Creating Purchase Orders

The purchase order system helps keep the balance between having adequate stock on hand and over-ordering which makes it easier to manage your inventory.

In this course, we show how to create purchase orders, post items to them, and change or delete them when necessary.

Objectives

- Create a PO
- Post Items
- Change/Delete POs

Create a PO

To create a purchase order, begin by launching Purchasing and Receiving from the Main Menu.

You may also do this by entering the shortcut MPO or PO in the launch bar.

The system divides purchasing and receiving into two important pages.

The first, or header page, includes header information for the purchase order such as Vendor, Purchase order number, Buyer and Terms.

The posting page shows detail lines for the items placed on the purchase order including each item's SKU, quantity ordered, related cost, and retail price.

Toggle between the pages by selecting the Post icon or pressing F11 on your keyboard.

The first step in creating purchase orders is to enter required information.

This includes the Vendor Code, Purchase Order Number, Order Type, Buyer's ID, Terms, and more.

The system may assign the Buyer's ID, PO number and Terms automatically. If you have the proper security permissions, you may override these manually.

Start with the Vendor code.

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

Next is the purchase order number.

The system typically assigns this automatically so you may leave this field blank.

In some cases, you may wish to manually assign a purchase order number.

If so, enter the purchase order number here.

The most common entry for the purchase order type is blank for normal or C for credit purchase order.

The system supplies other types for specific purposes such as special orders or requesting credit for defective merchandise.

For a detailed list of options, refer to online help.

In most cases, the system populates the buyers ID and terms automatically.

You can override these if necessary.

The remaining fields are optional. Fill them in as necessary.

When finished, select the Add icon.

The system prompts for order type confirmation.

Review the vendor, PO number, and buyer.

When ready to continue to the posting page, choose OK, or select Header to remain on the header page to update more fields.

Post Items

With the header information complete, the next step is to post the items.

As with point of sale, there are many ways to do this.

Each method provides you the opportunity to review sales history before posting to the purchase order.

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

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

There are two options for entering order quantity: stocking unit and purchase unit.

If ordering items stocked and sold by the each, enter the number you want here.

If ordering items whose stocking unit is different from the purchasing unit, such as rope or wire, enter the quantity in either box.

Just be sure to use the correct number.

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

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 the description lookup.

Highlight the item to add to the purchase order and press Enter.

This pulls the item into the posting area. Then enter the order quantity.

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

Select the Catalog icon.

Display the item you want to order and choose the Add or Order icons to add the item to inventory, or to add the item to a purchase order.

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

Open it by selecting the Viewer icon.

Use the Change Lookup link to select which criteria the viewer uses to populate the grid.

Adding checkboxes and the Posting Quantity column configures the viewer for use as a posting grid.

To do this, display the group of items from which to select.

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

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

Save the view for use with future purchase orders.

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

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

Enter the desired quantities directly into the posting quantity field in the viewer.

Choose Select to pull the items into the purchase order posting screen.

The system prompts for direction on how to handle the additions. Select an option applicable to the purchase order.

Typically, this is option 1 – Replace existing line items and Add if not on PO.

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

Change/Delete POs

Once the items post, click an item to review its sales history or to make changes to the order quantity or cost.

Sometimes, with so many items on a purchase order, it's hard to find a specific SKU.

If this happens, type the item number in the Item field.

A system prompt signals that the item has already posted and asks if you want to replace the existing line or add it again as a new line.

When finished making changes, press Enter to post the item back to the grid.

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.

Optionally, click the line wish to cancel which puts the item in the posting area.

Pressing Delete prompts you to confirm deletion for the line selected.

Even with the item canceled, it stays in the posting grid with a new status of X, showing that it's canceled.

The Quantity On Order will also be zero.

When completed posting items to the purchase order, select Header to return to the Header Screen.

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

Recap

As you can see, the purchase order system helps keep the balance between having adequate stock on hand and over-ordering which makes it easier to manage your inventory.

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About Epicor

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EPICOR

Corporate Office
804 Las Cimas Parkway
Austin, TX 78746
USA
Toll Free: +1.888.448.2636
Direct: +1.512.328.2300
Fax: +1.512.278.5590

Latin America and Caribbean
Blvd. Antonio L. Rodriguez #1882 Int. 104
Plaza Central, Col. Santa Maria
Monterrey, Nuevo Leon, CP 64650
Mexico
Phone: +52.81.1551.7100
Fax: +52.81.1551.7117

Europe, Middle East and Africa
No. 1 The Arena
Downshire Way
Bracknell, Berkshire RG12 1PU
United Kingdom
Phone: +44.1344.468468
Fax: +44.1344.468010

Asia
238A Thomson Road #23-06
Novena Square Tower A
Singapore 307684
Singapore
Phone: +65.6333.8121
Fax: +65.6333.8131

Australia and New Zealand
Suite 2 Level 8,
100 Pacific Highway
North Sydney, NSW 2060
Australia
Phone: +61.2.9927.6200
Fax: +61.2.9927.6298