Creating Manual Purchase Orders

A purchase order documents the items or services you're a requesting from your supplier and the agreed upon price.

This course will show you how to add a purchase order, add products to it then print, mail or email it to your supplier.

Objectives

- Creating a Manual Purchase Order
- Adding Items to a Purchase Order
- Printing and Emailing Purchase Order

Creating a Manual Purchase Order

From the main menu, select **Purchasing and then Purchase Order**.
Click the **Add** button.

The **Add New PO** window displays.

Fill out the required fields marked with a red asterisk.
There is a guided learning flow *here* to help you if you need.

Select a *supplier* from the drop-down menu.
The credit *terms code*, PO *creation* date, and *arrival* date are automatically filled when you select a supplier.

By default, *Normal* is selected as the PO Type. You can learn more about *PO types* from the Help menu.
Select the **Freight On Board** parameter from the drop-down.
The status of **Open** is selected by default. If you do not want to update the *quantity on order*, select **Draft**.
You can provide an alternate PO number *here* and a shipping method such as UPS or FedEx *here*.
Choose the **Tax Code** from the drop-down menu.
Select the *cancel* date. The PO will be canceled after the date specified.
The PO number is automatically generated once you save the Purchase Order.

Tap **Save**.

The **Edit Purchase Order** screen displays.

The **GENERAL** tab displays the information that you entered on *the Add New PO* screen.
Tap the **Edit** icon if you wish to update it.

In the **ADDRESSES** tab, you can view the supplier, billing, and shipping addresses.

Bill - To Store Address has the store address that will bear the cost of this order. Tap the **EDIT** icon if you need to update this address.
The **Ship to Address** will receive the actual merchandise.

You can view the status of your PO in the **Sent to Supplier** field. The value *NO* indicates that the PO has not been sent.
The dates automatically update when your PO is printed, emailed, or transmitted. To manually update this information, tap the **Edit** icon.
Any additional details are added *here.*

The minimum order for the supplier is displayed along with the PO summary in the **PO Summary** tab.
To modify the freight charges, total discount, and miscellaneous charges, tap **Edit.**

Adding Items to a Purchase Order

Products are added to your purchase order using the *Items to be Ordered* section of the edit screen.
You can choose to add items using the *purchasing or stocking* unit of measure.

Enter the item name or number you wish to order *here* and select them from the list.

Add the order quantity and tap the **Add Line Item** button.
The line item information is displayed *here.*

If the item is *not* in your product directory, select the **Add New Item** hyperlink.
Enter the required details in the pop-up window and press **Save.**

Typically, you want to order most or all of the items related to this supplier.
To do this, select the **Add Item** button.
Use the search box and the available filters.

Turn *this* toggle *on* to only see items whose quantity on hand is less than the order point.
If you prefer to see *all* items from this supplier, choose the option from the **Item Source** drop-down and tap **Search.**

Locate the items you want to add to your PO and select the related checkbox.
Enter the desired order quantity for each item.
Tap **Add To Order** when your cart is ready.

Once the items are added to the PO, you can export them to Excel or cancel line items.
If you want to update the retail price of an item *before* sending the purchase order to your supplier, select the **Menu** button and hover over **Columns.**
Select **New Retail.**
Enter the *new* retail price in the related columns and tap **Save**.

Printing and Emailing Purchase Orders

When your PO is ready, you may want to print it for review.
To do this, tap **Actions > Print Purchase Orders.**

The **Print Purchase Order** window appears.
You can choose to print all the PO lines or only the open ones.

From the **Template Type** drop-down, select the PO template.
Finally, choose a printer.

Tap **Preview** to view your PO.
Click the **Print** icon to print this PO.

Similarly, you can send your purchase order via email.
To do this, tap **Actions > Email Purchase Orders.**
In the *Email Purchase Order* window, enter the necessary information then tap **Send Mail.**

Recap

Purchase orders document and track the purchasing process for your buyers. The PO data helps ensure inventory is received at the agreed upon cost and in the correct quantities.

In this course, we showed you how to create a purchase order. We also demonstrated how to add items and print or email the document.

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