Create and Edit Purchase Order – Quick Reference

In this document, “Enter” or press “E” means press <Enter> key.

Create PO (for CBO’s & Stock) - Using Inventory/PO Review Scrn

1. Inventory Purchasing; **P.O. Status**
2. Enter Vendor ID & then F3=Create.
3. Enter Printer # or N=No Report Press <Enter> through all fields except: **Enter Order Mode: 7 Special/CBO Only.**
4. If CBO’s were picked up, upper right corner displays “P.O. Line.”
5. Press PgDn to review lines created for CBO’s.
6. Press TAB=BKO Lookup to see POS Order# and Customer. Press F12 to exit BKO Lookup screen.
7. To order items for stock, press F7=Chg Next Item (upper right corner=ITEM SEQ).
8. Press PgDn to review in Item Seq.
9. **To order an item, enter Qty and press E. Press F10.** (LN# is assigned.)
10. To create a Line Note for an item, see “Line Note” instructions.
11. To create an “item record” for not-on-file item, see instructions “How to Create an Item Record.”
12. To see other PO’s item is on, press F8=Item History. F12 to exit Item History Lookup screen.
13. To exit PO and leave in NEW status (to add more items later), press F12 and exit. See instructions for “Editing an Existing PO in New Status.”
14. To print a Purchase Order, press F12 and **P** for “Post & print.” Go to **Step 5** of instructions for “Post and Print Purchase Order.” To exit and print PO later, press F12 & Exit.

Create PO (for CBO’s & Stock) - Using Create/Edit Line Screen

1. Inventory Purchasing; **P.O. Status**
2. Enter Vendor ID & then F3=Create.
3. Enter Printer # or N=No Report
4. Press <Enter> through all fields except: **Enter Order Mode: 7 Special/CBO Only**.
5. <Create/Edit Line Items> Screen.
6. Each CBO has separate Line#. “B” in Flag column means cust bko. “S” means customer special order. “Note” contains Qty, POS Order#, Customer Name & Deliver Date.
7. To order item for stock when CBO’s exist, enter Line# following Line# for CBO.
8. To order item for stock when no CBO’s exist, simply enter Item #.
9. Press <Enter> past Vendor Code.
10. <Record Not Found> means item master does not exist in your inventory file.
11. Enter Qty and press <Enter>.
12. If cost is ok, press F10 to save. Next Ln# is assigned (increment by 10 or as specified in Main Options).
13. If entering NOF (not on file) item, enter cost.
14. To create an “item record” while entering this order, press **F12** & **O** for **inv/pO rev** screen. Then see instructions “**How to create an Item Record**.”
15. To exit PO and leave in a NEW status to add more items later, press **F12** Exit. See instructions to “Edit Existing PO in NEW status.”
16. To print a purchase order and post the on-order quantities in the item master, press **F12** & **P** to Post & Print the PO. Go to **Step 5** of Instructions to “Post and Print Purchase Order.”

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Post and Print Purchase Order

1. On P.O. Status screen, enter Vendor ID.
2. Enter LN# of PO you wish to post & print. (PO must be in NEW or REV status.)
3. **Press F6=POST**. Do you wish to convert to REV Status?-Y
4. **Specify Output Device:** Enter desired printer #.
5. Be sure Start & Stop # is the PO you wish to print.
6. Press <Enter> through other fields until “Print a Receiving Report.” Respond “Y” to print a receiving report now to file with the PO, otherwise, respond “N.” The report can be printed later as needed.
7. PO is now in ORD status. Qty on Order for items have been updated.
8. Retrieve PO from printer for faxing to vendor.

How to Reprint a Purchase Order

1. Inventory Purchasing; P.O. Status
2. Enter Vendor ID.
3. Enter LN# of PO to Reprint.
4. Press F6=Post.
5. Enter Printer #
6. Be sure Start & Stop# is PO you wish to reprint.
7. Press E through all fields except answer **“N” to Post and Print.**

Enter a Special Order

1. Inventory Purchasing; P.O. Status
2. Enter Vendor ID
3. F2=Edit
4. Enter Vendor ID again.
5. Press <Enter> past Ship Name unless drop ship.
6. OK to Add Record? Y
7. <Create/Edit Line Items> Screen displays. Enter Item Number.
8. Press <Enter> past Vendor Code.
9. Enter Qty and press <Enter>.
10. If cost is ok, press F10 to save line.
11. If entering NOF (not on file) item, enter cost.
12. To create an “item record” while entering this order, press **F12** & **O** for **inv/pO rev** screen. Then see instructions “**How to create an Item Record**.”
13. To print a purchase order and post the on-order quantities in the item master, press **F12** & **P** to Post & Print the PO. Go to **Step 5** of Instructions to “Post and Print Purchase Order.”

