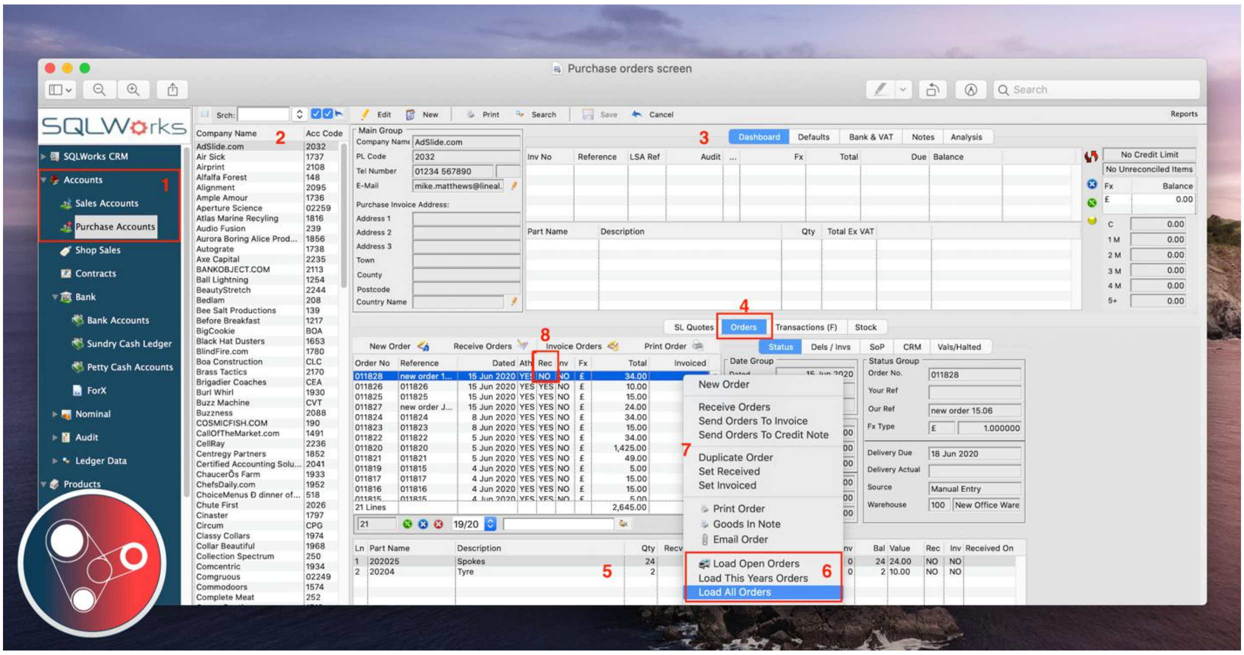
Introduction to Purchase Orders



Purchase orders (PO) can be created within the Purchase Accounts Orders tab or if a PO has been generated from running MRP this is where they will be stored and accessible to view and/or amend.

1. Purchase orders are accessible from the “Purchase Accounts” from the side navigation bar under the heading “Accounts”.
2. The first list on the left is the company list, by default all active suppliers will appear in this list, in alphabetical order.
3. To the right at the top of the screen, these header tabs display information relevant to this account.
4. Below this section is the specific information linked to this account. Like all other areas within SQLWorks, there are a number of tabs that can be made visible in this bottom window. Go to the ‘Orders’ tab to view all Purchase orders relating to this account.
5. When a specific order is selected, the line detail of that order will be shown in the list below.
6. To view all orders select ‘Load All Orders’, you also have the option to select ‘Load This Years Orders’ or ‘Load Open Orders’. These load controls are also available as 3 coloured buttons at the bottom of the order list and can be set as a default for that specific account.

7. You can create new orders and duplicate an existing order with the right click menu options, as well as print/preview an order and various other functions for completing the purchase order process, such as sending the order to 'Invoice' or 'Credit Note'.
8. To find orders that have not yet been received, check under the 'Rec' column, if not yet received, it will say 'NO'.
9. You can select multiple POs and receive or invoice at the same time.
10. You can receive stock independently of invoicing and track the quantity against each process separately.
11. You can also sort the table of orders by Order No., Ref and Date.
12. For help on How to receive a purchase order please see our Help guide here.