



Inventory Management in PowerEasy efficiently manages inventory at multiple warehouses, allowing you to reduce excess inventories and improve customer service with accurate inventory levels, simultaneously reducing your carrying costs, labor costs and inventory write-offs. Advanced search capabilities and flexible reporting capabilities provide quick and easy access to business-critical data.

With a 360° view you get a complete picture of Items, including on hand, on order and available quantities in each warehouse and on pricing and cost. PowerEasy allows you to choose from various pricing methods including pricing by amount, percent of list price, percent of standard cost, or markup or markdown of list price and standard cost. You can track quantities and cost in multiple warehouses and have the ability to transfer items between warehouses easily. You also have the luxury to organize your warehouse into bins enabling you to track your inventory accurately.

You gain tight control over processes using a cradle-to-grave view of serial and lot numbers to quickly trace where and when the item appears in bills of materials, customer orders, or other transactions. Inventory Management integrates with other PowerEasy modules—including Sales Order Processing, Purchase Order Processing, Invoicing, and General Ledger—to streamline mission-critical inventory and sales processes.

The screenshot displays the PowerEasy software interface. On the left is a navigation sidebar with categories like Receivables, Sales, Payables, Purchasing, Inventory, and Dashboards. The main window shows a table of 'Items' with columns for Category, Item #, Item Name, Type, Item Valuation, and Unit Price. The 'Illumination' item is selected. Overlaid on this is the 'Edit Item' window for 'Illumination', which includes fields for Item Id, Category, and Stock Information. A third window, 'Illumination - Stock Information', is open, showing detailed data for the 'Illumination' item across two warehouses: California (462) and Dropship (0). This window includes tabs for General, Bin, Available, History, and Serial, and displays various inventory metrics such as Reorder Point, On Hand, Reserved, Current Cost, and Total Received.

Warehouse	Quantity
California (462)	462
Dropship (0)	0

Metric	Value
Reorder Point	0
Reorder Qty	0
On Hand	462.00
Reserved	114.00
Available	462.00
Current Cost	25.0000
FIFO Cost	25.0000
Average Cost	25.0000
LIFO Cost	25.0000
Total Received	576.00
Total Issued	114.00
Transfer In	0.00
Transfer Out	0.00



Keep Your Customers Coming Back

- Inventory Management in PowerEasy offers better service and improves customer satisfaction with accurate inventory control and customer-specific pricing and promotions. You can also secure customer contracts with personalized pricing to meet customer demands and beat the competition, while maintaining the ability to change prices as needed

Tracking Items

- Inventory Management in PowerEasy improves picking efficiency with multi-bin tracking for primary and secondary stocking locations
- You can store and display images of your items, allowing you to see an item and verify its description when talking to a vendor or customer
- You can also track a single inventory item across multiple bins within the warehouse and optimize your picking efficiency
- You can add and track as many inventory, non-inventory and service items as you may feel necessary for your business
- Create “Kits” or Bills of Materials to track costs and inventory for assembled products more accurately. You can include both material and non-material costs such as labor and overhead on Bills of Materials
- You can “Build” components and labor into finished items with the subassembly option, which automatically adds built items to inventory and removes components from stock. As you build finished goods PowerEasy automatically deducts component items from your inventory
- You can also “Unbuild” or “unpack” assembled items into components or individual items and allow entry of receipts, issues, returns and adjustment of inventory costs after items have been received

Converting Unit of Measure

- Buy your items in one Unit of Measure, stock it in another, and sell it in yet another UoM. PowerEasy automates the conversion from one UoM to another as the item moves through your business
- With a click you can convert pallets to whatever UoM you may want to define. These units are then printed on invoices, purchase orders, pick lists and packing slips to help streamline your workflow

Sales Order

- With one click you can sort all your Sales Orders by date, by shippable dollar amount, or by customer
- You can customize PowerEasy to allow partial shipments, or only complete orders
- You can select the orders you want to ship and print multiple pick lists, packing slips, or invoices. Tracks back orders and sales promotions when used in conjunction with the Order Entry module

Backorder Tracking

Track back orders and sales promotions when used in conjunction with the Order Entry module.

