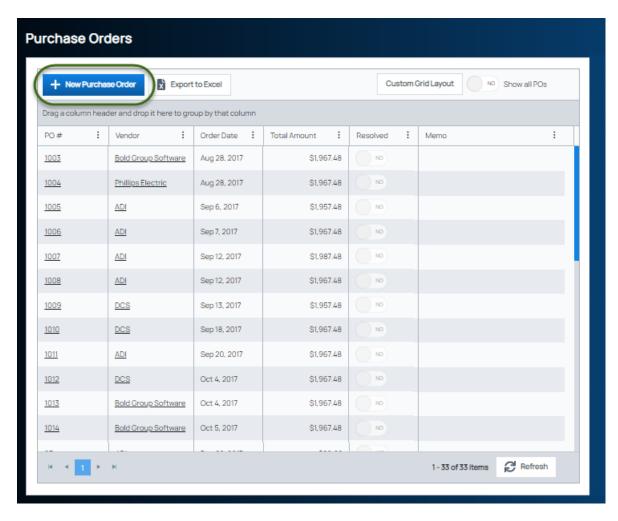
Add a Purchase Order

Last Modified on 04/28/2022 8:27 am EDT

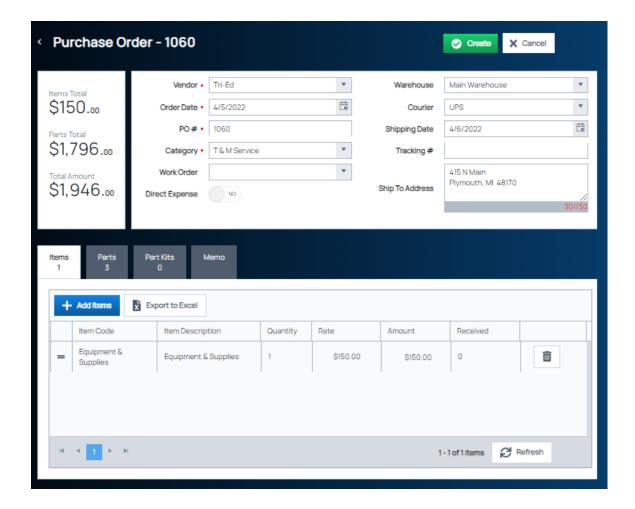
A purchase order may be created from the open purchase orders list (Accounts Payable > Purchase Orders >New Purchase Order button) or from a Vendor record. Both methods will be described in this topic section.

Create a Purchase Order from the Purchase Orders List

Navigate to Accounts Payable > Purchase Orders. The Purchase Orders list will be displayed. Click on the New Purchase Order button located at the upper left of the page.



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



Data Entry Fields

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

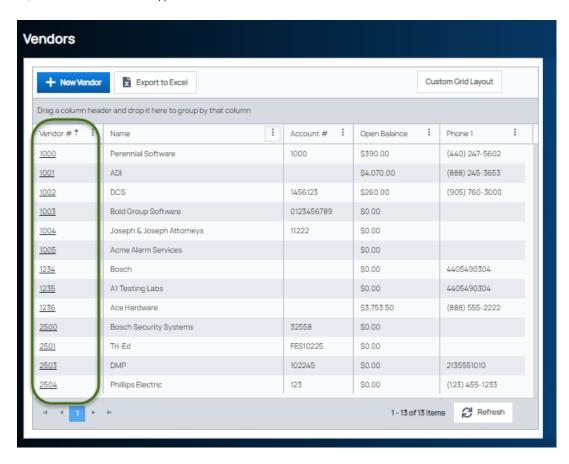
- Vendor Select the vendor from the drop-down list.
- Order Date This field will default to today's date. You may override this if necessary.
- **PO#** The purchase order number will automatically be assigned. You may change this if desired. This is an alphanumeric field, that will allow up to 25 characters.
- 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 will be set to Yes.
- Warehouse If parts are being ordered for inventory, select the warehouse into which the parts will be received.
- Courier From the drop-down list, select how the parts and/or items will be shipped to your company.
- **Shipping Date** This field will default 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, you may 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.

