

Adding Purchase Orders

When you add a purchase order, you can send it through an approval workflow. Approval workflows are setup by system administrators and are sent to designated approvers who can then approve or reject it.

To add a purchase order

- 1 **Select Purchasing > Purchase Order > Add PO.** The **Purchase Order** screen appears.
- 2 On the **Display Type** field, select the display type.



If you change display types in the middle of completing the screen, you will have to start over. Voyager refreshes the screen when you select a display type.

- 3 Complete the screen. For field descriptions, see the [Purchase Order Screen Reference](#).
- 4 Click **Save**.

Purchase Order Screen Reference

Vendor

v0000003

The Home Depot

776 Calle Real

Goleta CA 93117

8059862324

Expense Type

Tenant Improvements

Payment Due

Last Received

From Date

To Date

Description

Display Type

Standard PO Display Type

Sched. Deliv.

Order Date

09/30/2016

Required By Date

09/30/2016

Closed

☐ Close Date

PO Info

Total Amount

Approvals

Workflow

Status

Current Step

Next Step

Notes

Navigation

Back

Save

Save

New

Print

Help

Delete

Details

General Info

Addresses

Workflow

Approvers

More Details

Change Order

Distribute

Search Supplier

Property	Description	GL Account	GL Account Description	Qty Ord	Unit Price	Status	Payable Ctrls	Del
sbprop	Eggshell Paint	5010		5	40.00			<input type="checkbox"/>

Last Received



Voyager automatically completes this field with the date items were last received. You cannot edit this field.

From Date

Used for purchase orders that affect a period.

To Date

A date range is often used with European Service Charges when it is necessary to detail which period a transaction covers.

Order Date	<p>Voyager automatically completes this field with the system date (today's date). You can change it if needed. Voyager uses this date to calculate budgets.</p> <p>NOTE If the Budget Month field appears on your screen, Voyager does not use the Order Date field to calculate budgets.</p>
Budget Month	<p>This field appears only if the purchase order display type has the Show Budget Month check box selected.</p> <p>The month and year you want Voyager to use when it calculates budgets.</p> <p>The Budget Month field defaults to the value specified on the property's Property Control screen, Accounting Control header, A/P field. If necessary, you can change the Budget Month field to a month year up to three months in the future, but you cannot enter a month before the AP (accounts payable) month or a month in the past.</p>
Closed	Leave these fields empty when <i>you add</i> a purchase order.
Close Date	If you want to <i>inactivate</i> the purchase order, select the Closed check box and complete the Closed Date field. After you close a purchase order, you cannot receive or pay it. Voyager does not display closed purchase orders on selection lists, dashboards, and reports that filter on open purchase orders.
Navigation	<p>When the Workflow Dashboard or Purchase Order Dashboard returns more than one purchase order, the navigation buttons are available to easily move from one purchase order to the next.</p> <p>To view the preceding purchase order, click the Previous button </p> <p>To view the next purchase order, click the Next button </p>
More Details button	To add additional rows to the Details tab, click this button.
Change Order button	This button becomes visible after a purchase order has been approved. If you need to edit the purchase order, you can create a change order. For more information about change orders, see Creating Change Orders .
Check Budget button	<p>The Check Budget button does not appear until you click Save. If you want to check the budget, click the Check Budget button.</p> <p>When the Show PO Over Budget Warnings check box is selected on the AP Configuration screen, Voyager displays the Budget tab if entering a purchase order will put you over budget. If it is okay to go over budget, you can enter an explanation in the OVER BUDGET Explanation field, then click Save.</p> <p>If you want to <i>require</i> users to complete the OVER BUDGET Explanation field, load the optional parameter, MMW PO Over Budget Narrative required (optPOOverBudNarr.pkg).</p> <p>If you want to <i>prevent</i> users from being able to save over budget transactions, clear the Allow Save If Over Budget PO check box on the AP Configuration screen.</p>
Distribute button	To distribute an amount over multiple properties, click this button. For more information, see Distribute Screen Reference .
Search Suppliers	This button only appears if you are licensed for Voyager Inventory Control and

button have selected an Inventory Control display type.

To find vendors that are suppliers for an item, click a detail line, and then click this button.

The **Search Suppliers** screen appears with the vendors that supply this product and their prices.

For more information about suppliers, refer to the *Voyager Inventory Control User's Guide*.

Item Type If this is an inventory item, enter the item type code. Otherwise, leave this field empty.

If you select an item type code, Voyager completes the following fields automatically:

- Description
- GL Account
- GL Account Description
- Unit Price

Inventory is set up in the Voyager Maintenance module. For more information, see the *Basic Maintenance User's Guide*.

Description If you are not using inventory items, complete these fields manually.

GL Account

Unit Price

Qty Received These fields are informational only and display the quantity and date of items received for this purchase order.

