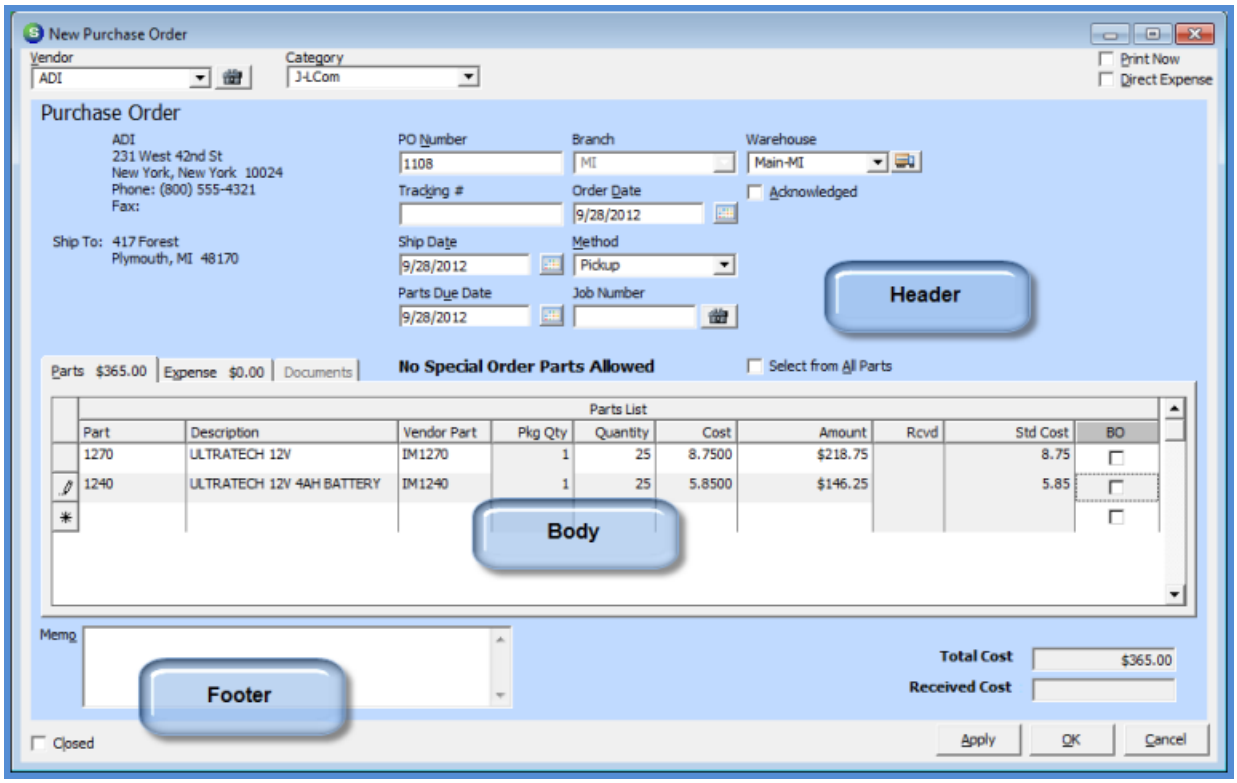
Purchase Order Form Definitions

Last Modified on 10/09/2025 3:52 pm EDT

This article describes the layout and the data entry fields contained on the Purchase Order form.

The Purchase Order form is divided into three main sections, PO Header, PO Body, and PO Footer. Each PO section is described and illustrated in this article.

