

Purchase Order Form Definitions

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This article will describe 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 will be described and illustrated in this article.

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Purchase Order Header

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

- Vendor - Pressing the drop-down arrow will display the Vendor List. Pressing the search button to the right of the Vendor field will open the Vendor Search form where filters may be used to narrow the search for the desired Vendor.
- Category - Once a Vendor is selected, the Category will automatically fill in with the default Category assigned to the Vendor; this may 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 the User creates a PO, this option will automatically be 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 the User 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 may automatically be assigned. If your company is not auto-generating PO Numbers, you will need to type in a PO Number.
- Branch - The Branch will automatically fill in with the default Branch assigned to the Vendor; the User may 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 will automatically change 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 will default to today's date; the User may override this if necessary.
- Acknowledged - Access to this field is controlled by User Group Security. If this field is grayed-out, this indicates the User creating the PO does 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 may review the PO 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, this date may be filled in. 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, this date may be filled in. This field is optional.
- Job Number - If the parts or expense item(s) being ordered is for a Job or Service Ticket, the User may press 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 the User creating the PO does not have permission to use this function. If the User is able to select this option, a part may be selected for a Vendor where the Vendor has not been set up as a supplier for the part.

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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 may type in the exact part number or lookup the part by pressing 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 will automatically fill in.
- Quantity - The quantity will default to 1; you may change the quantity.
- Cost - The cost will automatically fill in with the last purchase cost for the Vendor; you may override the unit cost if necessary.
- Rcvd - This field is not available for data entry. The received quantity will automatically fill 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, 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 or

der on the Purchase Order. When ordering Expense Items, you will 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, pressing the drop-down arrow in this field will display 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, press the GL Lookup button to the right of the field to search for the correct account number.
- **Description -** The description will default to the description for the GL Account selected; you may change the description.
- **Amount -** Enter the total amount for the expense line.
- **Category -** The category will automatically fill 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, press 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.

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Purchase Order Footer

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

- **Memo -** The Memo field may automatically fill in with information. If this occurs the information is defaulting from the PO Memo setup for the selected Vendor. You may add additional information to the default memo if needed. Up to 256 characters of information may 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 will automatically fill in when the PO is received at a later time.

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