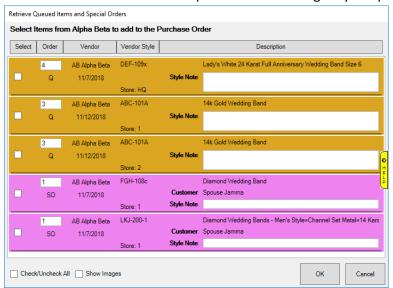# Multi-Store Purchase Orders

Introduction

The **Purchase Order** feature is designed to work in concert with **Levels** and **Reorder Form** to streamline the ordering process. When creating POs you have the ability to create them for specific stores or leave them unassigned. Individual PO lines can also be assigned to specific stores or left unassigned as well. It is possible to have a single PO with items assigned to more than one store and, when using **Receive Invoice**, ordered items can be re-allocated to different stores.

Creating a PO

To create a new PO:

1. Click **Inventory > PO > Add**.
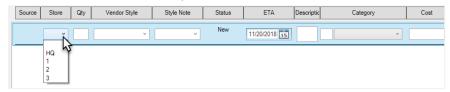2. Select the **Vendor**. If there are queued items waiting they will pop up now.

Each queued item indicates what store it is for below the vendor style #. Items queued for special orders (purple) will also list the customer's name.

3. Select the queued items you wish to place on this PO and click **OK**. Note you can get back to this window using the **Retrieve Queued** button.
4. Optionally, assign this PO to a store using the **PO Store** drop-down in the top right. The **Ship to Store** drop-down will default to the same store as **PO Store**, but can be changed. If no PO is specified, this PO will be 'Unassigned.' POs do not have to be assigned to stores.

5. Complete the remaining shipping information at the top (**Ship Via, ETA, Note**).
6. Use the **Add Line** button to create additional PO lines to order items that were not previously queued. Each PO line contains a drop-down allowing you to assign it to a store. This is not required and, even if set, can be overridden when you use **Receive Invoice** to add these items.

You can use the Vendor Style drop-down to select an existing item to copy from or, if this is a new item, enter its details now.

7. Save your PO.
   a. If ready to submit, you can use **Submit & Print** or **Submit & Email**. This will save the PO and mark the items as ordered.
   b. If not ready to submit, use one of the other save options. This will leave the items as entered on the PO, but not ordered. You will not be able to receive them until they are ordered.
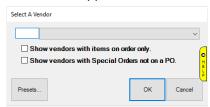
> **NOTE:** The **PO Settings** button at the bottom can be used to change what vendor information is printed. If the vendor record has incorrect information you can correct it via the **Edit Vendor** button in the top left. This button also lets you change shipping information for your store.
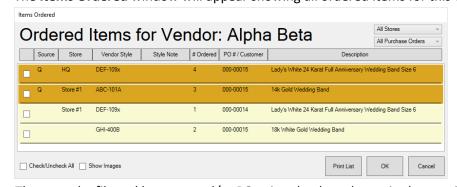
Receive Invoice

Once ordered, items can be added once the ship arrives using **Receive Invoice**. To do so:

1. Click **Inventory > PO > Rcv Invoice** or **Inventory > Items > Add > From Invoice**. The **Select a Vendor** window will appear.
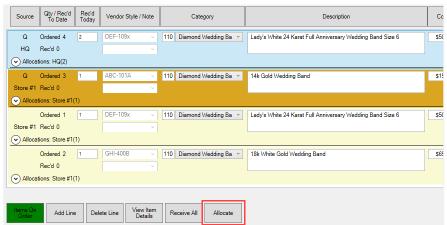

2. Use the drop-down to select the vendor. To limit choices to only those with outstanding ordered items, check the first box.
3. The **Items Ordered** window will appear showing all ordered items for this vendor.

These can be filtered by store and/or PO using the drop-downs in the top right.

4. Check the box for items being received and click **OK**. Note you can get back to this window using the **Items On Order** button.

5. If additional items were included that were not on the original PO, you can use the **Add Line** button at the bottom to add them now.
6. For each line, specify the quantity received today in the **Rec'd Today** field. If a store number was previously assigned to this line, it will allocate to that store by default. If no store was specified, the allocate window will appear allowing you to assign quantity to one or more stores.
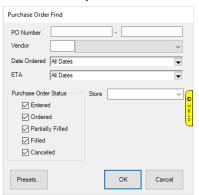7. To change the store allocation, click on the line and use the **Allocate** button at the bottom.

> **NOTE:** The currently selected line is highlighted blue. If you are trying to change allocation, make sure you have selected the desired line before clicking **Allocate**.
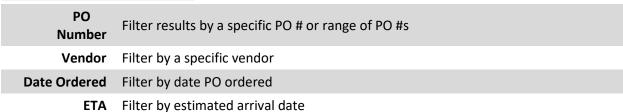
8. At the top, specify **Invoice #** and **Date Received**. Note there is also a drop-down here that can be used to allocate all unassigned items to a specific store. This will not change existing allocations.
9. Click **OK/Save & Close** once done. The items will be added to inventory.

Find/Edit/Cancel a PO

To find an existing PO:

1. Click **Inventory > PO > Find Orders**. The **Purchase Order Find** window will appear.

PO Number	Filter results by a specific PO # or range of PO #s
Vendor	Filter by a specific vendor
Date Ordered	Filter by date PO ordered
ETA	Filter by estimated arrival date

Purchase Order Status	Filter by current status of PO
Store	Filter by store

2. Enter criteria and click **OK**. A list of matching POs will be returned.
3. From here, you can **Edit** an existing PO, **Add** a new PO**,** or **Cancel PO**.

> **NOTE:** You cannot cancel a PO that has been partially or fully received. To cancel individual ordered items from a PO, **Edit** it, select the line, and use the **Cancel Line** button.

Next Steps

For more information:

➢ **Multi-Store Levels**
➢ **Multi-Store Reorders**