

How To Create Purchase Order

Here are the steps on how to create a Purchase Order:

1. From the **Main Menu**, expand **Purchasing** and click **Purchase Orders**. **Search Purchase Order** will be displayed.
2. Click **New** toolbar button to open blank Purchase Order screen.

- a. Click on **Vendor** to open combo box and then select vendor.
- b. After selecting Vendor: **Ship From**, **Contact**, **Ship Via** and **Terms** fields will be automatically populated by the details entered in Vendor screen.
- c. **Date** will default to today's date. Change date if necessary by selecting from the mini calendar dropdown or by entering the date manually.
- d. **Order Status** will show **Open** and will remain open as long as Purchase Order is not yet processed.
- e. **Ship To** - will default to the address entered in the **Common Info > Company Location**. This will be your location where items are to be shipped.
- f. **Ordered By** - will default to the user that is currently logged in.
- g. **Expected** - will default to today's date. This is the date you expect to receive the items.
- h. Click the **Freight Terms** dropdown button and select freight terms from the list.
- i. **Currency** - will default to the currency set in **Company Preference > Settings** screen

4. Add details on grid.

- a. Click **Insert** button or directly click **Item No.** field. Click dropdown button and select item from the list.
- b. **Description**, **UOM**, and **Cost** column will be automatically populated with the details of the selected item.

Item No.	Contract	Description	Misc Description	UOM	Contract Qty	Ordered	Received	Discou...	Cost	Tax	Total	Additional Info	Sub Location
☐ Coffee		Coffee Beans	Coffee Beans		0	0	0	0%	2.80	0.00	0.00		

- c. **Stock information** of the selected item will also be displayed.
 - i. **Item** - will display the Item Number and the Description of the selected item in the grid.
 - ii. **In Stock** - displays the total quantity in stock. This field changes every time an item is sold or purchased.
 - iii. **Committed** - displays the total quantity of the selected inventory item that has been ordered but not yet invoiced/shipped. This field changes every time an order is created and when an order is invoiced.
 - iv. **On Order (PO)** - displays the total quantity on order. This field changed every time a purchase order for the selected inventory item is created.
 - v. **Back Order** - displays the total quantity on back order. This field changes every time an invoice for the selected inventory item is posted where there are not enough stock to complete the order (Shipped qty is less than Ordered qty).

Item:	Coffee - Coffee Beans			
On Hand:	300.00	On Order (PO):	200.00	
Committed:	0.00	Back Order:	0.00	

- d. Select **UOM**.
- e. Enter **Ordered** quantity. **Total** amount will be computed based on the item's Cost.
- f. Amount fields will also be filled up with the computed amounts from the grid.
 - i. **Subtotal** - displays the total of all the line items entered in the grid.
 - ii. **Shipping** - displays the shipping cost of the transaction.
 - iii. **Tax** - display the calculated tax for the Tax Code fields.
 - iv. **Total** - displays the total of the Subtotal, Freight, and Tax fields. This is the amount entered to the Accounts Payable account in the General Ledger after posting the transaction.

Item No.	Contract	Description	Misc Description	UOM	Contract Qty	Ordered	Received	Discou...	Cost	Tax	Total	Additional
☐		Coffee	Coffee Beans	Bushels	0	500	0	0%	2.80	0.00	1,400.00	

Ship From:	Indianapolis, IN 46201 United States	Item:	Coffee - Coffee Beans	On Hand:	300.00	On Order (PO):	200.00	Approval		Subtotal:	1,400.00	
Ship To:	Fort Wayne, IN 46815 United States	Committed:	0.00	Back Order:	0.00	Require Approval:	<input type="checkbox"/>	Status:		Shipping:	0.00	
									Approval Notes:		Tax:	0.000000
											Total:	1,400.00

5. Save record by clicking **Save** toolbar button. A system-generated ID will be displayed in the **Purchase No** field.

Purchase Order - Cracked Mug

New Save Search Delete Undo Print Process Duplicate Approve Submit Reject Close

Details Attachments (0) Comments (0) Audit Log (1)

Vendor: Cracked Mug Ship From: Cracked Mug Contact: Cracked Mug Purchase No: PO-13

Date: 02/09/2016 Ship To: 0001 - Fort Wayne Ordered By: irelyadmin Order No:

Terms: Due on Receipt Ship Via: Truck Expected: 02/09/2016 Currency: USD

Order Status: Open Freight Terms: Pickup Approved By: Reference:

Item No.	Contract	Description	Misc Description	UOM	Contract Qty	Ordered	Received	Discou...	Cost	Tax	Total	Additional
☑		Coffee	Coffee Beans	Bushels	0	500	0	0%	2.80	0.00	1,400.00	

Ship From:	Indianapolis, IN 46201 United States	Item:	Coffee - Coffee Beans	On Hand:	300.00	On Order (PO):	700.00	Approval		Subtotal:	1,400.00	
Ship To:	4242 Flagstaff Cove Fort Wayne, IN 46815 United States	Committed:	0.00	Back Order:	0.00	Require Approval:	<input type="checkbox"/>	Status:		Shipping:	0.00	
									Approval Notes:		Tax:	0.000000
											Total:	1,400.00

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You can skip saving the record if the transaction is to be processed right away. This will be catered when Purchase Order is being processed to Inventory Receipt. (See)

Here are the steps on how to create a Purchase Order:

1. From the **Main Menu**, click **Purchasing > Purchase Orders**. If there is an existing record, docked **Search Purchase Order** screen will open. Otherwise, blank **Purchase Order** screen will open automatically.
2. If **Search Purchase Order** screen opens, click **New** toolbar button to open blank **Purchase Order** screen.

