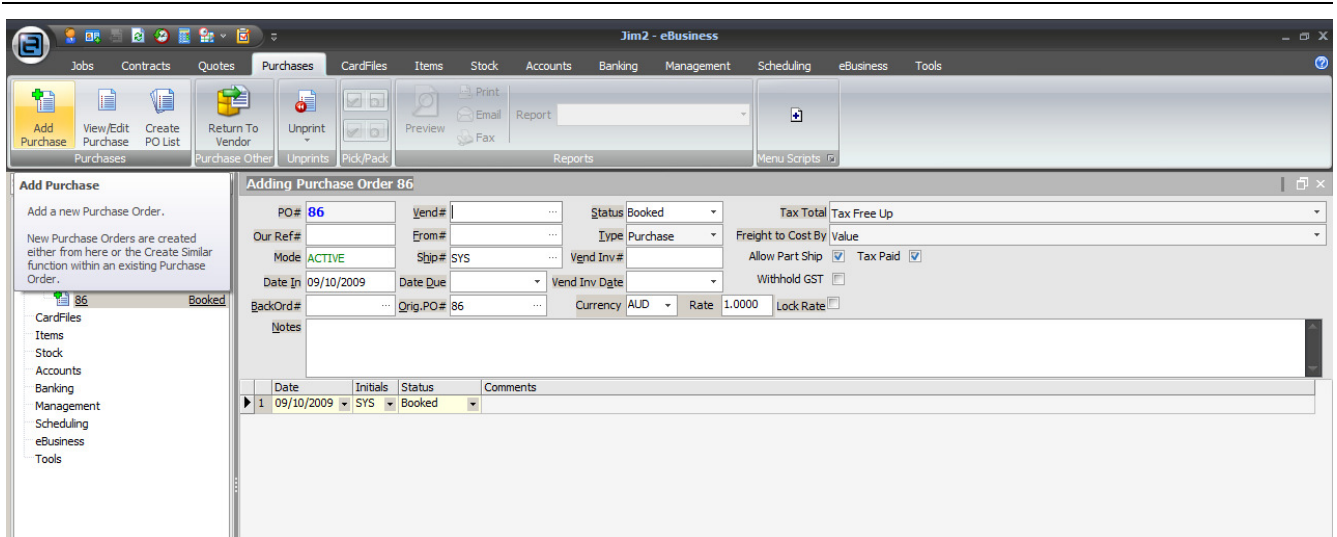


Skill: **Add a Purchase Order.** Who: **All users, all sites.**

Describe: Add a Purchase Order

Context: Ordering “non-depleting” type stock, or bulk quantities of “depleting” stock, can be done by adding a new purchase order. These orders do not automatically link to jobs.



**Skill Steps:**

1. Select the Purchases tab from the top of the Jim2 window.
2. Click Add Purchase in the Ribbon. The cursor moves to the Vend# field.
3. Type (or search for) the Card Code of the Vendor for this Purchase Order.
4. Click in the Date Due field and edit as necessary.
5. Press F4 (function key F4) to move to the Stock Code field.
6. Enter the stock code you wish to order.
7. Press the <<Enter>> key to move along the stock grid.
8. Edit the description of stock (if applicable). Press <<Enter>> key.
9. Enter quantity of stock to be ordered. Press <<Enter>> key.
10. Edit the Price TF or Price field to indicate the expected cost of the products being ordered. The choice of Price TF or Price is dictated by the “Tax Total” option at the top of the Purchase Order window. “Tax Free Up” allows entry into the Price TF field, “Tax Paid Down” allows entry into the Price field.
11. Press the <<Enter>> Key to add a new line to the Purchase Order.
12. Save the Purchase Order.
13. Preview/Print/Email/Fax the Purchase Order by selecting required Purchase Order Report from the Reports icon in the Ribbon.
14. Once the order has been placed with the supplier, edit the Purchase Order and change the status to “Ordered”.
15. Click Save.