero (0) Quantity or a Blank Qty will be ignored and will not be included with the order or sent for approval.

8. How can I check the approval status of the Order I have created and send for approval?

“My Order History” will display all the Orders you have created along with the statuses of each Order so that tracking orders and needed follow up is easily determined.

9. Can I choose a different Delivery Date for each Item in same Order?

You can choose a different Delivery Date for each Item in the same Order.

10. Can I see the Estimated Price of the Order before I send for the Approval?

When creating an Order, the Last Price will be displayed as well as the Estimated Net Amount based on the criteria below:

If there is a last price, the Estimated Net Amount will be calculated based on the Last Price multiplied by the Requested Quantity. If there is no last purchase price, it will be calculated based on Best Quoted Price x Request Quantity.

11. Can I send a Special Note/ Message/Instructions to other Users for the Order that I am creating?

Messages can be sent to other Users while creating the Order in order to communicate with the Department Head, Purchasing or other involved users.

12. Can I attach any picture or document with the Order?

Any type of document or picture can be attached with an Order and anyone involved with the approval or process of the order are able to view the attachment.

13. Can a Department Head change the Quantity before Approval?

A Department Head can increase or decrease the Quantity requested before it is approved and dispatched for next step.

14. Can an Approver see the Last Price and Last Purchase Vendor?

Department Heads can review the Last Price as well as the Estimated Net Amount based on the criteria below:

- If there is last price, Estimated Net Amount will be calculated based on Last Price x Approved Qty.
- If there is no last purchase price, it will be calculated based on Best Quoted Price x Approved Qty.

15. Can an Approver see the Available Quote of an Order Item?

An Approver can review the current available Quote for each Item.

16. Can an Approver see the Purchase History of the Order Item?

An Approver can review the history of each Item.

17. Can an Approver review what time the Order was sent for approval?

A Department Head can review a Log which displays the Users' Names, Dates and Times that any Order was dispatched for approval.

18. Can an Order be Rejected?

Each Approval Step can be defined as authorized to Reject. (i.e.: a General Manager may have the authority to reject, but a Financial Controller may not have authority to reject etc.)

19. Can an Order be sent back to the Requestor or a previous Approver?

Every Item in the Order or selected Item in the Order can be send back to every approval step of the Approval Flow or original requestor to take necessary action.

20. Can one Order be allocated to different Buyer?

It can allocated so that a different buyer is assigned for each item on the same Order.

21. Can an Approver approve only selected Items instead of approving all items of the order at same time?

An Approver can approve some items or all of the items and dispatch to next step of the process. The remaining items can be approved later or send back to previous approver or rejected.

22. Can a Buyer Transfer his Order to other Buyers?

After allocating the Orders to a Buyer, a Buyer may transfer the Order to Other Buyers.

23. How Can a Buyer Allocate Vendor to the Order?

Buyer can Allocate Vendor to Order in one of the following methods:

- Allocate Last Purchase - Allocate the same Vendor same price of last purchased.
- Manual Allocate Quote - Choose the Quote manually from available Quote.
- Auto Allocate Quote - Allocate the Best Quote from the available Quote.
- Input Manually – manual input of Vendor, Price etc.

24. How is the Best Quote chosen?

The Best Quote is chosen based on the following criteria:

Vendor Rank described in the Quote (From 1,2,3 .. so on and 1 is the Best Quote) If all available Quote has same Vendor Rank, the Best Quote will be decided based on Lowest Price.

If all available Quotes has same Vendor Rank and same Price, Best Quote will be decided based on which Quotation is created in the system first.

25. Can a Buyer create a new Quote directly from Allocated Vendor Screen?

There is an option to create a Quote from the selected order item.

26. Can a Buyer Print the Selected Item to Request for Quotation?

A Buyer can print the selected Item and choose the Vendors and print the Request for Quotation then send the file via fax or email to suppliers.

27. Can Buyer Split the Quantity of the Order Items?

The buyer can split the Quantities of the Order Items. There may be cases when 10 Qty is ordered but 1 supplier can supply only 6 Qty. In this case, a buyer can split the Order Item into 6 and 4 then allocate the balance quantity to different vendor.

28. Can a Buyer Merge Order Items from Different Orders?

There may be cases when the same item is ordered from different departments in different orders, but a Buyer may need to combine into one order. In this case, buyer can merge from different orders into one order.

29. Can an Approver change the Quantity of the Order after Buyer has allocated the order to a Vendor?

Once a Buyer has Allocated an order to a Vendor, the Approver should not change the Quantity and the order must be sent back to the Buyer to take the necessary action.

30. After a PO is printed, can it be reprinted?

Once the PO is printed, it can be reprinted from the Reprint PO screen with the title "Reprint Purchase Order".

31. Can we send the PO to Vendors by Email?

Once the PO is printed, a Portable Document Format(PDF) file is then generated and may be attached to an email and sent to a Supplier.

