

Creating a Purchase Order

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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**.

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.