Purchase Orders for Vendor

Last Modified on 05/24/2023 2:31 pm EDT

Records > Vendors > Purchase Orders

This screen shows a listing of purchase orders for a vendor. By default it shows all purchase orders that are posted and open.

Change the filters to find the PO's you want to see. Buttons will be activated based on where you fall in the approval table process.

The checkbox on the left side allows you to check multiple P.O.'s for approval, post, etc.

- Double-click on a line to browse the detail of the purchase order. You may also browse the attachments if any exist.
- To add a purchase order click the New button.

Vendor ID: The vendor to display purchase order for. Blank this out to browse P.O.'s for all vendors.

Open Status: Filter by whether P.O.'s are open or closed. A P.O. is considered closed when it has a zero balance.

Posted: Filter by whether P.O.'s are posted or not.

Status: Filter by where P.O.'s are at in the approval process as well as being paid.

View: Allows you to customize the columns and save your settings as a view. To hide or unhide columns click the customize columns button and check which columns are to be displayed.

To order columns you can either click the customize columns button or just drag columns where you want them by dragging the column header. Save a view by clicking the save view button.

You must have proper permissions to save or delete views.

Buttons

New: Click this button to add a new purchase order. The Purchase Order entry screen will open with the selected vendor id pre-populated.

Edit: Click this button or double-click a P.O. to edit it or see the full P.O. detail.

Approval Drop-down:

Submit: Submits the purchase order request for approval.

Send to reviewer

Log: Browses the approval log for a purchase order.

Approval Table: Click this button to browse the approval table for this purchase order.

Post: Makes the purchase order a permanent P.O. so that it can be used in invoice entry.

Approve: Approves the purchase request.

Disapprove: Denies approval. You must also specify a reason.

Delete: A P.O. cannot be deleted once has been posted. If posted and you need to delete it, you must close the P.O. instead.

Attachments: Open the attachments list for the selected P.O.

Close : Close the selected P.O.

Import: Import purchase orders from a .xls, .csv, or.txt file.

Filter: Click this button to do advanced filtering. You can filter by whether the P.O. was posted or not, vendor#, P.O.#, or a range of accounting periods.

Refresh: Refreshes the purchase orders with the current filters.

Forms: Print, preview, export to Word, or email the selected purchase order as a Word document.

- **Print:** Depending on user's workstation settings, either opens a "Select Printer" dialogue to print the PO or generates a pdf of the PO information, vendor #, Bill-to, Ship-to and all identifying information and GL distribution grid detail.
- **Preview:** Generates a pdf of the PO information, vendor #, Bill-to, Ship-to and all identifying information and GL distribution grid detail.
- **Word Export:** Generates a word document containing all PO information, vendor #, Bill-to, Ship-to and all identifying information and GL distribution grid detail.
- **Email to Vendor**: If a default email address is set this will email a copy of the PO in pdf form to the vendor.

Reports: Print, preview, or export to Excel the list of purchase orders displayed as it is displayed on the screen.

- **Quick Print**: Depending on user's workstation settings, either opens a "Select Printer" dialogue to print the PO list or generates a pdf of the PO list information.
- **Advanced Print**: Opens the Advanced Print dialogue and allows the user to change file zoom, print margins, column widths, and other options.
- **Excel Spreadsheet**: Downloads the PO list information in .xls format.

For more information see purchase order setup and rules