Menu Filter Menu

System Manager Common Info Dashboard General Ledger Financial Reports Cash Management Credit Card Reconciliation Inventory Purchasing **Purchase Orders** Bill Batch Entry Bills Recurring Transactions Batch Posting Pay Bills Pay Bill Details Print Checks Paid Bills History Vendor Expense Approval Import Bills from Origin Vendors Open Payables Vendor History Cash Requirements Check Register AP Transactions by GL Account Sales Payroll Notes Receivable Grain Contract Management Risk Management Scale Logistics Manufacturing Tank Management Card Fueling Store Help Desk

Purchase Order

New View Refresh Close 31 records

Purchase Order Number Date Vendor Name Vendor Order Number Location

Purchase Order

New Save Search Delete Undo Print Process Duplicate Vendor Close

Details Attachments

Vendor ID: Date: 06/26/2015 Location: AP's Compay Location Contract No: Currency: USD Order Status: Open Purchase No:

Ship From: Ship To: AP's Compay Location Contact: Order No:

AP's St. Cor Test Ave Columbus, OH 43270 United States Ship Via: Ordered By: AGADMIN

Expected: 06/26/2015 Approved By:

Freight Terms: Prepaid:

Reference: Terms:

Item No.	Description	Misc Description	UOM	Ordered	Contract Qty	Received	Discoun.	Cost	Tax	Total

Item:		On Order (PO):		Subtotal:	0.000000
On Hand:		Back Order:		Shipping:	0.000000
Committed:				Tax:	0.000000
				Total:	0.000000

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3. Fill in fields.
 - a. Click on **Vendor ID** combo box button and select vendor.
 - b. After selecting Vendor: **Ship From**, **Contact**, **Ship Via** and **Terms** fields will be automatically populated by the details entered in Vendor screen.
 - c. **Date** will default to today's date. Change date if necessary by selecting from the mini calendar dropdown or by entering the date manually.
 - d. **Location** filed will show the default location of the user. Click dropdown button and select new location if necessary.
 - e. **Currency** - will default to the currency set in Company Preference > Settings screen
 - f. **Order Status** will show **Open** and will remain open as long as Purchase Order is not yet processed.

- g. **Ship To** - will default to the address entered in the **Common Info > Company Location**. This will be your location where items are to be shipped.
 - h. **Ordered By** - will default to the user that is currently logged in.
 - i. **Expected** - will default to today's date. This is the date you expect to receive the items.
 - j. Click the **Freight Terms** dropdown button and select freight terms from the list.
4. Add details on grid.

- a. Click **Insert** button or directly click **Item No.** field. Click dropdown button and select item from the list.
- b. **Description, UOM, Cost** and **Storage Location** (if there's a setup) column will be automatically populated with the details of the selected item.

Item No.	Description	Misc Description	UOM	Ordered	Contract Qty	Received	Discoun...	Cost	Tax	Tota
✓ 'WHEAT	'wheat - inv		Each	0	0	0	0%	12.50	None	0.
'Glass installation	'Glass installation - Services		Each	0	0	0	0%	12.50	None	0.
'Car Rentals	'Car Rentals - Other Charge		Each	0	0	0	0%	25.00	None	0.
'Office Supplies	'Office Supplies - non inv		Each	0	0	0	0%	9.99	None	0.
'121 Software	'121 Software		Each	0	0	0	0%	35.00	None	0.

- c. **Stock information** of the selected item will also be displayed.

Item:	'WHEAT - 'wheat - inv		
On Hand:	2	On Order (PO):	1
Committed:	0	Back Order:	0

- i. **Item** - will display the Item Number and the Description of the selected item in the grid.
 - ii. **In Stock** - displays the total quantity in stock. This field changes every time an item is sold or purchased.
 - iii. **Committed** - displays the total quantity of the selected inventory item that has been ordered but not yet invoiced/shipped. This field changes every time an order is created and when an order is invoiced.
 - iv. **On Order (PO)** - displays the total quantity on order. This field changed every time a purchase order for the selected inventory item is created.
 - v. **Back Order** - displays the total quantity on back order. This field changes every time an invoice for the selected inventory item is posted where there are not enough stock to complete the order (Shipped qty is less than Ordered qty).
- d. Enter **Ordered** quantity. **Total** amount will be computed based on the item's Cost.
 - e. Amount fields will also be filled up with the computed amounts from the grid.

