Creating A Manual Purchase Order

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Sometimes you need something from a vendor that is not integrated to the shop mgmt software for electronic parts ordering & automatic Purchase Order generation. Here are the steps to manually create a Purchase Order as needed.

1. Go to the **Inventory** menu and select **Purchase Orders**.

2. Click on the **Add** button at the bottom to begin creating a PO Worksheet.

3. Select a **Vendor** from the drop-list (click Vendor to go to Setup and add it if not already on list). Then click on **Add** to begin putting parts on the PO.

4a. If the part you enter is unknown to the system, you'll need to fill in P/N, Description, Quantity, etc. Checking the Inventory Part checkbox added this item to the inventory list; Inventory button allows access to record once saved.

4b. If the part you enter is known to the system, press Tab and it'll fill in P/N, Description, Quantity, etc. details for you.

Inventory button allows access to make changes to this part record.

5. Consider the Delivery/Willcall, Tax, Fax & Comment options, then click on **Save**.

NOTE: You'll be printing or faxing this PO to the vendor.

6. Confirmation message that Purchase Order #xxxx has been created; click on **OK**.

7. When parts arrive, go to **Inventory** menu, select **Purchase Order** and then highlight this PO within the Open PO list. Click on **Edit/Receive** to begin the process.

8. PO Worksheet opens; click on **Receive All**.

9. Dialog box appears with options; these choices are sticky and do not have to be re-selected every time. Click **OK** to proceed.

10. Dialog box reports no RO found (this was ordered for stock) and it is an existing inventory record. Click **Receive** to process the next part or complete the process if only a single part involved.

11. Click on **Close PO** to complete the task. This document can be later reviewed from the Closed POs list.

See this instructional video for creating the manual purchase order from the Repair Order screen:

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