

Sales

How to Make a Direct Ship Purchase Order (DSPO)

Prerequisite

Be familiar with how to make a Sales Order. See [How to Make a Sales Order](#) for instruction.

Where is Direct Ship Purchase Order (PO) Located?

- **Sales > Start a Task > New Sales Order**

Why & When to use Direct Ship Purchase Order

Supply product for a Sales Order when the product is shipped directly from the supplier to the customer. Product is never put into inventory. Direct Ship is useful when you need to buy product to fulfill an order, but don't want to bring it into inventory or your location before shipping.

How to Make a Direct Ship Purchase Order

1. **Sales > Start a Task > New Sales Order**
 - Tip: these instructions are for a Sales Order where ALL product will be Direct Shipped
2. Create the sales order. There must be ordered product before a Direct Ship PO can be started.
3. Click the **Purchase** button and **Direct Ship Purchasing**.
4. Click the checkboxes of the product you want to purchase.
5. If you want to select all product lines, click **Select All Lines** to mark all checkboxes automatically.
6. Click the **Create New PO** button to create a new Direct Ship Purchase Order. Click **Go**.
7. A Direct Ship Purchase Order screen opens. All checked products appear in the bottom product grid.
8. The load will prefill with the Sales Order's load number. The **Direct Ship SO number** also autofills.
9. Complete all required yellow fields.
10. Optional: fill in the price you will pay the supplier for the product line. Change the **Quantity** or **Quantity Unit of Measure** if desired.
11. Verify information, **Save and Close**.
12. Go to the **Sales Order** screen.

There are multiple ways to ship direct in Envio. One method is outlined below:

1. Click the **Ship ALL DS PO** button to ship all the Direct Ship Purchase Orders for this Sales Order.
2. Fill in the comment and ship date. Click **OK** to ship. This enters shipped quantities, defaulting to the PO ordered quantity. A confirmation window

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appears.

- Note: shipped quantities are updated in both the Sales Order and the Purchase Order

Troubleshooting & Tips:

- From **Sales Order Shipping**, ship Direct Ship quantities for a specific Sales Order product line. If the SO line has more than one DS PO attached, Envio will ask which one to process.
- If you add product from inventory to a Sales Order that includes a Direct Ship Purchase Order, and if you use the Ship All DS PO button to ship, the Sales order will be marked as Shipped, even if the tags from your inventory have not yet been allocated. This may affect Salesboard(s) and Inventory.
- There are multiple places to ship a Direct PO from. You can ship from a Direct Ship Purchase Order Receipt, however it is only created after the DS PO has shipped, and therefore is not a preferred method of shipping.

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