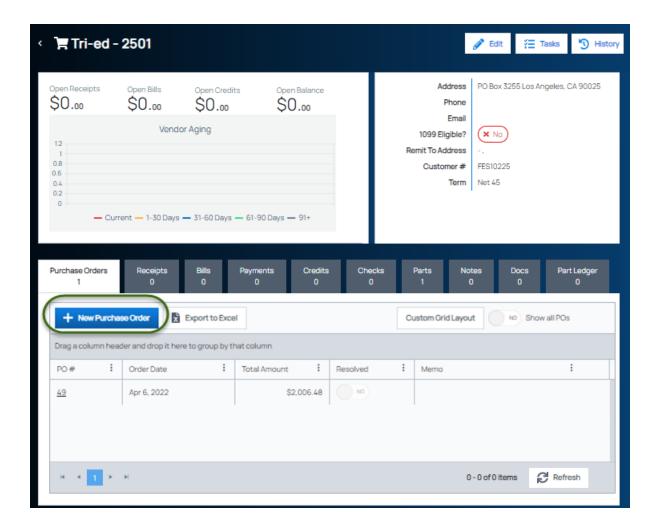
When finished filling in the header information, you may now select the Items and/or Parts for the purchase order. If you want to enter the ordered items later, but want to save the PO#, click the Create button at the upper right of the page.

Create a Purchase Order from a Vendor Record

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

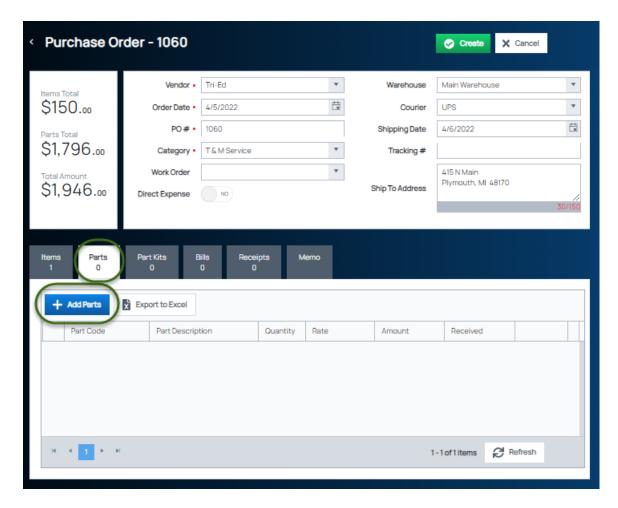


The Vendor record will be displayed. Click on the Purchase Orders tab, and then click on the New Purchase Order button. The remainder of the process is the same as creating a PO from the Purchase Order list.

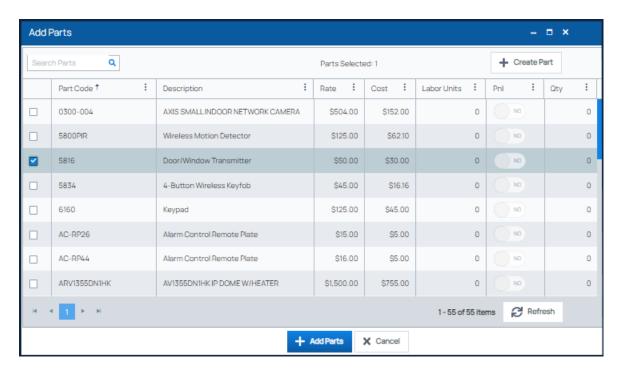


Add Parts to the Purchase Order

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

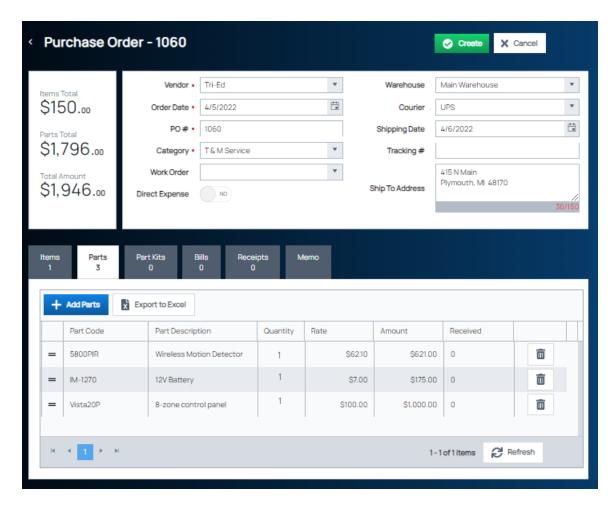


The Add Parts page will be displayed. Check the box to the left of each part to be included in the Purchase Order. When finished, click the Add Parts button at the bottom of the page.

