

Add a Purchase Order

Last Modified on 06/11/2025 8:20 pm EDT

You can create a purchase order from the open purchase orders list (Accounts Payable > Purchase Orders > New Purchase Order button) or from a Vendor record. Both methods are described in this topic.

Create a Purchase Order from the Purchase Orders List

Navigate to Accounts Payable > Purchase Orders. The Purchase Orders list opens. Click the **New Purchase Order** button located at the upper left of the page.

Purchase Orders

[+ New Purchase Order](#) [Export to Excel](#) Custom Grid Layout ☐ NO Show all POs

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

PO #	Vendor	Order Date	Total Amount	Resolved	Memo
1003	Bold Group Software	Aug 28, 2017	\$1,967.48	<input type="radio"/> NO	
1004	Phillips Electric	Aug 28, 2017	\$1,967.48	<input type="radio"/> NO	
1005	ADI	Sep 6, 2017	\$1,957.48	<input type="radio"/> NO	
1006	ADI	Sep 7, 2017	\$1,967.48	<input type="radio"/> NO	
1007	ADI	Sep 12, 2017	\$1,987.48	<input type="radio"/> NO	
1008	ADI	Sep 12, 2017	\$1,967.48	<input type="radio"/> NO	
1009	DCS	Sep 13, 2017	\$1,957.48	<input type="radio"/> NO	
1010	DCS	Sep 18, 2017	\$1,967.48	<input type="radio"/> NO	
1011	ADI	Sep 20, 2017	\$1,967.48	<input type="radio"/> NO	
1012	DCS	Oct 4, 2017	\$1,967.48	<input type="radio"/> NO	
1013	Bold Group Software	Oct 4, 2017	\$1,967.48	<input type="radio"/> NO	
1014	Bold Group Software	Oct 5, 2017	\$1,967.48	<input type="radio"/> NO	

1 - 33 of 33 items [Refresh](#)

The New Purchase Order page opens. The upper right panel contains the header information for the purchase order. Each data entry field is described below.

< Purchase Order - 1060

Create
X Cancel

Items Total
\$150.00

Parts Total
\$1,796.00

Total Amount
\$1,946.00

Vendor • Tri-Ed ▼

Order Date • 4/5/2022 📅

PO # • 1060

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

30/150

Items 1
Parts 3
Part Kits 0
Memo

+ Add Items
📄 Export to Excel

	Item Code	Item Description	Quantity	Rate	Amount	Received	
=	Equipment & Supplies	Equipment & Supplies	1	\$150.00	\$150.00	0	🗑️

⏪ ⏩ 1 ⏪ ⏩
1 - 1 of 1 items 🔄 Refresh

Data Entry Fields

Fields with a red bullet to the left of the field label are required fields.

- **Vendor:** Select the vendor from the drop-down list.
- **Order Date:** This field defaults to today's date. You can change this if necessary.
- **PO #:** The purchase order number is automatically be assigned. You can change this if desired. This is an alphanumeric field that allows up to 25 characters.
- **Category:** Select the appropriate category from the drop-down list.
- **Work Order:** If all items and parts on the PO are for one specific work order, click on the drop-down arrow to select the work order.
- **Direct Expense:** If the PO is for a work order, typically this toggle button should be set to Yes.
- **Warehouse:** If parts are being ordered for inventory, select the warehouse to receive the parts.
- **Courier:** From the drop-down list, select how the parts or items will be shipped to your company.
- **Shipping Date:** This field defaults to today's date. If your vendor has provided this information, select the date the vendor will ship the order.
- **Tracking #:** If your vendor has provided a shipper's tracking number, enter it into this field. This is for information purposes only.
- **Shipping Address:** If the order is being shipped to your company, enter the complete address. If the order is to be shipped to a customer or subcontractor, enter the address.

When you finish filling in the header information, select the items and parts for the purchase order. If you want to enter the ordered items later, but want to save the PO#, click the **Create** button at the upper right of the page.

Create a Purchase Order from a Vendor Record

Navigate to Accounts Payable > Vendors. The Vendors list opens. Locate the preferred vendor in the list, and then click on the hyperlink in the Vendor # column.

Vendors

[+ New Vendor](#) [Export to Excel](#) [Custom Grid Layout](#)

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

Vendor # ↑	Name	Account #	Open Balance	Phone 1
1000	Perennial Software	1000	\$390.00	(440) 247-5602
1001	ADI		\$4,070.00	(888) 245-3653
1002	DCS	1456123	\$260.00	(905) 760-3000
1003	Bold Group Software	0123456789	\$0.00	
1004	Joseph & Joseph Attorneys	11222	\$0.00	
1005	Acme Alarm Services		\$0.00	
1234	Bosch		\$0.00	4405490304
1235	A1 Testing Labs		\$0.00	4405490304
1236	Ace Hardware		\$3,753.50	(888) 555-2222
2500	Bosch Security Systems	32558	\$0.00	
2501	Tri-Ed	FES10225	\$0.00	
2503	DMP	102245	\$0.00	2135551010
2504	Phillips Electric	123	\$0.00	(123) 455-1233

1 - 13 of 13 items [Refresh](#)

The Vendor record opens. Click on the Purchase Orders tab, and then click the **New Purchase Order** button. The remainder of the process is the same as creating a PO from the Purchase Order list.

