

**PURCHASE ORDERS – Purchase Order desktop is used to receive, purchase and replenish stock.**

By default, the PO list and a blank PO are displayed. Let's look at the available left side options:

Sort Grid by;

1. PAYMENTS
2. Create a NEW RECEIVING INVOICE
3. Create NEW PO
4. PO History
  - a) Define Historical search by setting a Date Range, Vendor, Order # and/or Status. Click on a PO to open/view it.

Creating a NEW PO and PO Details;

Click on + NEW PO

1. Select a Vendor from the Vendor List or type in the Vendor name to Search for them.

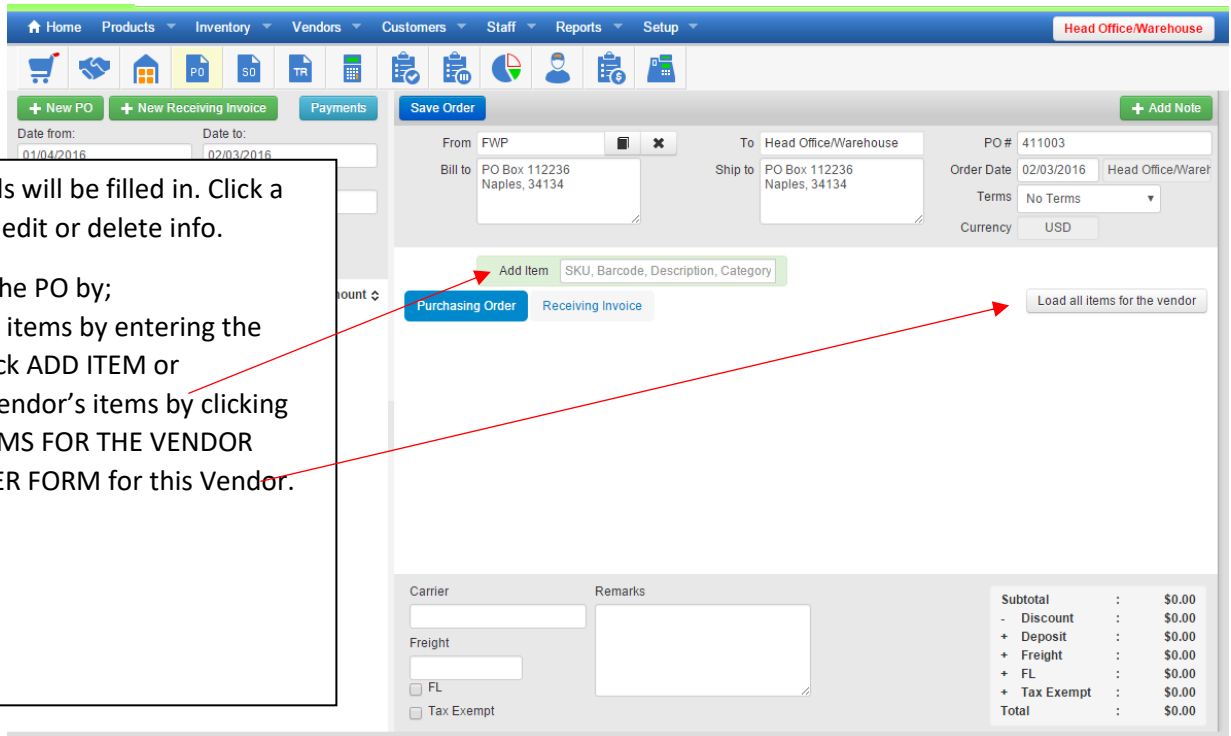
Your newly created PO will be created and ready to add details.

Default PO details will be filled in. Click a data box to add, edit or delete info.

Add product to the PO by;

1. Add individual items by entering the identifier and click ADD ITEM or
2. View all this Vendor's items by clicking on LOAD ALL ITEMS FOR THE VENDOR to load the ORDER FORM for this Vendor.

cont...

