

# Chapter 2.10: Purchase Order Setup and Usage

---

## Introduction

Often, customers will provide you with a *Purchase Order* number to identify product orders and make payments. This chapter will guide you through setting up, entering, and tracking *Purchase Orders* in the system.

Seven areas of the program are used to manage the *Purchase Order* system:

- ▶ Branch Setup
- ▶ Customer Information
- ▶ Delivery Orders
- ▶ Handhelds
- ▶ Desktop Invoices
- ▶ Expired P.O. Report
- ▶ Statements

Each option is covered in the order listed.

## Branch Setup

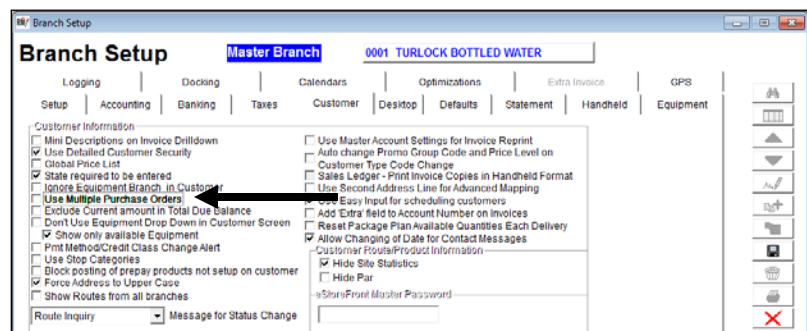
Prior to getting started with the Purchase Order system, you will need to determine if you will use a single standing Purchase Order per stop or up to three.

Listed below are a few differences between a single and multiple Purchase Order system:

- ▶ **One:** Easy to manage; allows you to address the needs of most customers who simply ask that you either secure a *Purchase Order* each time you make a delivery. Additionally, you can keep one on file for a period, or until a set dollar amount is reached.
- ▶ **Three:** Typically, a multiple Purchase Order system is used when separate *Purchase Orders* are required for different types of items.

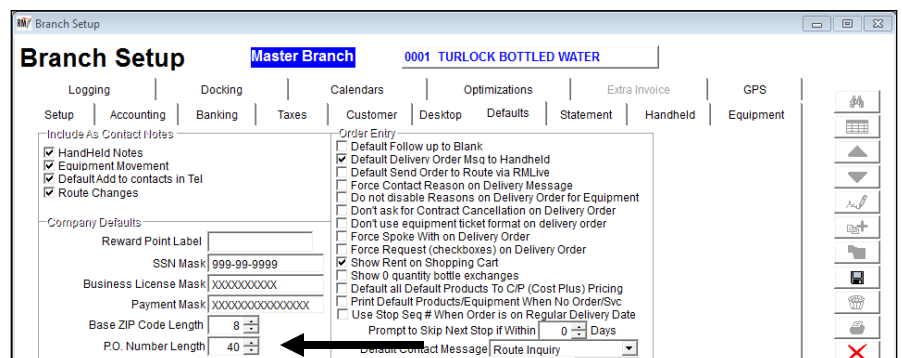
Navigate to *File > Branch Setup*, and click on the *Customer* tab.

A single P.O. system is enabled by default in Route Manager. To change to a multiple P.O. system, select the option 'Use Multiple Purchase Orders'.



**NOTE:** This change can only be applied to the *Master Branch*.

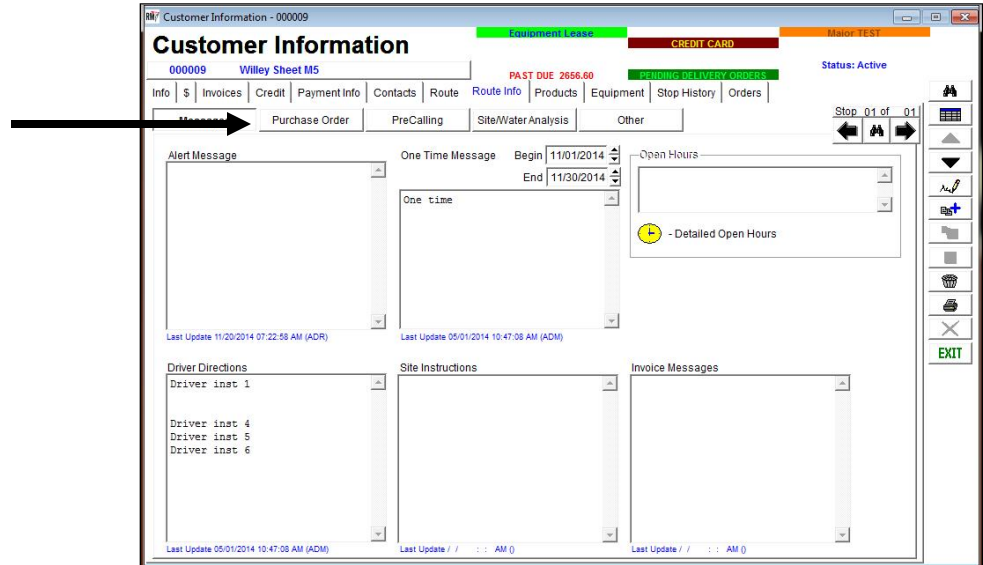
Additionally, the required P.O. character length can be established within the *Defaults* tab of *Branch Setup*:



