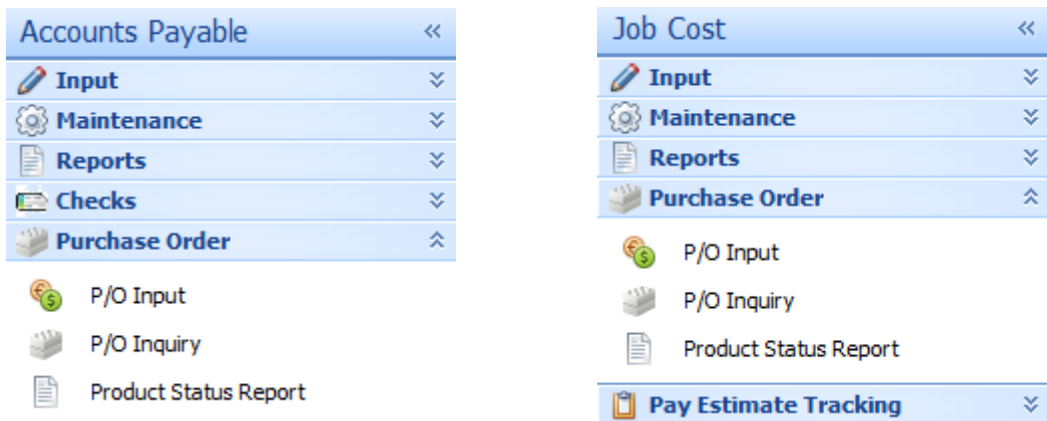


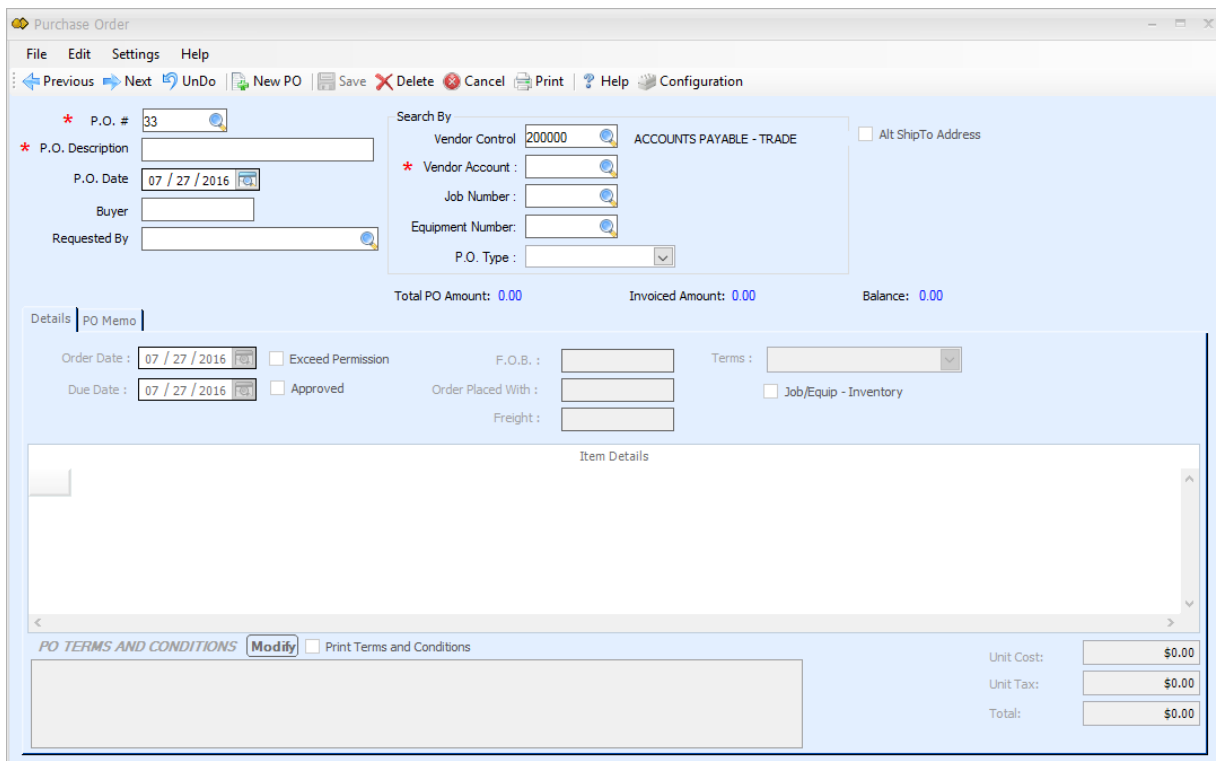


# Purchase Order Input

From the Main Menu (Account Payable > Purchase Order> Purchase Order Input) or (Job Cost > Purchase Order > Purchase Order Input)



