Purchasing

How to Make a Purchase Order

Prerequisite

A **Purchase Order Station** must be created before a Purchase Order can be made.
A **Purchase Order Receipt Station** must be created to receive items from a Purchase Order.

Where is New Purchase Order Located?

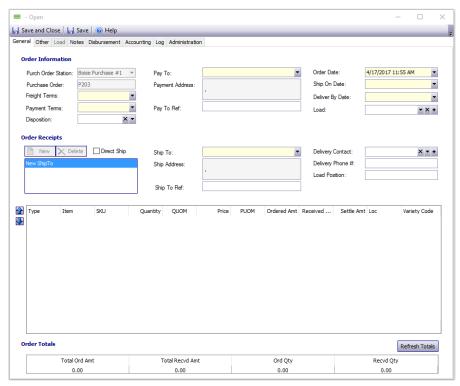- **Purchasing > Start a Task > New Purchase Order**

Why and When a Purchase Order is Used

A purchase order is used when inventory that is requested on a sales order is not in stock and must be purchased, or if you need to bring materials into your inventory. Purchase Orders are usually used to buy Raw and Packed product and packing materials. This function enables you to purchase raw or packed product and create pallet tags to bring it into your inventory or to ship it directly to customers.

How to Create a Purchase Order

1. **Purchasing > Start a Task > New Purchase Order**
2. Click the dropdown to see a list of Purchase Order stations in the **Purch**

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3. Depending on policies, some data will automatically fill.
4. In the **Pay to** field, use the dropdown menu to select a supplier.
    - **Note:** Only trading partners with the supplier checkbox selected in **Company > Find > Trading Partners** will appear in the list.
5. Depending on your supplier settings, other fields may auto-fill
6. Fill in the **Ship to** field. Click the dropdown menu to select a supplier.
7. Fill in the **Ship on Date** and **Deliver By Date**.
8. A load must be selected to continue. Click the dropdown to select an existing load. If no load exists, left click the **+** button to open a **Load** screen.
9. Once a load is selected, click **Save.**
10. Add product to the Purchase Order. Double click in the large empty grid to add a product line. Click to select between **Product** and **Addon** in the **Type** column.
11. To select a product, type the desired SKU under the SKU column **OR** click under the **Item** heading to open a dropdown selection menu. Type in the commodity and stage and press TAB to populate the dropdown list.
12. Fill in the information as needed. **Item, Quantity,** and **Price** is recommended as a minimum. Use **Column Chooser** to add or remove columns.
13. Click on the correct Product.
14. Continue adding products as desired.
15. Click the **+** symbol to see details about associated charges.
16. **Save** your Purchased Order. It is now created and in **Open** status.
17. Depending on permissions and if the tab is visible, you may also
    - Click the **Disbursement** tab to review liabilities
    - Click the **Administration** tab to print and preview the **Purchase Order** documents
    Order Station field.

Troubleshooting & Tips

Purchasing

- To reorganize the items on a PO, click to highlight a line item and the click the red **up** or **down** arrows.
- In order to receive the product, you must make a [How to Make a Purchase Order Receipt](#).

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Author: EnvioAg-Admin
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