Subtotal:	75.00
Shipping:	0.00
Tax:	0.00
Total:	75.00

- i. **Subtotal** - displays the total of all the line items entered in the grid.
 - ii. **Shipping** - displays the shipping cost of the transaction.
 - iii. **Tax** - display the calculated tax for the Tax Code fields.
 - iv. **Total** - displays the total of the Subtotal, Freight, and Tax fields. This is the amount entered to the Accounts Payable account in the General Ledger after posting the transaction.
5. Save record by clicking **Save** toolbar button. A system-generated ID will be displayed in the **Purchase No** field.

Purchase Order							
New	Save	Search	Delete	Undo	Print	Process	Duplicate
<div> <div>Details</div> <div>Attachments</div> </div>							
Vendor ID:	Date:	Location:	Contract No:	Currency:	Order Status:	Purchase No:	
V'100	06/29/2015	AP's Company Location		USD	Open	PO-33	
Ship From:	AP's Location	Ship To:	AP's Company Location	Contact:	Order No:		
AP's St. Cor 100 Test Drive Westerlo, NY 12193 United States		AP's St. Cor Test Ave Columbus, OH 43270 United States		Ship Via:	Ordered By:	AGADMIN	
				Expected:	Approved By:	AGADMIN	
				Freight Terms:	Prepaid:		
Reference:				Terms:	3% 5 Net 15		



You can skip saving the record if the transaction is to be processed right away. This will be catered when Purchase Order is being processed to Inventory Receipt. (See)

Here are the steps on how to create a Purchase Order:

- From the **Main Menu**, click **Accounts Payable Activities** and click **Purchase Order**. If there is an existing record, **Search Purchase Order** screen will open. Otherwise, **Purchase Order** screen will open automatically.

- If Search Purchase Order screen opens, click **New** toolbar button to open blank Purchase Order screen.

- Fill in fields.
 - Click on **Vendor ID** combo box button and select vendor.
 - After selecting Vendor: **Ship From**, **Contact**, **Ship Via** and **Terms** fields will be automatically populated by the details entered in Vendor screen.
 - Date** will default to today's date. Change date if necessary by selecting from the mini calendar dropdown or by entering the date manually.
 - Location** field will show the default location of the user. Click dropdown button and select new location if necessary.
 - Currency** - will default to the currency set in Company Preference > Settings screen
 - Order Status** will show **Open** and will remain open as long as Purchase Order is not yet processed.
 - Ship To** - will default to the address entered in the Common Info > Company Location. This will be your location where items are to be shipped.
 - Ordered By** - will default to the user that is currently logged in.
 - Expected** - will default to today's date. This is the date you expect to receive the items.
 - Click the **Freight Terms** dropdown button and select freight terms from the list.
- Add details on grid.

- Click **Insert** button or directly click **Item No.** field. Click dropdown button and select item from the list.
- Description**, **UOM**, **Cost** and **Storage Location** column will be automatically populated with the details of the selected item.
- Stock information of the selected item will also be displayed.

Item:	Item 1 - Sample Item 1			
In Stock:	0	On Order (PO):	0	
Committed:	0	Back Order:	0	

- Item** - will display the Item Number and the Description of the selected item in the grid.
 - In Stock** - displays the total quantity in stock. This field changes every time an item is sold or purchased.
 - Committed** - displays the total quantity of the selected inventory item that has been ordered but not yet invoiced/shipped. This field changes every time an order is created and when an order is invoiced.
 - On Order (PO)** - displays the total quantity on order. This field changed every time a purchase order for the selected inventory item is created.
 - Back Order** - displays the total quantity on back order. This field changes every time an invoice for the selected inventory item is posted where there are not enough stock to complete the order (Shipped qty is less than Ordered qty).
- Enter **Ordered** quantity. **Total** amount will be computed based on the item's Cost.
 - Amount fields will also be filled up with the computed amounts from the grid.

Subtotal:	75.00
Shipping:	0.00
Tax:	0.00
Total:	75.00

- Subtotal** - displays the total of all the line items entered in the grid.
 - Shipping** - displays the shipping cost of the transaction.
 - Tax** - display the calculated tax for the Tax Code fields.
 - Total** - displays the total of the Subtotal, Freight, and Tax fields. This is the amount entered to the Accounts Payable account in the General Ledger after posting the transaction.
- Save record by clicking **Save** toolbar button. A system-generated ID will be displayed in the **Purchase No** field.

Purchase Order

New Save Search Delete Undo Print Process Duplicate Vendor Inventory Close

Details Attachments

Vendor ID: 000000001 Date: 02/27/2015 Location: FW Warehouse Contract No: Currency: USD Order Status: Open Purchase No: PO-1

Ship From: 01 Ship To: FW Warehouse Contact: Order No.:
 01 TEST DRIVE
 Chesterville, OH 43317
 FW Test Avenue
 Fort Wayne, IN 46801
 United States

Ship Via: UPS Ground Expected: 02/27/2015 Ordered By: AGADMIN
 Freight Terms: Deliver Approved By: SSIADMIN
 Terms: 5% 10 Net 30 Prepaid: ☐

Reference:



You can skip saving the record if the transaction is to be processed right away. This will be catered when Purchase Order is being processed to Inventory Receipt. (See)