Last Modified on 01/15/2025 9:05 am EST

Purchase Order Preferences

There are three options to set up for purchase orders:

General Options

Entry Options

Purchase Order Form

The instructions below, which include menu navigation, will help you set up these options.

Settings > Purchase Order > General Options

These preferences control the main preferences and current dates in the purchase order.

Use Purchase Order: Activates use of the Purchase Order system.

Use Approved Documentation: A checkbox during PO entry that states the attachments are sufficient for approval.

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

Use Encumbrance: Includes PO encumbrance, which tracks the amount encumbered for each G/L account. This can then be displayed on the account browse or a financial statement.

Settings > Purchase Order > Entry Options

PO entry information.

PO# Assignment: Enables automatic or manual PO # generation.

Next PO#: Lists the next PO# to be generated.

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 POs back in time and in the future the number of periods specified. However, the Years setting in *Setup > Options > General Ledger* Entry overrides this setting.

Auto-post upon entry: Automatically posts the PO when created.

Force requester to be user entering PO: If checked, it doesn't allow the requester to be changed.

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

Require account upon entry: 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 requisition during entry. This is used to attach a quote from the vendor. Attachments will also be included in e-mails requesting approval.

Require an attachment: Forces the user to have at least one file attachment.

Default browse level: The browse permission level is assigned to all attachments when initially added to POs.

Allow PO to be modified once posted: Allows the PO to be changed even after it has been posted.

Include period and date on each PO detail line: Shows the accounting period and date on each detail line, allowing it to be different per line rather than just keying it for the whole PO.

Use received status: Includes a status column for PO distributions, allowing you to flag items as Received, Not Received, etc.

Dft 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 requester to change the ship to address 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).

Use regular PO edit: Displays PO edit screen with just header and detail information.

Use Split-screen PO edit: Displays PO edit screen with three-way screen split: PO header detail in the upper left of the screen, PO entry detail in the lower left of the screen, and PO attachment to the right.

Automatically show attachments on edit: Automatically displays PO attachments on the right side of the screen when the edit screen is accessed. If the user chooses to **Hide image**, the system will remember the display the next time they access the PO edit screen.

Settings > Purchase Order > Purchase Order Form

Customizes how the PO forms are printed and exported to Microsoft Word.

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

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

Include Federal ID#: Include 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.