Purchase Order

Module Guide: Purchase Order

Module Location

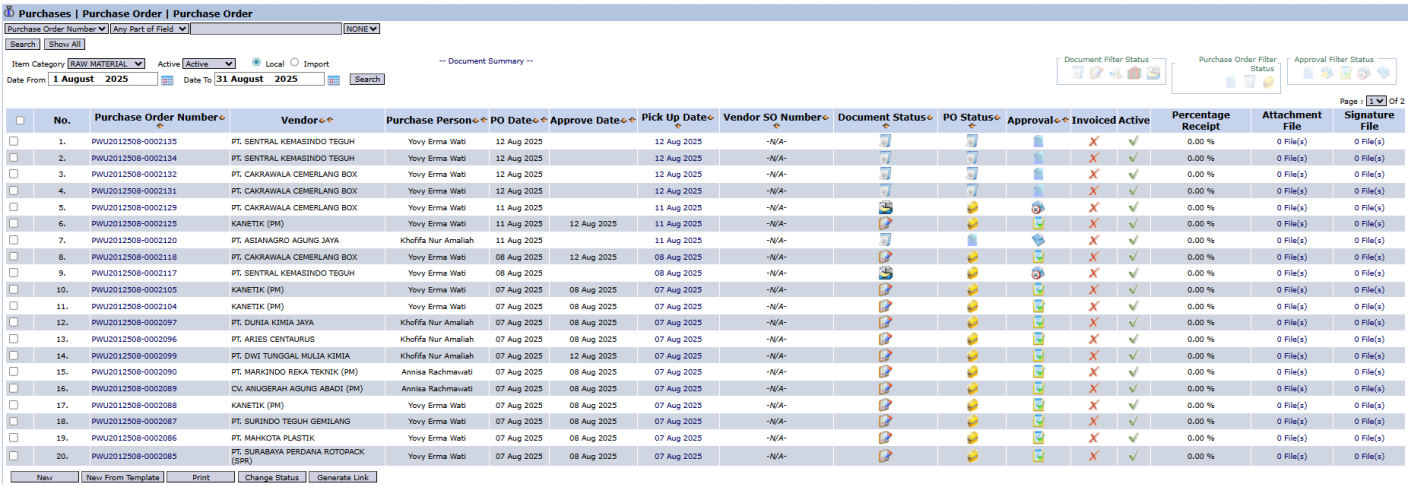
Purchasing > Purchase Order > Purchase Order

Module Objective

The **Purchase Order (PO)** module is the center of the procurement process. Its purpose is to create an official purchase order document that is sent to a supplier (vendor) to order goods or services. An approved PO is a legally binding document and serves as an authorization for the vendor to ship the goods, as well as the basis for the warehouse's goods receipt process.

1. Main View (Purchase Order List)

The main page of this module displays a list of all Purchase Orders (POs) that have been created.



View Explanation & Filters

This page is for viewing and managing all POs.

- **Filters**: You can search for a specific PO by **Purchase Order Number**, **Item Category**, **Active** status, or a date range.

- **PO List**: The table below will display all POs that match the filters, with columns such as **Purchase Order Number**, **Vendor**, **PO Dates**, **PO Status**, **Approval**, and **Invoiced** (Invoice Status).

Button Functions

- **New**: To create a new PO, usually from a Purchase Requisition or Vendor Quotation.

- **New From Template**: To create a new PO based on a saved draft/template.

- **Print**: To print the details of a selected PO.

- **Change Status**: To change the status of a selected PO.

2. Steps to Create a Purchase Order

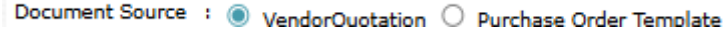
Step 1: Create a New PO

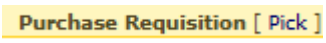
From the Main View, click the **New** or **New From Template** button to open the PO creation form. 

Step 2: Select the Source Document (Best Practice)

On the form that appears, the best way to maintain workflow integrity is to pull data from an existing document:

- Select a **Document Source** (for example, **Vendor Quotation** to pull the agreed-upon price).



- Alternatively, click the **Purchase Requisition | Pick** button to select items from one or more approved Purchase Requisitions (PRs). 

Step 3: Fill in Header Information

Select the **Vendor** (if not auto-filled) and verify all details such as the **PO Date** and **Payment Term**.

Step 4: Detail the Order Items

In the detail table in the middle section, ensure all **Item Code**, **Qty** (Quantity), and **Unit Price** are correct according to the quotation or requisition. You can also add additional costs in the **Add Miscellaneous Charge** section.

Step 5: Save and Confirm

After all data is filled in, use the buttons at the bottom:

- **Save**: To save the PO as a draft. 

- **Confirm**: To finalize the PO and send it into the approval workflow.



- **Cancel**: To cancel the entry. 

Workflow & Integrated Business Process

- A PO that has been **Confirmed** will go to the **Purchase Order Inbox** to be approved by a manager.

- An approved PO is the authorization for the vendor to ship goods and becomes the basis for the **Warehouse department** for the **Goods Receipt** process.

Tips & Important Notes

- Always try to create a PO from a **Purchase Requisition or Vendor Quotation** to ensure the purchase aligns with internal requests and approved prices.

- Use the **New From Template** button on the main page to quickly create routine POs.

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