

Create a Purchase Order from a Parts Record

Last Modified on 10/01/2025 4:55 pm EDT

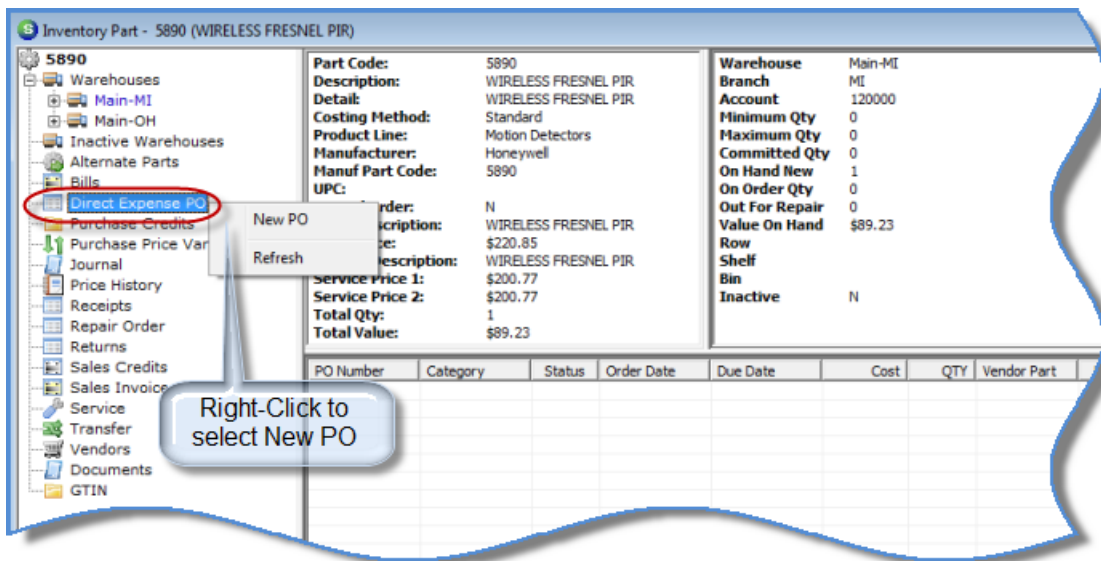
Follow these instructions to create a purchase order from a Part Explorer record.

Note: This option is only available if your company has activated Stock Tracking.

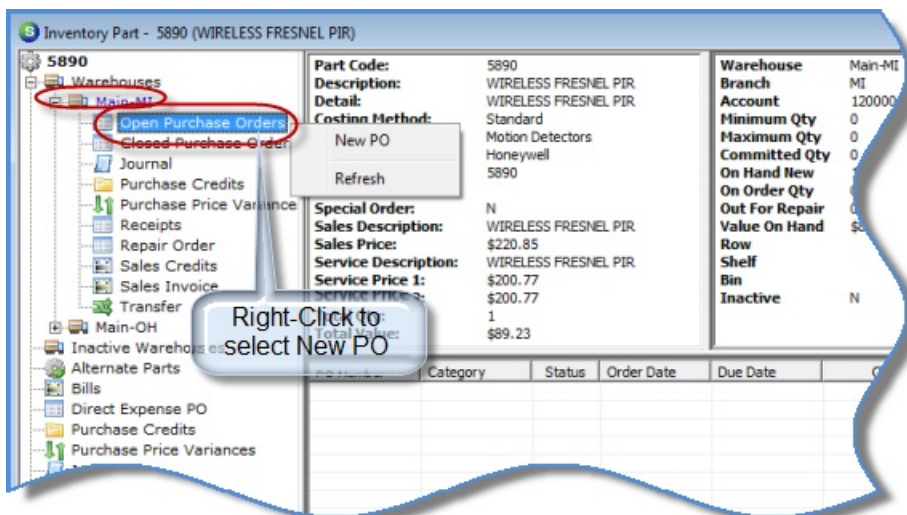
1. Navigate to the Main Application Menu and select the Inventory/Parts option.
2. The Parts Search form opens. Locate and open the part to create a purchase order for it.