Tri-ed - 2501

EditTasksHistory

Open Receipts
\$0.00

Open Bills
\$0.00

Open Credits
\$0.00

Open Balance
\$0.00

Vendor Aging

1.2

1

0.8

0.6

0.4

0.2

0

Current

1-30 Days

31-60 Days

61-90 Days

91+

Address
PO Box 3255 Los Angeles, CA 90025

Phone

Email

1099 Eligible?

No

Remit To Address
-

Customer #
FES10225

Term
Net 45

Purchase Orders
1

Receipts
0

Bills
0

Payments
0

Credits
0

Checks
0

Parts
1

Notes
0

Docs
0

Part Ledger
0

+ New Purchase Order

Export to Excel

Custom Grid Layout

NO Show all POs

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

PO #	Order Date	Total Amount	Resolved	Memo
49	Apr 6, 2022	\$2,006.48	NO	

0 - 0 of 0 items

Refresh

Add Parts to the Purchase Order

Click on the Parts tab, and then click the **Add Parts** button.

Purchase Order - 1060 Create Cancel

Items Total
\$150.00

Parts Total
\$1,796.00

Total Amount
\$1,946.00

Vendor: Tri-Ed

Order Date: 4/5/2022

PO #: 1060

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

30/150

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

+ Add Parts Export to Excel

Part Code	Part Description	Quantity	Rate	Amount	Received
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1 - 1 of 1 items Refresh

The Add Parts page opens. Select the checkbox to the left of each part to be included in the Purchase Order. When finished, click the **Add Parts** button at the bottom of the page.

Add Parts - □ ×

Search Parts 🔍 Parts Selected: 1 + Create Part

	Part Code ↑	Description	Rate	Cost	Labor Units	Pnl	Qty
<input type="checkbox"/>	0300-004	AXIS SMALL INDOOR NETWORK CAMERA	\$504.00	\$152.00	0	<input type="radio"/> NO	0
<input type="checkbox"/>	5800PIR	Wireless Motion Detector	\$125.00	\$62.10	0	<input type="radio"/> NO	0
<input checked="" type="checkbox"/>	5816	Door/Window Transmitter	\$50.00	\$30.00	0	<input type="radio"/> NO	0
<input type="checkbox"/>	5834	4-Button Wireless Keyfob	\$45.00	\$16.16	0	<input type="radio"/> NO	0
<input type="checkbox"/>	6160	Keypad	\$125.00	\$45.00	0	<input type="radio"/> NO	0
<input type="checkbox"/>	AC-RP26	Alarm Control Remote Plate	\$15.00	\$5.00	0	<input type="radio"/> NO	0
<input type="checkbox"/>	AC-RP44	Alarm Control Remote Plate	\$16.00	\$5.00	0	<input type="radio"/> NO	0
<input type="checkbox"/>	ARV1355DN1HK	AV1355DN1HK IP DOME W/HEATER	\$1,500.00	\$755.00	0	<input type="radio"/> NO	0

1 - 55 of 55 items Refresh

+ Add Parts Cancel

The selected parts appear in the grid area.

The quantity defaults to 1 and the rate defaults from the part setup. Click once on the part row to edit the quantity and the rate.

Purchase Order - 1060 Create Cancel

Items Total
\$150.00

Parts Total
\$1,796.00

Total Amount
\$1,946.00

Vendor: Tri-Ed

Order Date: 4/5/2022

PO #: 1060

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

30/150

Items 1

Parts 3

Part Kits 0

Bills 0

Receipts 0

Memo

+ Add Parts

Export to Excel

	Part Code	Part Description	Quantity	Rate	Amount	Received	
=	5800PIR	Wireless Motion Detector	1	\$62.10	\$621.00	0	
=	IM-1270	12V Battery	1	\$7.00	\$175.00	0	
=	Vista20P	8-zone control panel	1	\$100.00	\$1,000.00	0	

1 - 1 of 1 items Refresh

The Edit PO Part form opens. Enter the correct quantity and rate. Click the **OK** button when finished. Repeat this process for each part where changes need to be made.

Edit PO Part ✕

Part Code: 5800PIR

Part Description: Wireless Motion Detector

Quantity: 10

Rate: 62.1

Amount: \$621.00

Received:

✓ OK ✕ Cancel

Add Items to the Purchase Order

Click on the Items tab, and then click the **Add Items** button.

