InventoryControl: How to create a Purchase Order

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Creating a New Purchase Order

This function applies to Pro and Enterprise Version users only.

Note: For information on the benefits of upgrading your version of InventoryControl or WaspNest Inventory, please select **Help > Benefits of Upgrading** on the **Main screen**.

Purchase orders can be created in InventoryControl and emailed directly to your supplier, or printed for faxing or mailing. We recommend you review the article InventoryControl Purchase Orders/Receiving Overview (linked below) before using the purchase order feature for the first time.

Creating New Purchase Orders:

1. From the **Main Window**, select **New > Purchase Order**.

OR

From the **Main Window**, select **Lists > Purchase Order**. On the **Purchase Order List**, click the **New** icon.

The **Create New Purchase Order** screen appears.

Notice that the screen prominently displays the status as **New**. This status message changes based on the stage the purchase order is in.

Possible statuses are:

-New - This always displays when creating a new order.
-Issued - Once the purchase order is printed or emailed, the status changes to **Issued**.
-In Process - Once the order has started to be received (via the **Receive** screen accessed from the **Receive/Pick** menu), the status becomes **In Process** and the **Received Quantity** will display for each item on the order.
-Overdue - This status can appear for **New** or **In Process** orders that have passed the designated due date. This orders will appear with a symbol on the **Purchase Order List** to alert you of their overdue status.
-Closed - This status means the order has been completed and marked as closed.

Note: To prevent fields from clearing, click the pushpin button located to the right of the field you want to lock. Pushpins can be used to lock the values in all but one required field so that a scanner can be used to rapidly add inventory just by repeatedly scanning barcodes into that field.

Clicking the pushpin button will unlock the field.

2. Enter a supplier in the **Supplier** field. You can scan a value into this field, manually enter a value or click on the field to view a drop down list. The list contains the last 10 Suppliers selected on this screen. Select **<More>** to view the entire **Supplier List** or click **<New>** to go to the **Create New Supplier** screen to add a new supplier to the database.

When a supplier is selected, the **Supplier Address** information automatically populates. If the selected supplier has more than one address, you can select the Address Type from the drop down list.

After you enter the **Supplier** information, you can click the **Items at Minimum Stock Level** button at the bottom of the screen. The system will then check for any items for this supplier that are at or below their minimum stock levels and populate the purchase order with those items.

3. Enter a **Purchase Order Number**. Each purchase order is assigned a unique identifier consisting of an alpha-numeric value up to 36 characters. This number can be manually entered each time you create a new purchase order or you can create a template that the software will use to automatically generate a number for you. If you have set up a template, click the **Generate** button to have InventoryControl create and assign a PO number. The template can contain any combination of custom text, dates and/or counters enabling you to create a unique identifier that is meaningful to your company. For more information on setting up automatically generated **Purchase Order Numbers**.

You should set up your numbers to contain a date field, followed by a serialized (count field), at the very least.

4. Select a **Ship To Address** using the drop down menu. All address types you entered on the **Company Information** screen will appear in the list, or you can select **<New>** to enter a new address. Selecting **<New>** opens the **Company Information** screen allowing you to enter a new address.

5. Enter a **Reference Number** for this **Purchase Order** (optional).

6. The **Order Date** defaults to today's date. You can change this date by clicking the button next to the field and selecting a new date.

7. Select a **Due Date** for this **Purchase Order**. You can type in a date or click the button next to the field and select a date.

8. Select the preferred **Ship Method** for this order from the drop down list. This list contains several commonly used shipping methods, however; you can type in a new shipping method if desired. The new entry will appear in the drop down list for future purchase orders.

9. Select the **Payment Method** from the drop down list. This list contains several commonly used shipping methods, however; you can type in a new shipping method if desired. The new entry will appear in the drop down list for future purchase orders.

Note: If you need to delete a **Ship** or **Payment Method** you have entered, you can do so on the **Manage Ship Methods** or **Manage Payment Methods** screens. These screens also allow you to **Print**, **Export** and **Add New methods**. For more information on the **Manage Ship Methods** screen

10. Now you are ready to enter your item information in the **Line Item Details** section. Complete this information as follows:

Type - Select the type of item you are ordering. Options are:

-Inventory - This item is already in your inventory database. Use this to re-order existing items.
-Non-Inventory - This item is not listed as inventory in your database. Use this to order items for which you do not want to track quantity, such as marketing fliers or business cards.
Manual - Use this option to add one-time items, such as shipping and handling, to an order. Manual items cannot be received on the mobile devices.

