

Purchase Orders Manual

sZen Corp

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1 Purchase Orders

Purchase Orders are managed from the Purchase Order Module. To open this module:

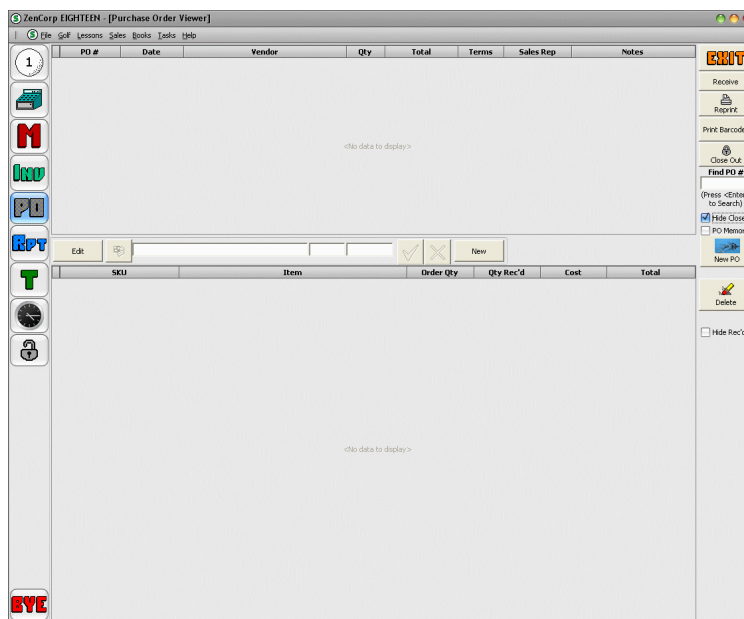
-**SELECT** the 'PO' button along the left side of the screen



-**OR**-

-**SELECT** Sales from the file menu, then Purchase Orders, then Purchase Order Viewer

-This opens the Purchase Order Viewer



The Purchase Order Viewer is where purchase orders will be created, printed, received or closed out. This section details all things to do with using the Purchase Order Module.

1.1 Making a New Purchase Order

Once the Purchase Order Module is open, a new purchase order can be created.

[The Purchase Order Screen](#)

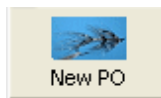
[Creating a New Purchase Order](#)

[Adding Items to the Purchase Order](#)

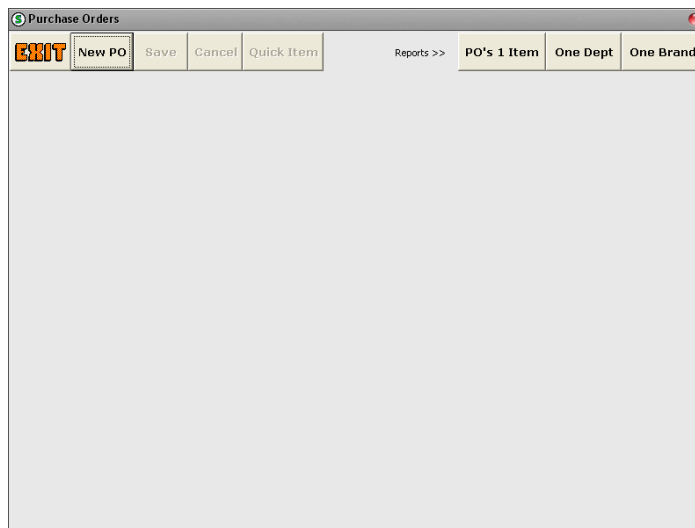
The Purchase Order Screen

To create a new purchase order:

-SELECT the 'New PO' button



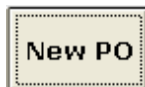
-This opens the Purchase Order Screen



Creating a New Purchase Order

To create a new order:

