Purchase Order Options

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Purchase Order Optional settings

Settings > Purchase Order > General Options

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 PO's in addition to comments.

Use Encumbrance: If checked, the system will track the amount encumbered for each G/L account. This is 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.

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.

Distribution method: Determines the default distribution method for entry.

Allow entry up to x periods past/future: Limits all users to only be able to enter PO's back in time and in the future the number of periods specified. However, the Years setting in Settings > General Ledger > Entry Options overrides this setting.

Auto-post upon entry: This only applies to organizations who enter POs but do not use an approval process. In this case, 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: Forces a vendor# rather than allowing blanks, though a vendor is still required before it can be posted.

Require account upon entry: Forces an account# 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: Forces the user to have at least one file attachment on a PO.

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

Allow PO to be modified once posted: 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.

Dft received status: The default received status to use for new PO's. 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 regular PO edit: If this is checked, the PO edit screen will be a full screen.

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

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

NOTE: *The option to force entry of a PO# in invoice entry is set in Vendor Types .*

Settings > Purchase Order > Purchase Order Form

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

Header Image: 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: Allows you to include a custom image to use as a footer. It should be a wide image, but not very high; roughly, 6 x 1 proportionally.

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

Include Log: Includes the approval log on the form.

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 sections. Headers will be bolded. Distributions and the log will be -2 of the size specified here.

Margins: Adjust the margins for the form here.