Quick Start Guide to using the Purchase Order Software

This assumes you already have the website application connected to the database and you are able to log in. If you have not made it this far, please read the installation file that was included with your files.

Getting started with Purchase Order Software:

1. Log in to Purchase Order Software using the Admin Login, click on the Admin link in the footer.
2. Setup your site settings
    a. Click on "Configuration"
    b. A Division, Department, Project and Vendor must be setup before you can enter a purchase order.
    c. We have entered a division (671), department (IT Department), project (671142500) and vendor (CppGames), which you can edit the information to match your company.
    d. To view the Division, click on "Configuration" > Manage Divisions > Search Divisions.
    e. To view the Department, click on "Configuration" > Manage Departments > Search Department.
    f. To view the Project, click on "Configuration" > Manage Projects > Search Projects.
3. Add an Administrative User (Clerk)
    a. Click on "Configuration" > Manage Users.
    b. Click the "Add New User".
    c. Select the Clerk Role for this user. The Clerk Role is similar to the Admin Role, they cannot Add/Edit Adminstrative Users, Site Settings and other Admin functions.
    d. Enter all required fields, login name, password and email address.
    e. Click submit.
4. View Approver
    a. The Approver is used to approve Purchase Orders, This option can be turn off or on depending on your needs. If the approval process is on (True), you must setup an Approver. The approval process option has already been turned on or set to True (default) and an Approver has already been entered to the system.
    b. To view the Approval Process option, click on "Configuration" > General Configuration > Purchase Setup. You can see the "Approval Process On" is set to "TRUE".
    c. To view the Approver, click on "Configuration" > Manage Approvers > Search Approvers.
    d. Write down the "Email and Approval Code" for the first approver (id=1 or Division=ALL), this will be used to approve the Purchase Order you create.
5. Click on the "Home" link, to return to the main page, then Log out as Admin.

Login as the User of the Clerk Role, using the Admin login screen. The User can add/edit vendors, purchase orders, projects, stored items, and received items.

Edit a Purchase Order and Submit the Purchase Order for approval:

1. You will edit the Purchase Order (PO-1), which is in the pending status.
    a. Click the "Purchase Orders" in the menu.
    b. From the purchase orders default page:
        i. Click on "Pending Purchase Orders".
        ii. Then click on the edit icon in the "Actions" column.
        iii. Leave the Vendor, Division, Department, and Project as shown. Scroll done to you see the Purchase Items.
        iv. Click on the "Add Item" button and select a new item from the "Description" drop down list. Example, select "SSL Certificate", then modify the Item Number as 1X12999, quantity as 3, unit price as 39.00, discount as 5.00, the total should be $111.15 for this line.

v. Tab down to the "Shipping amount and enter 10.00, then press the tab key. The total for the Purchase Order should be $302.82.
vi. Click "Save Purchase". The purchase order is now saved.
vii. Now you can submit the purchase order for an approval, Click the "Get Approval" button.
c. Click on the Home link, to return to the main page. Your Purchase Order is in the "Pending" status. When the purchase is approved, the status will change to "Approved".

Before we approve the purchase order, we will add another purchase order. We will also add a new project and a new stored item we can select from a list of items to purchase.

Create a new Project:

1. Click the "Projects" in the menu.
    a. From the Projects default page:
        i. Click on "Create Project".
        ii. Select a division (671) from the division dropdown list.
        iii. Enter the project number 671142600.
        iv. Enter a description for the project, "A new project".
        v. Enter a budget amount, 2500.00, set the billable to "False".
        vi. Click "Save Changes".
    b. Click on the "Search Projects" in the menu, to view the project list.

Create a new Stored Item to be purchased:

1. Click the "Purchase Orders" in the menu.
    a. From the purchase orders default page:
        i. Click on "Stored Purchase Order Items".
        ii. You will see a list of items that can be selected when creating a new purchase order.
        iii. Click on the "Add New Stored Item" link.
        iv. Enter the item number 1X12555.
        v. Enter a description for the item, "A New Item".
        vi. Select the Unit Type "Each"
        vii. Enter a the amount, 250.00
        viii. Leave the defaults for the Discount and Taxable.
        ix. Click "Save Changes".
    b. Click on the "Stored Purchase Order Items" in the menu, to view the items list.

Create a New Purchase Order (PO-2) using the project and stored item above.

