Purchase Order Definitions

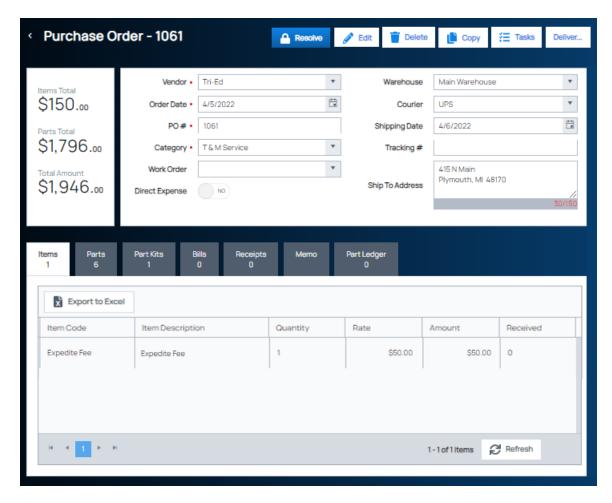
Last Modified on 04/27/2022 7:25 pm EDT

A Purchase Order (PO) is used to order goods and services from a Vendor. If ordering parts, they may be received in a warehouse or direct expensed to a work order.

When viewing a Purchase Order, there are several tabs available for adding, viewing, editing, or deleting information. Each tab of the Purchase Order will be described below.

Items Tab

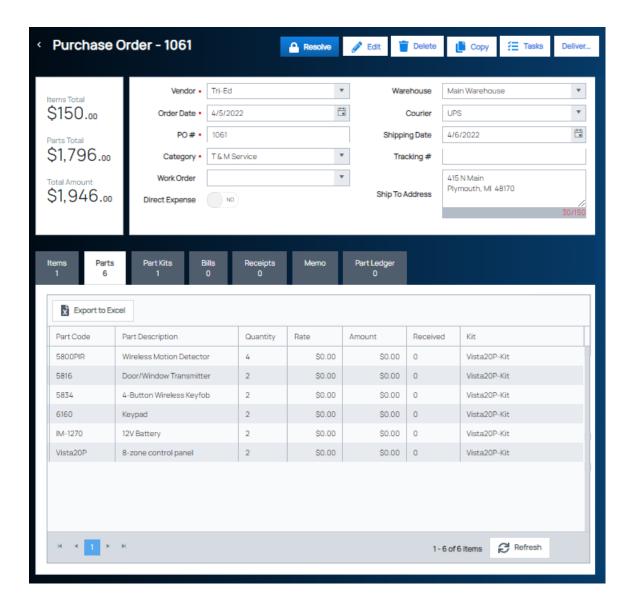
The Items tab will display all items added to the Purchase Order. If in edit mode, users may add additional items, and edit or delete existing items.



Parts Tab

The Parts tab will display all parts added to the Purchase Order. If in edit mode, users may add additional parts, and edit or delete existing parts. If part kits were added on the Part Kits tab, all parts contained in the kit multiplied by the number of kits being purchased will be shown in the grid area. The rate will be zero since you are paying a lump sum for the price of the parts within the kit.

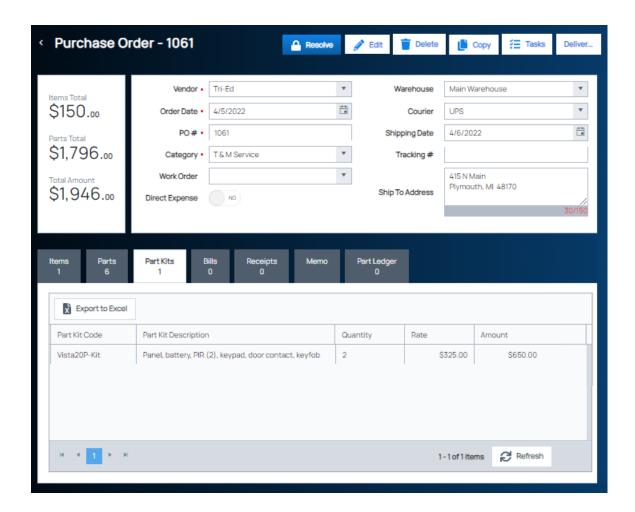
If there is text in the Kit column, this indicates a part kit has been selected on the Part Kits tab.