- Backorder Tracking on sales orders, invoices, and other sales forms show exactly what still needs to be shipped by you
- Backorder Tracking on purchase orders shows all your outstanding commitments from your vendors

Customizable Price Matrix

- PowerEasy provides four pricing methods (absolute, margin, markup and base) for each item and allows price differences by customer type as well as quantity price breaks
- You can create as many price levels you deem fit for each item
- Permits pricing information for items to be updated automatically
- Support for price matrix with quantity break based discounts to facilitate flexible pricing schemes

Reporting Capabilities

- PowerEasy provides numerous inventory reports to analyze inventory performance and control your inventory investment
- Your business gets a superior competitive edge, with easy-to-use stock analysis tools and flexible reporting capabilities that deliver access to detailed, consolidated inventory and ordering information
- Your employees are empowered with advanced search capabilities that provide quick, easy access to the inventory information they need, and one-time stock and pricing entry that provides accurate and timely information throughout the system



About Effigent, Inc.

Effigent, Inc. (a California Corporation) is a software company with its principal offices in San Jose, California. We specialize in delivering powerful, easy-to-use, enterprise-class applications by leveraging Apple Technologies and Open Source software.

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PowerEasy Purchase Order Processing (POP) seamlessly integrates with other PowerEasy modules (GL, AP, Inventory, SOP, etc.) allowing for a tightly-knit information system. PowerEasy POP module empowers its users by allowing access to critical information including audit control and purchase activity analysis with proper security permissions.

Built to save you time and ensure that you never run out of key items, purchase orders can be automatically generated when your on-hand quantity falls below a specified minimum level. E-mailing purchase orders to your vendors ensures timely delivery of key inventory items. Numerous reports are available to help you make informed purchasing decisions. Furthermore, purchase order receipts can optionally produce an Accounts Payable invoice to save data entry time and increase invoicing accuracy.

By making use of the Purchase Order features, you'll always know what items are in high demand and the proper order quantity needed to satisfy your customers without tying up your cash flow on seasonal or low performing items. Purchase Order Processing handles purchase orders, receiving and drop shipments, updating vendor and item records automatically.

The screenshot displays the PowerEasy software interface. The main window is titled "Receipts not Invoiced" and shows a table with columns: Receipt Date, Packing Slip #, PO #, Vendor Id, Vendor Name, Warehouse, and Status. A secondary window titled "Receive Shipment" is overlaid on top, showing details for Vendor: Johnstone Supply, PO #: 48, and a "Total Cost" of 23,950.00. The "Receive Shipment" window also contains a table with columns: #, PO #, Item Id, Unit, Bin, Qty, Description, Unit Cost, Ext Cost, and Comments.

Receipt Date	Packing Slip #	PO #	Vendor Id	Vendor Name	Warehouse	Status
08/09/2007		80	VALL229	Valley Publishing	California	Open
08/12/2007		81				
08/15/2007		82				
08/18/2007		83				
09/20/2007		38				
10/08/2007		39				
10/20/2007		43				
11/14/2007		46				
11/20/2007		48				
05/08/2008		84				

#	PO #	Item Id	Unit	Bin	Qty	Description	Unit Cost	Ext Cost	Comments
1	48	Illumination	Each	0	22	Illumination	25.0000	550.00	reference
2	48	Kavazon	Each	0	22	Kavazon	25.0000	550.00	reference
3	48	Lunazon	Each	0	22	Lunazon	25.0000	550.00	reference
4	48	Marketing	Each	0	22	Marketing	900.0000	19,800.00	reference
5	48	Matte Tea	Each	0	50	Matte Tea	5.0000	250.00	reference
6	48	Metabazon	Each	0	25	Metabazon	25.0000	625.00	reference
7	48	Plumbing-Mat	Each	0	25	Plumbing	65.0000	1,625.00	reference



