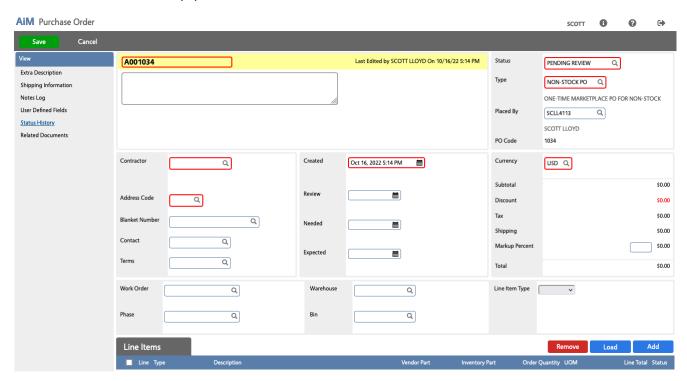
Create Purchase Order

Purchase Orders are used to purchase materials from Contractors (vendors). The status tells where, in the process, the Purchase Order is at and what can be done to the Purchase Order. In most situations the Purchase Generator will be used to create Purchase Orders. Creating a Purchase Order by hand will only be done occasionally.

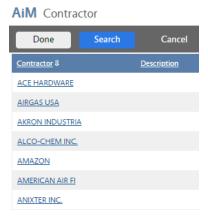
1. From the menu, under Purchasing - Purchase Order



- 1. Click Purchase Order hyperlink and then click
 - a. Alternatively, you can click from the menu.

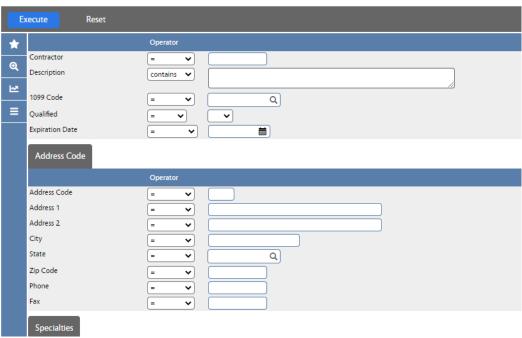


- 2. Enter the general information about the Purchase Order. *Note:* **Status**, **Type**, and **Placed By** are fiilled in with the default values.
 - a. Enter the **Contractor** you are ordering from. Click ${f Q}$



b. This will give you a list of all Contractors. Click the Contractor hyperlink to select a Contractor, or click Search and enter the search criteria.





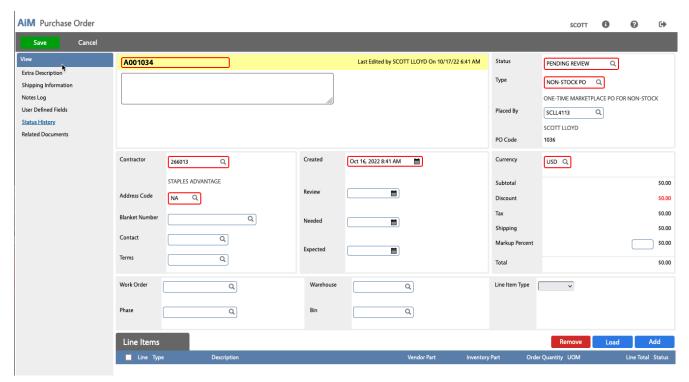
c. Click Execute



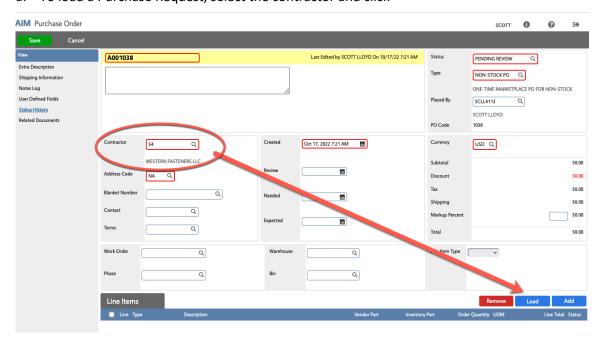


- d. Click the Contractor hyperlink to select the Contractor.
- e. You will be returned to the Purchase Order screen with the **Contractor** information filled in <u>IF</u> that Contractor only has one Address Code. (Which will be filled in also.) If the Contractor has multiple Address Codes your will need to select one.

f. Click the hyperlink for the Address Code you want to select. You will be returned to the Purchase Order screen with the **Contractor** and **Address Code** filled in.



