

Create a Purchase Order from a Job Record-Parts

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Automated Purchase Order creation for inventory parts is available from within a Job record. This automation takes into consideration the parts that are listed on the Materials form of the Job. Only Parts that are not flagged as stock items will be selected in this automated ordering.

Follow the instructions below to create a Purchase Order for parts within a Job record.

1. Navigate to the Main Application Menu and select the Job Management/Job Queue option.
2. The Job List will be displayed. Open the Job for which a Purchase Order will be created.
3. Once the Job record is open, press the Tools button from the Job Toolbar.
4. From the Tools Toolbar press the Purchase Orders button. In the white area to the right of the Tools Toolbar right-click and select the Create PO option.
5. If all parts on the Job Materials list are assigned to one Primary Vendor, then the New Purchase Order form will automatically open with the Primary Vendor for the parts defaulted into the Vendor field. If there is more than one Primary Vendor assigned to the parts on the Materials list, the "Select Vendors to Create PO's for" form will be displayed. Create one PO at a time by selecting the checkbox to the left of a Vendor displayed in the list. Once the PO is completed and saved, repeat the process beginning with step 4 until all Purchase Orders have been created.

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