Purchase Orders

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Navigate to the Vendors section under the accounting dropdown to create new purchase orders. Complete the required information, add parts to order, adjust the quantity of parts as needed (quantity defaults to 1 per part), and save the PO. NOTE: when you add parts to a PO, a truck icon will show up next to the quantity in that warehouse suggesting that additional parts are on the way.

- *Vendor*: Select the vendor this PO is going to.
- *Order Date*: Auto-populates the date but can be overridden.
- *PO Number*: Auto-populates the date but can be overridden.
- *Work Order*: Associate with an existing work order.
- *Address*: Enter the billing address.
- *Direct Expense*: Select "Direct Expense" if the contents of the PO will not be tracked stock items (e.g. commodity type items that are not worth tracking physically, could also be used for office supplies)
- *Ship To*: Enter the address of the warehouse this PO is going to. NOTE: You cannot ship to your warehouse if the PO is a direct expense.

Resolve PO

When the contents of the PO have arrived, you need to create a receipt to indicate you received the parts from the PO. Edit the PO and enter the quantity that arrived in the "Received" column in the Parts tab and select "Resolve".

Create a Bill

Create an invoice to pay the vendor after receiving the PO. You cannot pay a bill until you convert a receipt into a bill. Add a bill in the Bills tab of the PO and select "Pay" to add a payment. Complete the following information and save:

Vendor: Select the vendor to pay for this PO.
Bank Account: Select the bank account to pay the bill form.
Check Number: Enter the check number of the payment.
Date: The date auto-populates.
Total Amount: This total will auto-calculate as you select the bills to apply payment to.