Creating a Purchase Order

Purchase orders, or 'P.O.'s , are the beginning of the purchasing process.

In this session we will introduce you to the methods for creating a PO, [pause] pricing options, [pause] methods for adding products lines, [pause] entering a variety of notes along with several other PO options and tabs.

To create a new PO select 'Purchase Order' from the 'Home' tab.

An alternative method is using the 'Find Products' window.

With the products that need to be ordered selected, open the right-click menu.

Select 'Create New' [pause] and then 'Purchase Order'.
This opens to the Order Line Properties window to specify the quantity to order of the first product selected.

Enter the 'Quantity' here.

Click 'OK' to add this line.

The next product selected is automatically displayed so that you can enter the 'Quantity'.

Once all items have been entered, the Lines tab is shown with the products and quantities.

The products Default Supplier is automatically selected for the PO.

BisTrack system options are set to determine the pricing to use on POs.

When the primary method is to use 'Last Cost', BisTrack uses the price paid the last time you bought the product.

When a product is being purchased for the first time it uses the 'Standard buy price' that has been entered for the item .

Within Product Properties, the 'Last cost' and 'Standard buy price' are shown on the 'Prices' tab.

The 'Last cost' is automatically updated each time you buy the product.

On a PO, the 'Cost price' and 'Buy price' are shown.

They can be different values. The 'Cost price' is the current cost that you are paying for the product on this PO.

The 'Buy Price' is the general replacement cost for this product. It can be updated to match the 'Cost price'.

Clicking on either the 'Price Calculation' tab or the 'Show Calculation' button provides details about how the 'Cost' price is calculated.

In this case, the cost price is based on 'Last Buying Price'.

It is possible to override the price shown by keying in a new 'Cost price'.

A message indicates that this was 'Manually priced by user'.

Three methods can be used to add products to the PO.

The 'Quick Entry' method opens the Order Line Properties window once a product is selected.

This provides maximum flexibility for entering 'Quantity' and 'Price' along with setting Discounts, entering Notes and other details for the line.

Click 'Ok' to complete and return to 'Lines' tab.

Changing to 'Qty and Price', keeps you on the Lines tab. Once the product is selected, the 'Description' is shown and to the right are the 'Qty' and 'Price' fields.

Enter the 'Qty'.

If necessary override the 'Price' or leave as is by pressing 'Enter'.

The line is added to the PO.

The 'Qty Only' method is fastest for adding products to the PO as it only allows entry of the 'Qty' and NOT the 'Price'.

You can switch between the three methods as needed.

To add a text line from within the 'Lines' tab, click on the 'Other Options' button.

Then select 'Add Text Line'.

Enter the text.

Click 'OK' when complete.

The line is added and assigned its own line number.

You can move the text up or down within the PO.

The 'Notes' tab provides two additional areas for entering more information on the Purchase Order.

'Header notes' appear in the header area of the printed PO. These will be seen by the Supplier.

'Internal notes' do not appear on the printed PO document. You would enter text here that you would NOT want your supplier to see.

Once notes have been entered a small red icon appears alongside the 'F8' key tab reference.

The bottom area of the Lines tab has several buttons.

'Add Product' opens the 'Find Products' window to search for and select a product to add to the PO.

'Other Options' shows a pop-up menu of Line Options.

'Properties' opens the Order Line Properties window for the selected line.

'Remove' deletes the selected line from the PO.

'New Product' opens the option to add a new product to the Product file so that it can be added to the PO. User permission is required to access this option.

Use the arrows to change the sequence of the lines on the Purchase Order.

The 'Instructions' tab is for specifying the 'Deliver to' address and 'Special instructions' for delivery.

The 'Payment to' is the Supplier's default Address and 'Payment terms' from the Supplier properties.

These can all be changed as needed for this PO.

Click 'Complete Order' [pause] follow the prompts to print or email, [pause] and a PO number is assigned.

BisTrack provides many options and lots of flexibility for entering a PO.

After viewing this course you should be able to create a new PO, [pause] recognize where the Costs come from, [pause] how to change the product

entry method [pause] and be familiar with the tab options in the New Purchase Order window.

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