

Lesson 6-6: Creating and Customizing Purchase Orders

Figure 6-7

Creating and filling out a purchase order in the Create Purchase Orders window.

Click to print or e-mail the PO.

Type a vendor message to appear on the PO.

Make sure these are checked if you want to print or e-mail a batch of POs.

Type an identifying description of the PO to help you match it up when you receive the items (this is important).

When you start to run low on an inventory item, you can use a purchase order to order more. A purchase order—often referred to by its nickname, PO—is sent to a vendor and lists the items you want to buy. It doesn't affect your QuickBooks financial balances, but it does provide a record of what you've ordered.

When you receive the goods and the bill, you can use the purchase order to help you fill out the receipt of items and enter the bill. Using POs involves several steps: creating a customized purchase order form, filling out and sending the form, monitoring order status, and using the PO to help you receive the goods and enter the bill. Let's start this lesson by creating a customized PO form:

1. Select **Vendors → **Create Purchase Orders** from the menu.**

The Create Purchase Orders window appears, as shown in Figure 6-7. You can either use the form as-is, or customize it to better fit your business. To skip the customization steps, and start filling out the purchase order, continue with step 9. To customize a new PO form, continue with step 2.

2. To create a customized PO template, click the **Customize button.**

The Customize Template dialog box appears.

3. Click **New to create a new PO template.**

By selecting New, you create a copy so that you don't alter the original QuickBooks template.

The Customize Purchase Order dialog box appears. First you want to name the new template.

4. Type a name in the Template Name text box.

Now you're ready to customize the PO. Feel free to add and remove fields by checking and unchecking options.

5. Click the tabs and select the information that you want to appear on the PO form.

The tabs include: Header, Fields, Columns, Footer, Company, Format, and Printer. Each tab offers several items or options you can choose to display on your PO form.

Once you've selected the items you want to appear on your PO form, you can use the Layout Designer to further customize your layout.

6. Click the **Layout Designer button, if desired.**

The Layout Designer screen appears, showing the PO form in a grid format. You can drag items around the screen to different locations or add new items such as text boxes.

7. Edit the PO form layout by adding and moving items, as desired. Then click **OK.**

You return to the Customize Purchase Order dialog box.

Now that you've got your customized PO form set up, you're ready to create a PO.

8. Click **OK.**

You return to the Create Purchase Orders window to fill out the PO.

NOTE: If at any point you decide that you want to further change the template, click the Customize button, make sure your new template is selected in the list, and then click Edit.

9. Click the **Vendor list arrow and select the vendor you want to order items from.**

If you customized your PO, you may have other fields to complete in the header. Otherwise, you can move on to add the items you want to order.

10. Click the first row in the Item column, click the **list arrow, and select an item to order.**

Add as many items as necessary, then move on and specify the quantity of each item.

11. Type the quantity desired in the Qty column and adjust any other item information as desired.

Your purchase order is ready to be printed or e-mailed.

12. Click **Save & Close.****Quick Reference**

To Customize a Purchase Order Template:

1. Select **Vendors** → **Create Purchase Orders** from the menu.
2. Click the **Customize** button.
3. Click **New** to create a new PO template and type a name in the Template Name text box.
4. Click the appropriate tabs and select the information that you want to appear on the PO form.
5. Click the **Layout Designer** button, if desired, and edit the PO form layout. Click **OK**.
6. Click **OK**.

To Fill Out and Send a Purchase Order:

1. Select **Vendors** → **Create Purchase Orders** from the menu, if necessary.
2. Click the **Vendor** list arrow and select the vendor you want to order items from.
3. Select an item to order and adjust the quantity and any other item information as desired. Repeat for additional items.
4. Check the **To be printed** or **To be e-mailed** boxes, as desired.
5. Click **Save & Close**.