

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.

Purchase Order - 1061

Resolve Edit Delete Copy Tasks Deliver...

Items Total: \$150.00
Parts Total: \$1,796.00
Total Amount: \$1,946.00

Vendor: Tri-Ed
Order Date: 4/5/2022
PO #: 1061
Category: T & M Service
Work Order:
Direct Expense: NO

Warehouse: Main Warehouse
Courier: UPS
Shipping Date: 4/6/2022
Tracking #:
Ship To Address: 415 N Main, Plymouth, MI 48170

Items: 1 | Parts: 6 | Part Kits: 1 | Bills: 0 | Receipts: 0 | Memo: | Part Ledger: 0

Export to Excel

Item Code	Item Description	Quantity	Rate	Amount	Received
Expedite Fee	Expedite Fee	1	\$50.00	\$50.00	0

1 - 1 of 1 items Refresh

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.

Purchase Order - 1061 Resolve Edit Delete Copy Tasks Deliver...

Items Total
\$150.00

Parts Total
\$1,796.00

Total Amount
\$1,946.00

Vendor: Tri-Ed Warehouse: Main Warehouse

Order Date: 4/5/2022 Courier: UPS

PO #: 1061 Shipping Date: 4/6/2022

Category: T & M Service Tracking #:

Work Order: Ship To Address: 415 N Main, Plymouth, MI 48170

Direct Expense: NO

Items 1
Parts 6
Part Kits 1
Bills 0
Receipts 0
Memo
Part Ledger 0

Export to Excel

Part Code	Part Description	Quantity	Rate	Amount	Received	Kit
5800PIR	Wireless Motion Detector	4	\$0.00	\$0.00	0	Vista20P-Kit
5816	Door/Window Transmitter	2	\$0.00	\$0.00	0	Vista20P-Kit
5834	4-Button Wireless Keyfob	2	\$0.00	\$0.00	0	Vista20P-Kit
6160	Keypad	2	\$0.00	\$0.00	0	Vista20P-Kit
IM-1270	12V Battery	2	\$0.00	\$0.00	0	Vista20P-Kit
Vista20P	8-zone control panel	2	\$0.00	\$0.00	0	Vista20P-Kit

1 - 6 of 6 items Refresh

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.

Purchase Order - 1061 Resolve Edit Delete Copy Tasks Deliver...

Items Total
\$150.00

Parts Total
\$1,796.00

Total Amount
\$1,946.00

Vendor: Tri-Ed Warehouse: Main Warehouse

Order Date: 4/5/2022 Courier: UPS

PO #: 1061 Shipping Date: 4/6/2022

Category: T & M Service Tracking #:

Work Order: Ship To Address: 415 N Main, Plymouth, MI 48170

Direct Expense: NO 30/150

Items 1
Parts 6
Part Kits 1
Bills 0
Receipts 0
Memo
Part Ledger 0

Export to Excel

Part Kit Code	Part Kit Description	Quantity	Rate	Amount
Vista20P-Kit	Panel, battery, PIR (2), keypad, door contact, keyfob	2	\$325.00	\$650.00

1 1 - 1 of 1 items Refresh

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.

Purchase Order - 1061 Resolve Edit Delete Copy Tasks Deliver...

Items Total
\$150.00

Parts Total
\$1,796.00

Total Amount
\$1,946.00

Vendor: Tri-Ed Warehouse: Main Warehouse

Order Date: 4/5/2022 Courier: UPS

PO #: 1061 Shipping Date: 4/6/2022

Category: T & M Service Tracking #:

Work Order: Ship To Address:

Direct Expense: NO 415 N Main
Plymouth, MI 48170

Items 1
Parts 6
Part Kits 1
Bills 0
Receipts 0
Memo
Part Ledger 0

[+ New Bill](#)
[Export to Excel](#)
Custom Grid Layout Show all Bills

Drag a column header and drop it here to group by that column

Reference Number	Vendor	Bill Date	Due Date	Total Amount	Amount Due
No records available.					

1
0 - 0 of 0 items
[Refresh](#)

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.

Purchase Order - 1061 Resolve Edit Delete Copy Tasks Deliver...

Items Total
\$150.00

Parts Total
\$1,796.00

Total Amount
\$1,946.00

<p>Vendor • Tri-Ed</p> <p>Order Date • 4/5/2022</p> <p>PO # • 1061</p> <p>Category • T & M Service</p> <p>Work Order</p> <p>Direct Expense <input type="radio"/> NO</p>	<p>Warehouse Main Warehouse</p> <p>Courier UPS</p> <p>Shipping Date 4/6/2022</p> <p>Tracking #</p> <p>Ship To Address 415 N Main Plymouth, MI 48170</p>
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Items 1
Parts 6
Part Kits 1
Bills 0
Receipts 0
Memo
Part Ledger 0

[+ New Receipt](#)
[Export to Excel](#)
Custom Grid Layout NO
Show all Receipts

Drag a column header and drop it here to group by that column

Reference Number	Vendor	Bill Date	Due Date	Total Amount
No records available.				

1
0 - 0 of 0 items
[Refresh](#)

Memo Tab

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

Purchase Order - 1061 Resolve Edit Delete Copy Tasks Deliver...

Items Total \$150.00 Parts Total \$1,796.00 Total Amount \$1,946.00	Vendor • Tri-Ed Order Date • 4/5/2022 PO # • 1061 Category • T & M Service Work Order Direct Expense <input type="radio"/> NO	Warehouse Main Warehouse Courier UPS Shipping Date 4/6/2022 Tracking # Ship To Address 415 N Main Plymouth, MI 48170
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30/150

Items 1	Parts 6	Part Kits 1	Bills 0	Receipts 0	Memo	Part Ledger 0
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Expedite fee of \$50.00 approved is shipped overnight and received by 04/06/2022.

80/250

Part Ledger Tab

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

< Purchase Order - 1061

Resolve Edit Delete Copy Tasks Deliver...

Items Total \$150.00 Parts Total \$1,796.00 Total Amount \$1,946.00	Vendor • Tri-Ed	Warehouse • Main Warehouse
	Order Date • 4/5/2022	Courier • UPS
	PO # • 1061	Shipping Date • 4/6/2022
	Category • T & M Service	Tracking #
	Work Order	Ship To Address 415 N Main Plymouth, MI 48170
	Direct Expense <input type="radio"/> NO	30/150

Items 1 Parts 6 Part Kits 1 Bills 0 Receipts 0 Memo Part Ledger 0

Export to Excel Custom Grid Layout

Drag a column header and drop it here to group by that column

Entry	Record Type	Origin	Entry Date	Total Amount	Status
No records available.					

1 0 - 0 of 0 items Refresh