

## MPO Purchasing Overview

Andrew: “Hey Robert, we need to order some gardening tools for the spring and I haven’t created a purchase order before. Do you think you could go over the basics with me again?”

Robert: “Sure thing. It’s really easy if you understand the process and what goes in the header and posting screens. Pick any menu option and we’ll take it from there.”

### Topics

- Purchasing Concepts
- Header Screen
- Posting Screen

### Purchasing concepts

Purchasing helps you answer important questions like:

- How many are we ordering?
- When are they arriving?
- Is there freight or other adders?
- What are the vendor terms?

Keeping your inventory accurate by creating and receiving Purchase Orders, helps you stock what you need and offer it at a competitive price.

The Purchasing process is essential to staying well stocked to meet your customer needs, maintaining visibility of your inventory, and maintain appropriate margins. If you’re going to be able to sell anything to a customer, you’ll have to purchase it first. The role of Purchasing and Receiving is to do that accurately and consistently while keeping clear records.

Inventory management or Purchasing and Receiving is the process of purchasing and tracking products.

In the Eagle, you will enter all items to be ordered on a Purchase Order, and then receive that Purchase Order into Inventory once the merchandise arrives from the supplier.

Purchase Orders should be created for any product that is purchased for your store. That means new items will need a SKU by creating an Inventory Record in Inventory Maintenance.

Eagle’s Purchase orders prepare you to meet your customer’s needs in a timely manner, while maintaining accurate records and competitive margins. Using Purchase Orders instead of placing a phone or manual order improves the reliability of your records. This helps you better monitor your costs, margins, reliability of suppliers, and lets you better monitor that you get what your order for the agreed upon terms.

Purchase orders let us make sure we have answers to these crucial questions:

- Does the item exist in Inventory?

- How many are we ordering?
- Who are we ordering this item from?
- What is the cost?
- Is there freight or other adders?
- What are the Terms?

Answering these questions upfront ensure we track our inventory well, and simplifies re-ordering.

Setting up a Purchase Order lets you keep track that you've ordered that product, and when it will arrive.

Including the new cost of the item on your purchase order allows you to realize the gross margin you need to stay profitable, which may lead you to change the retail price as well.

## Header Screen

The Header screen displays basic information about the Purchase Order including, the Vendor, PO Number, the Date Created, the Date Due, and the Backorder status.

Press the Post or View PO button for more details.

Use the View PO button to select a Purchase Order to view.

Use this (Vendor) dropdown to search for a PO by number, or change the search field using the change lookup link.

Select the Post button to view the Posting Screen.

This is where quantities are received and costs are updated. You can toggle back and forth between the Header and the Posting screen at any time.

The MPO Header screen gives you general information about your Purchase Orders.

You can create a new Purchase Order here, or, view an existing one by selecting the View PO button.

This opens the Purchasing Viewer.

Use this dropdown to search for a PO by Vendor.

You can change the search field by using the change lookup link.

Choices include SKU, alternate PO number, and manufacturer part number. Select OK.

To display a Purchase Order on the Header screen, select it from the list and press F4 or the Select button.

The Header screen displays the basic information about the PO, including the created date, due date, reference number, shipping address, and more...

The Buyer's ID is the user who created the purchase order.

Links labeled Terms, and Special Instructions show additional information about credit terms and related notes.

The Totals section shows you details about, the cost, freight, and other charges that are related to the purchase order.

If you want to view the items posted to a PO, select the Post button to head over to the Posting Screen.

This is where quantities are received and costs are updated. You can toggle back and forth between the Header and the Posting screen at any time.

## Posting Screen

To add a line enter its SKU here. If you don't know the SKU, enter a partial description in the Description box and press enter to perform a search.

Selecting a line will show its details below.

This button will return you to the header screen.

Items that have been added to a Purchase Order are visible on the Posting Screen.

Selecting a line displays the details in the corresponding fields, including the SKU, Quantity on Order, and cost of the selected item.

You can customize the viewer to include and sort the information you need.

Right Click on the column header and choose Columns to View. Select the desired columns, and press Apply.

If you're adding more items to a Purchase Order, fill in the Item SKU field, and press enter.

If you don't know the SKU, you can type a keyword in the Description field and hit enter to pull up the Item Viewer.

Choose the desired item, and press F4 or the Select button to add it to the posting grid.

The ribbon menu has the Tools and Reports tabs to help you manage creating and receiving P.O.s.

Some reports that you'll use often are Print or Fax Purchase Order, and Receipt Posting.

If you need to go back to the Header, of this PO, select this button on the file tab.

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