This manual will walk you through the steps of creating a new purchase order.

Purchase orders can be created by

• Rolling a Material Request into a purchase order

• Manual entry of a purchase order

• A download from EPIC
  (Only if your group is set up with the EPIC download feature.)
From the Module Menu Choose Purchasing and from the Purchasing Menu choose Purchase Order.
Rolling a Material Request into a purchase order

Below you will see a blank PO Screen. Click on the NEW icon to enter a new PO.

Enter the Description. Make sure the Status, Type and Mark up are correct. Put in the contractor number (or zoom to find it). Make sure the address code is correct. Enter the work order or warehouse info. You can now add your shipping information.
At the top of your screen go to the view drop down menu and choose Shipping Information.
On the Shipping screen, fill in warehouse, shipment type, ordered by (this replaces “requestor” from focus) and the address. Click the green done flag.
Now you are ready to add your line items. In this example we are going to roll a material request into a purchase order. Click on Load Material Request. Below you will see a material request that I have finalized. Check the box on the left and click the green done flag.
As you can see, the line(s) from the material requests are automatically brought into the PO. If you do not need to make any changes to the line items, you can make sure your status is at finalized and click on the save icon.
When you are manually entering line items, you will fill out the top portion of the PO, and the shipping information as we did in the material request roll over sample.

When you are ready to add a line item, click on the small green plus on the line items portion of your screen.

Then you will see the screen below to choose Stock, Catalog or non-stock.
Fill in the description, part, uom, cost and quantity. Click on the large green and white plus at the top of the screen to add additional lines.

When you are done adding lines, click on the green done flag, change your status and then click on the save icon.
Purchase Orders from EPIC download

Just like you did in Focus, you will want to go to the purchase order screen and do a search. Click on the search icon in the upper right corner. In this example, I looked for EPIC in the description by using “contains” and EPIC. I also chose the status OPEN so that I would only see new EPIC orders. To narrow it down even farther, I put a user name into the Placed by search field.

As you can see, only 4 records met the search criteria. Click on a purchase order number to open it.
Click on the edit icon and make any changes needed to the po. Make sure the status is correct after you have made your changes and then click on the save icon.