

Purchase Order Overview

Tina

I just got back from the cycle count in the yard.

Andrew

Good call, how'd it go?

Tina

We're good, mostly... only a couple things that we're short on. How do we get more product?

Andrew

We'll take the cycle count results and create a Purchase Order for each of the Suppliers that we need product from.

C'mon, I'll show you how.

Tina

Pick a topic to see the process!

Topics

- Create
- Add Products
- Recall

Create Purchase Orders

You can create purchase orders from a Sales Order, the suggested ordering system, or from a Work Order.

To create a new purchase order manually, select the Purchase Order option from the Home tab New Purchasing section.

BisTrack opens the New Purchase Order window. We'll start on the General tab.

You have three order types to choose from when entering a PO.

The Stock order type is the default.

You'll use the Overhead and Overhead Advanced order types for non-stock type purchases such as office supplies.

Use the Picked Up checkbox to show that you'll collect the products on the PO from your suppliers location.

This box is unchecked by default, which means that the supplier will be making the arrangements to ship the items to you.

The Date fields default to today's date.

You can adjust them to help set expectations with your suppliers for acceptable delivery times, letting them know when you expect to receive the materials.

Here's a Tip: You can enter the plus sign (+) with a number to advance the date the number of days you specify.

For example, when we enter plus eight, the date advances eight business days from today.

Enter or search for the supplier.

Choose the next topic to see how you enter products on the purchase order.

Add Products

Open the Lines tab to add Products and manual charges to a Purchase Order.

Enter the product code, partial description, or barcode in the Quick Entry field.

A best practice is to use the Qty and Price option.

Enter the Product Code or scan its barcode.

If you don't know the product code, you can use the Find Products function by entering a description and pressing Enter.

Once you have the correct item press OK.

Change the Qty and/or Price as necessary and press Enter.

As you add products to the PO, they're listed in the main window.

Use the buttons at the bottom to add or make changes to the PO.

Note the totals displayed at the bottom of the screen.

Double click a product to open the Purchase Order Line Properties window.

Note the product code, description, and available stock.

Put your cursor in the quantity field and enter a new quantity as necessary.

Press Enter when you're finished and BisTrack recalculates the total cost.

The bottom area shows the line cost totals.

To add the line to the PO, press F12 or choose the OK button.

After you add all the required information, choose Complete Order.

The system gives you a prompt that allows you to Email or Fax the document to the Supplier as long as you have an email or fax server configured.

Choose Next and then Finish to allocate a PO number and save your work.

BisTrack displays the PO number assigned.

Recall Purchase Orders

An easy way to recall a purchase order is by using the Find Documents function.

Choose Purchase Order in the Find Documents menu.

Use the filters in the header section to refine your search.

You can look for a Purchase Order by changing the Where setting to Supplier name and then searching by name.

Choose and double-click a PO to open it.

Note the assigned PO number, and the current status displayed at the top of the window.

Make changes as necessary and when finished, choose Complete Order.

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