-SELECT the 'New PO' button on this screen



-This opens some text fields on the Purchase Order Screen

-ENTER in the appropriate information for, such as the date, terms, and vendor

Adding Items to the Purchase Order

Once the PO information is entered, the next step is to enter the items that are to be ordered. To do this:

-SELECT the 'New Order Item' button

-This opens the Inventory Locator Screen

- HIGHLIGHT the desired department
- HIGHLIGHT the desired inventory item
- SELECT the 'Go' button

-This will close out the Inventory Locator Screen. Some text fields will open on the Purchase Order Screen replacing the 'New Order Item' button. The desired inventory item will appear in the top left field

Callaway BB Fairway Wood			Spiff Amt	Net Cost	✓	✗
Qty	Item Cost	Retail \$ \$139.00	Spiff %	Total	Margin	
Item Note						

- ENTER** the appropriate information into the text fields
- SELECT** the green 'Check Mark' button
- The item will be added to the purchase order and will appear in the grid at the bottom of the Purchase Order Screen

Continue this process until all desired items have been added to the purchase order.

1.2 Editing a Purchase Order

Once a Purchase Order has been created and saved, there are several options for editing it.

[Adding a Purchase Order Item](#)

[Editing a Purchase Order Item](#)

[Editing Purchase Order Notes](#)

[Changing the Vendor for a Purchase Order](#)

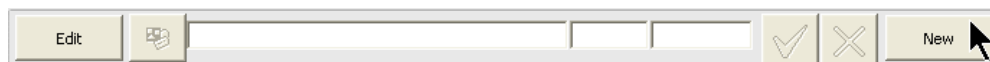
[Changing the Terms of a Purchase Order](#)

[Reprinting a Purchase Order](#)

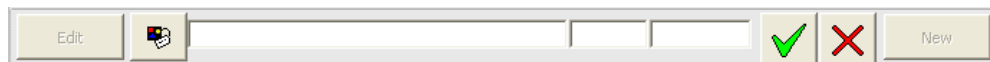
Adding a Purchase Order Item

To add an item to a purchase order that has already been created:

-SELECT the 'New' button above the grid containing the purchase order items



-This activates the text fields and buttons above the grid



-SELECT the 'Tag' button



-This opens the Inventory Locator Screen

Dept		Title	SKU	Item	Qty	Price	Cost
			99999200719	Cart Fee 18 ARROW-A/O	0	\$0.00	
			99999200731	Cart Fee 18 ARROW-3/A	0	\$0.00	
			99999200727	Cart Fee 18 ARROW-3/S	0	\$0.00	
			99999200723	Cart Fee 18 ARROW-M	0	\$0.00	
			99999431	Cart Fee 18 ARROWPEAK	0	\$0.00	
			99999317	Cart Fee 18 CART ROUND	0	\$18.87	
			99999200802	Cart Fee 18 CDAINN PKG SPECIAL	0	\$0.00	
			999992007140	Cart Fee 18 CDAINNGRP	0	\$0.00	
			999992007144	Cart Fee 18 CDAINNGRP-A/O	0	\$0.00	
			999992007150	Cart Fee 18 CDAINNGRP-3/A	0	\$0.00	
			999992007148	Cart Fee 18 CDAINNGRP-3/S	0	\$0.00	
			99999200735	Cart Fee 18 CDAINNGRP-M	0	\$0.00	
			999992007124	Cart Fee 18 CDAINNGUEST A/O	0	\$0.00	
			999992007136	Cart Fee 18 CDAINNGUEST 3/A	0	\$0.00	
			999992007132	Cart Fee 18 CDAINNGUEST 3/S	0	\$0.00	
			999992007128	Cart Fee 18 CDAINNGUEST M	0	\$0.00	
			999993	Cart Fee 18 COMP	0	\$0.00	
			99999200783	Cart Fee 18 CORP-A/O	0	\$0.00	
			99999200796	Cart Fee 18 CORP-3/A	0	\$0.00	
			99999200792	Cart Fee 18 CORP-3/S	0	\$0.00	
			99999200787	Cart Fee 18 CORP-M	0	\$0.00	
			9999920073	Cart Fee 18 DAY-A/O	0	\$0.00	
			99999200715	Cart Fee 18 DAY-3/A	0	\$0.00	