- 3. Fill in the other fields as needed.
- 4. To load the Line Items you have two options; load a Purchase Request, or add parts and services directly to the order.
- 5. OPTION Load a Purchase Request.
 - a. To load a Purchase Request, select the contractor and click



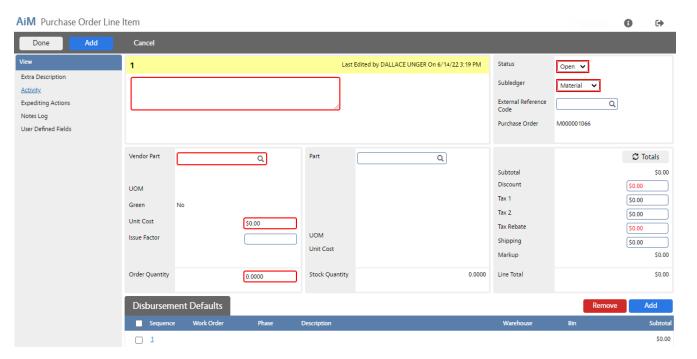
i. This will looks for Purchase Request for this Contractor and give you list of Purchase Requests to pick from.



- ii. Click the checkboxes for the transaction you want.
- iii. Click Done
- 6. OPTION Add an Inventory Stock Part
 - a. To add a new line, click
 - i. You will be asked to select the type on item you are adding.



ii. Click the radio button for Stock and then click



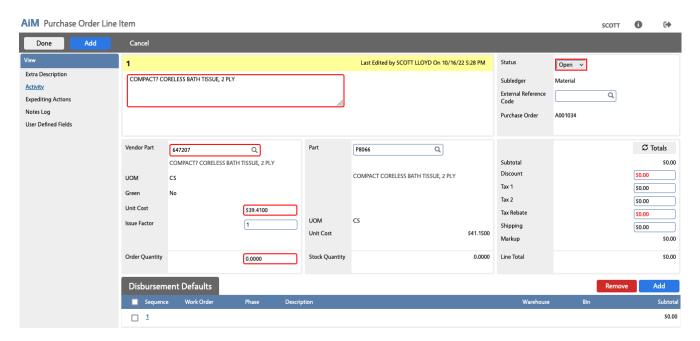
iii. On the **Vendor Part** click ${}^{ extstyle Q}$



iv. Enter the criteria to find the part and click



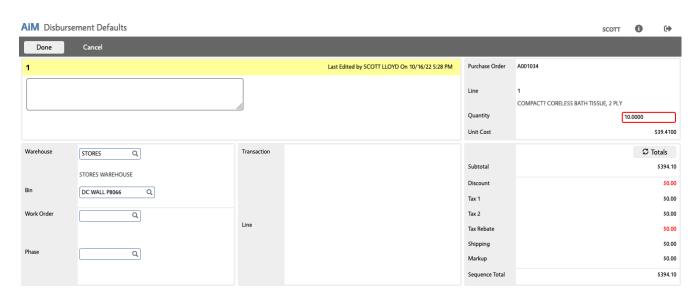
v. Click the Vendor Part hyperlink to select the part. This will return you to the Purchase Order Line Item and will fill in the fields.



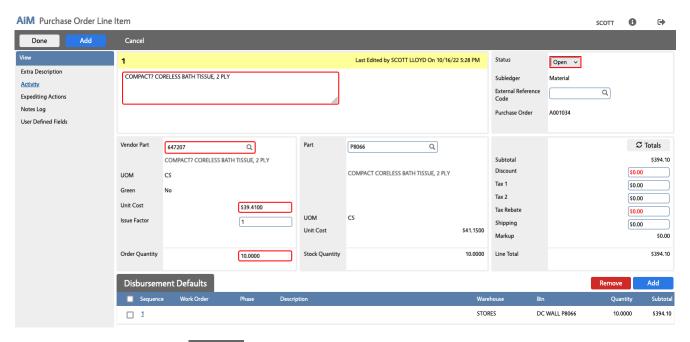
vi. Enter the Order Quantity.