1. Click on "Purchase Orders" in the menu.
    a. From the purchase orders default page:
        i. Click on "Create Purchase Order".
        ii. Select a vendor from the vendor dropdown list, then click "Done".
        iii. Select a division (671) from the division dropdown list.
        iv. Select a department (IT Department) specific to the division.
        v. Select the project (671142600).
        vi. Select the item "A New Item" from the description drop list, in the "Purchase Items", you can edit the quanity, price, discount and taxable.
        vii. If you need to add another item, click "Add Item" button.
        viii. Enter any comments you want your vendor to see. (optional)
        ix. Enter the shipping amount for the order. (optional)

        x. Click "Save Purchase".
    b. After you have entered all the line items you want for the purchase order (PO-2), you can submit the purchase order for an approval, Click the "Get Approval" button.
       Note: you can print the purchase order, but the message "Purchase Order Not Approved!" will appear until the purchase order has been approved. A print window will pop up, close after printing.
    c. Click on the Home link, to return to the main page. You now have an open Purchase Order with the status "Pending". When the purchase is approved, the status will change to "Approved".

Before we approve the purchase order, we will add another purchase order. We will also add a new Vendor.

Create a New Vendor.

1. Click on "Vendors" in the menu.
    a. From the Vendors default page:
        i. Click on "Create Vendor".
        ii. Add the First and Last Name, as John Doe.
        iii. Add the company as "New Company".
        iv. Select Net 30 for the terms.
        v. Telephone number as "800-555-1212".
        vi. Email an email address, password, address, city, state, country and postal code.
        vii. Write down the email address and password, we will need this later to login the Vendor area.
        viii. Click "Save Changes".
    b. After you have entered all the line items for the vendor, click on the "Search Vendors" in the menu, you should see the new vendor you just entered.

Create a New Purchase Order (PO-3) for the Vendor above.

1. Click the "Purchase Orders" in the menu.
    a. From the purchase orders default page:
        i. Click on "Create Purchase Order".
        ii. Select the new vendor "New Company" from the vendor dropdown list, then click "Done".
        iii. Select a division (671) from the division dropdown list.
        iv. Select a department (IT Department) specific to the division.
        v. Select the project (671142600).
        vi. Select the item "A New Item" from the description drop list, in the "Purchase Items", you can edit the quanity, price, discount and taxable.
        vii. If you need to add another item, click "Add Item" button.
        viii. Enter any comments you want your vendor to see. (optional)
        ix. Enter the shipping amount for the order. (optional)
        x. Click "Save Purchase".
    b. After you have entered all the line items you want for the purchase order (PO-3), you can submit the purchase order for an approval, Click the "Get Approval" button.
       Note: you can print the purchase order, but the message "Purchase Order Not Approved!" will appear until the purchase order has been approved.
    c. Click on the Home link, to return to the main page. You now have an open Purchase Order with the status "Pending". When the purchase is approved, the status will change to "Approved".

Since we continually order the same items from this New Vendor, we need to create a Recurring Purchase Order.

Create a Recurring Purchase Order for the Vendor above.

1. Click the "Purchase Orders" in the menu.
    a. From the purchase orders default page:
        i. Click on "Create Recurring Purchase Order".
        ii. Select the new vendor "New Company" from the vendor dropdown list, then click "Done".
        iii. Select a division (671) from the division dropdown list.
        iv. Select a department (IT Department) specific to the division.
        v. Select the project (671142600).
        vi. Select the item "Logo Design" from the description drop list, in the "Purchase Items", you can edit the quanity, price, discount and taxable.
        vii. If you need to add another item, click "Add Item" button.
        viii. Enter any comments you want your vendor to see. (optional)
        ix. Enter the shipping amount for the order. (optional)
        x. Click "Save Recurring Purchase".
    b. After you have entered all the line items you want for the purchase order, click on "Generate Next Purchase" to create a new purchase order (PO-4).
    c. You will see a new generated Purchase Order in the list at the bottom left of the page.
    d. Click on "Generate Next Purchase" to create another purchase order (PO-5). You should see 2 purchase orders.
    e. Click on the Home link, to return to the main page. You now have 2 more open Purchase Orders (PO-4, PO-5), one due next month and one due the month after, with the status "Pending". When the purchase is approved, the status will change to "Approved".

Edit the Purchase Order (PO-4), adding tax to the item.

