Purchase Order screen - How To's

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Help Topics

'**Purchase Order screen**' is a comprehensive screen that stores and displays every significant information about a Purchase Order transaction all on one screen. It is divided into four (4) main sections to organize data and functions:

- **Main Fields (section)**
  - **Vendor**
  - **Bill To**
  - **Ship To**
    - **Warehouse**
    - **Drop Ship To Customer**
  - **PO #**
  - **Status**
  - **Vendor Order #**
  - **Print Date**
  - **Received (checkbox)**
  - **To Sync** (QBO) - (checkbox) gets checked automatically each time a new Purchase Order is created in 1place then syncs with QuickBooks Online (QBO) when the record is saved.
  - **Resync Flag -** (checkbox) gets checked when a Purchase Order is changed in 1place then syncs with

QBO.
Last Synced
PO Date
Date Expected
FOB
Payment Terms
Ordered By
Customer PO #
Ship Via

Add/Edit Line Item (section)

Audit Log

icon - Allows you to view details of any changes or updates made on the Purchase Order Add/Edit Line Item section.

Gear

icon - Check to enable display of the fields or column filters on Lines 1 and 2 on the Purchase Order Add/Edit Line Item section.

Double Arrow Down

icon - Click to show Line 2 fields.

Double Arrow Up

icon - Click to hide Line 2 fields.

Commit Line Item


button - Click to validate and save any data input or changes on the Add/Edit Line Item table. This button turns red when you need to do so.

Line 1 (Column Filters/Fields)	Description
Rcvd	Check this box when item is received.
Qty Ord (Quantity Order)	
Item Number	The unique code for each item in your inventory that is used on Sales Orders, Invoices, Purchase Orders, etc.
Vendor Item Number	
Unit of Measure	
Qty Recd	
Case	
Case Pack	
Description	Specified item description which includes the Year, Make, Model and item category.
Sales Order #	
List Price	The basic price of an item in your catalog. Also known as the Suggested Retail Price.
Special Order Price	
Add'l Cost	
Cost	
Line Total	The total Price computation (before taxes) of each Line item on the Purchase Order.

Line 2 (Column Filters/Fields)	Description
Date Exp	
Date Rec	
Credit Memo #	
Volume	
Weight	
Comments	(Optional) Any specific notes for a particular Purchase Order line item.
List Margin	
Spec Order Margin	
Bin	This is an alpha-numeric field used by the Stock Picking Tickets to arrange the order that items are to be picked off the shelf by Picking Order, then Location, then Bin.
Lot/Serial #	

Shortcut Key: **Ctrl + F9**, or
On the **Quick Start Menu**, click the + icon and select **Purchase Order**, or
Click the **New** button on the lower left part of the **Purchase Order List** screen, or
Click the **New** button on the lower left part of any **Purchase Order** screen, or
On any **Sales Order** screen, click **Create PO(s)** button to make a **Purchase Order** record for that particular customer when **Qty Ship** is less than **Qty Ord.**

- Click the button (in the top left) and click **Purchase Order.**
  - Or, press **Ctrl+F9**
  - Or, on the **Main Menu Bar** on the left side, click **Purchasing** > **Purchase Orders list** and then click on the **New** button on the bottom left.
- Enter a Vendor (then press **Enter**).
- If desired, change the **Bill To warehouse** (then press **Enter**).
- If desired, change the **Ship To Warehouse** (then press **Enter**).
  - If you want to Drop Ship the item to a Customer click on the **Drop Ship To Cust** button and then select the Customer.
  - If the customer is not in the system pick a generic customer you have created and then hand type the Customer Name and Address in the larger box the drop down list.
- Enter or change any of the PO Header fields:
  - Vendor Order #
  - PO Date
  - Date Expected
  - FOB
  - Payment Terms
  - Ordered By
  - Customer PO#
  - Ship Via

- Enter Line Items
  - Qty Ord
  - Item Number
  - Vendor Item Number
  - Qty Received
  - Description
  - Sales Order #
  - List
  - Spec Order Price
  - Add'l Cost
  - Cost
  - Line Total
- Enter additional Info on the tabs
  - Other Info > Comments
  - AP Bill Info
- Click **Save**.