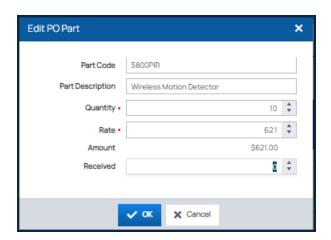


The selected parts will appear in the grid area.

The quantity will default to 1 and the rate will default from the part setup. Click once on the part row to edit the quantity and/or the rate.

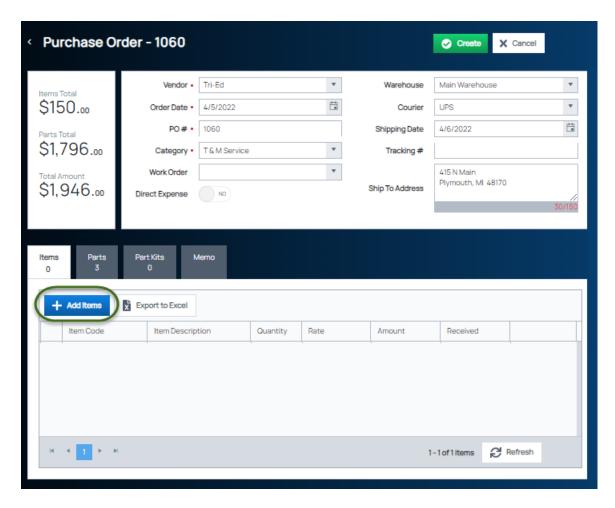


The Edit PO Part form will be displayed. Enter the correct quantity and/or rate. Click the OK button when finished. Repeat this process for each part where changes need to be made.

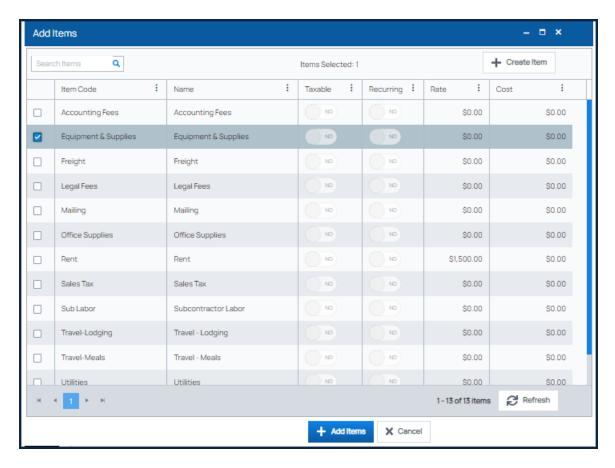


Add Items to the Purchase Order

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

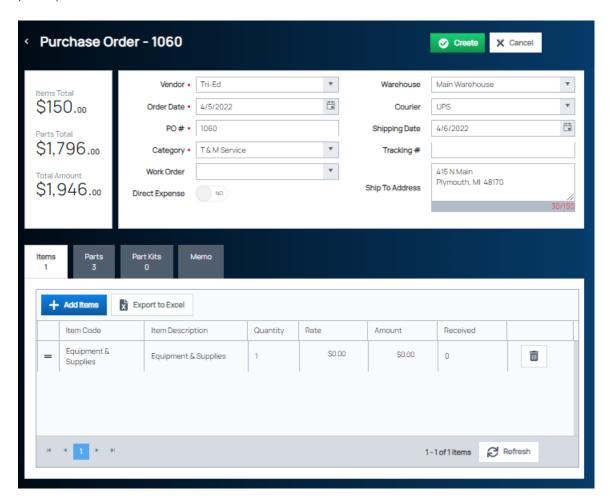


The Add Items page will be displayed. Check the box to the left of each item to be included in the Purchase Order. When finished, click the Add Items button at the bottom of the page.



The selected items will appear in the grid area.

The quantity will default to 1 and the rate will default from the item setup. Click once on the item row to edit the quantity and/or the rate.



The Edit PO Item form will be displayed. Enter the correct quantity and/or rate. Click the OK button when finished. Repeat this process for each item where changes need to be made.

