

# Email or Print a Purchase Order

Last Modified on 04/27/2022 7:26 pm EDT

To print or email a purchase order to the vendor, open the purchase order record from either the Open Purchase Order list or from the Vendor record.

Once the purchase order is displayed, click on the Deliver button at the upper right of the page.

## Email a Purchase Order

To email the purchase order, click the Email option.

The screenshot shows the 'Purchase Order - 1060' form. At the top right, there is a toolbar with buttons for 'Resolve', 'Edit', 'Delete', 'Copy', 'Tasks', and 'Deliver...'. The 'Deliver...' button is circled in green. Below the toolbar, the form is divided into several sections. On the left, there is a summary box showing 'Items Total \$150.00', 'Parts Total \$1,796.00', and 'Total Amount \$1,946.00'. The main form area contains fields for '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 #', and 'Ship To Address' (415 N Main, Plymouth, MI 48170). A '30/150' indicator is visible at the bottom right of the form. Below the form, there is a table with columns for 'Item Code', 'Item Description', 'Quantity', 'Rate', 'Amount', and 'Received'. The table contains one row: 'Equipment & Supplies' with a quantity of 1, a rate of \$150.00, and an amount of \$150.00. The table has a pagination bar at the bottom showing '1' of 1 items and a 'Refresh' button.

The Email Purchase Order dialog box will be displayed. If there is an email address setup on the vendor, this will auto-fill into the Email field. If you want to send to a different email address or if no email address is on file for the vendor, type in the desired email address. Click the Email button when finished. The purchase order will be sent as a .pdf attachment to the email.

The screenshot shows the 'Email Purchase Order' dialog box. It has a title bar with a close button (X). The main area contains an 'Email' field with the text 'carolynj@boldgroup.com'. At the bottom, there are two buttons: 'Cancel' and 'Email'.

## Print a Purchase Order

To print or preview the purchase order, click on either the Preview or Print option.

Both options will create a .pdf file and will appear on your windows tray. Double-click on the .pdf file to open for viewing. If you want to save a copy of the purchase order, once the file is open, click the download arrow to save to the desired location.

If selecting the preview option, if you are satisfied with the purchase order, click again on the Deliver button and select the Print option.

**Purchase Order - 1060**

Resolve Edit Delete Copy Tasks **Deliver...**

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

Preview  
Print  
Email

Items: 1, Parts: 3, Part Kits: 0, Memo:   
Export to Excel

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

1 - 1 of 1 items Refresh

Sample Purchase Order



**Best Security**

547 E Washington St.  
Suite 2111  
Chagrin Falls, OH 44023  
800-867-5309  
bestsecurity.com

# Purchase Order

Purchase Order # <b>1060</b>	Customer # <b>FES10225</b>	Purchase Order Date <b>4/5/2022</b>	Shipping Method <b>UPS</b>	Delivery Date <b>4/6/2022</b>	Total Amount <b>\$1,946.00</b>
---------------------------------	-------------------------------	--	-------------------------------	----------------------------------	-----------------------------------

To:  
Tri-Ed  
PO Box 3255  
Los Angeles, CA 90025 -

Ship To:  
415 N Main  
Plymouth, MI 48170

---

Item #	Description	QTY	Rate	Amount
Equipment & Supplies	Equipment & Supplies	1.00	\$150.00	\$150.00
5800PIR	Wireless Motion Detector	10.00	\$62.10	\$621.00
IM-1270	12V Battery	25.00	\$7.00	\$175.00
Vista20P	8-zone control panel	10.00	\$100.00	\$1,000.00
			<b>Total</b>	<b>\$1,946.00</b>