



## **QuickStart Guide**

### **Purchase Orders**

October 2004

## Purchase Orders

ARKONA QuickStart Guide

*Use this QuickStart Guide for help creating purchase orders.*

- There are 3 main types of purchase orders.
  1. PO's for emergency purchase parts.
  2. PO's for sublet work on repair orders.
  3. General purchase orders.
- For more information on general purchase orders, see the Quick Start Guide for Purchase Orders in the General Ledger.
  
- **To create a PO for emergency purchase parts**, take the following steps:
  1. Start a new invoice using your counterperson ID.
  2. Select the price level and manufacturer.
  3. Bill the parts.
    - a. Key in the part number and hit [FIELD EXIT]
      - i. The Quantity Not Available window displays because the part is not in stock.
    - b. Enter the quantity in the Emergency Purchase field, hit [FIELD EXIT] and [ENTER] to place the part on the invoice as an emergency purchase.
  4. Create the purchase order for the parts.
    - a. Take option **98=Add to Purchase Order** by all the parts you want to put on a purchase order.
    - b. Press [ENTER] to display the vendor list.
    - c. Position to the vendor name and take option **1=Select** by the vendor to pull the parts onto the purchase order.
    - d. Use function **F12=Cancel** to return to the Parts Transactions screen.
  5. Close the invoice.

- **To create a PO for sublet work on a repair order**, an authorized user may take the following steps:
  1. Start a new invoice using your counterperson ID.
  2. Type RO/REPAIR ORDER# to select the repair order.
  3. Use function **99=Repair Order Entry** to change.
    - i. The counterperson used in step 1 must be set up as a service writer with the same password as the counterperson ID.
  4. Locate the line that the sublet work was performed for and add take option **50=Enter/Change Sublet** by the line to display the Sublet Repairs screen.
  5. Use function **F6=Create PO** to display the Purchase Order screen.
  6. Hit F4 to display the vendor list, position to the vendor name, and take option **1=Select** by the vendor.
  7. Press [ENTER] to assign the PO number
  8. Type the quantity, amount, description, control number and account for each line of detail.
    - i. Hit [FIELD EXIT] after completing each field.
    - ii. Hit [ENTER] to add the detail to the purchase order.
    - iii. **The control number is optional** but is important on balance sheet accounts.
    - iv. The vendor number will be used as a control number if it is left blank.
  9. Repeat step 8 for as many lines of detail as is needed.
    - i. **To change detail on the purchase order**, take the following steps:
      1. Take option **2=Change** by the line you want to change and press [ENTER] to pull it up to the entry line.
      2. Change the quantity, amount, or description and press [ENTER] to save the changes.
    - ii. **To delete a line of detail**, take option **4=Delete** by the line and press [ENTER].
  10. Use function **F12=Cancel** to return to the Sublet Repairs screen.
  11. Distribute the cost between labor and parts if required and press [ENTER] to save.

12. Use function **99=Parts Entry** to return to the Parts Transactions screen.
13. Use function **10=Counter Sales** to exit the repair order.