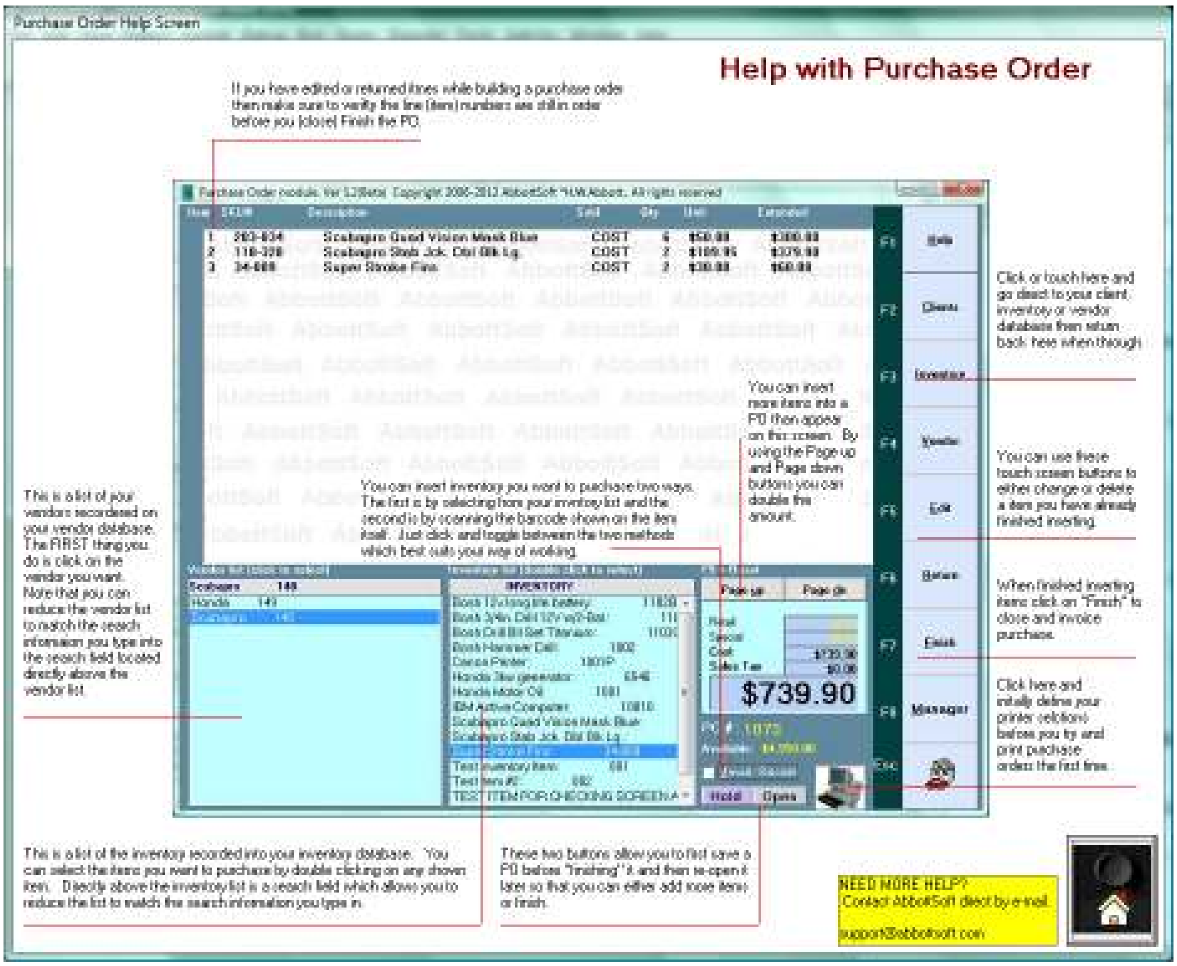
CREATING A PURCHASE ORDER:

This will be a step by step tutorial which will lead you through creating a purchase using your P.O. module.

NOTICE: You must have some vendors stored in your Vendor database and sales inventory stored in your sales inventory database before you begin this section. If you have not inserted clients and inventory already then please go to the applicable chapter and do so.

Here is a screen snapshot of the on-line help screen, which can be accessed while running your P.O. Module.



When to use this p.o. module:

1. Use to create a P.O. and record into daily PO report.
2. Use to update sales inventory counts.
3. Use to record method of payment and record of purchase into vendor database.

HOW THIS MODULE RELATES TO OTHER MODULES IN YOUR SYSTEM.
There are three modules when using the payables which are quite similar to modules used in the receivables.

Vendor Database: Similar in function and appearance to the Client Database
P.O Module: *(this module)* Similar in function and appearance to the POS module.
Daily, Monthly and Yearly Paid out reports. Similar to income reports.