-SELECT the desired inventory item

-SELECT the 'Go' button

-The inventory item description will appear in the appropriate text field

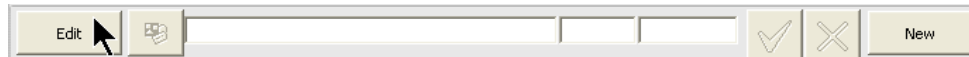
- ENTER** the quantity to order, and the cost in the appropriate text fields
- SELECT** the green 'Check Mark' button

The inventory item will be added to the purchase order.

Editing a Purchase Order Item

To edit an item that has already been added to a purchase order:

- HIGHLIGHT** the desired purchase order item
- SELECT** the 'Edit' button above the grid containing the purchase order items



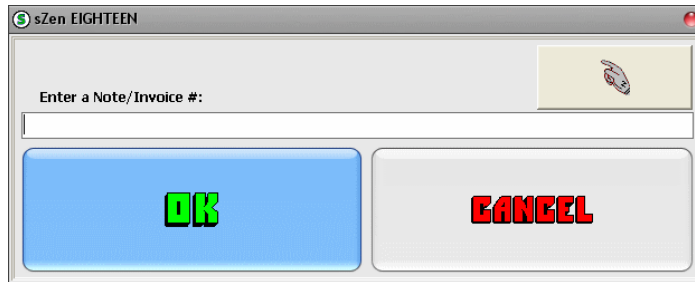
- The item and its order information will be brought into the text fields shown above
- Make the appropriate changes to the item
- SELECT** the green 'Check Mark' button

The changes will be made to the highlighted purchase order item.

Editing Purchase Order Notes

To edit the notes for the purchase order:

- RIGHT CLICK** on the desired purchase order
- A menu with some options will appear
- SELECT** 'Edit Note'
- This will open a screen in which to enter the note changes



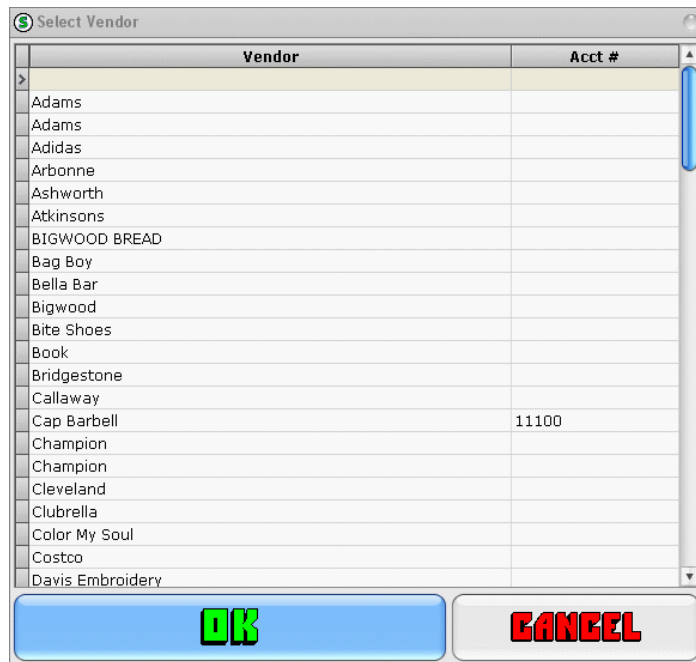
- ENTER** the desired note changes
- SELECT** the 'Ok' button

The changes will be saved.

