Purchase Orders: Purchase Order Procedures: Adding Purchase Orders

# **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

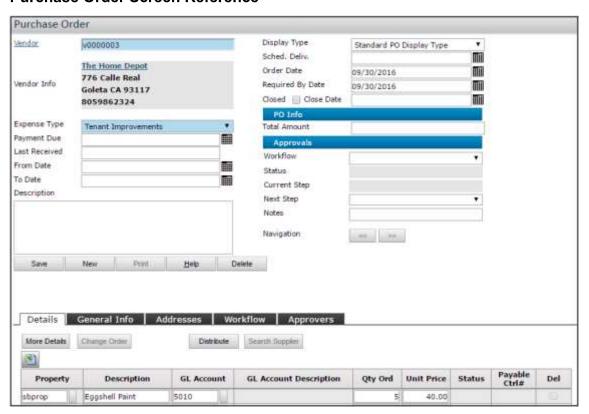
- 1 Select Purchasing > Purchase Order > Add PO. The Purchase Order screen appears.
- 2 On the **Display Type** field, select the display type.



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 <u>Purchase Order Screen Reference</u>.
- 4 Click Save.

### **Purchase Order Screen Reference**



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	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.			
	<b>NOTE</b> If the <b>Budget Month</b> field appears on your screen, Voyager does not use the <b>Order Date</b> field to calculate budgets.			
Budget Month	This field appears only if the purchase order display type has the <b>Show Budget Month</b> check box selected.			
	The month and year you want Voyager to use when it calculates budgets.			
	The <b>Budget Month</b> field defaults to the value specified on the property's <b>Property Control</b> screen, <b>Accounting Control header</b> , <b>A/P</b> field. If necessary, you can change the <b>Budget Month</b> 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.			
Closed	Leave these fields empty when you add a purchase order.			
Close Date	If you want to <i>inactivate</i> the purchase order, select the <b>Closed</b> check box and complete the <b>Closed Date</b> 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	When the <b>Workflow Dashboard</b> or <b>Purchase Order Dashboard</b> returns more than one purchase order, the navigation buttons are available to easily move from one purchase order to the next.			
	To view the preceding purchase order, click the <b>Previous</b> button			
	To view the next purchase order, click the <b>Next</b> button			
More Details button	To add additional rows to the <b>Details</b> 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 <a href="Creating Change Orders">Creating Change Orders</a> .			
Check Budget button	The <b>Check Budget</b> button does not appear until you click <b>Save</b> . If you want to check the budget, click the <b>Check Budget</b> button.			
	When the <b>Show PO Over Budget Warnings</b> check box is selected on the <b>AP Configuration</b> screen, Voyager displays the <b>Budget</b> 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 <b>OVER BUDGET Explanation</b> field, then click <b>Save</b> .			
	If you want to <i>require</i> users to complete the <b>OVER BUDGET Explanation</b> field, load the optional parameter, <b>MMW PO Over Budget Narrative required</b> (optPOOverBudNarr.pkg).			
	If you want to <i>prevent</i> users from being able to save over budget transactions, clear the <b>Allow Save If Over Budget PO</b> check box on the <b>AP Configuration</b> screen.			
Distribute button	To distribute an amount over multiple properties, click this button. For more information, see <u>Distribute Screen Reference</u> .			
Search Suppliers	This button only appears if you are licensed for Voyager Inventory Control and			

Ìί			

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 #

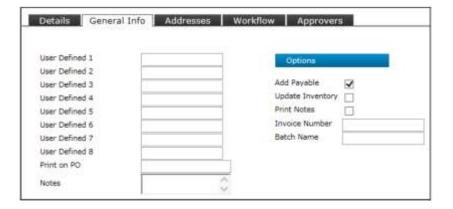
If this purchase order is attached to a payable, Voyager displays the payable control number.

## 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

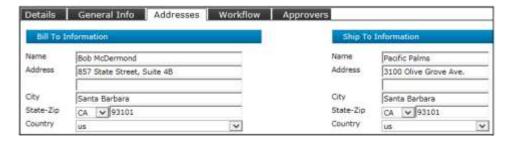


User Defined 1-8	These fields can be customized and can have different labels. Complete these customizable fields to suit your business needs.
	To define these fields go to System Administration, <b>Admin &gt; Environment &gt; Purchase Order Fields</b> .
Print on PO	Enter any comments that you want to appear on the printed purchase order.
Notes	Enter any comments about the purchase order. If you select the <b>Print Notes</b> check box under the <b>Options</b> header, these notes appear on the printed purchase order.
Add Payable	The default setting for this check box appears after you save the purchase order. The default for this field is set on the <b>AP Configuration</b> screen, <b>Purchase Orders</b> tab <b>Set Pay Flag</b> check box.
	If this check box is selected, this purchase order can become a payable.
	If this check box is not selected:
	You cannot post this purchase order to a payable.
	You cannot pull this purchase order into an invoice register or a payable.
Update Inventory	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).
	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.
	If this check box is selected, once you click <b>Save</b> , Voyager automatically updates the <b>On Hold</b> and <b>On Hand</b> figures for inventory when you post the purchase order.
Print Notes	The default setting of this check box comes from the AP Configuration screen, Purchase Orders tab, Print Notes check box.
	If this check box is selected, Voyager includes the text from the <b>Notes</b> field on the printed purchase order.
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**

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.



Property	Enter or select a property or property list.
	If you choose a property list, Voyager automatically distributes the amount based on the <b>Property List</b> 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 <b>Purchase Order</b> 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 <b>Y</b> if you want to distribute the quantity in whole numbers. If the quantity cannot be divided evenly, some properties get an extra item.

Select  ${\bf N}$  if you want to divide an uneven quantity evenly as a decimal (rounded to four decimal places).