

# How to Create a Purchase Order

## How to Create a Purchase Order

### Step One: Select Items

1. Click the Create Purchase Order icon along the tool bar at the top of your window.



2. Highlight a vendor you want to order from in the list to the left.
3. Once selected, all the items available from the vendor will be displayed in the window.
4. To quickly locate an item for the selected vendor, enter the item number in the item search field at the top right of the window.



5. Click Enter or tab to jump to the item in the list. If an item is not found, it will highlight the next closest match.
6. Tag the item you want to order and repeat the process until you have tagged all the items you want to order.

Tag	Number	D
	1-600	
	1-601	
✓	1-602	

7. If an item is marked as discontinued, there will be an image of a red shield displayed in the column labeled "D". It looks like this:



8. Select your next vendor on the left for any items you want to order and repeat the tagging process.
9. To review your list of tagged items for each vendor, highlight a vendor and click the Show Tagged button at the bottom of the window. Your tagged items for that vendor will be displayed. Press the button again to display all items.



10. When ready, click the Next button at the bottom right to enter ordering details.



## Step Two: Enter Item Details

The screenshot shows a software window titled "Create Purchase Orders" with a subtitle "2. Enter items details for each purchase order listed below. Then click Next." The window contains two main tables and several control buttons.

PO Number	E	Vendor	Date*	Date Required*	Shipping Method*	Send It*	Print*	* Priority
1048		Adhisa	2/07/08	1/30/08	Delivery by Vendor	N	Y	
1049		Arnel	2/07/08	1/30/08	Overnight UPS	N	Y	

Below the first table are "Change" and "Delete" buttons. A "Tips" icon is also present.

Item details for: Arnel										Frame Details			
Item Number	Description	Width	D	E	Type*	Qty*	Height*	Width*	Allowance*	Feet	Each	Total	Item Notes
28x17	X-Brush Grey Preview	1 1/2			Length	1.00			--	0.000	0.00	0.00	

At the bottom of the window are "Discontinued Items" and "Error - Incomplete Information" indicators, "Change" and "Delete" buttons, "Back" and "Next" navigation buttons, and a "Close" button.

Avonto Direct Connect automatically creates purchase orders displaying the items you want to order from each of your vendors. In this window you will enter the ordering details for each item.

You will see each purchase order listed in the top portion of the window (see image above) and the details of each item listed in the bottom portion of the window.

Columns which have an asterisk (\*) mean the information which is displayed can be edited/changed. These are called “entry fields”.

The purchase order details section includes the following entry fields:

(The defaults for these fields are set in your Program Options window).

**Date** = This is the purchase order creation date

**Shipping Method** = This is the method of preferred shipping. This is sent to the vendor, however this may not ultimately determine how the vendor ships your items due to agreements they may have.

**Send It!** = If set to Y (Yes), you are telling Avonto Direct Connect to “Send” the purchase order electronically to the vendor. This can only be set to Y if the vendor is set to receive the orders electronically. If set to N (No), this means, you do not want to send the orders electronically.

The program will not send electronically if a vendor is not set to receive them electronically. If this is the case, you can print the orders instead.

**Print** = If set to Y (Yes), Avonto Direct Connect will send the purchase order directly to your default printer in order to call or fax the order in. This option is good for those who prefer to call or fax their orders. If set to N (No), the purchase order will not be sent to the default printer.

**Priority** = Enter a priority level, such as “Rush” or “High”. Leave blank if there is no preference.

## Enter Item Details

To enter details for each item on a purchase order, follow these steps:

1. Highlight a purchase order in the top portion of the window.
2. In the Item Details section of the window, double click in an entry field (columns marked with an \*) to enter item details for each item listed on the selected purchase order.
3. Use the tab key or mouse to move from field to field. Here are the definitions of the Item Details entry fields:

**Type** = A category which the item falls into. For mouldings select either Length, Chop or Joined. For a mat order, select Mat. For Glass, select Glass. For a type not listed, select Other. For example if you order hardware, you can specify “Other”.

**Qty** = The order quantity of the item. If you selected Length as your Type, then Quantity represents the quantity of feet required. For example, if you need 25 1/2 feet of moulding 12345, then enter 25 1/2 as your quantity. However, if you are ordering 4 oval frames, enter 4 to represent the number of frames.

**Height** = Height refers to ordering Chop or Joined frames. For example, for a 16 x 20 joined frame, enter 16 as the Height. \*This is required when the Type is selected to Chop or Joined. If this is not entered, that item will be shown as having an error until the required fields are filled in. Otherwise, leave blank if you did not select Chop or Joined.

**Width** = Width refers to ordering Chop or Joined frames. For example, for a 16 x 20 joined frame, enter 20 as the Width. \*This is required when the Type is selected to Chop or Joined. If this is not entered, that item will be shown as having an error until the required fields are filled in. Otherwise, leave blank if you did not select Chop or Joined.

**Allowance** = Specify the allowance required when ordering Chopped or Joined Frame. Otherwise, leave blank. \*This is required if using Chop or Join as the Type. You can set a default allowance for each vendor under Program Options.

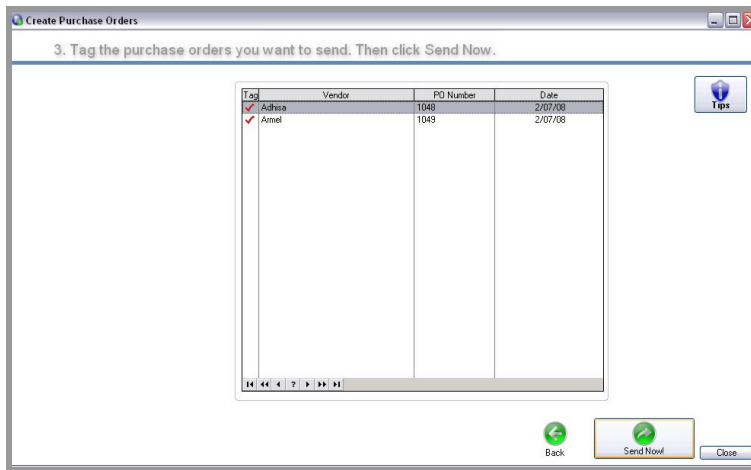
**Item Notes** = You are given the option to include up to 40 characters for any instructions regarding the listed item.

4. When finished, make sure there are no Errors. If you see a red explanation mark listed in the “E” column next to the vendor name at the top of the window then you need to recheck your entries and make any adjustments needed. A purchase order cannot be sent if there are any errors found.
5. Remember, when ordering Chop or Joined, the Height, Width & allowance are required entries.
6. Avonto Direct Connect will calculate and display on screen any required feet based on the measurements specified, along with the cost of “each” item and the item total.

**Please note:** These prices are the prices supplied by the vendor to be used in Avonto Direct Connect. These do not include any special pricing you may have set up directly with the vendor themselves. These prices represent the approximate cost based on your figures entered, not on existing agreements which may have already been established.

7. When ready, click the Next button.

### Step Three: Sending Orders



### Sending Orders

1. In this window you will see the purchase orders which are ready to send either electronically to the vendor or to your printer.
2. Tag each purchase order you want to send.
3. To send a listed purchase order at a later time, do not tag the purchase order. The order will remain listed until tagged, or deleted.
4. To make any changes, click the Back button, otherwise, click Send Now.
5. If sending electronically to the vendor, you will receive a confirmation email to the email address your software is registered to. You can view this information under Program Options. If you do not receive a confirmation email within 12-24 hours, please contact the Vendor directly to make sure your order has been received. Please allow extra time if ordering during a weekend or holiday.