Date Received

Payable Ctrl # If this purchase order is attached to a payable, Voyager displays the payable control number.

Del If you want to delete a line item, select this check box.

Voyager deletes the line after you click **Save**.

• **Purchase Order Screen: General Info tab**

The screenshot displays the 'General Info' tab of a Purchase Order screen. The interface includes a top navigation bar with tabs: 'Details', 'General Info' (selected), 'Addresses', 'Workflow', and 'Approvers'. The main content area is divided into two columns. The left column lists 'User Defined' fields (1 through 8) and a 'Print on PO' checkbox. The right column features an 'Options' section with checkboxes for 'Add Payable' (checked), 'Update Inventory', and 'Print Notes'. Below these are input fields for 'Invoice Number' and 'Batch Name'. At the bottom left, there is a 'Notes' section with a text area and a scroll arrow.

User Defined 1-8	<p>These fields can be customized and can have different labels. Complete these customizable fields to suit your business needs.</p> <p>To define these fields go to System Administration, Admin > Environment > Purchase Order Fields.</p>
Print on PO	Enter any comments that you want to appear on the printed purchase order.
Notes	Enter any comments about the purchase order. If you select the Print Notes check box under the Options header, these notes appear on the printed purchase order.
Add Payable	<p>The default setting for this check box appears after you save the purchase order. The default for this field is set on the AP Configuration screen, Purchase Orders tab Set Pay Flag check box.</p> <p>If this check box is selected, this purchase order can become a payable.</p> <p>If this check box is not selected:</p> <ul style="list-style-type: none"> You cannot post this purchase order to a payable. You cannot pull this purchase order into an invoice register or a payable.
Update Inventory	<p>If you have an Inventory Control license, Voyager automatically selects this check box, and displays it in read-only mode (you cannot clear the check box).</p> <p>If you do not have an Inventory Control license, the default setting for this check box comes from the AP Configuration screen, Purchase Orders tab, PO Update Inventory 'On Order' check box. You can override this field.</p> <p>If this check box is selected, once you click Save, Voyager automatically updates the On Hold and On Hand figures for inventory when you post the purchase order.</p>
Print Notes	<p>The default setting of this check box comes from the AP Configuration screen, Purchase Orders tab, Print Notes check box.</p> <p>If this check box is selected, Voyager includes the text from the Notes field on the printed purchase order.</p>
Invoice Number	If you are using invoices with this purchase order, enter the invoice number.
Batch Name	If you are using batches with this purchase order, enter the batch name.

• Purchase Order Screen: Addresses Tab

Bill To Information		Ship To Information	
Name	Bob McDermond	Name	Pacific Palms
Address	857 State Street, Suite 4B	Address	3100 Olive Grove Ave.
City	Santa Barbara	City	Santa Barbara
State-Zip	CA 93101	State-Zip	CA 93101
Country	us	Country	us

Bill To Information After you click **Save**, the **Bill To** address defaults from the **Property Control** screen, **Management Vendor** field, for the first property listed in the first line of detail on the purchase order. If this field is empty, Voyager uses the System

Administration, **AP Configuration** screen, **Purchase Orders** tab, **Management Vendor** field.

If needed, you can edit this information.

Ship To Information

After you click **Save**, the **Ship To** address defaults from the **Property** screen, for the property listed in the first line of detail on the purchase order.

If needed, you can edit this information.

Distribute Screen Reference

This screen appears when you click the **Distribute** button.

The screenshot shows a window titled "Distribute". It contains several input fields: "Property" with the value "sbprop", "Quantity" (empty), "Account" with the value "5075", "Stock" (empty), "Unit Price" with the value "65.95", "Description" (empty), and "Whole Numbers Only?" with a dropdown arrow. At the bottom are three buttons: "Submit", "Post", and "Help".

Property

Enter or select a property or property list.

If you choose a property list, Voyager automatically distributes the amount based on the % field on the **Property List** screen.

If you choose multiple properties, Voyager automatically distributes the amount by dividing the amount by the number of properties.

Quantity

Enter the total number of items to purchase. Voyager divides this number among the designated properties.

Account

To use the same GL account for each property, enter or select that account number. To use different GL accounts, leave this field blank and type the account numbers on the **Purchase Order** screen.

Stock

If this is an inventory item, enter the item type code. Otherwise, leave this field empty. If you select an item type code, Voyager completes the following fields automatically:

- Description
- Unit Price

Inventory is set up in the Voyager Maintenance module. For more information, see the *Basic Maintenance User's Guide*.

Description

If you are not using inventory items, complete these fields manually.

Unit Price

Whole Numbers Only?

Select **Y** if you want to distribute the quantity in whole numbers. If the quantity cannot be divided evenly, some properties get an extra item.

Select **N** if you want to divide an uneven quantity evenly as a decimal (rounded to four decimal places).
