

Prepare a Purchase Order

The Purchase Order window is used to prepare purchase orders for inventory. No accounting entry is made to any journal, subsidiary record, or general ledger after a purchase order is saved because a liability does not yet exist.

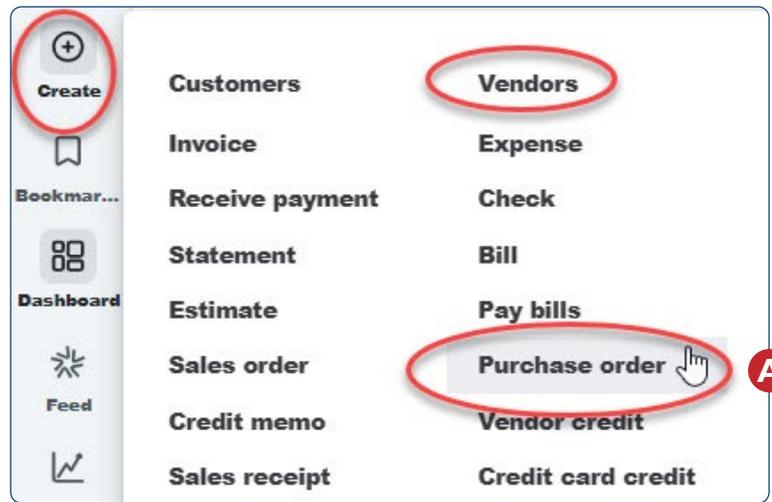
Quick Reference Table

| Step | Box or Other Location | Procedure |
|------|-----------------------------------|---|
| A | QBO Navigation bar | + Create → Purchase order (in the Vendors category) to open the Purchase Order window. |
| B | Vendor | Select a vendor from the drop-down list or add new. For a new vendor addition, refer to maintenance tasks in Chapter 5. |
| C | Shipping address | Accept the shipping address or change by typing in a different name and/or address. |
| D | Purchase Order Date | Accept default date or change. |
| E | Ship via | Type the name of the freight or other transportation company, if applicable. |
| F | PO no. | Accept the default purchase order number or change. |
| G | Item details section | Click to expand the Item details section of the window if it is not already expanded. |
| H | Product/Service (may say Variant) | Select an item from the drop-down list or add a new item. |
| I | Description | Accept the default description or change. |
| J | Qty | Enter the quantity to be ordered. |
| K | Rate | Accept the default rate or change. |
| L | Amount | Accept the total amount of the items ordered. Changing the amount will recalculate the rate. |
| M | Various | Repeat steps H-L for each inventory item to be ordered. |
| N | Purchase order window | Review the information to verify that it is correct. |
| O | Save options | Save the purchase order and close the window. |



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QBO windows



N **Purchase Order #1** Copy Give feedback Settings Help Close

Vendor: Choose a vendor **B** Co/Bco
 Email: Email (Separate emails with a ;)
 Purchase Order status: OPEN **V**

Mailing address:
 Ship to: Select customer for address **D**
 Shipping address: Jackson Supply Company US **C**
 Purchase Order date: 01/30/2023 **D**
 Ship Via: **E**
 PO no.: 1 **F**
 Store:

G **Category details**
Item details

| # | PRODUCT.SERVICE * | SKU | DESCRIPTION | QTY | RATE | AMOUNT | CUSTOMER |
|---|-------------------|-----|-------------|----------|----------|----------|----------|
| 1 | H | | I | J | K | L | |
| 2 | | | | | | | |

M **Add lines** **Clear all lines**

Your message to vendor:
 Memo:

O **Cancel** **Clear** **Print** **Make recurring** **Save** **Save and close**

* (May say Variant)

