

# Add a Purchase Order

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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.

**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
<a href="#">1003</a>	<a href="#">Bold Group Software</a>	Aug 28, 2017	\$1,967.48	<input type="checkbox"/> NO	
<a href="#">1004</a>	<a href="#">Phillips Electric</a>	Aug 28, 2017	\$1,967.48	<input type="checkbox"/> NO	
<a href="#">1005</a>	<a href="#">ADI</a>	Sep 6, 2017	\$1,957.48	<input type="checkbox"/> NO	
<a href="#">1006</a>	<a href="#">ADI</a>	Sep 7, 2017	\$1,967.48	<input type="checkbox"/> NO	
<a href="#">1007</a>	<a href="#">ADI</a>	Sep 12, 2017	\$1,987.48	<input type="checkbox"/> NO	
<a href="#">1008</a>	<a href="#">ADI</a>	Sep 12, 2017	\$1,967.48	<input type="checkbox"/> NO	
<a href="#">1009</a>	<a href="#">DCS</a>	Sep 13, 2017	\$1,957.48	<input type="checkbox"/> NO	
<a href="#">1010</a>	<a href="#">DCS</a>	Sep 18, 2017	\$1,967.48	<input type="checkbox"/> NO	
<a href="#">1011</a>	<a href="#">ADI</a>	Sep 20, 2017	\$1,967.48	<input type="checkbox"/> NO	
<a href="#">1012</a>	<a href="#">DCS</a>	Oct 4, 2017	\$1,967.48	<input type="checkbox"/> NO	
<a href="#">1013</a>	<a href="#">Bold Group Software</a>	Oct 4, 2017	\$1,967.48	<input type="checkbox"/> NO	
<a href="#">1014</a>	<a href="#">Bold Group Software</a>	Oct 5, 2017	\$1,967.48	<input type="checkbox"/> NO	

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

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.

**Purchase Order - 1060** Create Cancel

Items Total <b>\$150.00</b> Parts Total <b>\$1,796.00</b> Total Amount <b>\$1,946.00</b>	Vendor • Tri-Ed Order Date • 4/5/2022 PO # • 1060 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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Items 1 | Parts 3 | Part Kits 0 | Memo

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

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 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.

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

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.

Tri-ed - 2501

Open Receipts \$0.00    Open Bills \$0.00    Open Credits \$0.00    Open Balance \$0.00

Vendor Aging

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    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	<input type="radio"/> NO	

0 - 0 of 0 items    Refresh

## Add Parts to the Purchase Order

Click on the Parts tab, and then click on 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

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

1 - 1 of 1 items
Refresh

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.

**Add Parts** - □ ×

Parts Selected: 1
**+ Create Part**

<input type="checkbox"/>	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="checkbox"/> NO	0
<input type="checkbox"/>	5800PIR	Wireless Motion Detector	\$125.00	\$62.10	0	<input type="checkbox"/> NO	0
<input checked="" type="checkbox"/>	5816	Door/Window Transmitter	\$50.00	\$30.00	0	<input type="checkbox"/> NO	0
<input type="checkbox"/>	5834	4-Button Wireless Keyfob	\$45.00	\$16.16	0	<input type="checkbox"/> NO	0
<input type="checkbox"/>	6160	Keypad	\$125.00	\$45.00	0	<input type="checkbox"/> NO	0
<input type="checkbox"/>	AC-RP26	Alarm Control Remote Plate	\$15.00	\$5.00	0	<input type="checkbox"/> NO	0
<input type="checkbox"/>	AC-RP44	Alarm Control Remote Plate	\$16.00	\$5.00	0	<input type="checkbox"/> NO	0
<input type="checkbox"/>	ARV1355DNIHK	AVI355DNIHK IP DOME W/HEATER	\$1,500.00	\$755.00	0	<input type="checkbox"/> NO	0

1 - 55 of 55 items
Refresh

**+ Add Parts**
**× Cancel**

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.

**Purchase Order - 1060**

<b>Items Total</b> \$150.00  <b>Parts Total</b> \$1,796.00  <b>Total Amount</b> \$1,946.00	<b>Vendor</b> • Tri-Ed <b>Order Date</b> • 4/5/2022 <b>PO #</b> • 1060 <b>Category</b> • T & M Service <b>Work Order</b> <b>Direct Expense</b> <input type="radio"/> NO	<b>Warehouse</b> Main Warehouse <b>Courier</b> UPS <b>Shipping Date</b> 4/6/2022 <b>Tracking #</b> <b>Ship To Address</b> 415 N Main Plymouth, MI 48170
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+ Add Parts		Export to Excel				
Part Code	Part Description	Quantity	Rate	Amount	Received	
5800PIR	Wireless Motion Detector	1	\$621.00	\$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

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.

**Edit PO Part**

**Part Code** 5800PIR  
**Part Description** Wireless Motion Detector  
**Quantity** • 10  
**Rate** • 621  
**Amount** \$621.00  
**Received**

## Add Items to the Purchase Order

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

**Purchase Order - 1060**

<b>Items Total</b> \$150.00  <b>Parts Total</b> \$1,796.00  <b>Total Amount</b> \$1,946.00	<b>Vendor</b> • Tri-Ed <b>Order Date</b> • 4/5/2022 <b>PO #</b> • 1060 <b>Category</b> • T & M Service <b>Work Order</b> <b>Direct Expense</b> <input type="radio"/> NO	<b>Warehouse</b> Main Warehouse <b>Courier</b> UPS <b>Shipping Date</b> 4/6/2022 <b>Tracking #</b> <b>Ship To Address</b> 415 N Main Plymouth, MI 48170
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0   
  3   
  0   

  

Item Code	Item Description	Quantity	Rate	Amount	Received

1 - 1 of 1 items   

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.

**Add Items** - □ ×

Search Items   Items Selected: 1   

<input type="checkbox"/>	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

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.

**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

Items: 1 | Parts: 3 | Part Kits: 0 | Memo: 0

+ 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 of 1 items Refresh

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.

**Edit PO Item** ✗

Item Code: Equipment & Supplies  
Item Description: Equipment & Supplies  
Quantity: 1  
Rate: 150  
Amount: \$150.00  
Received: 0

✓ OK ✗ Cancel