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Purchase Orders Overview

🕒 Jun 1, 2022 · Knowledge

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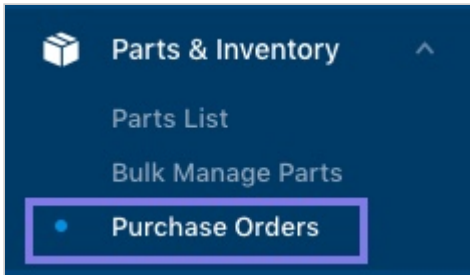
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Purchase Orders in Fleetio are designed to help standardize **Parts** procurement through a purchasing workflow.

Associating Purchase Orders with **Vendors** allows for detailed history tracking and cost reporting.

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You can access **Purchase Orders** by navigating to **Parts & Inventory > Purchase Orders** from the left sidebar menu.



PERMISSIONS: Account Owners and **Administrators** can fully manage the Purchase Orders on your account, but **Regular Users** must be given **Purchase Order** permissions through their assigned **Role**. Learn more in the [User Types \(/s/article/User-Types\)](/s/article/User-Types) and [User Roles & Permissions \(/s/article/User-Roles-And-Permissions\)](/s/article/User-Roles-And-Permissions) articles.

Purchase Order Stages

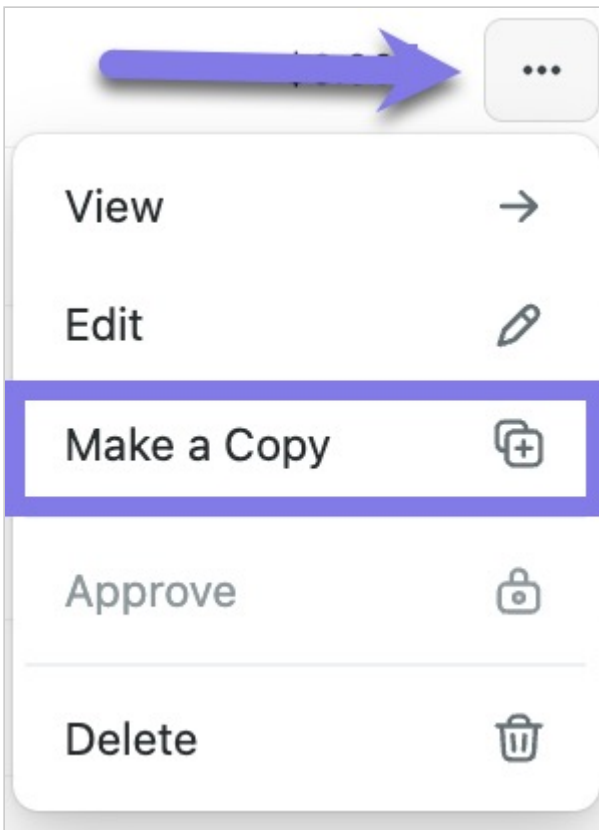
Click any stage of the Purchase Order process at the top of the page to view applicable purchase orders:

- 1. All** - for Purchase Orders in any status
- 2. Draft** - for Purchase Orders in the creation phase, or those that have been rejected and need further editing
- 3. Pending Approval** - for Purchase Orders that are ready for approval/rejection. or those that have been approved and need to be purchased
- 4. Approved** - for Purchase Orders that have been approved and need to be purchased
- 5. Receiving** - for Purchase Orders that have been purchased but need to be received; also for Purchase Orders that have been received in full, but require additional action prior to completion
- 6. Closed** - for Purchase Orders that have been 100% fulfilled and completed

Add a Purchase Order

NOTE: If you frequently create the same Purchase Order, you now have the ability to copy any existing PO to a new PO. Once you make a copy, all data from the original PO will be copied over into the new Draft PO. This is only available to users that have [Manage Permissions \(/s/article/User-Roles-And-Permissions\)](/s/article/User-Roles-And-Permissions) for

Purchase Orders. To access the copy feature, click the **More Actions** menu next to the existing PO you would like to copy and click **Make a Copy**.



If you would like to create a brand new purchase order, click the **+ Add Purchase Order** button.

The screenshot shows the 'Purchase Orders' overview page. At the top right, there is a blue button labeled '+ Add Purchase Order' with a plus sign icon. A blue arrow points to this button. Below the button, there are tabs for 'All', 'Drafts' (11), 'Pending Approval', 'Approved' (7), 'Receiving' (14), and 'Closed'. There is a search bar and several filter buttons: 'Parts', 'Vendor', 'Part Locations', 'Labels', and 'Filters'. The bottom part of the screenshot shows a table with columns: PO Number, Status, Part Location, Vendor, Parts, Description, Labels, Created By, Created Date, and Total. One row is visible with PO Number #123, Status Draft, Part Location Birmingham, Vendor Andrew's Body Shop, Parts 9652-643-CMR-B, Created By Reagan Cline, Created Date 2021-06-23 13:23, and Total \$80.73.

Required and Optional Fields

NOTE: In order to select line items, you must first select a **Vendor** (a) and **Part Location** (b). In order to submit a Purchase Order for approval, you must include at least one line item (d).

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You may optionally identify **Labels** (c), a **Description** (e), additional **Price** information (**Discount, Shipping, Tax**) (f), upload documents (g) and enter any Custom Fields (/s/article/Custom-Fields-Overview). (h).

Details

Vendor * **a**
Autozone - Homewood

Part Location * **b**
Warranty Parts

Label **c**
Please select

Line Items

+ Add Line Item **d**

No line items added

Description

e

Cost Summary

f

Subtotal		\$0.00
Discount	% v 0	\$0.00
Shipping	0	\$0.00
Tax	% v 0	\$0.00
Total		\$0.00

Documents

g

Drag and drop files to upload
or click to pick files

Custom Fields

h

Invoice #

When Invoice is received, enter the Invoice number here. This will be used to reconcile costs with the accounting department.