Purchase Order - 1060 Create Cancel

Items Total
\$150.00

Parts Total
\$1,796.00

Total Amount
\$1,946.00

Vendor: Tri-Ed

Order Date: 4/5/2022

PO #: 1060

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

30/150

Items: 0

Parts: 3

Part Kits: 0

Memo:

+ Add Items Export to Excel

Item Code	Item Description	Quantity	Rate	Amount	Received

1 - 1 of 1 items Refresh

The Add Items page opens. Select the checkbox to the left of each item to be included in the Purchase Order. When finished, click the **Add Items** button at the bottom of the page.

Add Items - □ ×

Search Items

Items Selected: 1 + Create Item

	Item Code	Name	Taxable	Recurring	Rate	Cost
<input type="checkbox"/>	Accounting Fees	Accounting Fees	<input type="radio"/> NO	<input type="radio"/> NO	\$0.00	\$0.00
<input checked="" type="checkbox"/>	Equipment & Supplies	Equipment & Supplies	<input type="radio"/> NO	<input type="radio"/> NO	\$0.00	\$0.00
<input type="checkbox"/>	Freight	Freight	<input type="radio"/> NO	<input type="radio"/> NO	\$0.00	\$0.00
<input type="checkbox"/>	Legal Fees	Legal Fees	<input type="radio"/> NO	<input type="radio"/> NO	\$0.00	\$0.00
<input type="checkbox"/>	Mailing	Mailing	<input type="radio"/> NO	<input type="radio"/> NO	\$0.00	\$0.00
<input type="checkbox"/>	Office Supplies	Office Supplies	<input type="radio"/> NO	<input type="radio"/> NO	\$0.00	\$0.00
<input type="checkbox"/>	Rent	Rent	<input type="radio"/> NO	<input type="radio"/> NO	\$1,500.00	\$0.00
<input type="checkbox"/>	Sales Tax	Sales Tax	<input type="radio"/> NO	<input type="radio"/> NO	\$0.00	\$0.00
<input type="checkbox"/>	Sub Labor	Subcontractor Labor	<input type="radio"/> NO	<input type="radio"/> NO	\$0.00	\$0.00
<input type="checkbox"/>	Travel-Lodging	Travel - Lodging	<input type="radio"/> NO	<input type="radio"/> NO	\$0.00	\$0.00
<input type="checkbox"/>	Travel-Meals	Travel - Meals	<input type="radio"/> NO	<input type="radio"/> NO	\$0.00	\$0.00
<input type="checkbox"/>	Utilities	Utilities	<input type="radio"/> NO	<input type="radio"/> NO	\$0.00	\$0.00

1 - 13 of 13 items Refresh

+ Add Items Cancel

The selected items appear in the grid area.

The quantity defaults to 1 and the rate defaults from the item setup. Click once on the item row to edit the quantity and the rate.

< Purchase Order - 1060

CreateCancel

Items Total
\$150.00

Parts Total
\$1,796.00

Total Amount
\$1,946.00

VendorTri-Ed

Order Date4/5/2022

PO #1060

CategoryT & M Service

Work Order

Direct ExpenseNO

WarehouseMain Warehouse

CourierUPS

Shipping Date4/6/2022

Tracking #

415 N Main
Plymouth, MI 48170

30/150

Items1

Parts3

Part Kits0

Memo

+ Add Items

Export to Excel

	Item Code	Item Description	Quantity	Rate	Amount	Received	
=	Equipment & Supplies	Equipment & Supplies	1	\$0.00	\$0.00	0	

1

1 - 1 of 1 items

Refresh

The Edit PO Item form opens. Enter the correct quantity and vendor cost if needed. Click the **OK** button when finished. Repeat this process for each item where changes need to be made.

Use the **Update Part Cost?** switch to update the part cost when they edit the cost on a purchase order.

To be able to set the Update Part Cost switch to YES, the vendor on the purchase order must be the vendor associated with the part.

Setting this to YES will update the vendor part cost so future purchase orders will use the updated part cost instead of the cost from the inventory part. This changes the purchase order cost without changing the inventory cost. This does not affect the standard cost of the part. Managely creates purchase price variances (PPV) for cost differences.

You can see the part cost on the part (Inventory > Parts > part detail) and can see the vendor cost on the part Vendor tab (Inventory > Parts > part detail > Vendor tab) in the Vendor Cost column. The Cost on the part and the Vendor Cost can be different. If you want these to be the same, edit the part and change the Cost field or update the part cost on the next purchase order to match the part cost in inventory.

By default, the Update Part Cost switch is NO.

Note: On the System Defaults page (Setup > Company > System Defaults), there is an existing switch called Auto Vendor Part Cost Update. This will enable updating the part cost for all parts regardless of the switch Update Part Cost? on the Edit PO Part form.