Purchase Order

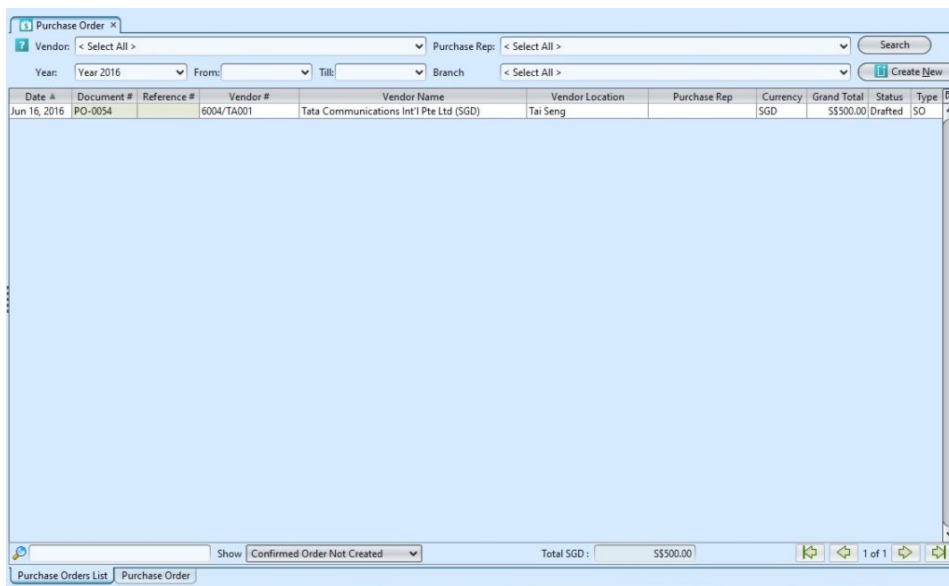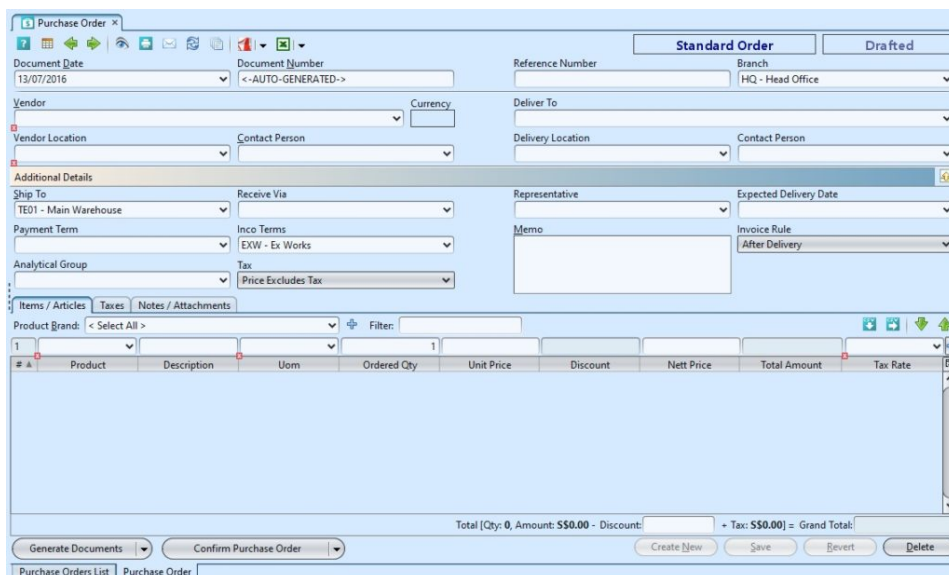Purchase Order view allows the user to create and manage purchase orders. Below are available actions for the user from *"Purchase Order"* view:

🔗 Create new purchase order

🔗 Update purchase order details

🔗 Delete purchase order

🔗 View and search purchase order details

Field Name	Explanations	Mandatory Information
Document Date	Creation date of the document	Y
Document Number	Document number of the purchase order	Y
Reference Number	Code for easy reference search of the document	N
Branch	Name of company's branch which make the purchase order	Y
Vendor	The vendor of whom to make the purchase from	Y
Currency	Currency used by the vendor	Y
Vendor Location	The location of vendor	Y
Contact Person	The contact person of vendor	N
Deliver To	Name of company to deliver the purchase order	N
Delivery Location	The location of company to deliver the purchase order	N
Contact Person	The contact person of company at delivery location	N
Ship To	Warehouse location to deliver the purchase order	Y
Receive Via	Method of the delivery	N

