**Ordering**

* From the Master Menu select Sales Processing
* Select Order Entry/Maintenance and select your printer
* Type the order # in the Order # box to open the order

Graphical user interface, text, application, email

Description automatically generated

* Click on the item that needs ordered to select it and right click to bring up the following options:

Graphical user interface, application

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* Select Assign Material Line as pictured above
* On the Assign Inventory to Order screen select the From PO Tab (1) and then select New PO (2)

Graphical user interface, application, table

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* The following screen will open:

A picture containing timeline

Description automatically generated

* + Verify Quantity to Order, Cost, Memo (long names may get cut off), and Vendor (if this is incorrect, click the vendor box and select the correct vendor)
* Click Save
* Purchase Order # will pop up after hitting Save. Write the PO info on the hard copy

Graphical user interface, text, application

Description automatically generated

* Click OK and then exit until you are at the main order screen
* Under the Job Detail tab, change the Job Status to 2.0 Order – Material Ordered or 2.1 BO – Goods Back Ordered

Graphical user interface, application

Description automatically generated

* Exit until you are back at the Master Menu and select Purchase Orders
* Open the PO you just created

Graphical user interface, application

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* Fill in Taken By (Person’s name if over the phone or Online) (1), Ordered By (2), and Ref # (3)

Graphical user interface, text, application

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* Select the Order All Lines tab at the top

Graphical user interface, application

Description automatically generated

* The following window will open:

Graphical user interface, application

Description automatically generated

* Fill in the Date Shipped and Estimated Arrival (I use the estimated arrival date for both), Order Reference #, and Ship Via (This will sometimes autofill and other times you will need to select Brauns or will call, etc.)
* After everything is filled in print the PO. Select Print at the top and then Print PO

Graphical user interface, application

Description automatically generated

* The following window pops up with the Print Options already selected (The only time I change this is if a PO has already been received and we need a copy. You will need to check the Print Closed Received Lines or it will not print.)

Graphical user interface, text, application

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* Make your warehouse tag and file the PO

**Ordering Multiple Items on the Same Order**

You will follow the same steps as listed above to create a PO.

* Once the PO has been created for the 1st item, right click the 2nd item and select Assign Material Line
* On the next screen select the From PO tab and hit the New PO button as before
* The following will pop up letting you know that there is already a PO assigned to the order
  + If you are using the same vendor click that PO and hit the Select button
  + If you are using a different vendor select New PO

Graphical user interface, text, application

Description automatically generated

* Follow the rest of the steps to complete the PO

**Extra Tip**

You can also complete the entire process within the Order Maintenance screen for PO’s that only have one item. I find this method the easiest when ordering one piece of carpet, etc.

* Follow the steps to create a PO
* After the PO is created and it gives you the PO number press OK and the screen will look similar to the following:

Graphical user interface, application

Description automatically generated

* Check the box for Line has been Ordered (1) and the lines inside the box will become available. Fill in the Date Shipped, Estimated Arrival, Taken By, Order Reference #, and Ship Via same as above (2)
* After everything has been entered click Update (3) on the bottom to save the information then Print P.O. (4)
* Make the warehouse tag and file the PO