



QuickStart Guide

Opening Purchase Order from a Deal

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Opening Purchase Order from a Deal

ARKONA QuickStart Guide

Use this QuickStart Guide to learn how to open a purchase order from inside a deal.

- To use this function, you must be authorized to open purchase orders in the Business Office application of your user profile in **7=User Security** on the System Environment menu.
- There is separate security in the Business Office application to govern whether a user can open a purchase order or post a purchase order.
- Purchase orders opened up through a deal are charged to the vehicle inventory account by default. The default account can be overridden if necessary.

1. Select the deal that you want to open a purchase order on.

- a. Enter the stock number on line 1; or
- b. Use function **20=Retrieve** to select the deal by customer name.

2. Display the Cost Disclosure screen.

- a. Use Fast Path Code **CD=Cost Disclosure** on the function line to display the Cost Disclosure screen.

3. Open a purchase order.

- a. Use function **F8=Open PO** to display the vendor list.
- b. Type in the first few characters of the company name and press [ENTER] to position to that area of the list and take option **1=Select** by the vendor number to retrieve that vendor into the new purchase order;
- c. Or, if you know the vendor number, type it into the Vendor field at the top of the screen and press [FIELD EXIT] and [ENTER] to retrieve the vendor directly into the new purchase order.
 - The purchase order number is assigned and displayed in the top right corner of the screen.

4. Write the purchase order.

- a. Type the quantity, amount, and description of the items on the purchase order.
- b. Check the control number (defaults to stock number) and the general ledger account to be charged (defaults to INVENTORY). Type in another control number or account if necessary. It would be unusual to change the account or control number.
- c. Press [ENTER] to add the item to the purchase order.

d. Repeat steps 4a. to 4c. if necessary to add more items to the purchase order.

5. Print the purchase order, if desired.

a. Use function **F8=Print** to print the purchase order.

6. Return to the deal.

a. Press **F12=Cancel** twice to return to the Deal screen.

- **To post the purchase order**, take the following steps:

- i. From the Purchase Order screen, enter the invoice number and invoice amount.
- ii. Verify that the invoice amount matches the purchase order amount. If they are different, change one of the lines in the purchase order detail to make the total purchase order match the invoice.
 1. Take option **2=Change** by the detail line you want to change and press [ENTER] to retrieve the detail to the entry line.
 2. Change the amount to match the invoice amount and press [ENTER] to save.
- iii. Use function **F10=Post** to apply the purchase order to the general ledger.

- **To void the purchase order**, take the following steps:

- i. From the Purchase Order screen, use function **F14=Void** to display the Void Confirmation window.
- ii. Press [ENTER] to confirm the void.