

Creating a Purchase Order

Last Modified on 06/06/2022 3:47 pm EDT

1. From the *EnergyService* menu, select **Purchase Orders**.
2. Choose **Create**.
3. Press **F5** in the *Vendor#*, *Warehouse#*, and *Status* fields to select from the lists. The Status automatically defaults to *Open*.

Purchase Order

Vendor Name / Address: Vendor# 2, GAS EQUIPMENT COMPANY OF DENVER, 4600 WADSWORTH BLVD, PO BOX 187, WHEAT RIDGE, CO 80033

Ship To Warehouse: Warehouse# 3, BURNS OFFICE, 5250 US HWY 36, AVON, IN 46123

Date: 02/19/2015, P.O. No.: 158

Status: 1, Open, Created by: SHANNON

Item	Description	Qty Ordered	Qty Rcvd	Price	Discount	Tax%	Tax Expected Dt	Last Recv Dt	Line Amount
781238HEX	1/2 TO 3/8 HEX BUSHING	50.00	0.00	\$1.30	0.00%	0.00000	0.00	00/00/00	\$65.00
7812CTSPLG	1/2 STAB-COUPPLINGS	10.00	0.00	\$10.16	0.00%	0.00000	0.00	00/00/00	\$101.60
7812CTSPTIE	1/2 POLY GAS TUBING	50.00	0.00	\$0.27	0.00%	0.00000	0.00	00/00/00	\$13.50

Vendor Part N: 781238HEX, Ref Proposal#: , Proposal Custo:

Sub Total: \$180.10, Tax: \$0.00, Total: \$180.10

Buttons: Only Vendor 'Open?', Receive All, Invoice, Undo, Clear Search, Create, Modify, Save & Close

4. Enter *Notes* if desired.
5. Press **F5** in the *Item* field to check the appropriate item(s) and choose **Select**.
6. Enter *Qty Ordered* and press **Tab**.
7. If some items have already been received, enter the amount in the *Qty Rcvd* column. This will change the PO to display as *Partial Received*. Otherwise, leave as 0.00.
8. If the PO is tied to a specific proposal for a customer, press **F5** in the *Ref Proposal#* field under the grid to choose from the list.
9. The *Price* should automatically default to the price set up in inventory. Modify if necessary and press **Tab**.
10. Enter the *Tax%* if applicable.
11. Enter the *Expected Dt* if an ETA is available for the item or leave blank.
12. Enter the *Last Recv Dt* if any of the items have already been received. Otherwise, leave blank.
13. The *Line Amount* will automatically calculate as will the sales tax if a *Tax%* was entered.
14. Press **Ctrl+Q** to save or select **Save & Close**.
15. To print the Purchase Order, select **Print** located on the top left of the screen.
16. Return to the Purchase Order at any time to modify unless the PO has been received.