32. When an Order ready for printing has more than one Vendor will the PO and PDF file be generated separately for each Vendor?

When a PO is ready to print, the Vendor can be selected to print the PDF file for each vendor. Hence, each Vendor will have separate PDF file and you can send only the PO portion that is related to the specific Vendor.

Receiving

1. If the price or vendor on the PO is wrong, can Receiving make corrections?

Receiving is not authorized to make changes but Receiving can forward the PO to the Buyer. The Buyer will then make the necessary changes and the Order can continue through the approval process.

2. Can we receive more than one PO in same Invoice?

Multiple POs can be selected to be received against one Invoice.

3. Can we receive partial Delivery?

If supplier delivered less than Actual PO Quantity, a partial delivery can be received and the remaining quantity will be open and available to receive in the future.

4. Can I cancel the PO from Receiving?

If the PO is partially received and not required to receive anymore than it can be canceled easily from the Receiving screen.

5. Can I receive without a Purchase Order?

Invoices can be received with a Purchase Order but this function is controlled by the user rights and allows only for an authorized user to receive without a PO.

6. Can I Return an Item to Supplier?

Both a Credit Note and a Return to Supplier can be processed through the system.

7. Can I Return an Item to Supplier if I have no Quantity On Hand?

If there is no Quantity On Hand, you could not be able to Return to Supplier.

8. Can I post only a Credit Note without Quantity?

If a supplier has given a discount or maybe a wrong price is posted, it can be a post Credit Note without Quantity.

9. Can I see the Estimated Price of the Requisition before I send for Approval?

When you are creating the Requisition, it will display the Average Price as well as the Estimated Net Amount based on Average Price x Request Qty.

10. Can I send Special Note/ Message to other Users for the Requisition that I am creating?

A Message can be sent to other Users while creating the Requisition in order to communicate with the Dept Head or Storekeeper etc.

11. Can I attach any picture or document with the Requisition?

You can attach any type of document, picture with the Requisition and anyone who will do the approval or process your requisition will be able to view the attachment.

12. How can I check the approval status of the Requisition I have created and send for approval?

“My Requisition History” will display all the Requisition you have created and the status of the Requisition so that you always can track your requisition and know who you will need to contact in order to follow up.

13. Can a Dept Head change the Requested Quantity before Approval?

Dept Head can increase or decrease the Quantity requested by the Requestor before it is approved and then dispatch for the next step.

14. Can Approver see the Estimated Amount of the Requisition?

A Dept Head can see the Average Price as well as the Estimated Net Amount based on the Average Price x Approved Qty.

15. Can Approver see what time the Requisition is sent for approval?

A Dept Head can review the Log which displays the User Name and Date Time of the Requisition dispatch for approval.

16. Can a Requisition be Rejected?

We can define each Approval Step whether they are authorized to Reject. (i.e.: General Manager may have authority to reject but Financial Controller may not have authority to reject etc.).

17. Can Requisition be sent back to the Requestor or previous Approver?

Every Item in the Requisition or selected Item in the Requisition can be send back to every approval step of the Approval Flow or original requestor to take necessary action.

18. Can Approver approve only selected Items instead of approving all items of the Requisition at same time?

An Approver can approve some item or all item and dispatch to next step for the process. The remaining items can be approved later or send back to previous approver or rejected.

19. After the Approved Requisition is printed, can it be reprinted?

Once the Approved Requisition is printed, it can be reprinted from the Reprint Requisition screen with the Title “Reprint Requisition”.

Inventory

1. Can I create an Inventory Schedule separately for each Business Unit?

An Inventory Schedule must be created separately for each Business Unit as some Business Units may have different Inventory Periods.

2. Do I need to create an Inventory for All Stores (Cost Centres) even they are set to Default Zero or Default System?

It is required to create the Inventory only for the Store(Cost Centre) which E.O.P.(End of Period) Type is Enter Counted Stock.

3. When I create the Inventory, can I choose how to sort the Counted Sheet?

When creating Inventory to print the Counted Sheet, you can sort by Item Code, Item Name, Alt Item Name. Then the inventory will be created according to the sorting method you choose.

4. After I created and printed the Inventory, Can I reprint again?

After Inventory is created, it is also able to be reprinted again.

5. We have already created the Inventory but we still need to post some Invoices or Transfers for that Inventory Period. Can we do that?

Once Inventory is created and when you have more Invoices or Transfers Posting for the same period, it will automatically update the Inventory Evaluated QoH.

6. Do we need to ask all users to logout from system when we need to close the inventory?

It is not necessary to ask any user to logout from system; you can proceed to close Inventory.

7. While we are processing Inventory, do we need to stop posting Invoices and Transfers for new period?

It does not necessary to stop the Posting as every posting for the new period will not be updated to current Inventory Evaluated QoH.