Changing the Vendor for a Purchase Order

To change the vendor for a purchase order:

- RIGHT CLICK** on the desired purchase order
- A menu with some options will appear
- SELECT** 'Change Vendor'
- This will open the Select Vendor Screen



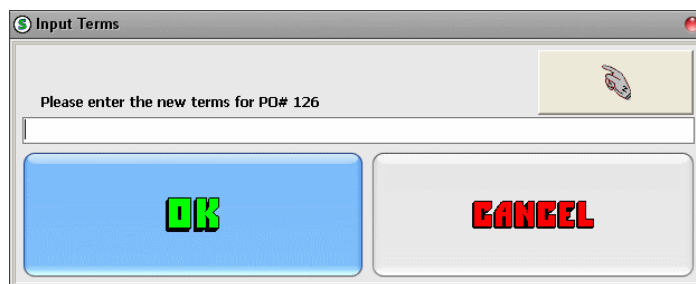
- HIGHLIGHT** the desired vendor
- SELECT** the 'Ok' button

The vendor for the selected purchase order will be changed.

Changing the Terms of a Purchase Order

To change the terms for a purchase order:

- RIGHT CLICK** on the desired purchase order
- A menu with some options will appear
- SELECT** 'Change Terms'
- This will open the Input Terms Screen



- ENTER** in the desired new terms
- SELECT** the 'Ok' button

The new terms will be saved to the selected purchase order.

Reprinting a Purchase Order

To reprint a purchase order:

- HIGHLIGHT** the desired purchase order
- SELECT** the 'Reprint' button



- A print preview will open
- Make sure everything is in order
- SELECT** the print button

The purchase order will proceed to print.

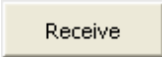
1.3 Receiving a Purchase Order

- [The Receive Items from PO Screen](#)
- [Receiving Items from a Purchase Order](#)
- [Receiving a Purchase Order in Full](#)
- [Closing Out a Purchase Order](#)

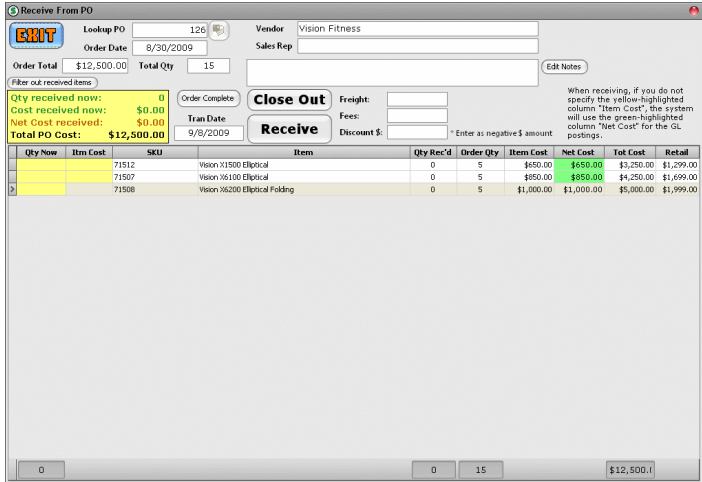
The Receive Items from PO Screen

Receiving items from purchase orders takes place in the Receive Items from PO Screen. To receive items from a purchase order using this screen:

- HIGHLIGHT** the desired purchase order
- SELECT** the 'Receive' button



-This opens the Receive Items from PO Screen



Receiving Items from a Purchase Order

Once the desired purchase order has been selected and its information brought into the Receive Items from PO Screen, individual items can be received from it. To do this:

- ENTER** the quantity received into the yellow 'Qty Now' text fields in the grid for the received items
- ENTER** the 'Item Cost' only if it is different from the original cost defined at the creation of the PO

	Qty Now	Item Cost
I	3	\$600.00
	2	
	4	

-**ENTER** in any other pertinent information such as freight cost and additional fees

-SELECT the 'Receive' button



Receiving a Purchase Order in Full

If all the items from a purchase order have been received, the received quantities can be filled in automatically by sZen. To make this happen:

