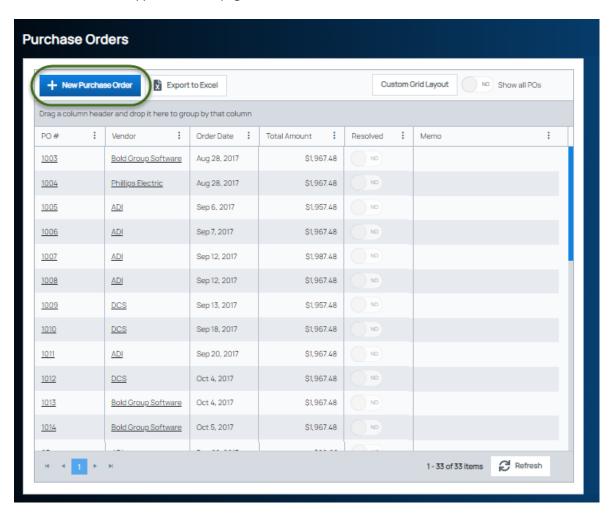
Add a Purchase Order

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

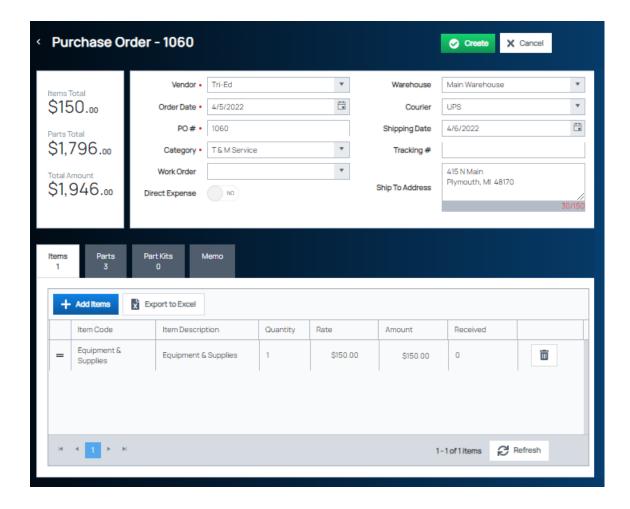
You can create a purchase order from the open purchase orders list (Accounts Payable > Purchase Orders > New Purchase Order button) or from a Vendor record. Both methods are described in this topic.

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.



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.



Data Entry Fields

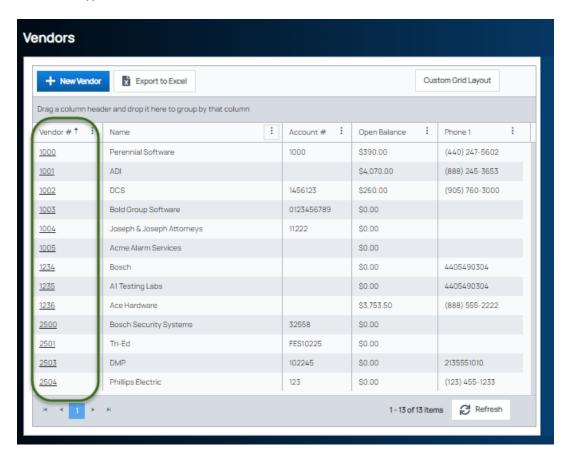
Fields with a red bullet to the left of the field label are required fields.

- 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.

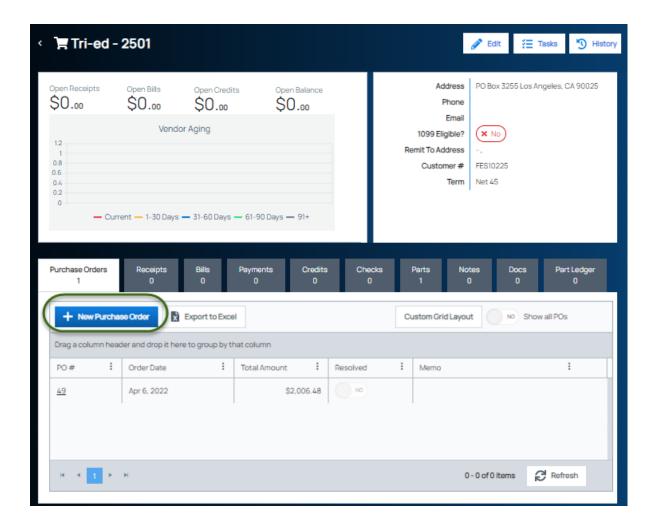
When you finish filling in the header information, select the items and parts for the purchase order. If you want to enter the ordered items later, but want to save the PO#, click the **Create** button at the upper right of the page.