-**Item Number** - Enter the Item Number of the item you want to order. To enter an Item Number, you can type or scan the value into the field, or you can use the drop down list to see the first 10 items in the database, select <more> on the drop down list to see all items in the Item List.

When you enter an **Item Number**, the **Description** field populates.

-Description - This field populates after the item number is entered. This field can only be edited if **Manual** was selected in the **Type** field. If you need to change the description, you can do so on the **Edit Item** screen.

-Vendor SKU - This field populates after the item number is entered if a SKU was entered on the Add/Edit Item screen for this vendor. This field can only be edited if Manual was selected in the **Type** field.

-Ordered QTY - Enter the quantity you are ordering of this item. This field defaults to 1. You cannot enter negative values in this field.

-Order Unit - Select the Order Unit from the drop down field or select **<New>** to enter a new Unit. You may want to enter a new unit here that is not an "eaches" or Stocking Unit measurement. For example, if you want to order 1 box of an item and this item ships in boxes containing 15 units, the "eaches", or Stocking Unit measurement is 15, but for ordering purposes, you could create a new unit that is BOX containing 15 units. You would then order 1 box rather than 15 units to avoid confusion for the supplier.

You can setup multiple Order Unit types for each supplier on the **Create New/Edit Item** screen - **Manage Suppliers** tab. This allows you to enter units based on the suppliers method of shipping (whether the supplier ships in boxes of 15, pallets of 50, etc.) For instance, you could set up a Box and Pallet Order Unit on the **Suppliers** tab so that when you create a Purchase Order for that item to go to the supplier, you can quickly select whether you want a box or a pallet. For more information on the **Add Item** screen - **Manage Suppliers** tab.

-Cost - The cost will populate based on the **Order Unit** selected. You can also type in a new cost here.

-**Line** Total - This field calculates based on the **Quantity** multiplied by the cost.

11. After you have entered all items for this order, you can optionally select to:

-Print on Save - If this box is checked, a copy of this order automatically prints when you click the **Save** button.

-Email on Save - If this box is checked, a copy of this order is automatically sent to the email address listed in the **Supplier** screen for this supplier when you click the **Save** button. If you have selected to view the **Email Destination List** (selected on the **Options** screen), the list will appear allowing you to select email addresses or change email addresses as needed. If you have selected not to view the list, the order will automatically be sent ***to*** the email address listed in the **Supplier** screen ***from*** the email address listed in the logged in user's network email setting. Please note that if the email address is not entered on the Supplier screen or the logged in user does not have an email address, you will receive an error message when you try to send emails.

An email is also sent to any CC addresses designated on the **Options** screen. You can choose to ignore the **CC address** by deselecting the checkbox next to the CC Addresses field on the **Email Destination List**.

It is a good idea to send yourself or someone else internal to your company a copy of any orders you email to a supplier.

In order for the email feature to work correctly, you must set your **SMTP Server**, **User Name** and **Password** (if authentication is required for outgoing mail) and the **SMTP Port** on the **Options** screen. If these are not set, an error message will appear.

-**Items at Minimum Stock Leve**l - To help you keep track of items that are in danger of becoming understocked, InventoryControl has an automatic notification system built in. Click the **Items at Minimum Stock Level** to view a list of all items that are currently at their minimum stock levels and whose default supplier is the supplier selected for this purchase order. InventoryControl calculates minimum stock levels based on the data entered in the **Location Settings** tab of the **Create New/Edit** Item screen, not the minimum stock level entered on the **General** tab.

To use this feature, make sure you turn on the **Automatic Notification** option via the **Options** screen, then enter a quantity in the **Minimum Stock Level** field on the **Create New** or **Edit Item** screen, **Location** tab.

-**View Quantity Available** - Select this checkbox and highlight an item on your purchase order to display the total number of that item in inventory, the number checked out and/or the number currently included on any pick orders. This section will also display the quantity of the selected item included on other purchase orders.

12. Click Save to save this purchase order to the database.

Related Articles:

InventoryControl Purchase Orders/Receiving Overview
https://support.waspbarcode.com/kb/articles/798