# Beyond - How to Create & Manage Purchase Orders

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## What are Purchase Orders?

A purchase order (PO) allows for accurate tracking and organization of services, materials, groups of workers, quantity, and time frame for an order or assignment. When a purchase order is added to the customer record, it can be set to display on the customer's invoice. Once a purchase order is created, it can be attached to an order record, assignment record, or individual transaction.

## **Creating a Purchase Order**

1. From the related customer record, select the 'PO Setup' sub-tab within 'INVOICE SETUP' tab:

	VISIFILE	DETAILS	~	DEFAU	LTS	~	DOCUMENTS	INVOICE HISTO	RY INVOICE	SETUP 🗸
	^ Contacts								Billing Setup	
		nouement, vner/Library	-						PO Setup	J.
2.	Select the + E	Button:								
	VISIFILE D	etails 🗸	DEFAUL	ts 🗸	DOCUI	MENTS	INVOICE HISTORY	INVOICE SETUP	✓ MESSAGES	MORE
	PO Number		Cu	istomer Id			Department		Amount	
									RESET	SFARCH Add Purchase Order
	Search returned	l 0 results								+
							No results			

3. This will open the 'Purchase Order' wizard. Input the PO number and PO value:

Add Purchase Order			
PO Number	PO Value		
AM12141	1000		
End Date			
Applies To Child Departments	_		
SAVE AS DRAFT		CANCEL	SUBMIT

- PO Number: Alpha, numeric, and special characters are valid when defining a PO number.
- PO Value: A PO number does require a value. If your PO number does not have a value, simply enter 0.00
  - If a true value is entered (i.e. not 0.00), a "warning amount" will automatically be attached to an added PO number once it is created. The value is equal to 75% of the original value. In our example, we added a value of 50,000.00 so our "warning amount" would be 37,500.00

\***Note**\* The value field does not accept special characters including the dollar sign (\$). Values should be entered in simple format, e.g. 50000.00

- End Date: The expiration date of the PO number.
  - If an end date is entered, a "warning date" will automatically be attached to an added PO number once it is created. The date is set to 10 days prior to the PO's end date. In our example, we entered an end date of 5/24/2018 so our "warning date" would be 5/14/2018.
  - When a PO number has reached it's end date it will no longer be an option in the PO setup drop down (under details) on a new order record; in other terms the PO has expired. However, if the PO was attached to an assignment (prior to it's end date) the PO will continue to be listed on the invoices and reports (etc.).
- Applies To Child Departments: Selecting the 'Applies to Child Departments' option will populate the PO within the customer departments, sub-departments, and allow the PO to be selected on any subsequent orders.

Once done, select submit to add the PO.

### **Reviewing POs**

To see all current PO Numbers for a customer, navigate to Invoice Setup > PO Setup.

VISIFI	.e detai	ls 🗸	DEFAULTS	~	DOCUMENTS	INVOICE HISTOR	NVOICE SETUP	~
↑ Con	tacts						Billing Setup	
er con	Denoueme	nt, Dew	vey (11926)				PO Setup	c
	Owner/Libra	ary Supe	ervisor				4	

#### Purchase Orders will be listed with different sets of information:

PO Number	Amount	End Date	Warning Amount	Warning Date		Ac	
AM12141	1,000.00		750.00			`	• •
XYZ123	25,000.00		18,750.00			`	0 0 0
			Rows per page: 20 💌	1-2 of 2	<	1	>

#### Right click on the top bar to change which columns you have available.

Date Created
Created By
Amount Used
Applies To Child Departments
Inherited From Parent
Customer Id 1-2 of 2

#### When reviewing PO numbers, users have the ability to see:

- Assign to Entities
- PO Number
- Amount (Value)
- End (Expiration) Date
- Warning Amount (\$)
- Warning Date
- Active/Inactive
- Date Created
- Created By (Service Rep)
- Amount Used

- Applies/Does Not Apply to Child Departments
- Inherited From Parent
- Customer ID/Department ID
- Customer Name
- Department Name

### PO Numbers & Invoice Setup

Two standard options exist for handling PO numbers with regards to invoicing.

#### **Option 1- Create Separate Invoices by PO number:**

In an invoice run where this feature is selected and there is an instance of more than one PO number being billed to the client, a separate invoice will automatically be created for each PO number being billed in the run.

