Purchase Orders Overview

This course introduces you to the basics of creating Purchase Order or 'PO' documents.

We will discuss how to select a supplier,   the steps required to add products to the Purchase Order and the steps needed complete the process.

We will then locate and recall an existing Purchase Order using the 'Find Documents' feature.

Purchase orders can be created 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.

At the top you will see a Menu Bar.

Below that are Task buttons for performing specific actions.

Once the purchase order is completed a number is assigned and the Status identified.

The Tabs here   determine the data entry fields shown below.

The 'General' tab is used when creating a new PO.

There are three order types to select from when entering a PO.

The default is a 'Stock' order which is used to replenish inventory levels.

The other two order types are for non-stock type purchases such as office supplies.

The 'Picked Up' checkbox is used to indicate that you will collect the products on the PO from your supplier's location.

By default this box is unchecked indicating that the supplier will be making the arrangements to ship the goods to you.

‘Date required:’, ‘Earliest date:’ and ‘Latest date:’ all default to today’s date.

These parameters allow you to set clear expectations with suppliers regarding acceptable timelines for receiving the products.

You can use the drop down calendar to adjust any of these fields.

You can also enter the plus sign ‘+’ and a number. Here, we will adjust this to be 8 business days from today.

With the cursor in the ‘Supplier’ entry field, type a few characters of the supplier’s name and press Enter.

If there is only one match, that supplier is automatically selected.

If no matches occur, the ‘Find a Supplier’ window is launched.

You can also click the ‘Supplier’ button to trigger this same search feature.

The Lines tab is used to add Products and manual charges to a Purchase Order.

The ‘Quick Entry’ dialog box is used to enter the product code, partial description, or barcode.

Best Practice is to utilize the ‘Qty and Price’ option.

Enter the Product Code or Scan the barcode.

You can also type in a Description, press Enter and launch the ‘Find Products’ window.

Select the correct item and press ‘OK’.

Alter the Qty and/or Price and press Enter.

As products are added to the PO, they are listed in the main window.

Several columns will be shown and the scroll bar at the bottom allows you to move left and right.

Below are buttons that can be used to add or make changes to the lines of the PO.

Totals are displayed at the bottom of the screen.

Double click on a Product and the ‘Purchase Order Line Properties’ window opens.

The ‘Product code’, ‘Description’ and ‘Available stock’ are shown.

Fields with a white background are available to be changed.

With the cursor in the ‘Quantity:’ field, a quantity is entered .

Press ‘Enter’ and the ‘Total cost’ is recalculated.

The bottom area shows the line cost totals.

To add the line to the PO press the ‘F12’ key or click the ‘OK’ button.

After you have added all the required information, click the ‘Complete Order’ button or press ‘Alt’ ‘P’.

A prompt allows you to Email or Fax the document to the Supplier when an email and fax server has been configured.

Click ‘Next’ and then ‘Finish’ to allocate a PO number and save your work.

The PO number assigned is displayed.

Purchase Orders can be recalled using the ‘Find Documents’ function.

‘Purchase Order’ is selected.

The drop down next to ‘Look for’’ lists a number of filters to refine the search.

These filters are specific to the various PO statuses and types.

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

To open the PO just highlight it and double-click.

The PO displays the assigned PO number and current status in the top portion of the window.

Make any needed changes and press Complete Order.

You should now have a good understanding of how to create a Purchase Order for a given Supplier, add the Products you need to order to it and how to locate the document throughout the purchasing cycle.

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