

Creating a Purchase Order

Last Modified on 02/03/2026 12:33 pm EST

1. From the *EnergyService* menu, select **Purchase Orders**.
2. Choose **Create**.
3. Press **F5** in the *Vendor#*, *Warehouse#*, and *Status* fields to select from the lists. The Status automatically defaults to *Open*.

Purchase Order

Vendor Name / Address
Vendor# 3
GAS EQUIPMENT CO
123 KANSAS AVENUE
KANSAS CITY, KS 65989

Ship To Warehouse
Warehouse# 1
AVCON
5200 US HWY 36
SUITE 100
AVCON, IN 46123

Date 02/02/2026 P.O. No. 594

Status 3 Partial Received Created by LAURA BEJO

Item	Description	Ordered	Received	Price	Disc	Tax%	Tax	Expected Dt	Last Recv Dt	Line Amount
114343CTCDS	11/4" C X 3/4" C X 3/4" C TEE	1.00	1.00	\$6.25	0.00%	0.00	0.00	00/00/00	02/02/26	\$6.25
114343CTCPH	11/4" C X 3/4" C X 3/4" C TEE	1.00	0.00	\$7.86	0.00%	0.00	0.00	00/00/00	00/00/00	\$7.86
1142BVCYPH	1 1/4" BALL VALVE C X C NFULL P	1.00	1.00	\$15.86	0.00%	0.00	0.00	00/00/00	02/02/26	\$15.86

Location 1 Vendor Part No 114343CTCDS Ref Proposal# Proposal Customer

Sub Total \$29.97
Tax \$0.00
Total \$29.97

Only Vendor Open? Receive All Invoice Undo Clear Search Create Modify Save & Close

4. Enter *Notes* if desired.
5. Press **F5** in the *Item* field to check the appropriate item(s) and choose **Select**.
6. Enter *Qty Ordered* and press **Tab**.
7. If some items have already been received, enter the amount in the *Qty Rcvd* column. This will change the PO to display as *Partial Received*. Otherwise, leave as 0.00.
8. If the PO is tied to a specific proposal for a customer, press **F5** in the *Ref Proposal#* field under the grid to choose from the list.
9. The *Price* should automatically default to the price set up in inventory. Modify if necessary and press **Tab**.
10. Enter the *Tax%* if applicable.
11. Enter the *Expected Dt* if an ETA is available for the item or leave blank.
12. Enter the *Last Recv Dt* if any of the items have already been received. Otherwise, leave blank.
13. The *Line Amount* will automatically calculate as will the sales tax if a *Tax%* was entered.
14. Press **Ctrl+Q** to save or select **Save & Close**.
15. To print the Purchase Order, select **Print** located on the top left of the screen.
16. Return to the Purchase Order at any time to modify unless the PO has been received.