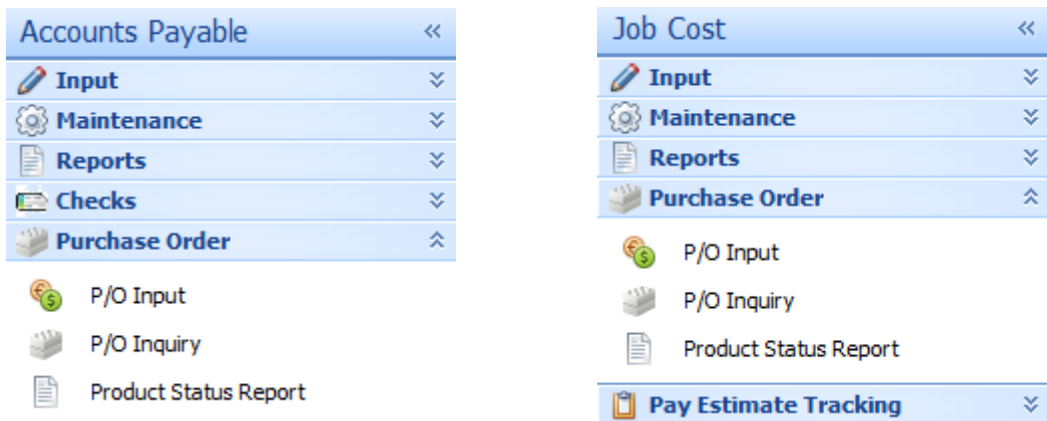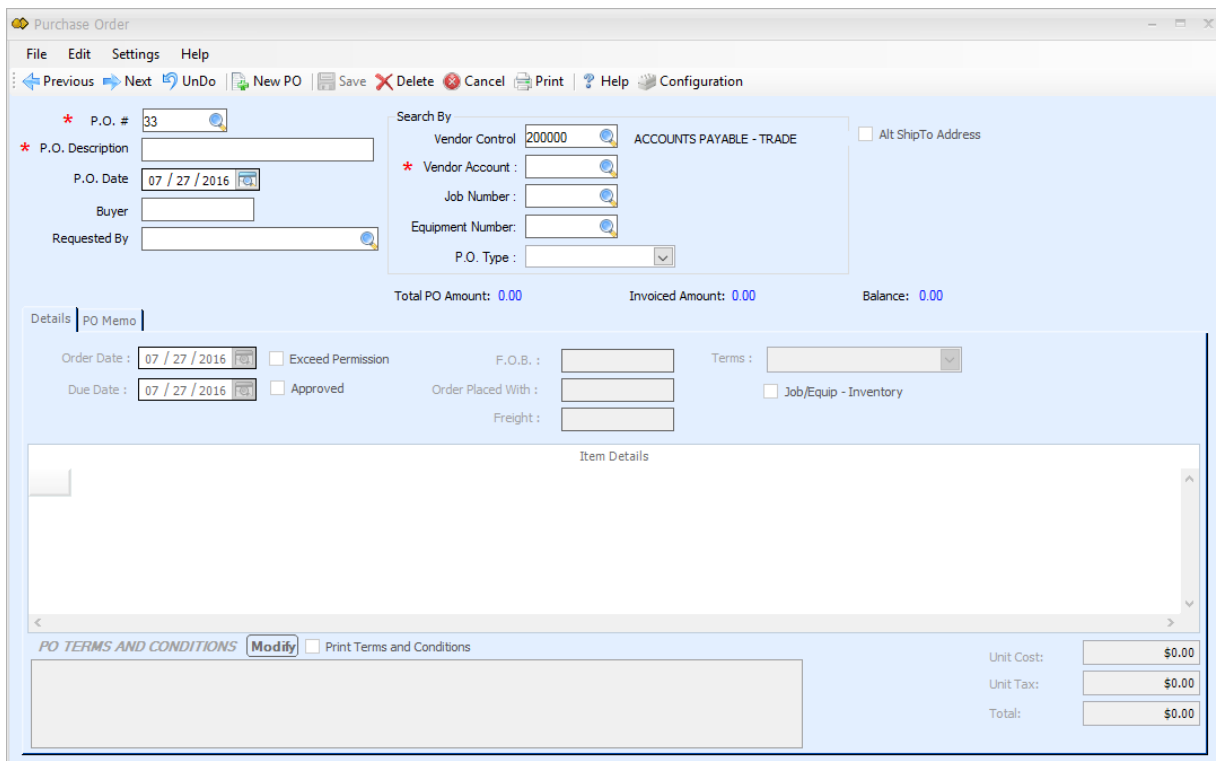# Purchase Order Input

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

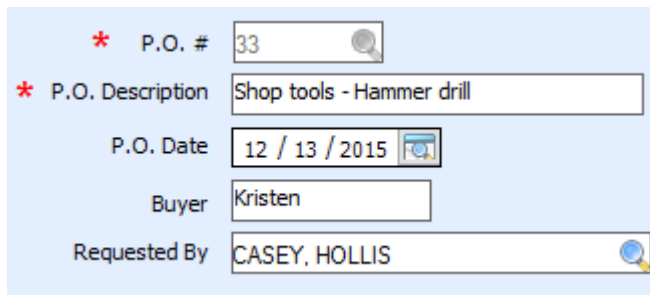When Purchase Order opens, you will see the screen below:

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).
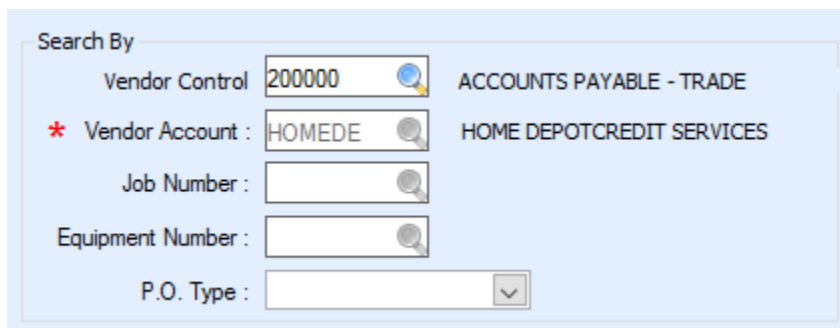

Vendor Control: This pulls from Control Accounts set up in General Ledger.

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".

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

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

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.

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

Item Details

PO TERMS AND CONDITIONS **Modify** ☐ 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".

You have now successfully created a P.O!