Purchasing

Allocate Freight from the Load Tab to the Product on a Purchase Order (PO)

Here is the process to Allocate Freight from the Load Tab to the product on a PO. Make sure there is a Charge for Allocated Freight – Name of your choice. Go to Company > Charges> New Charge if you do not already have an allocated freight charge. Note the check box for the Category and Post to AP/GL. The Default Liability Partner is optional.

The Rate for the Charge Variant only needs one Entry if you choose to keep it general. You may have multiples if you choose.

Go to Purchasing > New Purchase Order

Create a PO with product lines and a load.

Enter the Freight Amount then click the "Allocate Freight Amt" button.

If you are applying freight BEFORE the product is received – then select "Ordered" basis. If product has been received – the "Shipped" will be relevant. The screen will show the distribution of the Amount. Click the "Accept" button if the distribution is acceptable.

Note the end result is now showing on each product line in the charges grid.

Next review the Disbursement Tab. The charge will display and so will the partner if that was to be populated automatically. If not, select the Partner..

The rest of this process is similar to making Sales Order Disbursements.

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