Adding & Tracking Vendors Made Easy

- Enable your business to grow with the facility to include as many vendors as you may need
- Get complete purchasing history such as average cost, average cost difference and average lead time for each vendor and item. The Vendor history provides you with sufficient information to decide on the best vendor to service your needs
- You can easily add new vendors and items on the fly during quote, purchase order, and invoice entry
- Quickly locates vendors, items, quotes, orders and invoices, with flexible search features — increasing efficiency
- Easily look up a vendor's item sales history while entering purchase orders, and invoices

Purchase Order Processing & Receiving

- Track purchase orders from entry to receiving invoices from vendors, providing a complete detailed history for better purchasing decisions
- Automatically create purchase orders in response to quantity shortages on customer orders and manage these documents from within Purchase Order Processing
- Track and update the total cost, including freight, insurance, and duties associated with an inventory item. Automatically assign or modify these costs on a Purchase Order as items are received
- Control purchasing processes with cost variance tracking, easy transfer of information, receiving/invoicing against multiple purchase orders, comprehensive receipt information, posting, and 1099 reporting
- Manage purchase orders at the line-item level with automated roll-up of similar items, free on-board designation, individual line item release to vendor dates, and multi-site delivery
- Get instant answers with complete tracking of open or historical purchase order and receiving documents by order number, item number, or date
- Maintain audit control with cancelled item tracking, line-item ordering and status information, document revision tracking, and customized landed cost definition
- Alerts prevent employees from issuing invalid purchase orders
- You can enter contract numbers and expiration dates on purchase orders
- Enter a ship-to address for each line item on a purchase order, reducing documentation for items shipped to multiple addresses
- Track as much or as little purchase order information as desired. You can customize the purchase order to exclude certain fields you may not use, expediting data entry

- PowerEasy saves you time by enabling Accounts Payable vendors and inventory parts to be added on the fly during purchase order entry
- Allows comments and non-stock items to be added to purchase orders, providing better communication with your vendor and facilitating more accurate purchase order receipts
- Create new purchase orders by copying a purchase order for a similar order on file for the same vendor or a different vendor
- Ensure that you always have enough stock on hand to satisfy your customers' needs without overstocking. Purchase orders can be automatically generated for the primary vendor based upon order points you define
- PowerEasy maintains purchase order history including ordered and received items, while automatically updating Inventory Control for precise inventory tracking
- Drop-ship orders directly from supplier to customer and bypass the typical inventory update process with options when entering a purchase order
- Support three way matching for regular purchase orders and two-way matching for drop shipped orders
- Support for partial shipments during purchase order receipts. Items not received can be left open or can be canceled later

Reporting Capabilities

- PowerEasy allows you to make informed purchasing decisions without overstocking slow moving items with the Items Stock report
- Clearly displays your profit margin for each item as well as purchase order information for your vendors on various inventory management reports
- Analyze purchase activity with Purchase Order Status, Invoice Cost Variance, and posting reports

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PowerEasy Sales Order Processing (SOP) module forms a third of the core Inventory and Order Processing and helps you improve the quality of your sales cycle. SOP allows you to manage the entire sales process, from start to finish, with pinpoint accuracy. This makes you capable of serving top customers more effectively, monitor fulfillment and invoicing and more precisely, and streamline processes to minimize shipping costs and labor.

The SOP module builds stronger relationship between you and your customers by optimizing the invoicing and distribution process which speeds inquiries and order deliveries and reduces errors. Supports sales cycle from all sales channel including phone, email, fax and the web.

Sales Order Processing allows you to create and maintain orders, cash deposits, back orders, shipments, invoices and returns. A one-window order entry provides quick transaction entry and immediate access to all related information. Work the way you want by defining tracking numbers, information fields, fulfilled quantities, and other order entry functions to fit your needs.