Cancel **i** Save as Draft Save & Approve

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According to the PO stage, and your User permissions, you may **Save as Draft** or **Save and Approve** (i).

Add Line Items to POs

A Purchase Order can contain an unlimited number of **Line Items**.

1. Click the **+ Add Line Item** button to add a new line item for each part that is needed. Then, search for each part in the line item field.
2. Select a **Part** from the drop-down list.
3. Enter the **Unit Cost**.
4. Enter the **Quantity**.
5. Click the Trash icon to **Delete** if necessary, or search for a replacement part in the part selection box to reset the quantity, unit cost and amount for the new part.

Line Items 3

[+ Add Line Item](#)

PART	QTY	UNIT COST	AMOUNT
15-22124	0.00	\$5.8800	\$0.00
Q Search parts...	0.00	\$0.0000	\$0.00
Q Search parts...	0.00	\$0.0000	\$0.00

NOTE: Line Items can only include **Parts** that are **Active** at the **Part Location** selected on the Purchase Order.

Please fix the following errors:

- Line Item: Part OF-8943 is not active at Bozeman Warehouse

Purchase Order Details & Comments

The Purchase Order **Details** page displays the information you have entered with **Details** (a), **Line Items** (b), the ability to **Watch** the Purchase Order (c) along with a section for **Comment** (d) or **Documents** (e).

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NOTE: While you can manually add watchers to a Purchase Order, there are specific instances where an individual will automatically be added as a

Watcher:

- User who creates a Purchase Order
- User who edits a Purchase Order
- User who changes the status on a Purchase Order
- User who comments or add attachments to a Purchase Order

Additionally, a user will now receive notifications (/s/article/User-Notification-Settings) for comments on Purchase Orders they are watching.

← Purchase Orders

Purchase Order #343 Open

Accident Edit Labels

Watch Edit Approve

Details

Status ● Open

Part Location AT&T

Vendor 5 Points Sunoco

Created By Michael Harrison 1 month ago

Description —

Review Date —

Line Items

Part	Qty Ordered	Qty Received	Unit Cost	Subtotal
456 Battery	2	0	\$89.0000 ea	\$178.00
Subtotal				\$178.00
Discount		Fixed		-\$0.00
Shipping				\$0.00
Tax		Fixed		\$0.00
Total				\$178.00

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Purchase Order Status

There are 8 pre-defined Purchase Order **Status** options. You may change the Status options by going to **Account Settings > Purchase Orders > Purchase Order Statuses**.

- Draft
- Pending Approval
- Rejected
- Approved
- Purchased
- Received, Partial
- Received, Full
- Closed

Save Options: Save as Draft, Submit for Approval

When a PO is created, the **Save** options depend on **User Permissions**.

Save as Draft or **Submit for Approval / Save and Approve**.

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PERMISSIONS: Account Owners and Administrators can **Save as Draft** or **Save and Approve**. Only **Regular Users** *without* PO Approve permission will see the option to **Submit for Approval (Pending Approval Status)**.

Pending Approval / Rejected / Approved

PO's that are **Pending Approval** can be either **Rejected** or **Approved** by Users with the appropriate permissions.

Click the **More Actions** menu at the end of the row in the PO list, or **Edit** the PO and click the **Reject** or **Approve** button.

Purchased Status

Once a Purchase Order has been **Approved**, it can be marked as **Purchased**. Click the **More Actions** menu at the end of the row in the PO list, or **Edit** the PO and click **Mark Purchased**.

Received Status - Partial / Full

A Purchase Order marked as **Purchased** is ready to be **Received**. You may **Unmark as Purchased** if needed, or click to **Receive**.

You will then see a form for entering the received values of each line item.

To quickly receive ALL items on the order, click the **Select All** box on the left. The number field automatically populates with the number ordered. **If you are using FIFO or LIFO (<https://help.fleetio.com/help/s/article/Switching-to-an-Advanced-Inventory-Valuation-Method-FIFO-LIFO>), you can change this value based on what was actually received, but the value cannot exceed the number ordered.** Once complete, click the **Receive** button.

Receive items from PO #292 ✕

Select the items you have received. You can change the receive amount after you select an item.

<input checked="" type="checkbox"/> Item	Total Received	Total Ordered	Receive
<input checked="" type="checkbox"/> Castrol 5W-30 Motor Oil	0.0	20.0	<input style="width: 100%;" type="text" value="20.00"/>

Close Receive

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If the number of items received is less than the number ordered, the Purchase Order becomes **Received, Partial** status. The additional items may be received as they come in.

NOTE: The **Total** on a partially received Purchase Order reflects the sum of ALL part subtotals, regardless of whether or not they have been received yet. As parts are received, the **Received Quantity** updates accordingly.

If the number of items received matches the number ordered, the Purchase Order becomes **Received, Full**.

IMPORTANT: The values entered on this form will automatically become inventory adjustments for your Parts.

Close a Purchase Order

After the Purchase Order is **Received, Full** it can be **Closed**. Click the **More Actions** drop-down menu at the end of the row in the PO list, or **Edit** the PO and click **Close**.

Purchase Order Reports

Navigate to **Reports > Parts > Purchase Orders List** for several Purchase Order reporting options

There are two **Layouts** available: **Group by Purchase Order** and **Split by Part**.

TIP: Learn more in the [Reporting on Parts and Purchase Orders \(/s/article/Reporting-On-Parts-And-Purchase-Orders\)](/s/article/Reporting-On-Parts-And-Purchase-Orders) article.

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