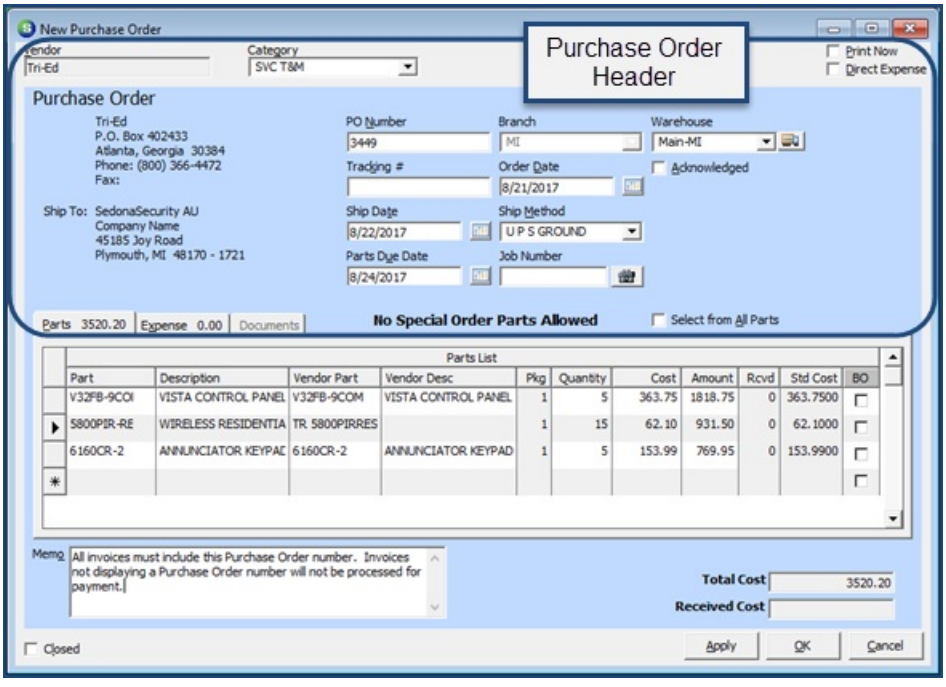


Purchase Order Header

Each of the fields and options in the Header section of a PO are described below.

- Vendor - Clicking the drop-down arrow displays the Vendor List. Clicking the search button to the right of the Vendor field opens the Vendor Search form where filters can be used to narrow the search for the desired Vendor
- Category - Once a vendor is selected, the Category automatically fills in with the default category assigned to the vendor; this can be changed if it is not correct for the PO being created.
- Print Now - If this option is selected, once the PO is saved, the PO will automatically be sent to the default PO Printer defined in SedonaOffice Printer Setup. If this option is selected, the next time someone creates a PO, this option will be automatically selected.
- Direct Expense - If the PO is being created for parts that will be direct expensed, this option should be selected. Parts that are direct expensed are not received into a warehouse; they are immediately expensed. If this option is selected, the next time someone creates a PO, this option will automatically be selected. This option is typically used when linking a job number or ticket number to the PO.
- PO Number - Depending on your company settings, a PO Number can automatically be assigned. If your company is not auto-generating PO Numbers, you need to type in a PO Number.

- Branch - The Branch automatically fills in with the default branch assigned to the vendor; you can change the branch if it is not correct for the PO being created.
- Warehouse - If parts are being ordered and will be received into a warehouse, select the appropriate warehouse from the drop-down list. The Branch field automatically changes to the branch assigned to the warehouse; this may not be overridden.
- Tracking # - This is an optional field to type in the shipper tracking number such as UPS or FedEx tracking numbers. This field is for informational purposes only.
- Order Date - The Order Date defaults to today's date; you can override this if necessary.
- Acknowledged - Access to this field is controlled by User Group Security. If this field is grayed-out, this indicates that you do not have permission to Acknowledge a PO. This field is designed to be used as a PO approval. Once a PO is created, a manager can review the PO, and then select the Acknowledged option to approve the PO for ordering. This is purely a procedural flag. Not acknowledging a PO has no impacting on the ordering process; it is for informational purposes only.
- Ship Date - If the vendor has provided a date on which the parts will be shipping, you can fill in this date. This field is optional.
- Method - From the drop-down list, select the method by which the parts will be shipped. This field is optional but highly recommended.
- Parts Due Date - If the vendor has provided a date on which the parts will be delivered, you can fill in this date. This field is optional.
- Job Number - If the parts or expense item(s) being ordered is for a job or service ticket, you can click the search button to the right of this field to look up the job or service ticket number. This field is optional.
- Select From All Parts - Access to this field is controlled by User Group Security. If this field is grayed-out, this indicates that you do not have permission to use this function. If you can select this option, you can select a part for a vendor where the vendor has not been set up as a supplier for the part.



