

Creating a Purchase Order - Transcript

Topics

- Create a Purchase Order

Create a Purchase Order

Creating a Purchase Order is a straightforward process.

You choose the method that you want to open a new purchase order, choose the items that you want to order, enter additional information if required, and place the order.

Let's see how this works in the system.

Recall that I said you could choose the method to start the order. You have two options.

One method is to select Purchase Order from the New Purchasing section in the ribbon on the Home tab.

This opens the New Purchase Order window with the General tab selected.

You'll need to select the Lines tab to enter the items you want to put on the purchase order.

Entering an item in the quick search field opens the Purchase Order Line Properties window with the items' information.

The other method is to find the product that you want to order in Find Products, and with the item selected, use the right-click menu to select Create New > Purchase Order.

This opens a New Purchase Order window and the Purchase Order Line Properties window with the selected item's information.

Whichever method you've chosen, you'll continue from the Purchase Order Line Properties window.

Adjust the quantity and Cost Price as needed.

Here's a tip. When you change the cost price, the system shows it by noting Manually priced by user next to the total cost.

Select OK.

The system closes the Purchase Order Line Properties window and returns you to the Lines tab on the new purchase order.

From here, you can use the quick entry field or the buttons at the bottom of the lines panel to add or adjust the items you want to order.

Now suppose you want to add some information to the order. Maybe you need to explain a price change, leave information for internal staff, or give information about the order to the supplier.

The system gives you the ability to add several types of notes to help explain information on the purchase order.

Let's examine some the options.

The first is by adding a text line from within the Lines tab, which adds a line to the item list with its own line number.

For example, this is a good way to communicate that you have an approved price change.

To do this, select the Other Options button and choose Add Text Line

Enter a note in the New Text Purchase Order Line window. Select OK when finished.

The system adds the text line to the order.

You can use the Up and Down arrow keys to move the text line up or down in the item list.

You have two additional notes options on the Notes tab. Add Header Notes and Internal Notes.

Header notes appear on the printed PO and are seen by the supplier. Use these notes for things specific to the PO itself, like delivery instructions.

Internal notes do not appear on the printed PO.

Use Internal notes when you want to record information that is not necessary to share with the supplier.

While the system adds the suppliers address and payment terms from its records, you may need to change the information for this Purchase Order.

You can make these changes on the Instructions tab.

When you're finished and ready to complete the Purchase Order, select Complete Order.

Select Next in the Send Purchase Order window.

Select Finish in the Complete Purchase Order window.

The system acknowledges the completion and displays the Purchase Order number.

You might want to make a note of the number for future reference.

Create a PO – Basic Steps

1. Start the PO from the ribbon or item
2. Add items and adjust quantity
3. Adjust price as necessary
4. Add notes as necessary
5. Review and complete the Purchase Order

Adding Items

The system gives you three options when adding items to the Purchase Order.

1. Quick Entry – This method opens Order Line Properties when you enter an item. It gives you the maximum flexibility for entering quantity, price, discounts, notes, and more.
2. Qty and Price – This method keeps you on the Lines tab. When you enter an item, the system displays the item description and provides adjacent fields to enter quantity and price. You can override the price if necessary.
3. Qty Only – This method is fastest for adding products to the Purchase Order as it only allows entry for Quantity and not Price.

Pricing Options

Your system options determine the pricing to use on Purchase Orders.

Last Cost - The primary method is to use the Last Cost, which is the price you paid the last time you bought this product.

First Time Purchase – When purchasing this item for the first time, the system uses the Standard Buy Price set in the system.

Product Properties – The system displays the Last Cost and Standard Buy Price on the Prices tab in Product properties. It also updates the Last Cost each time you buy the item.

Purchase Order Line Properties > General tab – The Purchase Order shows the Cost price and Buy price.

The Cost price is what you are paying for the item on the Purchase Order.

The Buy price is the general replacement cost for the item. You can update this to match the cost price if necessary.

Select either the Price Calculation tab or Show Calculation button to see details on how the system calculates the Cost price, which is based on the last buying price.

Note: When you change the Cost price, the system displays a note adjacent to the Total cost field indicating that the cost is manually priced by the user.

Notes

You can enter three types of notes on a Purchase Order.

1. Line Notes – These appear on their own lines with the product items and on the printed Purchase Order. Use these to make comments regarding price changes or add a note of thanks for doing business with the customer.
2. Header Notes – These appear in the header section of the printed Purchase Order. You might use a header note to provide direction for shipping or something else that you want the supplier to see.
3. Internal Notes – These are useful for providing information about the purchase order to your internal staff and do not want, or need, to share with the supplier.

The system displays a red icon on the Notes tab when you enter either a Header or Internal note.

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