Purchase Order List Definitions

This article will describe the layout and options available within the Purchase Order List. This list displays open Purchase Orders and Closed Purchase Orders when selecting the option to include closed PO's.

The Purchase Order List is accessed by navigating to the Main Application menu and selecting the Purchase Orders option within the Accounts Payable module.

The Purchase Order List is divided into to major sections; the Warehouse pane on the left and the Purchase Order Listing on the right. When the Purchase Order List is first opened, all open Purchase Orders for all warehouses will be displayed. If it is desired to view the list of open purchase orders for certain warehouses, pressing the Invert Selection button located at the lower left will de-select all warehouses, then you may select the checkbox to the left of each warehouse desired.

If you want to include closed purchase orders, select the checkbox "Show Closed Purchase Orders" located at the bottom of the list. Selecting this option will display all open and closed purchase orders that have ever been created.

The Purchase Order Listing displays several columns of information related to the PO, each of which is described below. If any parts on a PO have been flagged as back ordered, the Purchase Order will be displayed in red.

- PO Number - The Purchase Order Number auto assigned or manually entered by the User. PO Number auto-assign is controlled by a setting in SedonaSetup AP Setup/Processing.
- Vendor - The Vendor code assigned to the Purchase Order.
- Order Date - The date on which the Purchase Order was placed. When creating a new PO, the Order Date defaults to the date on which the PO is being created but may be overridden by the User.
- Due Date - If the Vendor provided a date on which the parts will be delivered, the User manually fills in this date.
- Type - If the PO is linked to a Job or a Service Ticket, the type will display as JOB and SVC respectively.
- Number - If the PO is linked to a Job or Service Ticket, the Job Number or Service Ticket number will be displayed, otherwise this column will be blank.
- Amount - The total amount of Parts and Expense Items on the Purchase Order.
- Received - The total amount received against the PO as of the date/time the Purchase Order List is being viewed.
- Memo - Any information entered into the memo field of the PO will display in this column.
- Ack - If a User has selected the Acknowledged checkbox on the PO, a Y will be displayed, otherwise an N will be displayed in this column.
- Ack By - If the character in the Ack column is Y, the User code of the person that acknowledged the PO will be displayed in this column.

Located at the lower right of the Purchase Order List are four function buttons; Receive, Edit, New and Close. Each of these functions buttons will be described below.

- Receive - Used to receive a Purchase Order. Highlight a Purchase Order in the list then press the "Receive" button to open the Parts Receipt form.
- Edit - This button is used to edit an open purchase order. Highlight a Purchase Order in the list then press the Edit button to open the Purchase Order to make changes. Press the OK button at the lower right of the PO form to save any changes. A Purchase Order may also be edited by double-clicking on a Purchase Order within the list.
- New - Pressing this button will open the New Purchase Order form. If your company is auto-numbering Purchase Orders, if the User does not save the purchase order, this number will be discarded and not re-used.
- Close - Pressing the Close button will exit out of the Purchase Order List.