

Purchase Order Options

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Purchase Order Options

Settings > Purchase Order

Purchase Order General Options

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Use Purchase Order: Activates menus for Purchasing.

Use Approved Documentation: A checkbox during PO entry that states the attachments are sufficient for approval. This is simply a notation.

Use Item#: Includes use of an item# on each detail line of POs in addition to comments.

Use Encumbrance: If checked, the system will track the amount encumbered for each G/L account. This is the total amount of any POs with a balance remaining. This encumbered amount can then be displayed as a column on the account browse or a financial statement.

Search Purchase Orders for Vendor By Vendor Name: Controls the search preference (vendor name vs vendor number) for a vendor's POs from the menu option Records > Vendors > Purchase Orders.

Purchase Order Entry Options

Settings > Purchase Order > Entry Options

PO# Assignment: You may elect to have PO numbers auto-assigned by the system (recommended) or manual assignment upon entry.

Next PO#: This is the next PO# to be assigned.

Entry period range allowed: Limits all users to only be able to enter POs back in time, and in the future, the number of periods specified. However, this Years settings in *Settings > General Ledger > Entry Options* override this setting.

For specified users: User/Groups selected are limited to the stated number of past and future periods for GL entries.

For all other users: This option limits all users other than those specified above to the stated number of past and future periods for GL entries.

Auto-post upon entry: This only applies to organizations that enter POs but do not use an approval process. This setting controls whether POs are to be manually posted later or auto-posted upon entry. Always leave this box unchecked if using an approval process for purchasing.

Force requester to be user entering PO: If checked, **Requested By** may not be changed when entering a PO.

Require vendor upon entry: This requires a vendor number rather than allowing blanks, though a vendor is still required before it can be posted.

Require account upon entry: This option forces an account number rather than allowing

blanks, though an account is still required before it can be posted.

Allow attachments: Allows users to attach any file to the PO. Attachments may be included in e-mails requesting approval.

Require an attachment: This forces the user to have at least one file attachment to post or submit a PO for approval.

Default browse level: This controls the minimum menu permission required for users to browse PO attachments.

Automatically display attachments on edit: If this is checked, the PO edit screen will be split, with the PO displayed on the left side and the attachment displayed on the right side, without having to click the Attachments button.

Allow PO to be modified once posted: This option allows the PO to be changed even after it has been posted if the user has the high-level (80) menu permission for Purchase Order Entry.

Include period and date on each PO detail line: Includes a column for the accounting period and date on each detail line when browsing a PO.

Use received status: Option to utilize a column for a user-defined status for POs, allowing you to flag items as Received, Not Received, etc (words of your choice). The table file is under Settings > Purchase Order > Received Statuses.

Default received status: The default received status to use for new POs. Typically, this is **Not Received**.

Allow SHIP TO to be modified: Do you want to allow the ship to address to be changed upon PO entry?

Default print upon entry: If this box is checked, the PO will be printed upon saving the PO (on the PO entry screen). This is rarely used.

Use Standard PO edit mode: If this is checked, the PO edit screen will be a full screen.

Use Split-screen PO edit mode: If this is checked, both the PO edit screen and the batch list will be displayed on the same screen.

NOTE: The option to force entry of a PO# in invoice entry is set in [Vendor Types](#).

Purchase Order Form

Settings > Purchase Order > Purchase Order Form

This controls the optional settings for a printed or emailed PO.

Bill To: Determines the address to show on the form; company or ship to.

Font: The font name and size to be used on the form for the vendor, ship to information, and bill to selections. Headers will be bolded. Distribution and the log will be -2 of the size specified here.

Header Image: This option allows you to include a custom image to use as a header (such as your company letterhead). It should be a wide image but not very high; roughly, 6 x 1 proportionally.

Footer Image: This option allows you to include a custom image for the footer. The image should be wide but not very high, roughly 6 x 1 proportionally.

Include Federal ID#: Include the company's federal ID# on the form.

Include Log: Includes the approval log on the form.

Margins: Adjust the margins for the form here.