SELECT THE VENDOR:
The first thing to do is tell your PO module which vendor you are working with. The Vendor must already be recorded in your Vendor database"

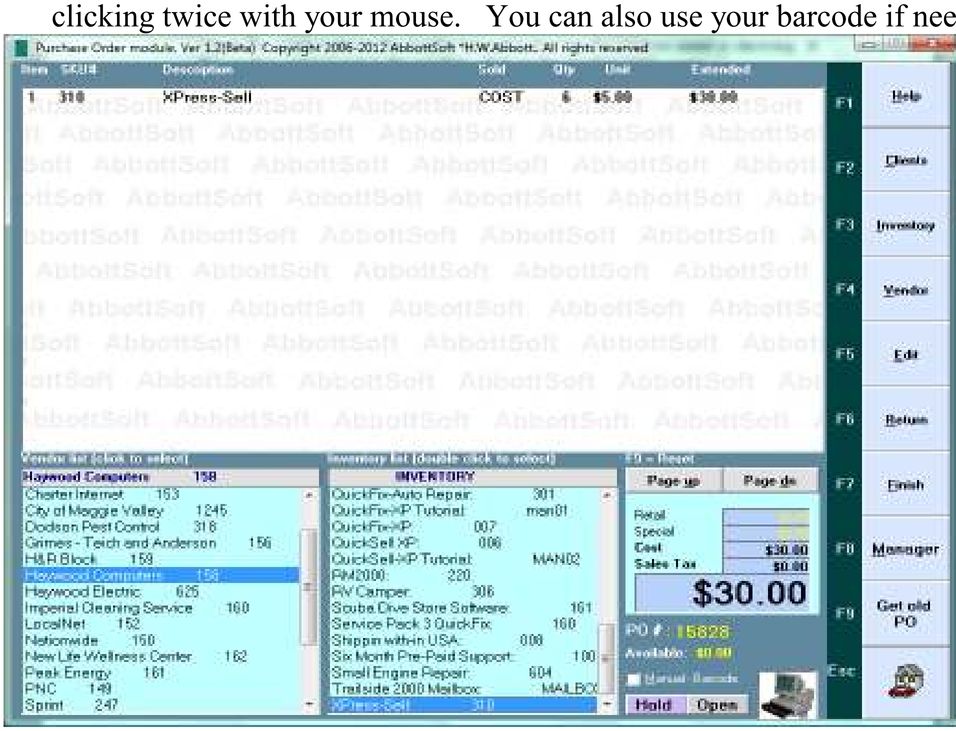
You can also type all or part of the vendors name in the search field and press the Enter key and your list will be shortened to match your search information.

Check the window above the vendor list and make sure the vendors name is showing. If the vendors name is not in the window, click on the vendors name again.

SELECT THE INVENTORY:
Once your vendor is selected you then retrieve from your inventory database any and all items you have chosen to purchase and insert these items onto your purchase orders screen.

There are two ways of selecting these items.

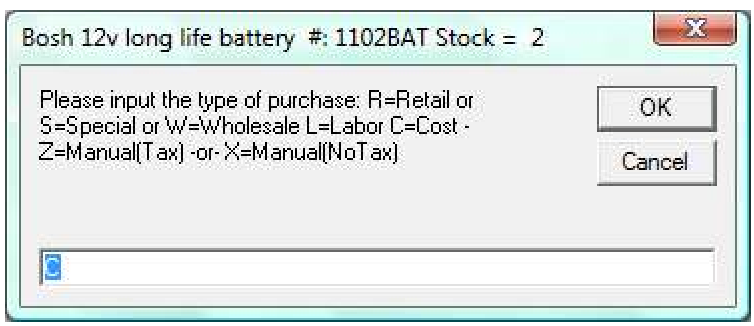
1. Pick items from the inventory list on the bottom center of the PO screen, by clicking twice with your mouse. You can also use your barcode if needed.



Once you have selected any item stored in your inventory database another window will appear asking for the quantity you are buying.

The default for this window is one item. If you are only selling one then just press the Enter key on your keyboard or click on the OK button else type in the quantity then Enter or OK.

The next window will ask if you want to price this item R=Retail, S=Special, W=Wholesale, L=Labor, C=Cost – Z=Manual(Tax) - or X=Manual(No Tax) The default is the price you have recorded under C=Cost.



Depending upon the selection you make determines the unit price you are authorizing the vendor to sell the item to you for. If you choose Z or X then you can manually insert any price you want and tax will or will not be charged.
(See chapter on sales inventory for information on pricing inventory)

After telling I-sell how many of the item you wish to sell and the price you are selling it for you will see the item appear in the Purchase orders window and it will be extended and totals computed.

If, when you inserted the item you placed any information in the two notes lines then you will also see a box appear which includes the information. You can use this information for both your sales person and the vendor. The information will be printed on the sales receipt.

USING A BAR CODE READER:
If you are inserting a lot of inventory into Purchase Orders, and if you have properly set up your inventory database for this purpose then you can save some time.

You can use most any bar code reader, which acts as a wedge between your keyboard and your computer.
There are many types of bar code readers available. We suggest you choose a laser gun with as great a depth of field as feasible. The wand is rarely used because it is too harder to read the codes.