Edit an Existing PO in NEW Status - Using Inventory/PO Review Screen

1. Inventory Purchasing; P.O. Status. Enter Vendor ID & LN# of PO to edit. <Create/Edit Line Items> Screen displays. **F12 & O** for “inv/pO rev” screen.
2. **PgDn** to review items in P.O. Line Seq.
3. To review items in Item Seq, press F7=Chg Next Item so that upper right corner is ITEM SEQ.
4. To order item, enter Qty and press Enter. Press F10. PO Ln# is assigned.
5. To exit PO and leave in NEW status (to add more items later), press F12 and exit.
6. To print a purchase order and post the on-order quantities in the item master, press **F12** & **P** for Post & Print. Go to **Step 5** of Instructions to “Post and Print Purchase Order.”

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Purchase Order Status Descriptions

NEW New PO "in the works."
REV Reviewed PO. Ready to Post & Prt
ORD Order placed with Vendor. Qty on Order for items has been posted.
RVD Received. Items marked as received but have not yet posted to item records.
BKO Backordered. PO partially received; one or more items are backordered.
CLS Closed PO. All lines received or cancelled.

LCK Locked PO. A posting process was interrupted causing PO to be in Locked status.

Adding an Item to an Ordered PO

1. Inventory Purchasing; P.O. Status
2. Enter Vendor ID
3. Enter Ln# of PO in ORD status and press Enter.
4. Press F2=Edit. <Receive Line Items> screen displays. Press **F12** and **H** for Heading Scn.
5. Press **F2=Edit Ordr**.
6. <Create/Edit Line Items> screen displays.
7. Enter item# & vendor code.
8. Enter Qty to order.
9. If cost is ok, press F10 to save line.
10. If item is a special order (Not on File) item, must enter cost.
11. The Qty on Order for the items added to an "ordered" PO is immediately posted.
12. Press F12 and Exit when finished.
13. To reprint PO, refer to instructions "How to Reprint a Purchase Order."

Print a Suggested Order (Optional)

1. A suggested order (with qty & sales history) may be printed for PO's in a **NEW** status.
2. Inventory Purchasing; P.O. Status
3. Enter Vendor ID
4. Enter Ln# of PO (status must be NEW).
5. Press F4=Suggested.
6. Enter printer # for suggested report
7. Be sure Start & Stop# have PO# you are working on.
8. Press Enter through all fields.

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Line Notes for Items on NEW PO - ***Using Inventory/PO Review Screen***

1. On Invent/PO Review screen, line notes can be added to PO in NEW status only.
2. Item No. currently shown must be on the PO (must have a LN#). Press F12 and **L** for Line notes.
3. Enter PR in PRTF column to print on PO and Receiving Report.
4. Enter note under "Information." Enter multiple notes for same item as desired.
5. Press F3=SAVE-EXIT when done.

Line Notes on NEW or ORD PO - ***From <Create/Edit Line Items> Scrn***

1. From Create/Edit Line Items screen, line notes may be added to items on a PO in NEW and ORD status.
2. Press F2=LN# to move cursor to Line# column & Enter Line# of Item# already on PO.
3. Press F12 and L for Line notes.
4. Enter PR in PRTF column to print note on PO and Receiving Report.
5. Enter note under "Information." Enter multiple notes for same item as desired.
6. Press F3=SAVE-EXIT when done.
7. Press F10 to save note with that line item.

Reserve a PO# to Add Lines Later

1. Inventory Purchasing; P.O. Status
2. Enter Vendor ID
3. F2=Edit
4. Enter Vendor ID again.
5. Press Enter past Ship Name unless drop ship.
6. OK to Add Record? Y
7. <Create/Edit Line Items> Screen displays. Make note of PO Number shown upper left.
8. Press F12 and Exit.

How to Delete a Purchase Order

1. Inventory Purchasing; P.O. Status
2. Enter Vendor ID
3. Enter LN# of PO you wish to delete.
4. Press F2=Edit
5. <Create/Edit Line Items> screen or <Receive Line Items> screen displays. **Press F12 and H for Heading Scn.**
6. Press F6.
7. All Ln Items will be deleted! Continue-Y

Delete a Line Item on a NEW PO

1. Inventory Purchasing; P.O. Status
2. Enter Vendor ID.
3. Enter Ln# of PO that has line item to be deleted. Press F2=Edit.
4. If PO is in NEW status, <Create/Edit Line Items> screen displays:
5. Identify item to be deleted. If not on first screen, PgDn to find it.
6. Press F2=LN#. Cursor moves to Line# field.
7. Enter LN# of item to be deleted and press E.
8. **Press F6**. OK to Delete this Line Record? **Y** for Yes.
9. Press F12 and Exit.

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Delete a Line Item on an ORD PO

1. Inventory Purchasing;   P.O. Status
2. Enter Vendor ID.
3. Enter Ln# of PO that has line item to be deleted. Press F2=Edit.
4. If PO is in ORD status, <Receive Line Items> screen displays:
5. Press F12 & **H** for Heading Scn
6. Press F2=Edit Ordr
7. <Create/Edit Line Items> screen displays.
8. Identify item to be deleted. If not on first screen, PgDn to find it.
9. Press F2=LN#. Cursor moves to Line# field.
10. Enter LN# of item to be deleted and press E.
11. **Press F6**.   OK to Delete this Line Record? **Y** for Yes.
12. Press F12 and Exit.

