

Merging and Copying Purchase Orders

Keeping track of your Purchase orders can be challenging. Merging orders for a single supplier and Copying similar orders can help keep inventory data organized and accurate. This course presents some of the benefits associated with purchasing tools. We also show you the steps required to merge multiple orders and to copy one purchase order to a new one.

There are a number of reasons why it can be beneficial to merge and copy your purchase orders. Copying a supplier order saves time as you do not have to complete all of the steps to create one multiple times. This can be useful when a customer orders the same thing multiple times during the year or when a restocking request contains the same list of items.

Copying with the option to create multiple copies is also beneficial when attending trade shows in order to allocate a block of purchase order numbers. By copying a blank template PO, you can reserve those numbers in BisTrack. Merging purchase orders allows you to merge several purchase orders into one. This is particularly useful with special order products and back-to-back PO's created from multiple sales orders. Instead of sending multiple PO's with multiple items, you can send one merged PO with all of the items you wish to purchase. This helps when it is necessary to meet vendor minimum ordering amounts.

Merging related documents is an easy way to simplify your purchasing process and combine several small purchase orders into one prior to sending it to the vendor. From the Find Documents Folder, select Purchase Orders. Use the search fields to locate the document you wish to merge other documents into. You can also press Go to view the first 50 documents.

When you locate the document, double-click it. Now select Merge. Here you can choose other purchase orders to merge with the current document. You're only able to merge purchase orders for the same supplier. Click on the check box of each order, and then press OK. The lines from all of the merged orders now appear on your current order.

All of the information that was formerly contained in the individual purchase orders is now available in the final merged document. Once you complete the merge, the system deletes the original document. For example, if we search for document 83853- one of the documents we merged, no results appear. If the purchase orders were related to sales orders, all of those sales orders now relate to the PO selected to merge to.

Locate the document you wish to copy from in the Purchase Orders Viewer.

Right click the document. On the dropdown menu, choose Copy. You can also access the copy screen by double-clicking the document and selecting the Copy button. You can copy the entire order or specific lines. Determine how many copies of the order you want to create. Note: Select a number of copies in order to create a block of Purchase Orders to take to a trade show. For example, the purchase order selected for this case would likely only contain a text line to allow the details to be entered later.

There are two ways to copy the order: Copy to Order or Copy to Sales Call Off. Copy to Order creates a new purchase order. Copy to Sales Call Off creates a copy of the order as a Sales Transaction. The header information does not populate from the PO since the PO relates to suppliers and the sales call off relates to customers.

Copying to Sales Call Off is most useful when you have a large purchase for a specific customer that will be shipped out over multiple deliveries. Selecting Copy to Order will bring you to the new Purchase Order Screen. Select Complete Order. Press Next, and then Finish. The system assigns this copy a new PO number. To view the copy, return to the Find Documents Viewer, type the number in the search box and click Go. You can now view details about this copy.

We think you will agree, you can keep your inventory data well organized by merging purchase orders from the same supplier. We also discussed the benefits of allocating a group of PO numbers for a market trip and showed you the steps to copy similar orders. Now you're ready to try this out with your own products and suppliers on your own BisTrack system. Go for it!

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