Representative	Name of staff to process the purchase order	N
Promised Date	Date of delivery	N
Payment Term	Payment term for the purchase order	N
Inco Terms	Inco Terms rules associated with the transportation and delivery of goods	Y
Analytical Group		N
Tax	Indicate whether price of the product to purchase include or exclude tax	Y
Memo	Additional information in regard to the purchase order document	N
Invoice Rule	Invoice mode of the purchase order, immediate or after delivery	Y
Product Brand	Select product brand(s) to filter products	N
Filter	Enter keyword(s) to filter / search for products	N
Product	Product code of the item	Y
Description	Description of the item	N
Uom	Type of the item	Y
Ordered Qty	Number of quantity of the item to purchase	Y
Unit Price	Cost per item	Y
Discount	Discount for the item to purchase	N
Nett Price	Nett price for the item to purchase	Y
Total Amount	Total cost for the item to purchase	Y
Tax Rate	Tax of the item to purchase	N
Total Discount	Total discount for all the items on the purchase order	Y
Grand Total	Total cost for all the items on the purchase order after discount and tax	Y

Create New Purchase Order:

1. Click on *"Create New"* at the top right of screen of *"Purchase Orders List"* tab, it will open *"Purchase Order"* tab with empty form
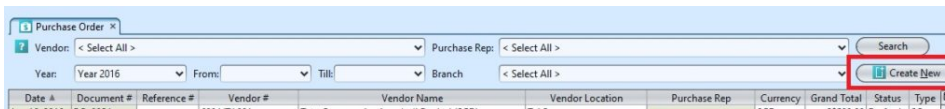
2. Select a vendor from the *"Vendor"* drop-down list on top left side of screen. It will fill up the form with the vendor's info

3. Fill up purchase order's information on the top half of screen

4. Click **"Save"** button at the bottom right side of screen

5. Filter the products list by selecting a brand from **"Product Brand"** drop-down list. Add product into the purchase order by searching for the product from the product drop-down list in the table on **"Items / Articles"** tab

6. Enter the product's info and click button to add the product into the purchase order

7. Repeat steps 5-6 to add more products into the purchase order

8. Click on **"Notes / Attachments"** tab at the middle of screen to add notes or files attachment for the purchase order

9. Click on **"Save"** button at the bottom right of

screen when completed

10. Click on **"Confirm Purchase Order"** button at the bottom of screen to confirm the purchase order

11. Click on **"Approve Purchase Order"** button at the bottom of screen to approve the purchase order. Tax entries applicable for the purchase order will be automatically created under **"Taxes"** tab if any

12. Click arrow on **Generate Documents** button at the bottom left of screen and select **"Generate Delivery Confirmation"** option to generate a new delivery confirmation. A link to show the delivery confirmation will be created above the button

13. Click arrow on [Generate Documents ▼] button and select **"Generate Similar Purchase Order"** option to generate a new copy of the purchase form

Update Purchase Order Details:

1. Click on **"Purchase Orders List"** tab at the bottom of screen

2. Double click on purchase order to be updated, it will bring up the details on **"Purchase Order"** tab for the selected order. If a purchase order's status is **"Confirmed"** or **"Approved"**, right click on the order and reopen / undo approval of the order first. User can do so from the document as well by clicking the arrow on **"Generate Report"** button at the bottom left

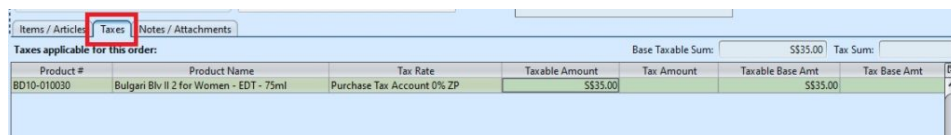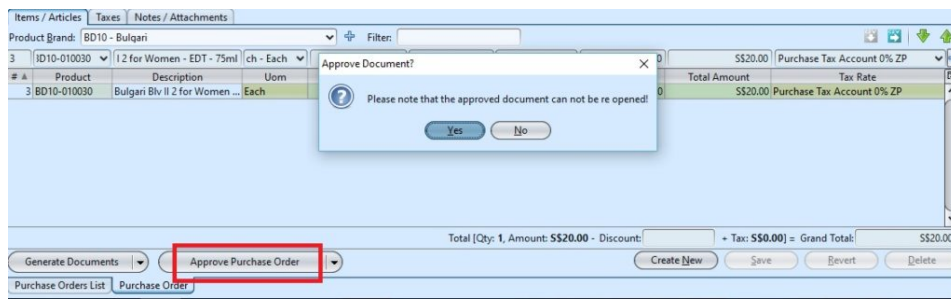of the document screen