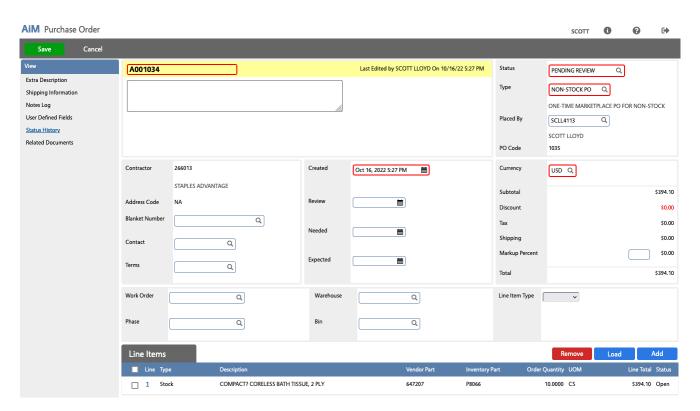
vii. Complete the Disbursement Defaults, click the Sequence hyperlink.



- viii. Fill in either the **Warehouse** and **Bin** (if ordering for stock replenishment) or **Work Order** and **Phase** (if the part is going to a job).
- ix. Click Done



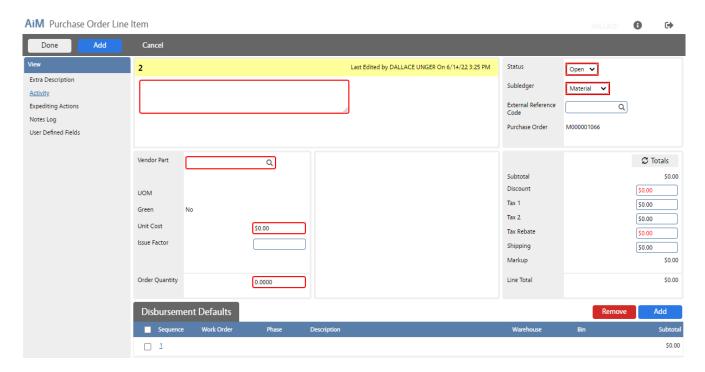
x. Click Done



- 7. **OPTION** Add a Vendor's Catalog Part
 - a. To add a new line, click
 - i. You will be asked to select the type on item you are adding.



ii. Click the radio button for Catalog and then click



iii. On the **Vendor Part** click ^Q



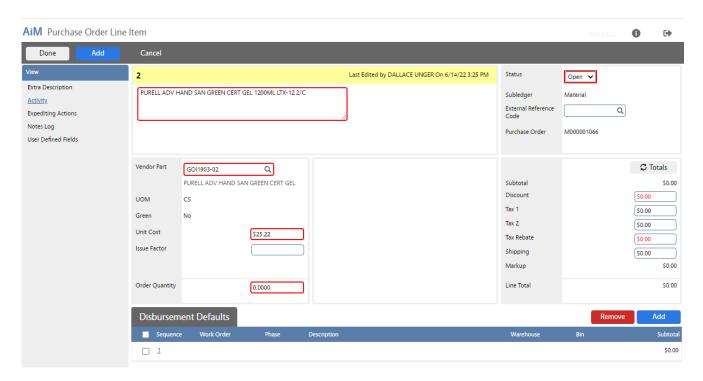


iv. Enter the criteria to find the part and click

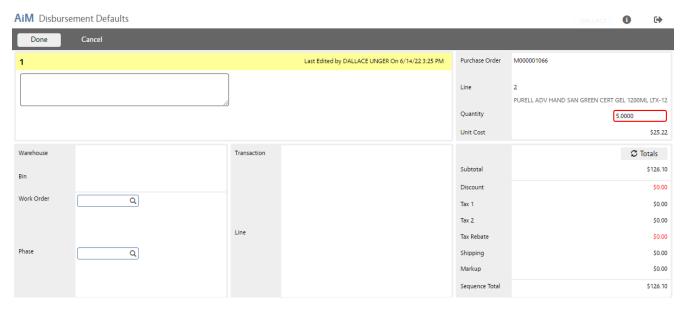
AiM Vendor Part



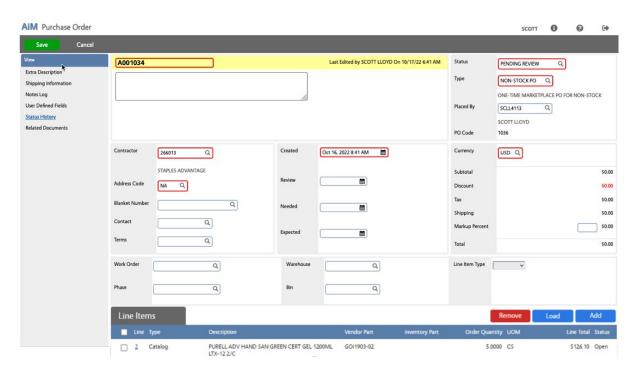
v. Click the Vendor Part hyperlink to select the part. This will return you to the Purchase Order Line Item and will fill in the fields.