8. After I've input the Physical Counted Quantity, can I print the Inventory Difference?

Once you have input the Counted Quantity, you can print an Inventory Difference Report.

9. After I've input Physical Counted Quantity, Can I print the Quantity on Hand Value Report?

Once Physical Counted Quantity is Input, you would be able to print QoH (Quantity on Hand) Value so that you could start preparing your "Month End Reconciliation Report", before closing the Inventory Period.

10. Do I need to close Inventory in the system first to prepare for my Month End Report?

We have provided all the reports to prepare your month end report without closing the inventory period in system. But you must input all of the Physical Counted Quantity into the system, then prepare your monthly report and then you can do the month end closing once everything is completed.

11. While I'm Inputting Physical Counted Stock into the system, can I easily search items?

You can filter the item by typing any content of the item name in filter box. You can also search by Item Code or Alternate Item Name.

Spot Check

1. Can we conduct Spot Check and update into system?

Spot Check can be used to update the stock balance after conducting physical stock at any time before the Inventory is created.

2. The system is recently implemented and we need to update the current stock into system but we have not yet purchased anything through system and all the average prices are at 0. How easily we can update average prices into system.

Unlike other systems, it is not necessary to create Dummy Vendor to input all the opening balance as Receiving Posting. We can directly update the stock balance by using a Spot Check Count Function where you can also directly update the Average Price. However, your IT administrator needs to set the appropriate permission to update average price and it can be revoked anytime later.

3. Can I conduct Spot Check for All Stores(Cost Centres)?

All the Stores(Cost Centres) which E.O.P.(End of Period) Type is Default System or Enter Counted Stock will be able to conduct Spot Check and update into System.

4. Can I create Spot Check and Inventory for the same Store(Cost Centre) at the same time?

Inventory and Spot Check cannot be created for the same Store(Cost Centre) at the same time. Spot Check or Inventory has to be completed and closed first.

5. Can I create Spot Check only for some Items from the Store(Cost Centre)?

You can create Spot Check for All Items or Selected Items from the Store(Cost Centre).

6. When I create the Spot Check, can I choose how to sort the Counted Sheet?

When creating Spot Check to print Counted Sheet, you can choose to sort by Item Code, Item Name, Alt Item Name and the Spot check will be created according to the sorting method you choose.

7. After I created and printed the Spot Check, Can I reprint again?

After Spot Check is created, it can be reprinted again.

8. We have already created the Spot Check, but we still need to post some Invoices or Transfers for the previous day before Spot Check is created. Can we do that?

Once Spot Check is created and when you have more Invoices or Transfers Posting for the previous day before Spot Check is created, it will automatically update the Spot Check Evaluated QoH.

9. While we are processing Spot Check, do we need to stop posting Invoice and Transfer for the date after the Spot Check created?

It is not necessary to stop the Posting as every posting for the date after the Spot Check created will not be updated to current Spot Check Evaluated QoH.

10. After I've input Physical Spot Check Counted Quantity, can I print Spot Check Difference?

Once you have input the Counted Quantity, you can print the Spot Check Difference Report.

11. After I've input Physical Spot Check Counted Quantity, can I print the Quantity on Hand Value Report?

Once Physical Counted Quantity is Input, you would be able to print QoH (Quantity on Hand) so that you can reconcile your stock Balance, before closing the Spot Check.

12. I have created Spot Check for 3 Stores(Cost Centres), Do I need to close all of them together?

Unlike Inventory Closing, Spot Checks are independent and you can close each Store(Cost Centre) individually.

13. While I'm Inputting Physical Spot Check Counted Stock into system, can I easily search item?

You can filter the item by typing any content of the item name in filter box. You can also search by Item Code or Alternate Item Name.

14. Do we need to ask all user to logout from system when we need to close the Spot Check?

It is not necessary to ask any user to logout from system so that you can process to close Spot Check.

Reports

1. Can I see samples of All Reports?

We are happy to provide you with sample reports and please feel free to contact our Business Partner in your Country/Region (www.beeees.com/business_partners) or contact sales@beeees.com or contact us using "Contact Us" on our website.

2. How many Reports are available in your System?

Over 100 Reports are available ranging from Daily Reports such as Receiving, Order Pending, Deviation, Internal Movement and Month End Reconciliation Report to In depth analysis of Consumption, Purchase Analysis, Cost Analysis etc. for Management and Owners.

Please request the latest full list and sample reports from our Business Partner in your Country/Region (www.beeees.com/business_partners) or contact sales@beeees.com or contact us using "Contact Us" on our website.



BEEEES *escm*

15th Fl, Sathorn Thani 1 Building 90/40-41
North Sathorn Road, Silom, Bangrak
Bangkok 10500 Thailand

Tel: +662 610 3189
Email: sales@beeees.com

WWW.BEEEES.COM