3. Make change(s) on the purchase order information

4. Click on **"Save"** button at the bottom right of screen when done

5. Click on **"Revert"** button at the bottom right of screen or refresh icon at the top of the screen to roll back the changes
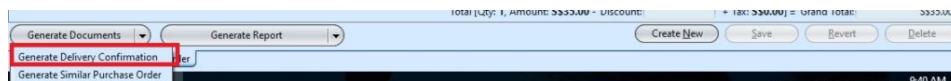
6. Click on **"Confirm Purchase Order"** button at the bottom of screen to confirm the purchase order

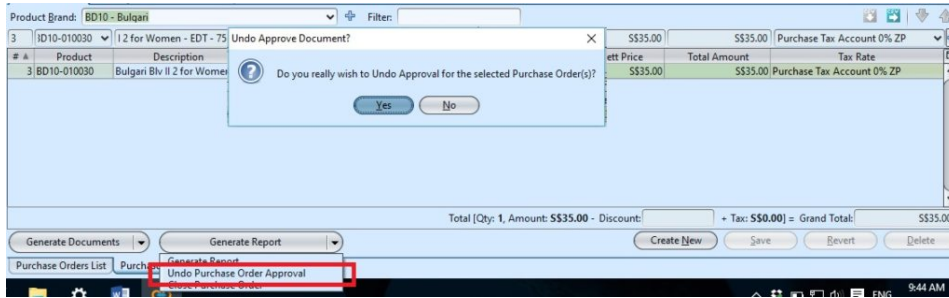7. Click on **"Approve Purchase Order"** button at the bottom of screen to approve the purchase order

Delete Purchase Order:

1. Click on **"Purchase Orders List"** tab at the bottom of screen

2. Double click on purchase order to be deleted, it will bring up the details on **"Purchase Order"** tab for the selected order. If a purchase order's status is **"Confirmed"** or **"Approved"**, right click on the order and reopen / undo approval of the order first

3. Click on **"Delete"** button at the bottom right side of screen

4. Click on **"Yes"** button on the pop-up window to confirm purchase order deletion
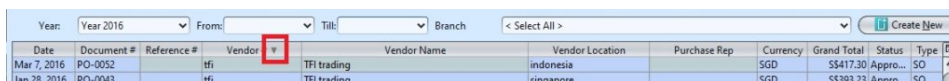
View and Search for Purchase Order Details:

1. Click on **"Purchase Orders List"** tab at the bottom of screen

2. Enter search parameter to filter the result, i.e. type in which vendor to search for in the **"Vendor"** text field box or select from drop-down list
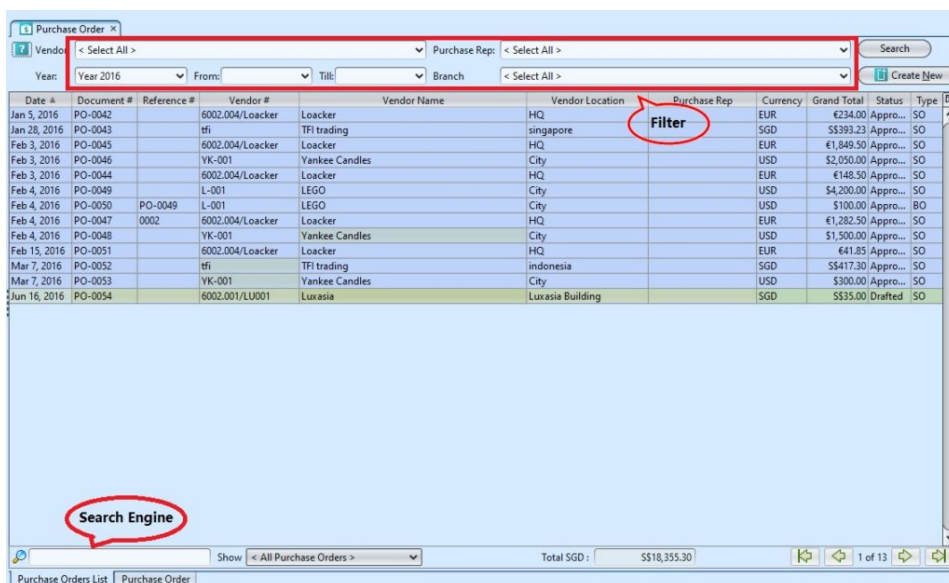
3. Result can be sorted alphabetically by clicking the fields' columns

4. Double click on purchase order to view full details of the order, it will bring up the details on **"Purchase Order"** tab for the selected order