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.

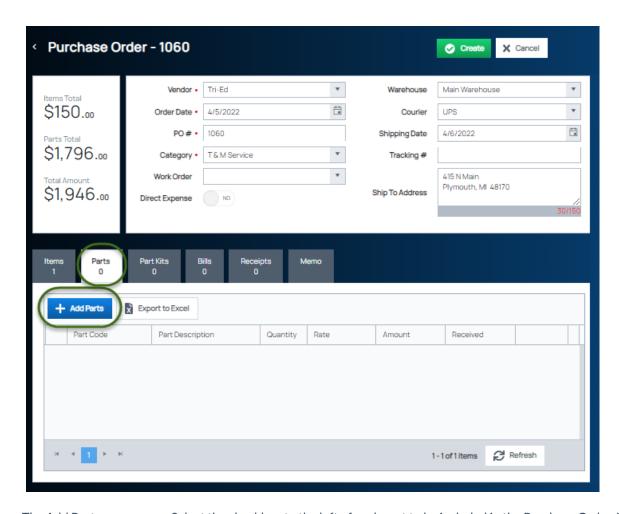


The Vendor record opens. Click on the Purchase Orders tab, and then click the **New Purchase Order** button. The remainder of the process is the same as creating a PO from the Purchase Order list.

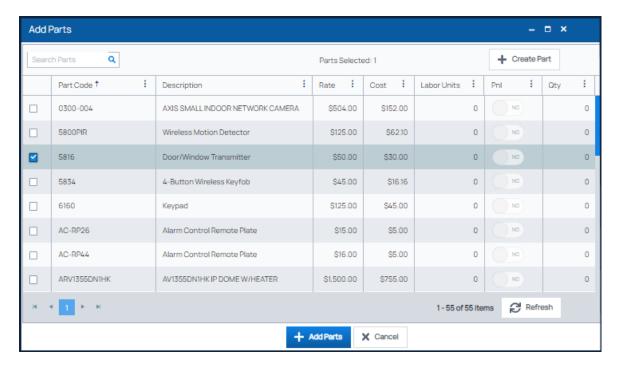


Add Parts to the Purchase Order

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

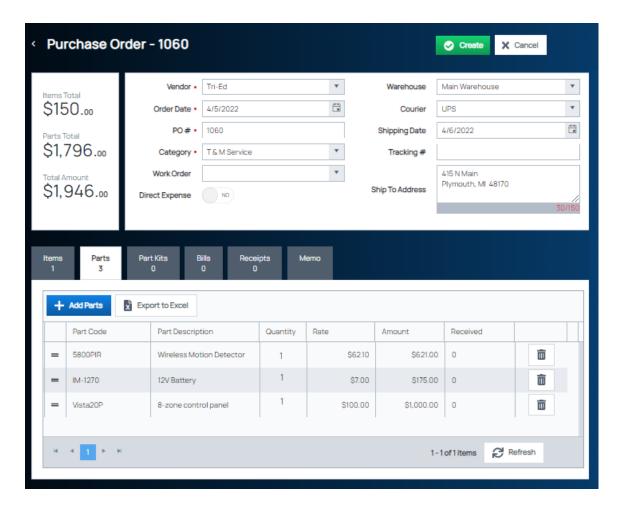


The Add Parts page opens. Select the checkbox to the left of each part to be included in the Purchase Order. When finished, click the **Add Parts** button at the bottom of the page.

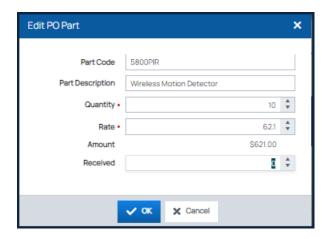


The selected parts appear in the grid area.