The Part Explorer opens. There are two methods to create a new PO; select one of the two options below:

- Highlight the tree option Direct Expense PO, right-click and select the New PO option.



- Expand the Warehouse tree of the warehouse into which the part being ordered will be received. Highlight the Open Purchase Orders tree option, right-click and select the New PO option.



3. The New Purchase Order form opens. Fill in the header information. For descriptions of each field in the header area, refer to the [Purchase Order Form Definitions](#) topic.
4. If ordering parts, select the needed part(s). For additional parts advance to the next line and enter the part information fields. For descriptions of each field contained on the Part form, refer to the [Purchase Order Form Definitions](#) topic.
If ordering expense items, navigate to the Expense tab and enter the needed expense items. For additional expense items, advance to the next line on the expense tab and enter the expense information fields. For descriptions of each field on the Expense form, refer to the [Purchase Order Form Definitions](#) topic.
5. In the footer section of the PO form, enter a Memo, if desired, of up to 256 characters. This information will print on the purchase order.
6. If a document needs to be attached to the purchase order, click the Apply button; navigate to the Documents tab; and either scan in and attach a document or add an existing saved document. If no documents are being attached, proceed to step number 7.
7. Once all information is entered, click the OK button located at the lower right of the form to save the purchase order.
The Ship To Address can be changed if necessary: hover the mouse over the words Ship To: in the header of the PO form, right-click and select Edit Address. You can also click on the Edit button shown below the Ship To label in the PO Header.

Purchase Order 3449

Vendor: Tri-Ed Category: SVC T&M

Purchase Order

Tri-Ed
P.O. Box 402433
Atlanta, Georgia 30384
Phone: (800) 366-4472
Fax:

PO Number: 3449 Branch: MI Warehouse: *MI-Main

Trading #: Order Date: 8/21/2017 Acknowledged

Ship To: SedonaSecurity AU
Company Name
5185 Joy Road
Plymouth, MI 48170 - 1721

Ship Date: 8/22/2017 Ship Method: UPS GROUND

Parts Due Date: 8/24/2017 Costing:

Parts 3520.20 Expense 0.00 Documents **No Special Order Parts Allowed** ☐ Select from All Parts

Part	Description	Vendor Part	Vendor Desc	Pkg Qty	Quantity	Cost	Amount	Rcvd	Std Cost	BO
V32FB-9COM	VISTA CONTROL F	V32FB-9COM	VISTA CONTROL F	1	5	363.75	1818.75	0	0.0000	<input type="checkbox"/>
5800PIR-RES	WIRELESS RESIDE	TR 5800PIRRES		1	15	62.10	931.50	0	0.0000	<input type="checkbox"/>
6160CR-2	ANNUNCIATOR KE	6160CR-2	ANNUNCIATOR KE	1	5	153.99	769.95	0	0.0000	<input type="checkbox"/>
*										<input type="checkbox"/>

Memo: All invoices must include this Purchase Order number. Invoices not displaying a Purchase Order number will not be processed for payment.

Created By: Administrator 8/21/2017 10:05:49 PM
Edited By: Administrator 8/21/2017 10:05:49 PM

Total Cost 3520.20
Received Cost 0.00

☐ Closed

Purchase Order 3449

Vendor: Tri-Ed Category: SVC T&M

Purchase Order

Tri-Ed
P.O. Box 402433
Atlanta, Georgia 30384
Phone: (800) 366-4472
Fax:

PO Number: 3449 Branch: MI

Tracking #: Order Date: 8/21/2017

Ship Date: 8/22/2017 Ship Method: U P S GROUND

Parts Due Date: 8/24/2017 Costing:

Ship To: SedonaSecurity, LLC

Edit Address Find Customer

Parts 3520.20 Expense 0.00 Documents **No Special Order Parts Allowed**

Part	Description	Vendor Part	Vendor Desc	Pkg Qty	Quantity
	WISTA CONTROL F	V32FB-9COM		1	