On the **Purchase Order** screen > **Add/Edit Line Item** table, check the box '**Rcvd**' to tag as received. This will auto-fill the value under **Qty Received** column.
You may edit the **Qty Received** value depending on the actual item/s received.
Click on **Commit Line Item** button.
Click **Save**.

On the **Purchase Order** screen > **Add/Edit Line Item** table, uncheck the box '**Rcvd**'.
Click **Commit Line Item button**.
Click **Save**.
This should remove the 'Received' green stamp on the bottom right of the screen.

Using Shortcut Key: **F9**, <u>or</u>
On the **Quick Start Menu**, click the **Search** (magnifying glass) icon then select **Purchase Order**, <u>or</u>
(If already on the **Purchase Order List** screen) use the Search feature (magnifying glass icon) to type the PO Number or any information/keywords to filter multi search, <u>or</u>
On any **Sales Order** or **Invoice** screen (under the **Add/Edit Line Item** table): Click on the **Magnifying Glass** button next to the **PO#** column.
On any **Item Detail** screen (under **PO's** tab) click any PO Number that is associated with that particular Item.
On any **Vendor Detail** screen (under **Purchase Order** tab) click any PO # that is associated with that particular Vendor.

Shortcut Key: **Shift+F9**, <u>or</u>
On the **Quick Start Menu**, click the **List** button and select **Purchase Orders**, <u>or</u>
On the **Main Menu Bar**, click **Purchasing>Purchase Orders**.

On the **Purchase Order List screen**, check the box/es (first column on the left) to select one or more records then click **Batch Actions** button and select **Delete Selected**, <u>or</u>
Click the first box (topmost, on the fields row) to either select all records on a page or all records on the entire list then proceed with deletion, <u>or</u>
On the **Purchase Order screen**, click **Delete** button (lower left part of the screen).

Note: To preserve the integrity of the database, you cannot delete any Purchase Order record that has been used on any of the screens such as Sales Orders, Sales Order PO's, Invoices etc.

Make sure to input the **Vendor name** first (**Bill To** and **Ship To** textboxes) to enable the adding of Line Item/s.
Fill in other detailed information as indicated on the upper part of the screen.
On the **Add/Edit Line Item** table section, click on the **Item# drop down arrow** icon to select the particular line item. Input the **Quantity Order** then click **Commit Line Item.** Click **Save.**
Optional Preferences:

You may choose to automatically update the cost of the item for the related Vendor.

- To do this, go to **Settings**>**Purchase Orders**>**Purchase Orders Settings**. Select **Yes** to **automatically update the item cost of the item for the related Vendor (when PO cost is changed on a PO Line Item).**

On the Purchase Order screen (under the **Add/Edit Line Item** section), click the **X** icon (under the **Actions** column) on the row of the particular Line Item that you want to delete. Click **Yes** then **Save**.

On the **Main Menu** bar, click on **Reports > Purchase Orders.**
Define your Report.

1place allows you to generate different types of Purchase Order Reports according to your needs. Pick from the type of Purchase Order Report (i.e. Purchase Orders By Vendor, Purchase Orders By Date etc.) from the **Reports section.**

Note: You can adjust the period covered by your report. On the **Report Period** filter section, select from the **drop down** filter lists or manually input the dates 'from' and 'to'.

Click on **Run Report**.

Note1: There is an option to further customize your Report by clicking the **Gear** (gray) icon to make the **Report Lists Settings popup** screen appear. Check or uncheck box(es) of the column(s) that you prefer to show/hide.

Note2: At this point, you may choose to Print, Email or Download your Report copy.

After doing the instructions above, click on the **Customize** (blue) button to further modify and save your newly created Report.
On the **Customize Report popup** screen:

(Optional) Select the **Min Access Level** from the **drop down** icon.
(Required) Type in the **Report Name** (whatever you want to call your Report).
(Optional) Type in any **Report Description**.
(Optional) Check the box if you want to **Make Report Private** and/or **Favorite**. Check or uncheck box(es) of the column(s) that you prefer to show/hide.
Click on **Save.**
Note1: This Report will appear on the list of **Custom Reports** and on **My Favorites** if you checked the **Favorite** box.
Note2: You can always edit or update any Custom Reports. Go to **Reports** > **Custom Reports** and click on the **Pencil** icon (under **Actions** column). Do the necessary changes and click on **Update**.
Note3: Click on the **X** button to permanently delete any Custom Report from the list.

