

Create a Purchase Order from a Parts Record

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Follow the instructions below 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 will be displayed. Locate and open the part for which a Purchase Order will be created.

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

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

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b. 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.

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3. The New Purchase Order form will be displayed. Fill in the Header information. For descriptions of each field contained 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 contained on the Expense form, refer to the [Purchase Order Form Definitions](#) topic.

5. In the Footer section of the PO form, you may enter a Memo if desired. Up to 256 characters of information may be entered into this field. This information will print on the Purchase Order.

6. If a document needs to be attached to the Purchase Order, press the Apply button then 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, press the OK button located at the lower right of the form to save the Purchase Order.

The Ship To Address may be changed if necessary by hovering the mouse over the words Ship To: in the Header of the PO form, right-click and select Edit Address. You may also click on the Edit button shown below the Ship To label in the PO Header.

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