1. Click the "Purchase Orders" in the menu.
    a. From the purchase orders default page:
        i. Click on "Pending Purchase Orders", then click on the Edit icon under the "Actions" column for the (PO-4).
        ii. Scroll down to the detail and click on the taxable box, this will add tax to the purchase.
        iii. Tab down to the "Shipping amount and enter 15.00, then press the tab key.
        iv. The total for the Purchase Order should be $147.50.
        v. Click "Save Purchase".
    b. Click the "Get Approval" button.
    c. Click on the Home link, to return to the main page.

View Purchase Order Reports.

1. Click on "Purchase Order Stats" on the Home page, this is a summary of all the purchase orders created.
2. Click on "Reports" in the menu, then click on "Detailed Purchase Report". Click on the "Search" button to display the purchase order you created today.
3. You can select different date ranges to view other Purchase Orders. Change the date range for "This Month", then click on the "Search" button. Note: the second purchase order you generated from the recurring purchase order is not displayed because it has a creation date of next month.
4. Change the date to include next month, then click on the "Search" button to view the purchase order.
5. Click on the Home link, to return to the main page.
6. Log out as the User.

Approve the Purchase Orders

1. Login as the Approver, click on the "Approval" link in the footer and login as the approver, you noted above.

a. Enter the email address and password (approval code).
b. Click on "View Purchase Orders" in the menu.
c. If the Approval column displays a green "Circled Check Mark", then purchase order has been submitted and is waiting for your approval.
   If the Approval column displays a "?", then purchase order has not been submitted for your approval.
   If the Approval column displays a green "Check Mark", then purchase order has been approved.
d. To approve the purchase order, click on the green "Circled Check Mark", a pop window will ask you to confirm the process, click "OK".
e. The Purchase Order has been approved and the Approval column now displays the green "Check Mark" indicating the approval process is complete.
f. Approve all purchase orders.
g. Click on the "Print" icon in the table to print the purchase order.
h. Log out as Approver.

Mark the items received for a Purchase Order

You would do this when you receive the products from the vendor.

Log in as the User you assigned to the Clerk Role. Note: you will need to log in to the Administration Area.

There are now 4 purchase orders with the Approved status.

1. Click on "Received Items" in the menu.
   a. From the Received Items default page:
      i. Click on "Enter Received Items", then click on the Edit icon under the "Actions" column for the (PO-3).
      ii. Scroll down to the detail and click on the received box, this will mark the item as received.
      iii. Click on the "Save Received Items" button, this will change the status to completed.
   b. Click on "Received Items" in the menu.
   c. Click on "View Received Items", to view all completed purchase orders. Notice the column "Items Received" displays a check mark, indicating all items have been received.
2. Click on "Received Items" in the menu again we will mark items received for another purchase order.
   a. From the Received Items default page:
      i. Click on "Enter Received Items", then click on the Edit icon under the "Actions" column for the (PO-1).
      ii. Scroll down to the detail and click on the received box for only one item, this will mark the item as received.
      iii. Click on the "Save Received Items" button, notice the status is still approved. The status will change to completed when all items are marked received.
   b. Click on "Received Items" in the menu.
   c. Click on "View Received Items", to view all completed purchase orders. Notice the (PO-1) is not displayed in the list.
   d. If you click on "Received Items" in the menu, then click on "Enter Received Items", you will see the (PO-1) is listed.
3. Click on the Home link, to return to the main page. Notice the (PO-3) is missing from the list of approved purchase orders on the Home page. The purchase order is completed. To view the completed purchase orders click on "View All Purchase Orders" in the "Quick Links" menu. From the Status dropdown list, select "Completed", then click on the "Search" button. Then click on the "Rest" button to see the full list.
4. Log out as User.

View the Vendor area

1. Click on the "Home" link in the footer. Login as the Vendor you created above.
   a. The main page displays the Open Purchase Orders you created and were approved (PO-4).
   b. The vendor can print the purchase order.
   c. Click on "Purchase History". This area displays the completed purchase orders (PO-3).
   d. Note: The vendor will only be able to log into the system, if you provide them with the username (email) and password you assigned to them.
   e. Log out as Vendor.

This should give you an overview of using the Purchase Order Software.

If you need more testing, have the Administrator create a new division and new department for this division. Then enter a new project for the division, then add a new purchase order to the system.

Note: There is online help throughout the program. Click on the "?" Help icon.

Please send questions and comments to info@iPurchaseOrder.com

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