Purchase Order Body

The Body of the PO is used to select Parts and/or Expense Items.

Parts Tab

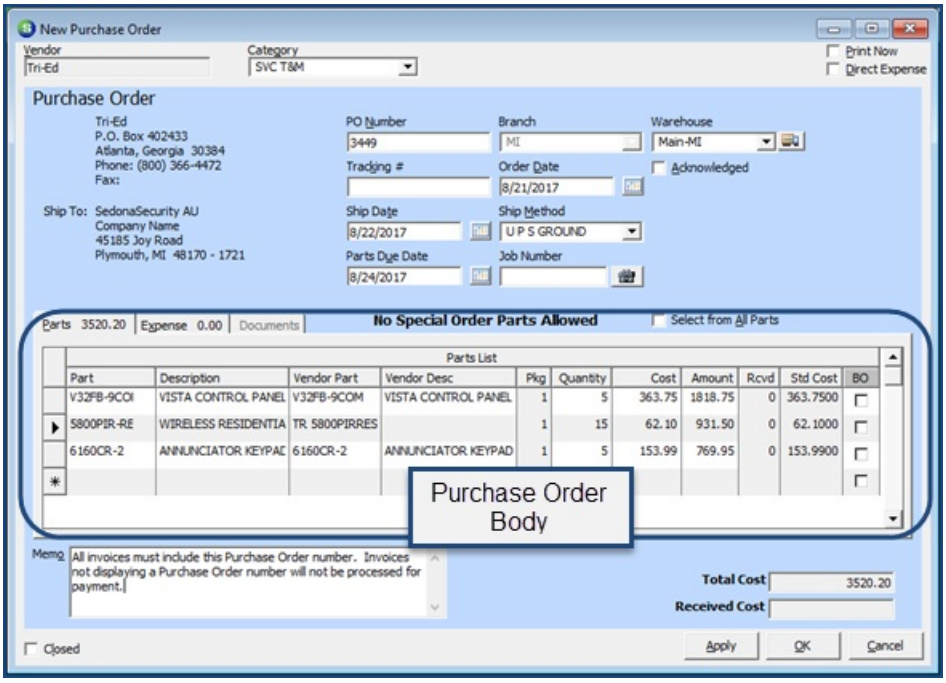
This tab is used if parts are being order on the purchase order.

- Part (Code) - In the Parts section, starting on the first white line under the part column, you can type in the exact part number or lookup the part by clicking the Part Search button. If the Select From All Parts option was selected in the PO Header, all active parts for all vendors will be available for selection. If this option was not selected, only parts for which the vendor selected in the PO Header is a supplier in the part setup will be available for selection.
- Description & Vendor Part- Once a part is selected, the Description and Vendor Part number from the part setup automatically fill in.
- Quantity - The quantity defaults to 1; you can change the quantity.
- Cost - The cost automatically fills in with the last purchase cost for the vendor; you can override the unit cost if necessary.
- Rcvd - This field is not available for data entry. The received quantity automatically fills in when the PO is received at a later time.
- BO - The Back Order field is for informational purposes. If the vendor indicates the part is on back order and if this field is selected, when viewing the PO from the Purchase Order List the PO will be displayed in a red colored font.

Expense Items Tab

This tab is used if expense items are being ordered on the purchase order. When ordering expense items, select a G/L Account number for the expense.

