

Purchase Order Preferences

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Purchase Order Preferences

Settings > Purchase Order > General Options:

Controls the main preferences and current dates in purchase order.

Use Purchase Order: Activates use of the Purchase Order system.

Use Approved Documentation: A checkbox during PO entry that states the attachments are sufficient for approval.

Use Item#: Includes an item# on each detail line of PO's in addition to comments.

Use Encumbrance: Includes PO encumbrance, which tracks the amount encumbered for each G/L account. This can then be displayed on the account browse or a financial statement.

Settings > Purchase Order > Entry Options:

PO entry information.

PO# Assignment: Enables automatic or manual PO # generation.

Next PO#: Lists the next PO# to be generated.

Distribution method: Determines the default distribution method for entry.

Allow entry up to x periods past/future: Limits all users to only be able to enter PO's back in time and in the future the number of periods specified. However, the Years setting in Setup > Options > General Ledger Entry overrides this setting.

Auto-post upon entry: Automatically posts the PO when created.

Force requester to be user entering PO: If checked, doesn't allow requester to be changed.

Require vendor upon entry: Forces a vendor# rather than allowing blanks, though a vendor is still required before it can be posted.

Require account upon entry: Forces an account# rather than allowing blanks, though an account is still required before it can be posted.

Allow attachments: Allows users to attach any file to the requisition during entry. This is used to attach a quote from the vendor. Attachments will also be included in e-mails requesting approval.

Require an attachment: Forces the user to have at least one file attachment.

Default browse level: Browse permission level assigned to all attachments when initially added to POs.

Allow PO to be modified once posted: Allows the PO to be changed even after it has been posted.

Include period and date on each PO detail line: Shows the accounting period and date on each detail line, allowing it to be different per line rather than just keying it for the whole PO.

Use received status: Includes a status column for PO distributions, allowing you to flag items as Received, Not Received, etc.

Dft received status: The default received status to use for new PO's. Typically this is "Not Received".

Allow "ship to" to be modified: Do you want to allow the requester to change the ship to address upon PO entry?

Default print upon entry: If this box is checked, the PO will be printed upon saving the PO (on the PO entry screen).

Use regular PO edit: Displays PO edit screen with just header and detail information.

Use Split-screen PO edit: Displays PO edit screen with three-way screen split: PO header detail in upper left of screen, PO entry detail in lower left of screen, and PO attachment to the right.

Automatically show attachments on edit: Automatically displays PO attachments on right side of screen when edit screen accessed. If user chooses to "Hide image" the system will remember the display the next time they access the PO edit screen.

Settings > Purchase Order > Purchase Order Form:

Customizes how the PO form they are printed on as well as exported to Microsoft Word in.

Header Image: Allows you to include a custom image to use as a header. It should be a wide image, but not very high; roughly, 6 x 1 proportionally.

Footer Image: Allows you to include a custom image to use as a footer. It should be a wide image, but not very high; roughly, 6 x 1 proportionally.

Include Federal ID#: Includes the company's federal ID# on the form.

Include Log: Includes the approval log on the form.

Bill To: Determines the address to show on the form; company or ship to.

Font: The font name and size to be used on the form for the vendor, ship to, information, and bill to sections. Headers will be bolded. Distributions and the log will be -2 of the size specified here.

Margins: Adjust the margins for the form here.
