**Creating purchase orders for jobs**

**To create purchase orders for jobs:**

1. Open **6-6-1 Purchase Orders**.
2. Leave the **Order#** blank. Sage 100 will not allow duplicate purchase order numbers to be created. If a purchase order was created in SSO, the Order# will already be filled in.
3. In the **Order Date** box, enter the date of the purchase order. Sage 100 Contractor automatically prefills the text box with today's date.
4. In the **Vendor** box, enter the vendor. You can do this by typing Vendor number (if known) or by using the drop-down arrow to the right to see the list of Vendors
5. In the **Attention** box, enter the name of the person to whom you are sending the purchase order.
6. In the **Description** box, enter a brief statement about the order.
7. In the **Job** box, enter the job number.
8. If the job uses phases, enter the phase number in the **Phase** box.
9. In the **Approved** box, enter the date the purchase order was approved.
10. In the **Scheduled** box, enter the scheduled date of delivery.
11. In the **Delivery** box, enter the actual date of delivery.
	* **Note:**If you are having items sent to a delivery site, enter the address information in the **Address 1**, **Address 2**, **City**, Province, and **Postal** text boxes.
12. In the **Via** box, enter the means of delivery.
13. In the **Terms** box, enter the payment terms.
14. In the **Status** list, select the status of the purchase order. This defaults to 1-Open. Should there be an issue, change the status to 5-Void
15. In the **Type** box, select the method in which payment is to occur.
16. In the **grid**, for each item you want to purchase, enter where applicable:
	* In the **Part#** cell, enter the part number.
	* In the **Description** cell, enter a brief statement about the item.
	* In the **Alpha Part#** cell, enter the alpha part number.
	* In the **Unit** cell, enter the unit of measurement.
	* In the **Quantity** cell, enter the number of items you want to purchase.
	* In the **Price** cell, enter the cost for one item.
	* In the **Cost Code** cell, enter the cost code you want to use.
	* In the **Cost Type** cell, enter the cost type.
17. Click **File** > **Save**.



**To create purchase orders by copying previous information:**

1. Note that the purchase orders will be in order of record #. The record # is automatically assigned in order of creation. The record # has no relevance outside of Sage 100.
2. By using the drop-down arrow next to the scrolling buttons, a window displaying all the purchase orders that have been created. You can filter by status, or search by any field after clicking on that header



1. Select the purchase order record you wish to copy
	1. Under the Edit Menu – click copy purchase order
	2. Under the File Menu – click new
	3. Under the Edit Menu – click paste purchase order
2. You now must change the purchase order number, as well as the other relevant details.
3. Click Save

**Purchase order statuses:**

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| **Status** | **Description** |
| 1-Open | Indicates the purchase order has been approved by someone with authority in the company to approve purchase orders. |
| 2-Review | Indicates the purchase order should be reviewed by someone with authority in the company to review purchase orders.**Important.**Before creating an invoice, you should review the purchase order.You can enter an invoice with a status of **2-Review**, but the program warns you about it. |
| 3-Dispute | Indicates a purchase order in dispute with the vendor. The authority reviewing the purchase order is disputing the charges, quantities, and so on, of the purchase order. |
| 4-Closed | Indicates all items contained in the purchase order have been purchased or canceled. |
| 5-Void | Indicates the purchase order is void. |
| 6-Master | Tracks all materials to be purchased from the vendor for an entire project.With a master purchase order, you can create individual purchase orders to the vendor. The master allows you to control the ordering and shipping of materials to the job site. |