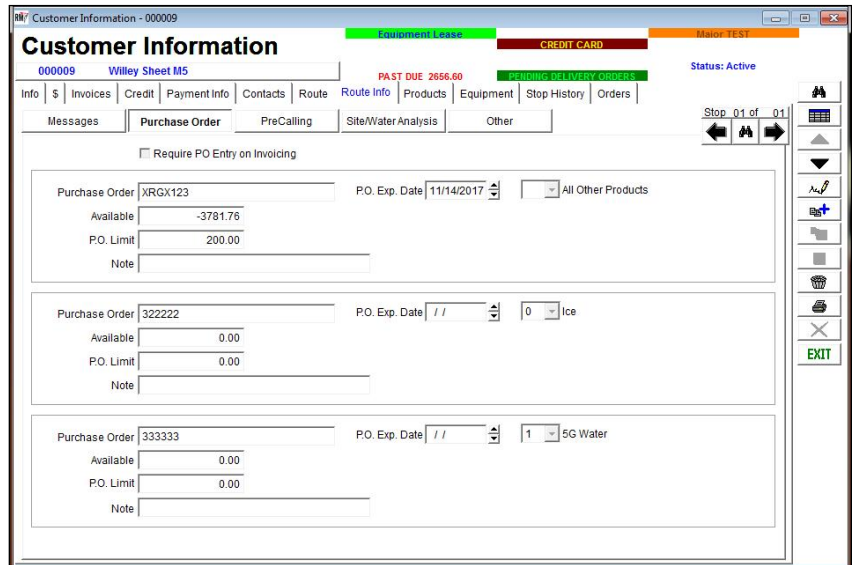
The maximum length that can be entered is '40' characters.

## Customer Information

The *Purchase Order* option within each customer's account can be found within the *Route Info* tab of *Customer Information*:



The following screen displays the *Multiple Purchase Order* field:



### Field Definitions:

**Require PO Entry on Invoicing:** When this box is checked a PO number is required for all invoices generated for this customer.

**Purchase Order:** Displays the current P.O.

**Purchase Order Expiration Date:** This is the date the current P.O. will expire.

---

**NOTE:** Leave blank to establish a non-expiring P.O.

---

**Purchase Order Class (only used with multiple Purchase Orders):** This option allows you to select a *Product Class Code* from the drop down menu that the P.O. will be applied to on each invoice. This is helpful when you would like to apply the P.O. to a specific group of items. Leave the class field blank to apply the P.O. to all items being sold.

---

**NOTE:** If you have assigned a P.O. to a *Product Class Code*, it will be necessary to establish a second P.O. on the account that will be used for all additional items sold on the account.

---

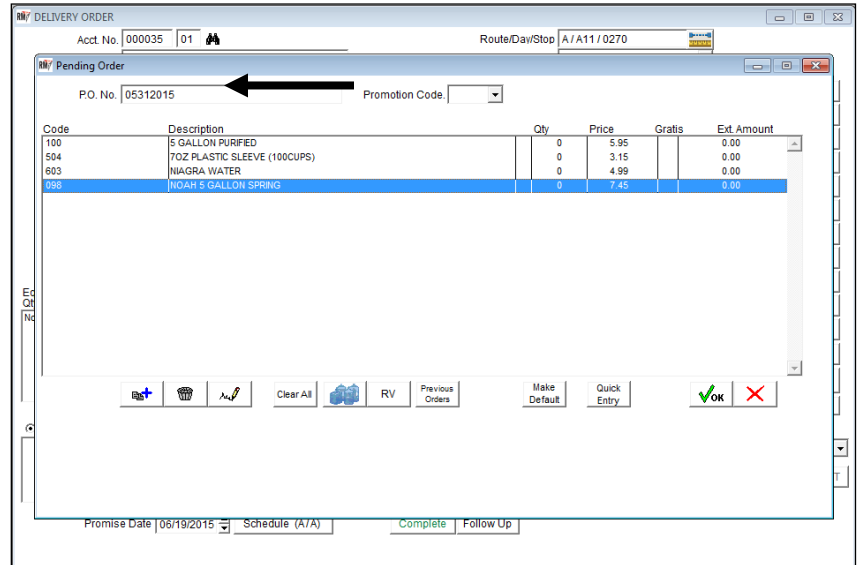
**Available (requires P.O. Limit below):** Displays the available credit remaining on the P.O. This field is updated automatically when items are sold under the current P.O.