Deleting Line off PO that has CBO

Deleting a PO line item that has a customer backorder (CBO) is handled the same as deleting a line item for stock. Follow the instructions for "Delete a Line Item on a NEW PO" - or - "Delete a Line Item on an ORD PO."

After deleting a PO line item with a customer backorder, the CBO becomes "unattached." It will be "picked up" the next time a PO is created and backorders are processed.

How to Create an Item Record

1. You may create a new item master record while working on a Purchase Order.
2. From the **<u><Inventory/PO Review></u>** screen, press **F2=Clear Item**. Cursor is positioned in Item No. field.
3. Enter new Item number and Vendor Code. ("Record Not Found" displays indicating item is not in item master file.)
4. **Qty: Enter quantity to order.**
5. **Price:** Enter your price for the item and <Enter>. Press **F10** to **Save**.
6. **OK TO ADD THIS INVENTORY RECORD? (Y OR N) Y**
7. ENTER DATA AND THEN PRESS <F10>
8. **Description**. Enter item description.
9. **Costs:** Enter the cost (your price) into the appropriate cost fields.
10. Enter data in other fields as needed. To bypass a field, press the <Enter> key.
11. **DIV**. Enter Division Code (if used).
12. After entry of Division Code, press **F10 to save**.
13. The next PO Line number will be assigned to the new item.

Print Item Master Screen for Template

1. A screen print of an item master similar to the new item you want to "add" to the inventory master file can help.
2. A screen print can ***only print*** to the system default printer – usually prt# 1. <u>Check to be sure it is ok to use printer1</u>!
3. Select Inventory from main menu.
4. 1=Item Master. Enter Item No and Vendor Code of item to be used as template.
5. Press **F4** (this is the print screen command) and then press **F12 & Exit.** Item Master screen will print on **printer 1** (or your default system printer).

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Unlocking PO’s in LCK Status

1. A “locked” (LCK) status can occur on a PO if a process was interrupted. The PO needs to be “unlocked.”
2. If locked PO was in a **NEW** status:
3. Go to P.O. Status Screen.
4. Enter Vendor ID
5. Enter Ln# of PO in LCK status.
6. F2=Edit. On PO Heading Screen, press **TAB** to unlock the PO.
7. If PO is locked because **Post & Print** process was interrupted, simply re-run the Post & Print. When complete, check that PO no longer has LCK status.
8. If PO is locked because **Receiving** process was interrupted, re-run the receiving program. When complete, check that PO no longer has LCK status.
9. If status of PO prior to LCK is **unknown**, follow all of the above steps (in order) until the PO becomes unlocked.

Adding A CBO to a NEW PO

1. If a salesperson backorders an item on a customer order AFTER PO is created, “manually” attach the CBO to the purchase order as follows.
2. Inventory Purchasing; P.O. Status
3. Enter Vendor ID
4. Enter Ln# of PO in NEW status and press E.
5. Press F2=Edit
6. <Create/Edit Line Items> screen displays. **Enter Item number and press E.**
7. Vendor Code displays automatically. Do <u>not</u> enter Qty. Press **TAB**=BKO Lookup.
8. <Purchasing Backorder Line Item Lookup> screen displays. If the customer backorder (POS ORD) you wish to order is highlighted, press **F10=Order Item**.
9. If customer backorder you wish to order is not highlighted, use down arrow key to highlight & then press **F10=Order Item**.
10. Item may be on multiple customer orders. Highlight each one to be ordered & press F10.
11. When finished, press F12 and Exit.
12. Notice that each CBO is a separate line on the PO with a corresponding NOTE. The CBO is “attached” to this PO. Also notice the B (for customer backorder) under the F (flag) column.

Adding a CBO to an ORDERED PO

1. If a salesperson backorders an item on a customer order AFTER you have placed the order with the vendor, you may “manually” attach the CBO to the PO. This procedure assumes you called the vendor to “add on the item” after order was placed.
2. Inventory Purchasing; P.O. Status
3. Enter Vendor ID
4. Enter Ln# of PO in ORD status and press E.
5. Press F2=Edit
6. <Receive Line Items> screen displays. Press F12 & **H** for Heading Scn.
7. Press F2=Edit Ordr.
8. <Create/Edit Line Items> screen displays. **Enter Item number and press E**.
9. Vendor Code displays automatically. Do <u>not</u> enter Qty. Press **TAB**=BKO Lookup.

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10. <Purchasing Backorder Line Item Lookup> screen displays. If the customer backorder (POS ORD) you wish to order is highlighted, press **F10=Order Item**.
11. If customer backorder you wish to order is not highlighted, use down arrow key to highlight & then press **F10=Order Item**.
12. Item may be on multiple customer orders. Highlight each one to be ordered and press F10.
13. When finished, press F12 and Exit.
14. Notice that each CBO is a separate line on the PO with a corresponding NOTE. The CBO is “attached” to this PO. Also notice the B (for customer backorder) under the F (flag) column.