Note: You have the option to Email, Print or Download a Report copy (see instructions below).

On the **Purchase Order List** screen:

Select the record(s) by checking the box(es) .
Click the
button to Print and
to download (in Excel form).
There is also an option to Share
record(s) and this feature will be available in the future.

For Purchase Order Reports, go to **Main Menu** Bar > **Reports** > **Purchase Orders,** create your Report (*see previous instructions) then click on the
button (upper right).
The **Print Preview** popup screen will appear.

<u>DOWNLOAD COPY</u>: Click on

button (upper right) to <u>download</u> the Report. Save in your PC.

<u>EMAIL COPY</u>: Click on


button (lower right) to send a copy of the Report through <u>email</u>. Create the body of the Email and input other necessary details on the left side of the **Email popup** screen. Click on


button (lower right).

<u>PRINT COPY</u>: Click on
button (upper right) to <u>print</u> the Report. Adjust Print Settings then click on


button (lower right).

Comments
Total Weight
Total Volume
Total # Lines
Total # Units
Total # Units Received

QuickBooks AP Bill Creation Date
QuickBooks AP Bill ID
QuickBooks AP Bill Amount
QuickBooks AP Bill Date Paid
QuickBooks AP Bill Paid Amount
QuickBooks AP Bill Paid
AP Bill Notes
Vendor Invoice #
AP Bill Date
Due Date

Show Scanning Details

To enable automatic creation of AP Bill, go to **Settings** > **Purchase Orders** and put a check on the box that says **'Prompt user to auto create new AP Bill in QuickBooks Online after the PO has been received in full'**which is found under the **Other Settings** (section).

When Ordering parts from a supplier you may have additional costs that may need to be added to each part in order to get an accurate landed cost. OneSource has a built in feature will break down the total freight into charges for each individual item based on one of four things;

- Quantity
- Weight
- Volume
- Item Price (Preferred by Most)

Item Price is the preferred method because it does not require that you have additional information such as weight or volume for each part. The Item Price method assigns a portion of the total cost of the added freight by the parts percentage of the total cost of the PO. You may have items that cost $500 that can absorb a $20 shipping charge where a $10 item can't. A part that is 1% of the total cost of the PO will receive approximately 1% of the added freight charge.

If you are going to use Weight or Volume

- All items must have the weight, volume, or both assigned to it prior to using this feature.
  - On the Purchase Order under the description are 2 boxes that will display Wt. and Vol for each item that already has this info entered
  - Click on the **magnifying glass** icon next to each Part number to get to the Inventory Management screen for each of these items as needed
  - Enter the weight and volume information on the lower left side of the Inventory Management screen
  - For each item that you add information to you will need to reselect the item on the PO
    - Click on the drop down arrow and select the item again (it will be highlighted in the drop down screen)

Once you have the weight and volume of each item on the PO you can switch back and forth between the different methods to see which one is the best for your shipment. If you do not have weight and volume for each of your parts, the Item Price method is the best.

To enter the Added Cost to the parts on your PO:

- On the top left corner of the PO to the left of your company name is a grey box with a couple of >> arrows, click on this to open the Quick Display
  - Enter a description, (Freight Costs)
  - The date
  - The supplier; This is the supplier that you received the parts from only if they are the same company that you are paying the additional freight charges to. This is for Accounts Payable so you can enter a bill for the freight.
  - If the freight is being paid to a different company enter their name in the supplier box. Additional boxes will open so you can enter multiple charges if needed
  - Enter the amount of the additional charge

Clac Method... This is where you will choose which method that you would like to use in order to divide up the additional charges. you can enter the method that you feel will best suit your circumstances and then at he bottom of the Quick Display box, click on Distribute Costs. (you will be able to change this latter if you would like to see how another method works.

Once you click distribute costs another box will pop up giving you a summary of the PO, the Quantity, weight, and volume for each item.

Click Distribute Costs again

When asked if you wish to receive the items click no (You won't be able to change the methods of distribution and you will have received all items on the PO into inventory)

Evaluate the Add'l Cost to determine if the cost are divided up equitably to each of the parts.

When complete the added costs will be put in the added cost field on theInventory management screen in stock tab. When you create a sales order the added cost will be combined with the individual cost prior to any calculation for discounts or matrix pricing. The additional costs will not be itemized on the invoice.