Begin by expanding the 'INVOICE SETUP' tab and locating the 'Billing Setup' tab within the customer record:

VISIFILE DETAILS V	DEFAULTS	~	DOCUMENTS	INVOICE HISTORY	INVOICE SE	ETUP	~
^ Contacts					Billing Setup	Ŀ	F
Denouement, De Owner/Library Sup	PO Setup		Γ				

Locate the 'Separate Invoices' card. Select the 💋 button:

<ul> <li>Separate Invoices</li> </ul>				0
Assignment	No	Branch	No	
Cost Center	No	Department	No	
Division	No	Employee	No	
Job Order	No	Job Title	No	
PayCode	No	Purchase Order	No	
Shift	No	Sub Entity	No	
Supervisor	No	Weekend Date	No	
Worksite	No			

Select 'Purchase Order' and click 'SUBMIT':

Separate Invoices <ul> <li>Assignment</li> <li>Department</li> <li>Job Order</li> <li>Purchase Order</li> <li>Supervisor</li> </ul>	<ul> <li>Branch</li> <li>Division</li> <li>Job Title</li> <li>Shift</li> <li>Weekend Date</li> </ul>	<ul> <li>Cost Center</li> <li>Employee</li> <li>PayCode</li> <li>Sub Entity</li> <li>Worksite</li> </ul>
SAVE AS DRAFT		CANCEL SUBMIT

The 'Separate Invoices' card will now display that different purchase orders will be split into separate invoices:

<ul> <li>Separate Invoices</li> </ul>				(
Assignment	No	Branch	No	
Cost Center	No	Department	No	
Division	No	Employee	No	
Job Order	No	Job Title	No	
PayCode	No	Purchase Order	Yes	
Shift	No	Sub Entity	No	
Supervisor	No	Weekend Date	No	
Worksite	No			

#### **Option 2- Adding PO Number as a Line Item on Invoices:**

Selecting this option will allow customers to view all associated PO numbers, per line item, on one invoice.

\*Note\* The ability to for an additional line item to be added/displayed will be dependent upon what invoice styles have been selected or created for your company.

From the 'Billing Setup' sub-tab, select '+ ADD.' This will add a new item from the Invoice Line Items box:

Invoice Line Items		+ ADD
	No line items	

From the 'Line Item Field Type' drop-down, select 'PO number,' and click 'SUBMIT':

	Vaa
Invoice Line Items	
Line Item Field Type	<u>^</u>
PO Number	
Requisition Number	
Sub Entity	

The *Invoice Line Items* card will display any current items displayed per transaction:

Invoi	ice Line Items	+ ADD
-	PO Number	Î

## **Attaching PO Numbers to Orders and Assignments**

Once a purchase order has been added at the customer level, it can be attached to orders, assignments, and timecards for that customer.

#### Orders

Within the order, select the 'PO Setup' sub-tab within the 'DETAILS' tab:

	VISIFILE D	etails 🗸	CANDIDATES	DOCUME			
	∧ Snap: PO Solution:	Setup		F			
Locate the 'PO Information' card and select 🕑 button:							
^ PO Information					0		
PO Number	AM12141	Ρ	O Value	1,000.00			
End Date							

From here, the 'PO Number' field can be edited/updated with any PO number that is active from the customer record.

	PO Information				
	PO Number AM12141			$\times$	_[hn
	PO Number	Value	End Date		
4	AM12141	1000			-
	XYZ123	25000			

#### Assignments

Within the assignment, select the 'DETAILS' tab:

	VISIFILE	DETAILS	MESSAGES	CUSTOM DATA		
Locate the 'Financials' card. Select 📀 :						
^ Financials						0
Multiplier Code	1.4	2	0	vertime Factor	1.5000	
Bill Rate	31.	24	Pa	ay Rate	22.00	
Salary Bill Rate	0.0	0	Sa	alary Pay Rate	0.00	
Unit Bill Rate	0.0	000	U	nit Pay Rate	0.0000	
Overtime Bill Rate	46.	86	0	vertime Pay Rate	33.00	
Doubletime Bill Rat	e 62.	48	D	oubletime Pay Rate	44.00	
Worker Comp Code	e MN	8810	W	-2	Yes	
Employer	Hig	h Tech Staffing	Ve	endor	High Tech Sta	affing
Burden	Bui	rden 3%	P	O Number		
Payroll Note						

Select the 'Purchase Order Number' field. This drop-down will display any active PO numbers from the related customer record.

## **Updating PO Numbers in Mass**

Once created, a PO number can be assigned to job orders, assignments, and timecards in mass by selecting the 'Assign' button located under the ellipses on the right of the PO Number:

PO Number	Amount	End Date	Warning Amount	Warning Date	Ac
AM12141	1,000.00		750.00		. :
XYZ123	25,000.00		18,750.00		🖍 Edit
			Rows per page: 20 💌	1-2 of 2	Assign

Once selected, a wizard will appear prompting the user to assign the PO number to all job orders, assignments, and/or timecards. Any combination may be selected, for instance, perhaps the client gives you a new PO number each week. This can be a useful tool once all timecards are created to apply a new PO number for the week:

Assign PO Number AM335PQ7 To:			
<ul> <li>☐ Job Orders</li> <li>✓ Timecards</li> </ul>	Assignments		
Related To			
<ul> <li>This customer</li> <li>This Customer or one of its Departments</li> </ul>			
		CANCEL	SUBMIT

Users are able to update records related to the current customer record or they can also choose to include its departments.

## **Related Articles**

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