Part Kits Tab

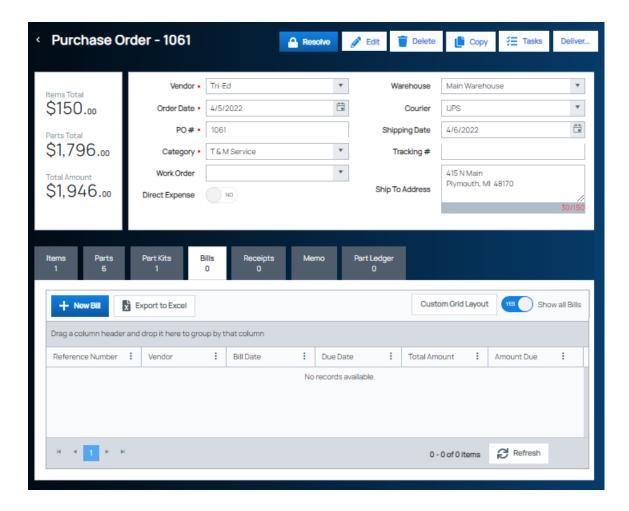
The Part Kits tab will list all kits being purchased on the PO. When selecting a part kit, the individual parts that comprised the kit will be displayed on the Parts tab.

Part Kits are created and maintained in setup. Setup > Items & Parts > Part Kits.



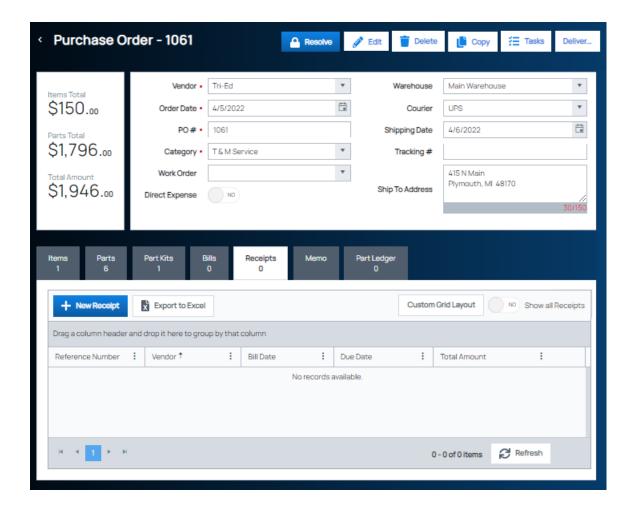
Bills Tab

If any vendor bills have been entered which are associated with the Purchase Order, they will be displayed in the grid area. Bills may be opened for viewing and may be edited if no payments or credits have been applied to the bill.



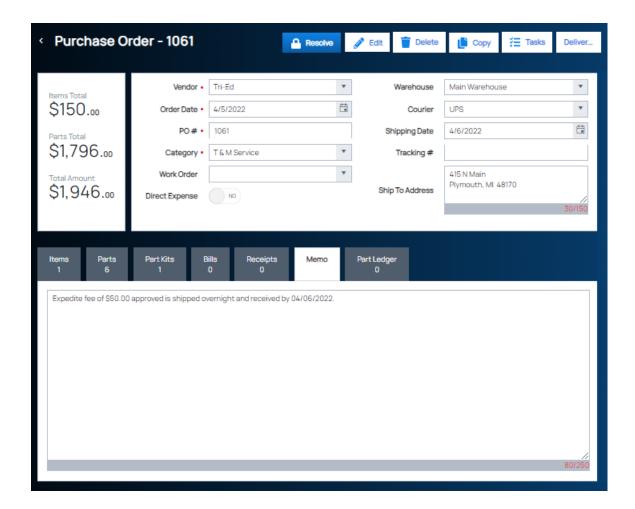
Receipts Tab

Any receipts for the Purchase Order will be listed in the grid area. Receipts may be opened for viewing and may be edited if the receipt has not been converted into a bill.



Memo Tab

The Memo tab displays information that was entered primarily for the purpose of printing on the Purchase Order.



Part Ledger Tab

The Part Ledger tab will display all transactions related to parts for the Purchase Order.