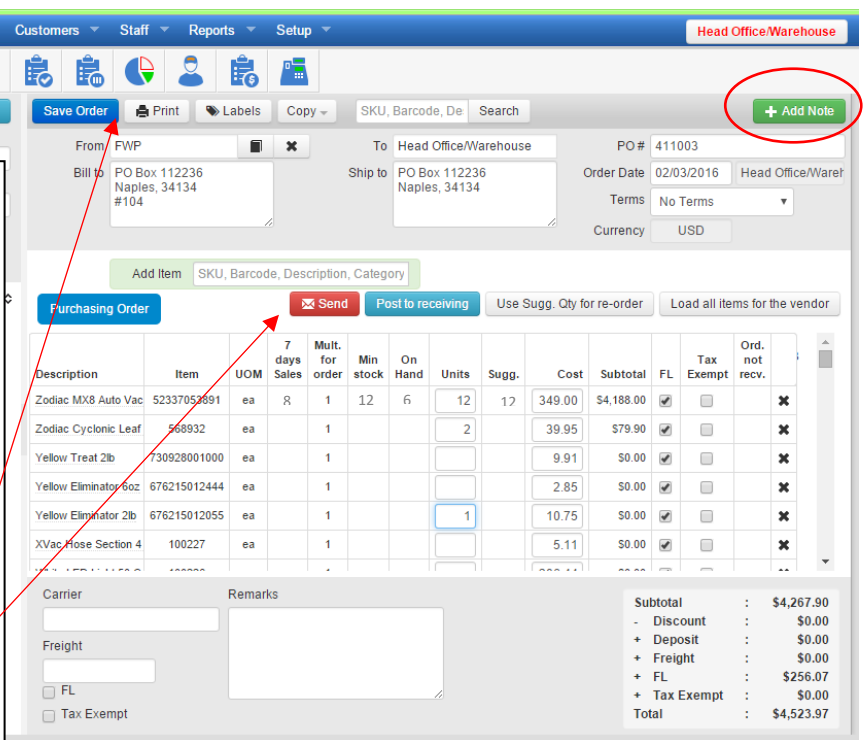


The system will offer a SUGGESTED order based on Sales, Inventory, Minimum stock settings. (If data is available) Use the SUGGESTED quantities or enter quantities.

1. A running Product total and Subtotal are displayed.
2. ADD NOTE if desired.
3. Shipping details
  - a) tick the TAX EXEMPT box when applicable.
  - b) Add shipping details and/or add a shipping Remark if required.

When satisfied, SAVE, PRINT or EMAIL order.

This PO can now be accessed from the PO HISTORY LIST (on the left)



To Delete a PO, open it. Once open a red DELETE button will appear in the upper right corner of the PO. **CAUTION! Using the DELETE button cannot be "undone".**

## RECEIVING

### Receive an existing PO

1. Open the PO to be received from the PO HISTORY list by clicking on it.
2. Click POST TO RECEIVING.

Home Products Inventory Vendors Customers Staff Reports Setup

+ New PO + New Receiving Invoice Payments

Date from: 01/04/2016 Date to: 02/03/2016

Vendor: (Show All) Order #: (Show All)

Status: (Show All)

#	Date	Status	Vendor	Amount
411004	02/03	PO	FWP	12.08

From: FWP To: Head Office/Warehouse

Bill to: PO Box 112236 Naples, 34134 Ship to: PO Box 112236 Naples, 34134

Add Item SKU, Barcode, Description, Category

Purchasing Order Send Post to receiving Use Sugg. Qty for re-order Load all items for the vendor

Description	Item	UOM	7 days Sales	Mult. for order	Min stock	On Hand	Units	Sugg. Recv.	Cost	Subtotal	FL	Tax Exempt	Ord. not recv.
Yellow Eliminator 6oz	676215012444	ea		1			4		2.85	\$11.40			4

Receiving Invoice

Subtotal : \$2.85  
- Discount : \$0.00  
+ Freight : \$0.00  
+ FL : \$0.17  
+ Tax Exempt : \$0.00  
Total : \$3.02

Create Receiving Invoice

Add/Edit Receiving Details and click, CREATE RECEIVING INVOICE (or CANCEL)

Home Products Inventory Vendors Customers Staff Reports Setup Head Office/Warehouse

+ New PO + New Receiving Invoice Payments

Date from: 01/04/2016 Date to: 02/03/2016

From: FWP To: Head Office/Warehouse PO # 411004

Bill to: PO Box 112236 Naples, 34134 Ship to: PO Box 112236 Naples, 34134

Order Date: 02/03/2016 Head Office/Ware

Terms: No Terms Currency: USD

Purchasing Order Receiving Invoices Send Payments

Invoice # 16034104158 (03/02/2016) Received

SKU	Description	Qty	Cost	Subtotal	SN
676215012444	Yellow Eliminator 6oz (ea)	1	2.85	2.85	

Subtotal : \$2.85  
- Discount : \$0.00  
+ Freight : \$0.00  
+ FL : \$0.17  
+ Tax Exempt : \$0.00  
Total : \$3.02

Payments:

Invoice #	Date	Type	Amount	A/P	Paid	To Pay
16034104158	02/03/2016	Receiving	\$3.02	\$3.02	\$0.00	\$3.02

Print Edit Invoice

Payments

Date: 02/03/2016 Amount Paid: 3.02 Pay With: Cheque Cheque #:

Receiving Invoices to Pay

Pay Close

The RECEIVING INVOICE will be displayed, including the RECEIVING confirmation.

Options:

1. SAVE or PRINT PO Invoice and/or
  2. SEND email PO Invoice for payment and/or
  3. Create LABELS and/or
  4. Add PAYMENT details (if required) or
  5. DELETE (red button) PO INVOICE
- CAUTION! Using the DELETE button cannot be "undone".**

To RECEIVE without a Pending Order, Click + NEW RECEIVING INVOICE and follow the above process.

Home Products Inventory Vendors Customers Staff Reports Setup

+ New PO + New Receiving Invoice Payments

Date from: Date to:

Select Vendor To: Head Office/Warehouse

-END-