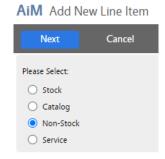
- vi. Enter the Order Quantity.
- vii. Complete the Disbursement Defaults, click the Sequence hyperlink.



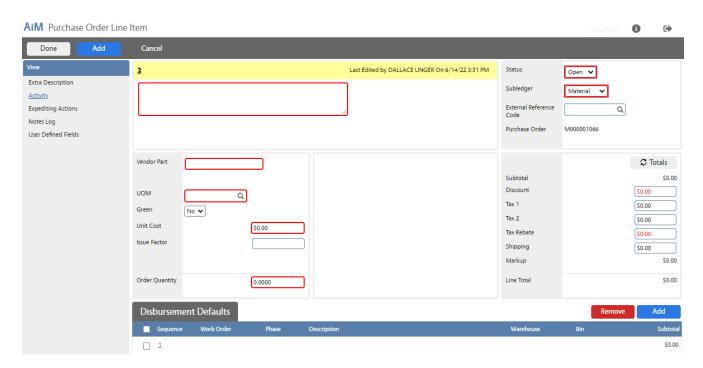
- viii. Enter the Work Order and Phase.
- ix. Click Done
- x. Click Done



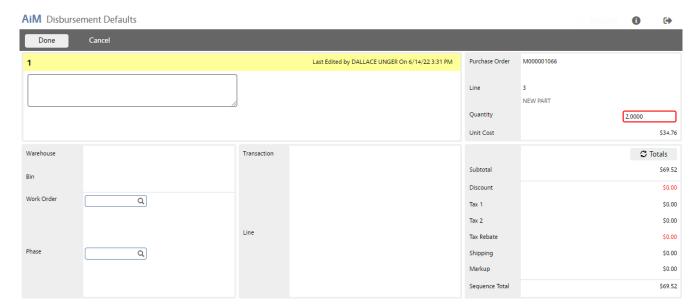
- 8. **OPTION** Add a Non-Stock Item
 - a. To add a new line, click
 - i. You will be asked to select the type on item you are adding.



ii. Click the radio button for Non-Stock and then click

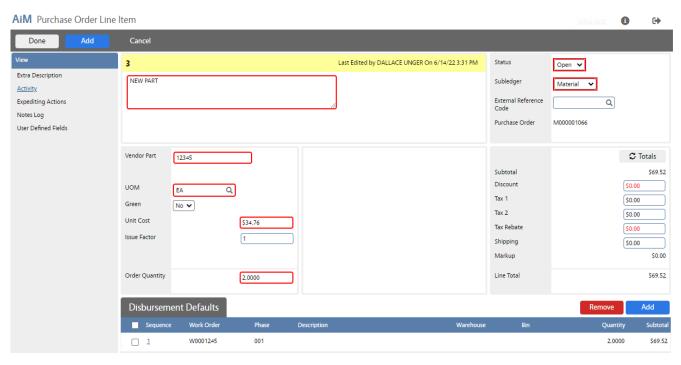


- iii. Fill in the fields:
 - 1. Description of the part (in the red box on the top left side)
 - 2. Vendor Part
 - 3. **UOM**, click ^Q to see a list of units of measure
 - 4. Unit Cost
 - 5. Order Quantity
- iv. Complete the Disbursement Defaults, click the Sequence hyperlink.

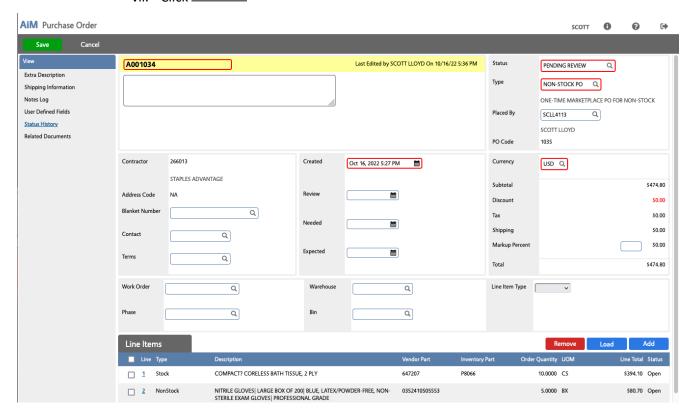


- v. You will need to enter the Work Order and Phase.
- vi. Click Done

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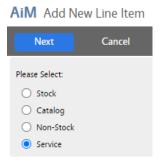