To toggle the Manual (bar-code) on or off then click on the "Manual" radio button on the bottom left of your PO page. *Next to the picture of the computer.
When using barcode (manual method) the inventory list will disappear and you will always start with the prompt for the part number.

To return to the automated method, first clear the prompt asking for the part number from your page by using the "Esc key", then click on the Manual control button and you will see your inventory list appear and you can then select any item shown and continue the purchase order.

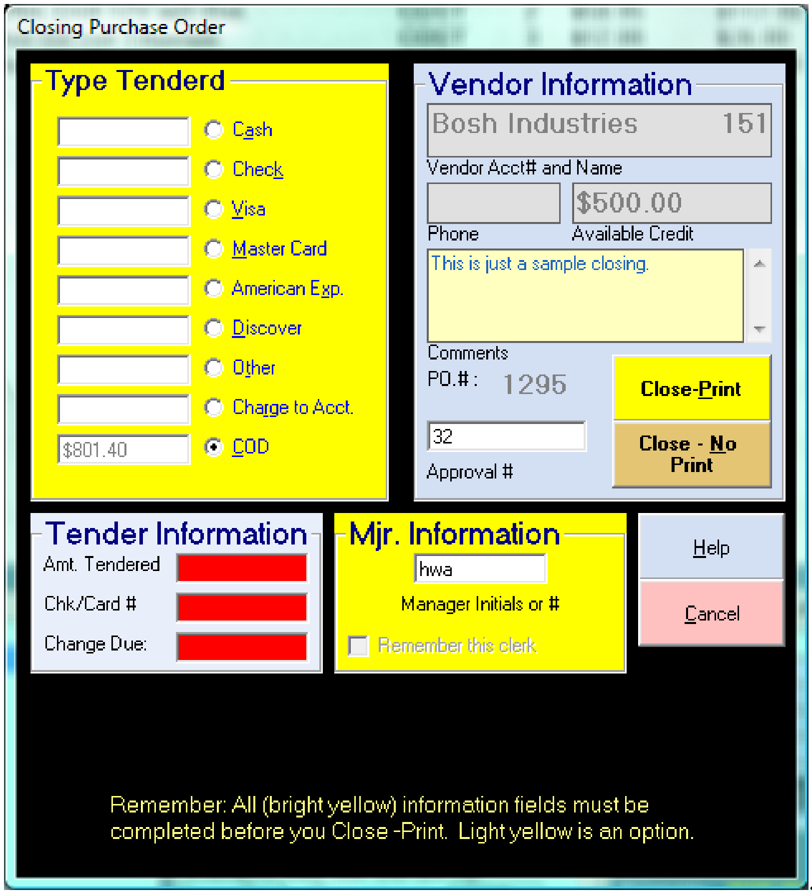
CORRECTING A ENTRY ON PURCHASE ORDER WINDOW:
It is possible that you could make a mistake when entering items to be sold into the invoice window or that your client will change their mind while you are ringing up the sale.

You can easily change or delete items already entered or even clear the window and start over. The Touch buttons located on the left side of the page are used to accomplish these tasks.

Just activate the appropriate button "Edit, Delete or Clear" and follow the prompts.

CLOSE AND PRINT THE PURCHASE ORDER:
Once you are satisfied that you have inserted into your P.O. screen all the items intend to purchase, then it is time to close the purchase order and print a copy if desired.

To continue, activate the tender screen by clicking on the "FINISH" touch button on the left of your screen and record the type of payment and other important



If you failed to select a vendor then you will see a warning telling you to activate the "Cancel" control button, return to the purchase orders screen and select a vendor, then try again.

If you have selected a vendor from your database then I-sell will check the vendors information and determine their available credit, tax exempt status and if they require a Purchase Order Number on the invoice.

Warnings will be displayed at different times during the closing of the purchase order if needed and you are expected to respond accordingly.

The program will display information fields in Yellow, which is required before you print the invoice. Information fields, which turn red, are not applicable to the method of payment and are blocked.

Order of completing the tender page.

1. Click on the method of payment. Cash, check etc. (Available choices depend upon the version of your software) and make sure the total due is shown on the left.
2. Under "Tender Information" you can type into the "Amt. Tendered" field the amount of money paid to your vendor and the change owed back will be displayed immediately just below where you are typing. (Not available on Lite version)
3. If are paying with a check or credit card then you will need to fill in the check number or the credit card number with the expiration date.
4. In the "Clerk Information" box type in your initials or number. (keep it short)
5. In the "Vendor Information" - "PO# or Approval" field type in either your Purchase Order number, the credit card authorization or if needed management approval number for exceeding the vendors credit limit or for ringing up a cash refund or credit to account etc.
6. Depending upon the version of your PO module you may be able to record the payment and print or not print the actual PO.

While your printer is producing the purchase orders receipt; The program is adjusting and recording your inventory, vendor information, daily, monthly and yearly income totals, sales reports, tax obligations and Account payable database. All this is completed by the time the Purchase Order finishes or about as long as it took you to read this paragraph.