Delight your customers and increase retention with optimized invoicing and distribution capabilities that speed inquiries and order deliveries, reduce errors, and minimize costs. Expand your distribution capabilities and gain flexibility in reporting, order management, inventory control, and general ledger with seamless integration to other PowerEasy modules.

The screenshot displays the PowerEasy software interface. On the left is a navigation sidebar with categories like Receivables, Sales, Payables, and Dashboards. The main window is titled 'Open Orders' and contains a table with columns: Date, Order #, Customer Name, Customer PO #, Order Total, Salesperson, Comments, Status, and Expected Ship Date. The table lists three orders, with the most recent one (06/02/2008, Order # 87) for Henry Goodall selected. An 'Order' window is overlaid on top, showing details for the selected order. It includes fields for Customer (Henry Goodall), Outstanding Balance (1,082.51), Order # (87), Date (06/02/2008), Customer PO #, Terms (Net 30), Salesperson (Smith), and shipping information (Main_Shipping, pickup, 05/12/2008, California). A 'FINALIZED' stamp is visible on the order details. Below the details is an 'Items' table with columns: #, Item Id, Description, Unit, Quantity, Unit Price, and Ext Price/Comments. It shows one item: Aquazon (Quantity 2, Unit Price 30.0000, Ext Price 60.00). At the bottom right of the 'Order' window is a summary table:

Sales Amount:	60.00
Trade Discount: % 0.00 \$	0.00
Freight:	0.00
Other:	0.00
Tax:	4.95
Total:	64.95

Buttons for 'Cancel' and 'Approve' are located at the bottom of the 'Order' window.



Adding & Tracking Customers Made Easy

- Enable your business to grow with the facility to include as many customers as you may have
- You can easily add new customers and items on the fly during quote, sales order, and invoice entry
- Quickly locates customers, items, quotes, orders and invoices, with flexible search features — increasing sales efficiency
- Lets you easily look up a customer’s item purchase history while entering quotes, sales orders, and invoices
- Generates quotes for customers and tracks the probability of the quote being converted into an order

Sales Order Processing & Invoicing

- Assign separate document and posting dates, and record quote and order dates, as well. Assigning separate documents and General Ledger posting dates enables you to post documents to the correct accounting period, especially useful when recording “after the fact” invoices
- You can recommend substitutions for out-of-stock items and allow easily select these substitute items while processing quotes, orders, and invoices. Your shipments won’t have to wait when an item is unavailable
- PowerEasy allows partial shipment of sales orders so you can begin invoicing customers at the earliest opportunity
- Specify how discounts should be managed, then enter markdowns as percentages or amounts. You also can choose to enter trade discounts for an entire document
- Reduce the need for keeping excess inventory on hand. You can order items from your supplier to be sent directly to your customer by entering drop ship items on sales transactions
- Create “kit items” in the Inventory module and sell them through Sales Order Processing
- Save time and help ensure accuracy by transferring information from an existing sales order to a new sales order
- Manage inventory shortages by allocating inventory from multiple sites for the same item, as well as options including substitution, overriding, or selling the balance
- You can optimize picking efficiency with the ability to pick according to warehouse Bin locations
- Manage inventory more effectively with optional settings that prevent discontinued items from being entered on a quote, order, back order, or invoice
- Customize and print pick tickets and packing lists to help your staff quickly and easily assemble and ship the orders you’ve entered
- You can select the orders you want to ship and print multiple pick lists, packing slips, or invoices. Tracks back orders and sales promotions when used in conjunction with the Order Entry module

Backorder Tracking

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Reporting Capabilities

- Your business gets a superior competitive edge, with easy-to-use stock analysis tools and flexible reporting capabilities that deliver access to detailed, consolidated inventory and ordering information



- Keep the most important information in front of you while drilling down for more details; making inquiries across PowerEasy applications; or bringing up customer payment, shipping, and billing information
- Need one more point for Reporting

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