-SELECT the 'Order Complete' button



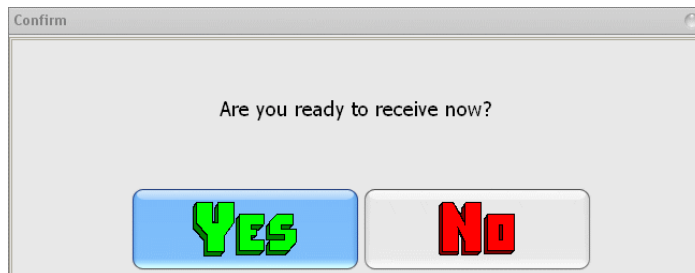
-The 'Qty Now' fields will automatically be filled out with the total quantity ordered.

	Qty Now	Itm Cost
>	5	
	5	
	5	

-ENTER in any other pertinent information such as freight cost and additional fees
-SELECT the 'Receive' button

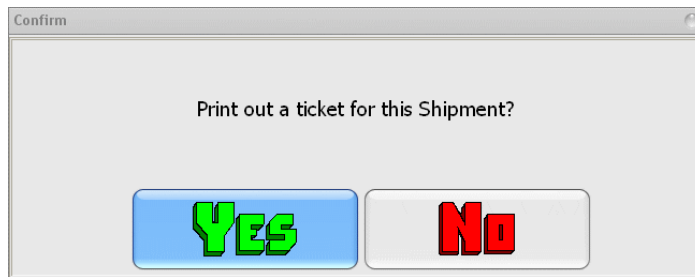


-A confirmation screen will open

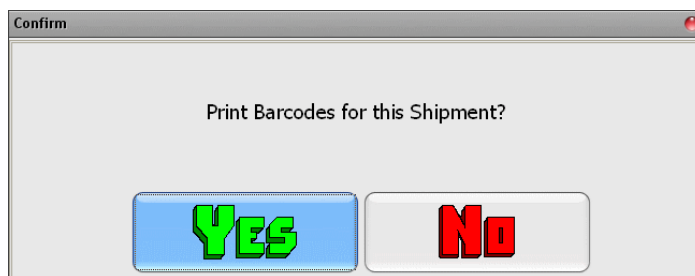


-SELECT the 'Yes' button

-Another confirmation screen will open asking whether or not it should print out a ticket for the shipment



- SELECT** the appropriate answer
- If the 'Yes' button is selected, a screen will open with some printing options
- Another confirmation screen will open asking whether or not it should print out barcodes



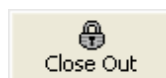
- SELECT** the appropriate answer
- If the 'Yes' button is selected the barcode printing feature will open. See Barcodes in the chapter on inventory for more details

Once all the confirmation screens have been dealt with, the purchase order will be closed out and the received inventory will be added to the in stock inventory.

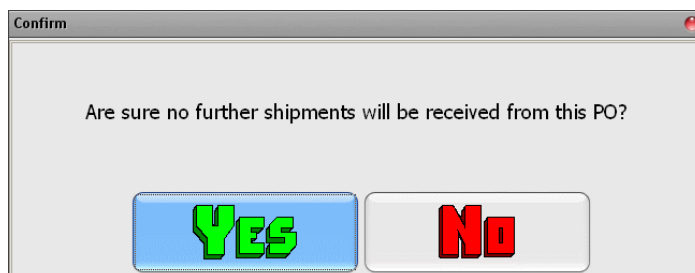
Closing Out a Purchase Order

If a purchase order is not complete, but it is known that there will be no more items received from that order, it can be closed out. To do this:

- HIGHLIGHT** the desired purchase order
- SELECT** the 'Close Out' button



- A confirmation screen will open



-SELECT the 'Yes' button

The purchase order will be closed. No other items may be received from this order, and no changes may be made. There is also an option to close a purchase order from the Receive Items from PO Screen. There is a 'Close Out' button that when selected will perform the same operation as the above steps detail.