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.

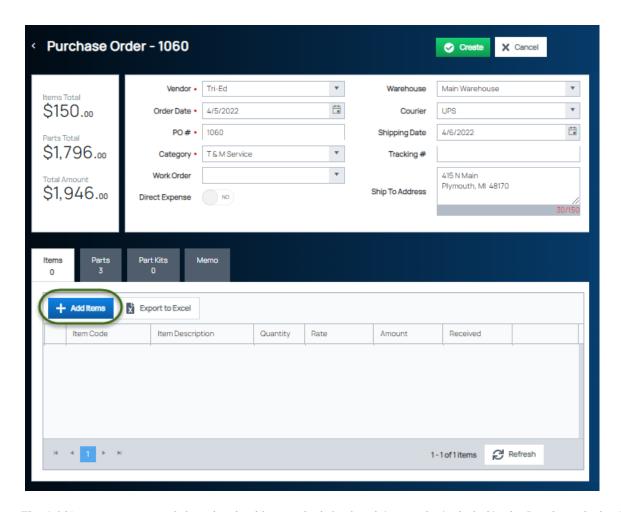


The Edit PO Part form opens. Enter the correct quantity and rate. Click the **OK** button when finished. Repeat this process for each part where changes need to be made.

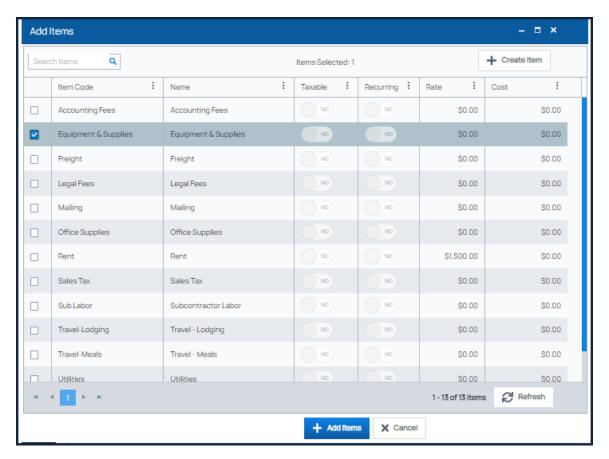


Add Items to the Purchase Order

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

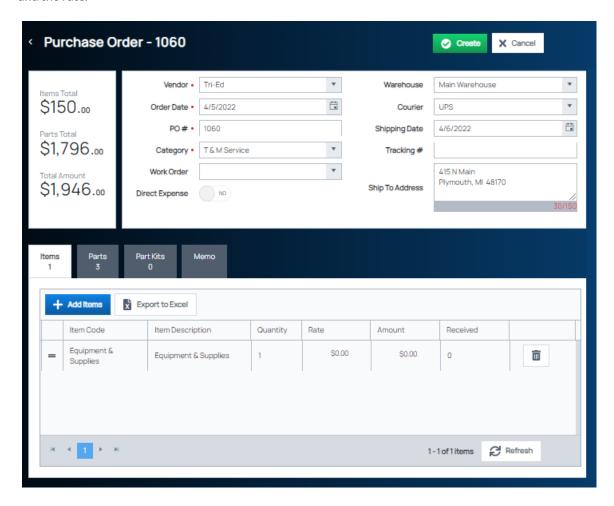


The Add Items page opens. Select the checkbox to the left of each item to be included in the Purchase Order. When finished, click the **Add Items** button at the bottom of the page.

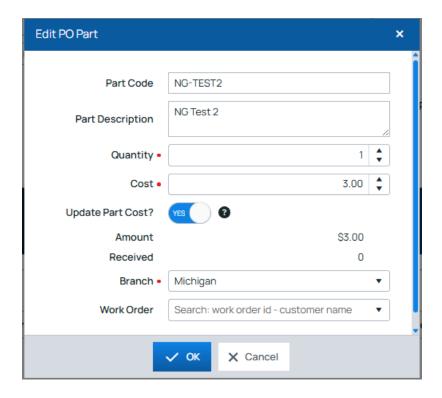


The selected items appear in the grid area.

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.



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.