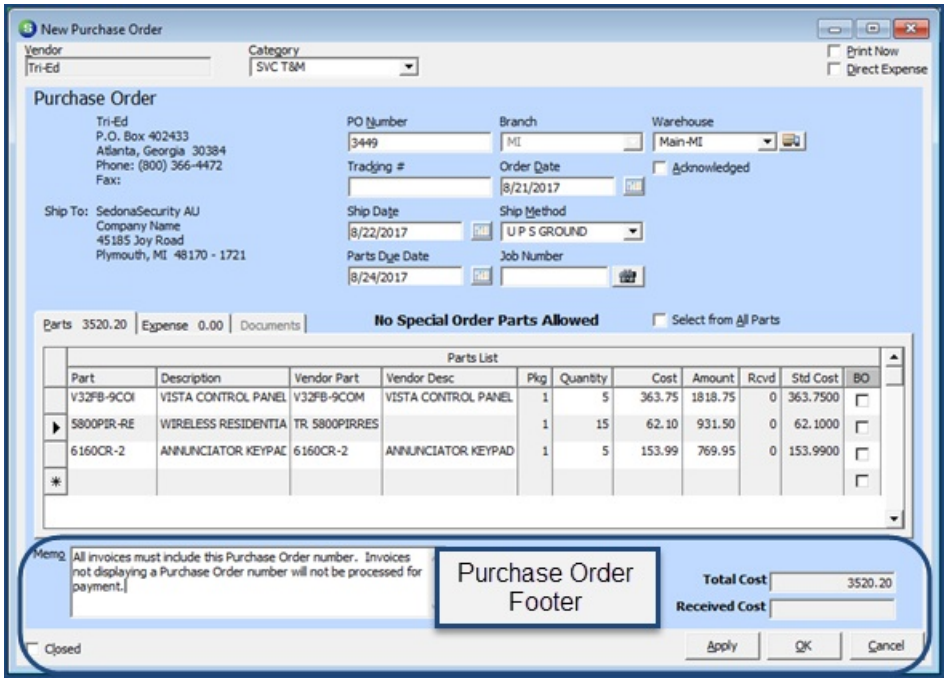
- GL Account- Select the GL account number. If purchase orders for expense items have previously been created for the selected vendor, clicking the drop-down arrow in this field displays all previously used GL account numbers. If nothing is displayed on the drop-down list or the desired GL account number is not on the drop-down list, click the GL Lookup button to the right of the field to search for the correct account number.
- Description - The description defaults to the description for the GL account selected; you can change the description.
- Amount - Enter the total amount for the expense line.
- Category - The category automatically fills in with the category selected in the PO Header section.
- Job - If the parts or expense item being ordered is for a job or service ticket, click the search button to the right of this field to look up the job or service ticket number. This field is optional.
- Type - If a job or service ticket number was selected in the Job field, select the appropriate Expense Type from the drop-down list.



Purchase Order Footer

The footer of the PO contains one data entry field and two display only fields.

- Memo - The Memo field can automatically fill in with information. If this occurs the information is defaulting from the PO Memo setup for the selected vendor. You can add more information to the default memo if needed. Up to 256 characters of information can be entered into this field.
- Total Cost - This field is not available for data entry. The Total Cost is automatically filled in with the total of all parts and expense item amounts in the body of the PO.
- Received Cost - This field is not available for data entry. The received cost automatically fills in when the PO is received at a later time.


New Purchase Order
Vendor
Tri-Ed
Category
SVC T&M
Print Now
Direct Expense
Purchase Order
Tri-Ed
P.O. Box 402433
Atlanta, Georgia 30384
Phone: (800) 366-4472
Fax:
Ship To: SedonaSecurity AU
Company Name
45185 Joy Road
Plymouth, MI 48170 - 1721
PO Number
3449
Branch
MI
Warehouse
Main-MI
Tracking #
Order Date
8/21/2017
Acknowledged
Ship Date
8/22/2017
Ship Method
U P S GROUND
Parts Due Date
8/24/2017
Job Number
Parts 3520.20
Expense 0.00
Documents
No Special Order Parts Allowed
Select from All Parts
Parts List
Part
Description
Vendor Part
Vendor Desc
Pkg
Quantity
Cost
Amount
Rcvd
Std Cost
BO
V32FB-9COI
VISTA CONTROL PANEL
V32FB-9COM
VISTA CONTROL PANEL
1
5
363.75
1818.75
0
363.7500
5800PIR-RE
WIRELESS RESIDENTIA
TR 5800PIRRES
1
15
62.10
931.50
0
62.1000
6160CR-2
ANNUNCIATOR KEYPAD
6160CR-2
ANNUNCIATOR KEYPAD
1
5
153.99
769.95
0
153.9900
Memo
All invoices must include this Purchase Order number. Invoices not displaying a Purchase Order number will not be processed for payment.
Purchase Order Footer
Total Cost
3520.20
Received Cost
Closed
Apply
OK
Cancel