

PREPARE A PURCHASE ORDER

OVERVIEW

The Purchase Order Entry window is used to prepare purchase orders for the purchase of both inventory and non-inventory items. No entry (posting) is made to the subsidiary records or general ledger after a purchase order is saved because a liability does not yet exist.

QUICK REFERENCE TABLE

Step	Box or Other Location	Procedure
A	Navigation Pane buttons	Click <i>Purchasing</i> → <i>Transactions</i> → <i>Purchase Order Entry</i> .
B	Type	Accept Standard as the purchase order type.
C	PO Number	Accept the default purchase order number or type the correct purchase order number.
D	Date	Review the default purchase order date and change if necessary.
E	Vendor ID	Select the Vendor ID.
F	Item	Select or type the item number ordered.
G	Quantity Ordered	Type the quantity ordered.
H	Unit Cost	Accept the default unit cost or type the correct unit cost.
I	Description	For inventory items, accept the default description; for non-inventory items, type the description of the item ordered.
J	Site ID, Quantity Canceled, and Extended Cost	Select or accept the Site ID and move through the Quantity Canceled and Extended Cost boxes.
K	Various	Repeat steps F through J for each type of item ordered.
L	Purchase Order Entry window	Review the Purchase Order Entry window for completeness and accuracy.
M	Save button	Save the purchase order.

Purchase Order Entry Window **A** *Purchasing* → *Transactions* → *Purchase Order Entry*

L **Purchase Order Entry** ↗ ✕

Purchase Order Vendor Detail Item Detail Blanket Detail

M Save Actions AA Options View Print E-mail Help Add Note

Actions Options View File Help

Type: Standard **B** Hold

PO Number PO2080 **C**

Buyer ID

Date 04/12/2017 **D**

Allow Document Commitments

Vendor ID CRUGEREN0001 **E**

Name Cruger Engineering Company

Currency ID Z-US\$

Line	Item	U of M	Quantity Ordered	Unit Cost
	Description	Site ID	Quantity Canceled	Extended Cost
1	PHON-ATT-53BK F	Each	G	H \$90.25
	Cordless-Attractive 5352-Black I	WAREHOUSE J	J 0	J \$180.50

K

Remaining PO Subtotal

Company Tax Sched COMPANYPUR

Comment ID

Subtotal	\$180.50
Trade Discount	\$0.00
Freight	\$0.00
Miscellaneous	\$0.00
Tax	\$0.00
Total	\$180.50

PO Number PO Status New Revision

DETAILED INSTRUCTIONS

A. Click *Purchasing* → *Transactions* → *Purchase Order Entry*

- ▶ Click *Purchasing* → *Transactions* → *Purchase Order Entry* to access the *Purchase Order Entry* window.

B. Accept *Standard* as the purchase order type

- ▶ The default for the *Type* box is *Standard*. Press [Tab] to accept the default.

C. Accept the default purchase order number or type the correct purchase order number

The software automatically assigns the next sequential purchase order number in the PO Number box.

- ▶ Accept the default purchase order number or type the correct purchase order number.

D. Review the default purchase order date and change if necessary

- ▶ If the purchase order date is different than the date shown, type the correct date.

E. Select the *Vendor ID*

- ▶ Use the adjacent lookup button to select the *Vendor ID*.

F. Select or type the item number ordered

For inventory items, the Item lookup button is used to select the item ordered from a list of items commonly purchased from the selected vendor.

- ▶ For an inventory item ordered, use the Item lookup button to select the item number ordered. If a unit of measure does not default into the next field, *U of M*, use the *U of M* lookup button to select the proper unit of measure.

For non-inventory items, *Microsoft Dynamics GP* does not keep a record of item numbers, descriptions, and costs for items commonly purchased from each vendor. This information must be typed when preparing each purchase order.

- ▶ For a non-inventory item ordered, type the vendor's item number. If a unit of measure does not default into the next field, *U of M*, use the *U of M* lookup button to select the proper unit of measure.

G. Type the quantity ordered

- ▶ Type the quantity ordered.

H. Accept the default unit cost or type the correct unit cost

For inventory items, *Microsoft Dynamics GP* automatically completes the Unit Cost box using information on file for the selected vendor and inventory item. For non-inventory items, the unit cost must be typed during the preparation of the purchase order.

- ▶ *For inventory items, accept the unit cost or type the correct unit cost if it is different from the default.*
- ▶ *For non-inventory items, type the unit cost.*

I. For inventory items, accept the default description; for non-inventory items, type the description of the item ordered

For inventory items, the software automatically completes the Description box using information on file for the selected inventory item. For non-inventory items, the description must be typed during the preparation of the purchase order.

- ▶ *For inventory items, accept the description or type a new description.*
- ▶ *For non-inventory items, type the vendor description of the item ordered.*

J. Select or accept the Site ID and move through the Quantity Canceled and Extended Cost boxes

- ▶ *Select or accept the Site ID and then press [Tab] repeatedly until the cursor reaches the next blank Item box.*

K. Repeat steps F through J for each type of item ordered

- ▶ *Continue entering information for each type of item ordered.*

L. Review the Purchase Order Entry window for completeness and accuracy

Before the purchase order is saved, most errors can be corrected by clicking the box with the error and making the correction. Certain boxes cannot be changed after they are originally completed. Errors in these boxes can only be corrected by deleting the purchase order window and entering the purchase order again.

- ▶ *Review the Purchase Order Entry window for completeness and accuracy. If you find an error while reviewing the window, click the box with the error and make corrections.*
- ▶ *If the box with the error cannot be accessed or changed, click the Delete option in the Actions menu and click Delete again when asked if you are sure that you want to delete this record. Enter the purchase order again by returning to step B.*

M. Save the purchase order

- ▶ *After you are satisfied with all of the data in the Purchase Order Entry window, click the Save button to save the purchase order.*

PURCHASE ORDER REVIEW

After a purchase order is saved, you can determine if it has been included in the system by completing the steps that follow. Because no transaction occurred, no posting entry is made to either the subsidiary records or to the general ledger.

- ▶ *Click Purchasing → Inquiry → Purchase Order Documents to open the Purchase Order Processing Document Inquiry window.*
- ▶ *Click the box to the left of “Open Purchase Orders” in the middle of the window.*
- ▶ *Click the Redisplay button. The scrolling window shows a list of open purchase orders.*
- ▶ *Locate the purchase order you want to review and click once on its line. Zoom on the PO Number description field to open the Purchase Order Inquiry Zoom window for the selected purchase order.*

The window that appears is a replica of the Purchase Order Entry window for the selected purchase order. By clicking the Show Details button, you can review details for each item in the purchase order. It is not possible to change information through the inquiry window.

- ▶ *After reviewing the Purchase Order Inquiry Zoom window for the selected purchase order, close the window and close the Purchase Order Processing Document Inquiry window.*

ERROR CORRECTION AFTER SAVING A PURCHASE ORDER

If you discover an error after saving a purchase order, refer to Appendix A.