

Creating A Manual Purchase Order

Article Number: 287 | Rating: Unrated | Last Updated: Mon, Jul 20, 2015 at 10:48 AM

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: [Â](#)

Posted by: [Tim McDonnell](#) - Wed, Jun 6, 2012 at 6:32 AM. This article has been viewed 5764 times.

Online URL: <https://mitchell1.com/knowledgebase/article.php?id=287>