

Sales Order Purchase Order Screen - How To's

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Help Topics

Overview

Special and Related Tasks

[How to Batch Create PO's Using the Sales Order PO Screen](#)

[How to Open the Sales Order PO's Screen](#)

[How to Create a Dropship Purchase Order and Invoice](#)

The [Sales Order PO's](#) screen gives users a way to view items on Sales Orders that need to be purchased on a PO.

It is divided into four (4) main sections to organize data and functions:

- Top fields (section):
 - **Show All**
 - **Select One**
 - **Bill To**
 - **Ship To**
 - **Warehouse**
 - **Customer (Drop Ship)**
- Sales Order PO's List (table) - columns/fields as follow:
 - [Sales Order Date](#)
 - [Sales Order #](#)
 - [Customer Bill To Name](#)
 - [Item Number](#)
 - [Item Description](#)
 - [Vendor](#) (*Editable field*)
 - [Qty Ord](#) (Quantity Order)
 - [Qty Shp](#) (Quantity Ship)
 - [Vendor Cost](#) (*Editable field*)
 - [Extended Cost](#)
 - [SELECT](#) checkbox. (*Editable field*)
 - [QIS](#) (Quantity in Stock)
 - [QBO](#) (Quantity on Back Order)
 - [QO](#)
 - [Group](#) (This is the [Sales Order](#) line item Group field)
- Footer (section)
 - **Show Item Vendors** (button)
 - **Refresh** (button)
 - **Proceed (Show Prebuild Summary)**
 - **Help** (button)
 - **Close** (button)

You can use the [Sales Order PO's](#) screen to select items and Vendors then batch create PO's that will be linked to the individual [Sales Order](#) line items. When making the PO's the user can select the option to create a NEW PO or add the items to an existing PO. This allows a company to have several items on 1

PO rather than multiple PO's.

On the Sales Order PO's screen:

- Select the items.
- Select the Vendors.
- Input Vendor Costs.
- Click on the **Proceed (Show Prebuild Summary)** button. A Sales Order PO's - Prebuild Summary popup will appear which displays the following columns:
 - **Vendor:** Shows you which Vendors are related to the selected items on the Sales Order PO's screen.
 - **Existing PO:** You can select an 'Existing PO' (which will cause the selected items for that Vendor to be 'added' to that existing PO).
 - To do this, you need to uncheck first the **Create PO checkbox**. Then click the **Existing PO drop down** button and select an existing PO.
 - **PO Total:** Shows you a TOTAL amount of each PO's and all PO's that will be made.
 - **Create PO checkbox:** Leave this checked if you want to create a new PO for the items related to a Vendor.
 - **Group:** The Sales Order Line Item group field.
- Click on **Create/Add to PO's** button.

You can open the Sales Order PO's screen in these ways:

On the **Main Menu Bar**, click **Purchasing > Sales Order PO's**, or

On the Sales Order screen, click on the **Create PO(s)** button.

Follow the steps below if you need to fulfill a Sales Order by shipping the items from a Vendor directly to your Customer.

On the Sales Order screen of the Dropship Order:

Click on **Create PO(s)** button. This will automatically open the Sales Order Purchase Orders (to create) screen.

On the Sales Order Purchase Orders (to create) screen:

Tick the circle icon for **Customer (Drop Ship)**

 **Customer (Drop Ship)**

found above right of the screen.

Select your **Vendor** from the drop down list.

Input **Vendor Cost**.

Click on **Proceed (Show Prebuild Summary)** button.

On the Sales Order PO's - Prebuild Summary popup screen:

Click on **Create/Add to PO's** button.

You have just created the Dropship Purchase Order.

Confirm item availability of the item(s) with the Vendor by sending an email (to the Vendor) with PO attachment.