When Purchase Order opens, you will see the screen below:

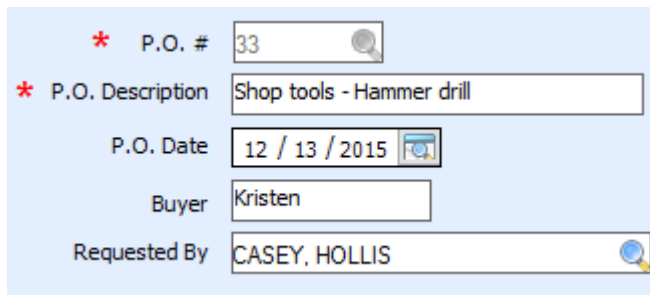


Click "New PO" and a blank Purchase Order should appear with Job Number and Equipment Number grayed out. Press "Enter" and your cursor will be in the P.O. Description box.

**P.O. Description:** An editable text box and can be your customer, job, etc.

**Buyer:** The name of the person giving the P.O. (hovering over the boxes will give you a brief description).

**Requested By:** The person that is requesting the P.O. (click the magnifying glass to select an employee from your company).



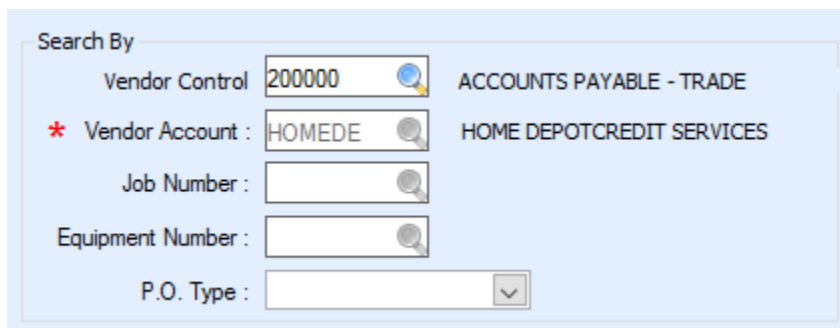
A screenshot of a software interface for creating a Purchase Order. The form is light blue and contains the following fields:

- P.O. #:** A text box containing the number "33" with a magnifying glass icon to its right.
- P.O. Description:** A text box containing "Shop tools - Hammer drill" with a magnifying glass icon to its right.
- P.O. Date:** A date picker box showing "12 / 13 / 2015" with a calendar icon to its right.
- Buyer:** A text box containing the name "Kristen".
- Requested By:** A text box containing "CASEY, HOLLIS" with a magnifying glass icon to its right.

**Vendor Control:** This pulls from Control Accounts set up in General Ledger.

**Vendor Account:** You can type the Vendor Number or click the magnifying glass to select them from a list.

**P.O. Type:** A dropdown menu that allows you to choose the type of P.O. These can be set up by typing in this box or in Configuration on the ribbon. A P.O. Type can be deleted in Configuration by selecting the type, right-clicking, and selecting "Delete Item".



A screenshot of a "Search By" form in a software application. The form is light blue and contains the following fields:

- Vendor Control:** A text box containing "200000" with a magnifying glass icon to its right. To the right of the text box is the text "ACCOUNTS PAYABLE - TRADE".
- Vendor Account:** A text box containing "HOMEDE" with a magnifying glass icon to its right. To the right of the text box is the text "HOME DEPOTCREDIT SERVICES".
- Job Number:** A text box with a magnifying glass icon to its right.
- Equipment Number:** A text box with a magnifying glass icon to its right.
- P.O. Type:** A dropdown menu with a downward arrow icon to its right.

**Configuration:** If you have permission, this window allows you to set up defaults for P.O.'s under your User ID.

elp Configuration

ACCOUNTS PAYABLE - TRADE  Alt ShipTo Address

Configuration

**User Settings**

Vendor Account : 200000

ACCOUNTS PAYABLE - TRADE

Default Tax Percent : 0.00

Default Buyer :

Default UoM:

PO Type:

Skip PO Date

Exceed Permission

Approved

Confirm

Zeroes After Decimal : 03

Default Expense Code : 0

Always use Phase/Account Description

Search Inventory By Vendor

**Global Settings**

Use Next Available PO Number

Vendor Account : 200000

ACCOUNTS PAYABLE - TRADE

Default Tax Percent : 0.00

Exceed Permission

Approved

Confirm

Received

PO Terms and Conditions :

Save

Under Details, there is an "Approved" checkbox. (In Configuration, you have the option to set it where the "Approved" check box is always checked.)

