

Add a Purchase Order

Last Modified on 12/11/2024 2:51 pm EST

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](#) [x 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 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 <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

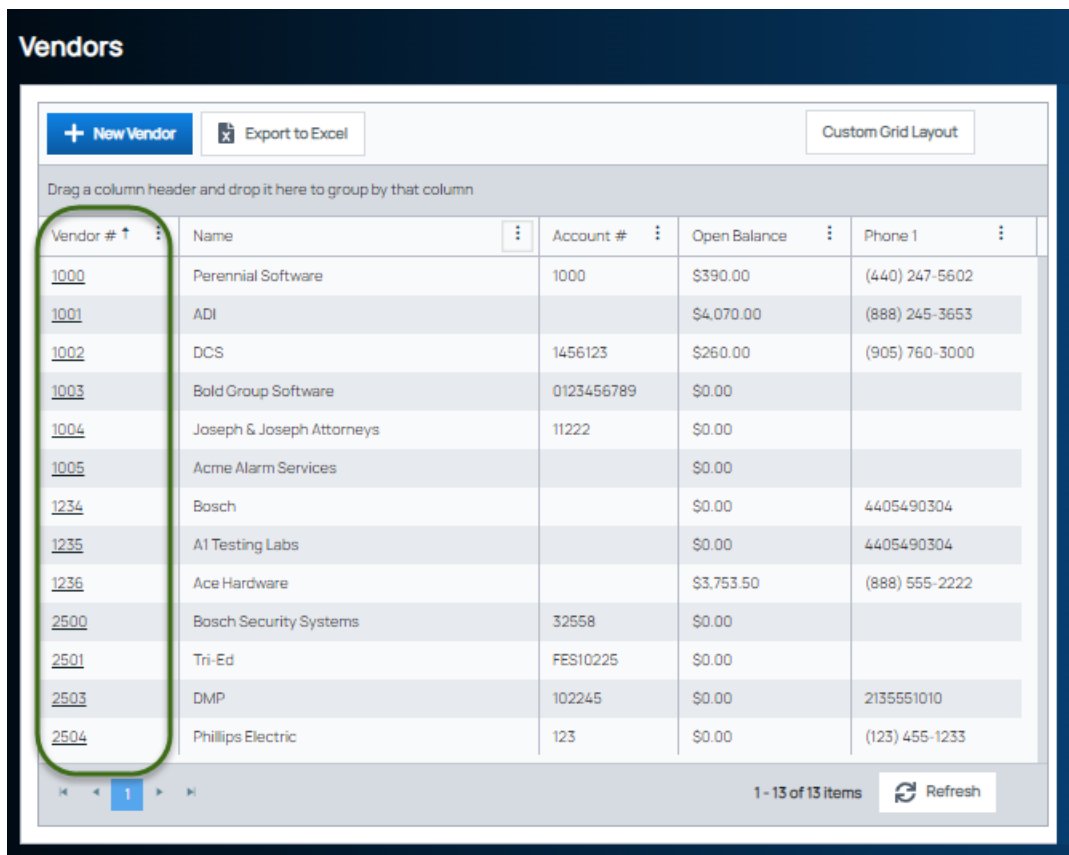
Fields with a red bullet to the left of the field label are required fields.

- **Vendor:** Select the vendor from the drop-down list.
- **Order Date:** This field 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

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 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 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 - □ ×

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="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"/>	ARV1355DNIHK	AVI355DNIHK 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

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:

Part Description:

Quantity:

Rate:

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

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 <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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Item Code	Item Description	Quantity	Rate	Amount	Received
1 - 1 of 1 items <input type="button" value="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

	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 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 ✓ 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

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 opens. Enter the correct quantity and 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