Creating Purchase Orders

Maintaining that perfect balance between having adequate stock on hand and over-ordering can be tricky.

Eagle's purchase order system eases this task, making it easier for you to manage your inventory.

Purchase orders may be created automatically by Suggested Order Reports. However, you can also create purchase orders manually as needed in Purchasing and Receiving.

Additionally, you will find that you can use Eagle viewers to make informed buying decisions.

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P&R Overview

Let's begin by launching Purchasing and Receiving from the Main Menu of the Eagle Browser.

Remember, you may also type MPO or PO in the launch bar to open Purchasing and Receiving.

You will find that Purchasing and Receiving is divided into two important pieces. The first page that displays includes header information for the purchase order such as Vendor, Purchase order number, Buyer and Terms.

Detail lines are managed on a separate Posting page.

With a Purchase Order displayed, press the Post Icon or F11 key to toggle to the Posting page.

From this page, detail lines are added, modified or deleted from a purchase order. Those lines include the SKU, the Quantity ordered, and the related Cost and retail Price.

Press F11 again or press the Header Icon to return to the Header page.

Create a PO

When creating a purchase order manually, certain fields are required. The Vendor Code, Purchase Order Number, Order Type, Buyer's ID and Terms are all required fields.

The Buyer's ID, PO number and Terms may be assigned automatically, but also may be overridden manually with appropriate security permissions.

Begin by indicating the Vendor code. Note that a special lookup is available and launched with the '=' key to look up vendors by name.

Next, a purchase order number is typically assigned automatically, and you may leave this field blank. In some cases you may wish to manually assign a purchase order number. If so, indicate the purchase order number here.

The Purchase Order type will most often be Blank for 'Normal', typically the most common type or 'C' for Credit Purchase Order. Other types are available for specific purposes.

Note that the buyers ID and Terms will be populated automatically in most cases but may be manually overridden if necessary.

The remaining fields are optional and can be filled in as needed.

Press the Add Icon and you will be prompted to confirm the purchase order type and then review the Vendor, PO number and Buyer.

As the purchase order is created, you may choose the OK button to proceed to the Posting page or select 'Header' to remain on the header page to update additional fields.

Now that you've created the purchase order, the next step is to post the line items.

Post Items

There are a variety of different ways to accomplish this task, many of which will be familiar to you from Point of Sale.

Each method provides you the opportunity to review sales history before items are posted to the purchase order.

Let's start with posting items using the Item/SKU field.

The posting screen opens with the cursor in the Item (SKU) field, so you're ready to begin.

Type in the item number, manufacturer part number, alternate part number, or UPC code, then press Enter.

Notice that the item detail fills in, including information about quantity on hand, quantity on order, and sales history.

Use this information to make a more informed decision on ordering the item.

Next, you'll enter the quantity.

There are two options for entering the quantity to order: Stocking unit and Purchase unit. If you are ordering items that are stocked and sold by the each, enter the number you want here.

If you're ordering items whose stocking unit is different from the purchasing unit, such as rope or wire, you can enter the quantity in either box. Just be sure that you use the correct number.

As an example, if chain comes in a 250-foot roll, and you want one roll, you could enter the stocking unit—250 feet—here, or the purchasing unit—1 roll—here.

Just as in Point of Sale, you can type a key word or phrase in the Description box if you don't have an item number handy.

When you press Enter, the inventory viewer opens, displaying all items that match your description lookup.

Highlight the item that you wish to add to your purchase order and press Enter. This pulls the item into the posting area for you, and you can enter the order quantity you desire.

If an item is in an Eagle Catalog but not in Eagle, you may quickly add it to inventory and a purchase order at the same time.

Press the 'Catalog' icon to launch the Eagle catalog, display the item you wish to order, and press the 'Add' or 'Order' icons to add the item to inventory, or to add the item to a purchase order.

The Inventory Viewer also offers a quick way to add multiple items to a purchase order.

You can open it by pressing the Viewer icon.

Use the ‘Change Lookup’ hotlink to manipulate which criteria the viewer uses to populate the grid.

Adding checkboxes and the Posting Quantity column sets up the viewer for use as a posting grid.
To do this, display the group of items that you’ll be selecting from.

Then right-click any column header and select Check boxes.

Right-click again to Select Columns to View, and check Posting Quantity.

Once you’ve done this, save the view so you can use it again with future purchase orders.

Simply click File, Save View, then select what you want to save.

The next time you need this view, click File, and then ‘Load View’ to access it.

Now, you’re ready to make your selections. Enter the quantities directly into the posting quantity field in the viewer.

Once you have entered the desired quantity of the items you wish to order, press Select, to pull the items into the posting screen of your purchase order.

A prompt asks you how you want to handle these new additions. Select the option that is most appropriate for your purchase order. Typically, you’ll select option 1 – Replace existing line items and Add if not on PO.

The system then imports the items that you selected in the grid and posts them to the purchase order.

Modify/Delete POs

Once the items have been posted, you can click an item to review its sales history or to make changes to the order quantity or cost.

Sometimes, you’ll have so many items on a purchase order that it’s hard to locate a specific SKU.

If this happens, type the item number in the Item (Sku) field. A prompt appears signaling that the item has already been posted and asks if you want to replace the existing line or add it again as a new line.

If you need to cancel an item on the purchase order, press Delete while in the posting grid.

When prompted, enter the line number to delete and press Enter.

You can also click the line you wish to cancel, bringing the item down to the posting area.

Pressing Delete at this point asks you to confirm that you want to delete the line you’ve selected.

Although the item has been canceled, it remains in the posting grid but its status changes to X.

This indicates that the item has been canceled. The ‘Quantity On Order’ will also be zero.

Once you have finished making your changes, press Enter to post the item back into the grid.

Once you have completed posting items to your purchase order, press Header or F11 to return to the Header Screen.

Use the toolbar to access the Misc menu and add special instructions or select post to add more items to the purchase order, or even choose Delete to cancel the entire PO.

As you can see, the Eagle purchasing system allows you to quickly add and modify purchase orders. Using methods very similar to those in Point of Sale, you can quickly and efficiently add items to a purchase order.

All the while, you're given sales history to help you make an informed buying decision.

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