Details | PO Memo

Order Date : 12 / 13 / 2015  Exceed Permission

Due Date : 12 / 13 / 2015  Approved

In the Details tab, enter the:

**Account:** Job or Equipment Account

**Cost-Code:** Phase

**Exp.:** Expense Code

**Description:** This should automatically pull in once you have entered an Account. If you scroll over this box, a pencil will appear. Clicking here opens a text window that lets you type a more detailed description.

**UOM:** Unit of measure. A default can be set or you can select one from the drop-down menu.

**Quantity:** Quantity of items

**Unit Price:** Price per unit

Continue with each line item until you have entered all line item for this P.O. then you can check your total at the bottom. If you do not completely fill out this line, the line item will not save.

Item Details														
Type	Account	Cost-Code	Exp	Description	UOM	Quantity	Unit Price	Amount	Tax %	Tax Amt	Ext Amount	Previous Received	Invoiced	Balance
1	JOB	SHOT00	01	4 Shop Tools		1.000	110.190	110.190	.000	\$0.00	\$110.190	.000	110.190	.000

**PO TERMS AND CONDITIONS**   Print Terms and Conditions

Unit Cost:	\$110.19
Unit Tax:	\$0.00
Total:	\$110.19

Purchase Order

File Edit Settings Help

Previous Next Undo New PO Save Delete Cancel Print Help Configuration

\* P.O. # 33

\* P.O. Description Shop tools - Hammer drill

P.O. Date 12 / 13 / 2015

Buyer Jamie

Requested By CASEY, HOLLIS

Search By

Vendor Control 200000 ACCOUNTS PAYABLE - TRADE  Alt ShipTo Address

\* Vendor Account : HOMEDE HOME DEPOTCREDIT SERVICES

Job Number :

Equipment Number :

P.O. Type :

Total PO Amount: 110.19 Invoiced Amount: -110.19 Balance: 0.00

Details PO Memo

Order Date : 12 / 13 / 2015  Exceed Permission F.O.B. : Terms :

Due Date : 12 / 13 / 2015  Approved Order Placed With :  Job/Equip - Inventory

Freight :

Item Details															
	Type	Account	Cost-Code	Exp	Description	UOM	Quantity	Unit Price	Amount	Tax %	Tax Amt	Ext Amount	Previous Received	Invoiced	Balance
1	JOB	SHOT00	01	4	Shop Tools		1.000	110.190	110.190	.000	\$,000	\$110.190	.000	110.190	.000

PO TERMS AND CONDITIONS  Print Terms and Conditions

Unit Cost: \$110.19

Unit Tax: \$0.00

Total: \$110.19

Click "Save" at the top and you will get a message telling you that your Purchase Order was saved. Click "OK".

Purchase Order

File Edit Settings Help

Previous Next Undo New PO Save Delete Cancel Print Help Configuration

\* P.O. # 33

\* P.O. Description Shop tools - Hammer drill

P.O. Date 12 / 13 / 2015

Buyer Jamie

Requested By CASEY, HOLLIS

Search By

Vendor Control 200000 ACCOUNTS PAYABLE - TRADE

\* Vendor Account: HOMEDE HOME DEPOTCREDIT SERVICES

Job Number: SHOTOO

Equipment Number:

P.O. Type:

Alt ShipTo Address

Total PO Amount: 110.19 Invoiced Amount: -110.19 Balance: 0.00

Details PO Memo

Order Date: 12 / 13 / 2015  Exceed Permission F.O.B.:

Due Date: 12 / 13 / 2015  Approved Order Placed With:  Saved  Job/Equip - Inventory

Freight:

Type	Account	Cost-Code	Exp	Description	UOM	Quantity	Unit Cost	Amount	Tax %	Tax Amt	Ext Amount	Previous Received	Invoiced	Balance	
1	JOB	SHOTOO	01	4	Shop Tools		1.000	110.190	110.190	.000	\$0.000	\$110.190	.000	110.190	.000

PO TERMS AND CONDITIONS   Print Terms and Conditions

Unit Cost: \$110.19

Unit Tax: \$0.00

Total: \$110.19

You have now successfully created a P.O!