Sales Order Purchase Order Screen - How To's

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- 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)**
      

      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.