vii. Click Done

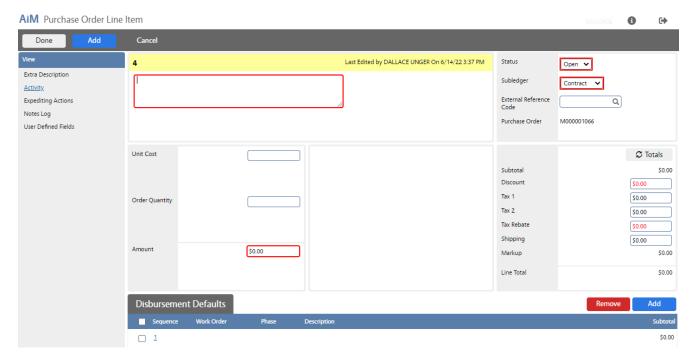


- 9. **OPTION** Add a Service Line
 - a. To add a new line, click
 - i. You will be asked to select the type on item you are adding.

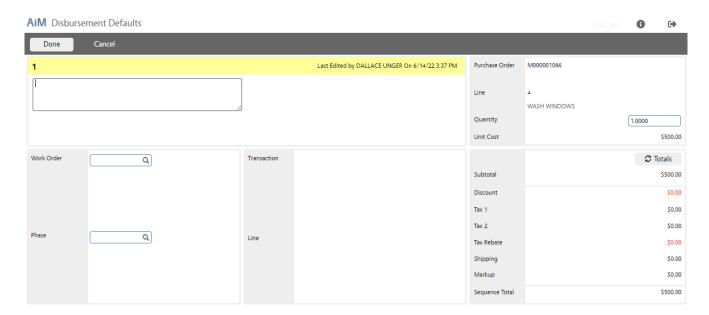
12



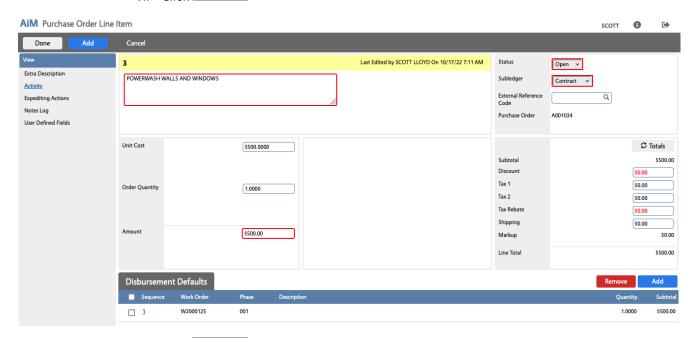
ii. Click the radio button for Service and then click Next



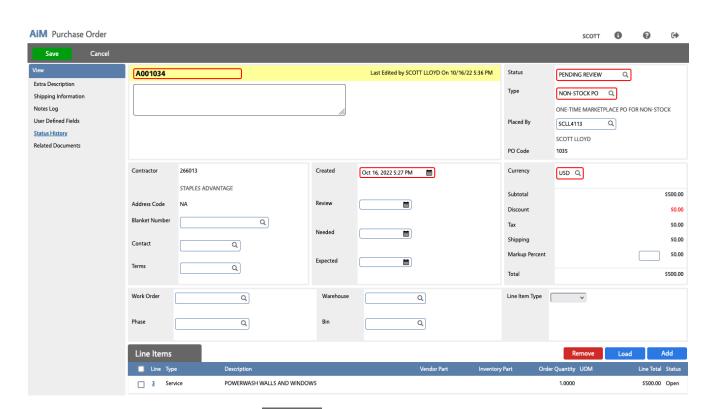
- iii. Fill in the fields:
 - 1. Description of the part (in the red box on the top left side)
 - 2. Amount
 - 3. Optionally, enter the **Unit Cost** and **Order Quantity** (the system will calculate the Amount for you)
- iv. Complete the Disbursement Defaults, click the Sequence hyperlink.



- v. Enter the Work Order and Phase.
- vi. Click Done



vii. Click Done



10. After all lines are entered, click