**P.O. Limit (Optional):** Enter a limit for the current P.O.

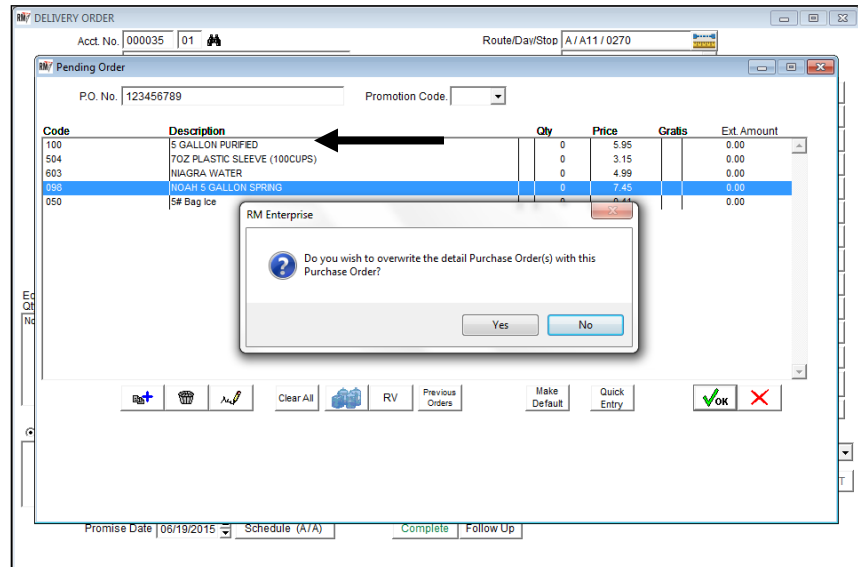
**Note (Optional):** Enter a reference note for the current P.O. The note is only displayed within this screen.

## Delivery Order Screen

The *Delivery Order* screen will automatically include the customer's P.O. on their order (found within the *Pending Orders* screen Double click on the Orders section to open):

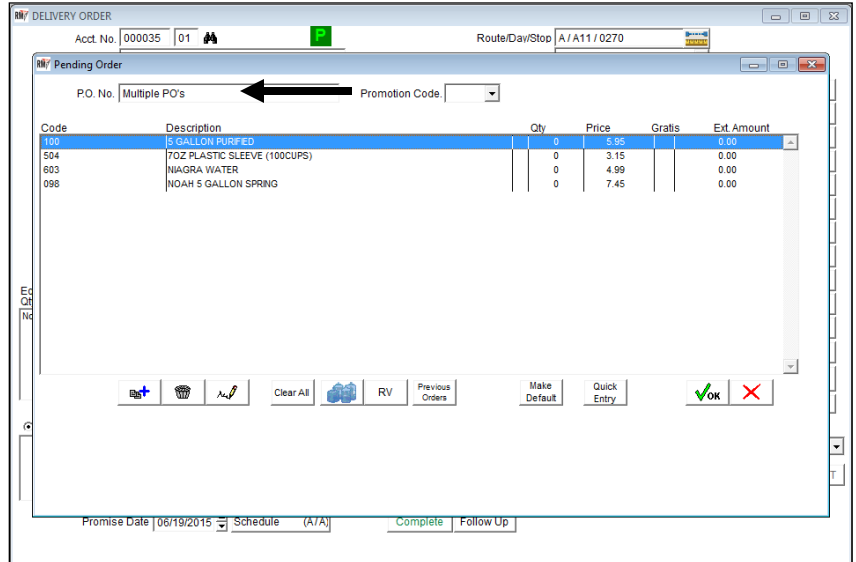


You can override the current P.O. if you would like to use a unique P.O. on the order:



**NOTE:** This will not override the standing P.O. on the account and will only apply to the current order.

Additionally, if a customer is assigned multiple P.O. numbers on their account, the *Delivery Order* screen will display 'Multiple PO's' in the *P.O. No* field:



You can override the current P.O. if you would like to use a unique P.O. on the order.

**NOTE:** This will not override the standing P.O. on the account and will only apply to the current order.


## On the Handheld











Assigned *Purchase Orders* will automatically be included, and printed, on all handheld invoices.

Tue, Oct 19 2010, 06:58am			
Driver: Daniel Plainview			
Rte-Day-Stop: A - B07 -0010			
Account 000100			
Easy Mart 2			
1983 W. Hatch Rd.			
Modesto, CA 95351			
Package Plan:: TEST			
PO Number:	Class:	Other	
1234EXAMPLE	←		
Item	Qty	Price	Amount
Plastic Cups	1	2.500	2.50
Recurring Charge	1	1.000	1.00
Sales			3.50
Tax			0.00
<b>INVOICE TOTAL</b>			<b>3.50</b>

Tracy, we need to talk with you about the plan for Labor Day. Lot of

Should the driver need to enter a new P.O. on the invoice, the data can be entered on the *Confirm Sale* screen by tapping the *P.O.* key:

 Confirm Sale

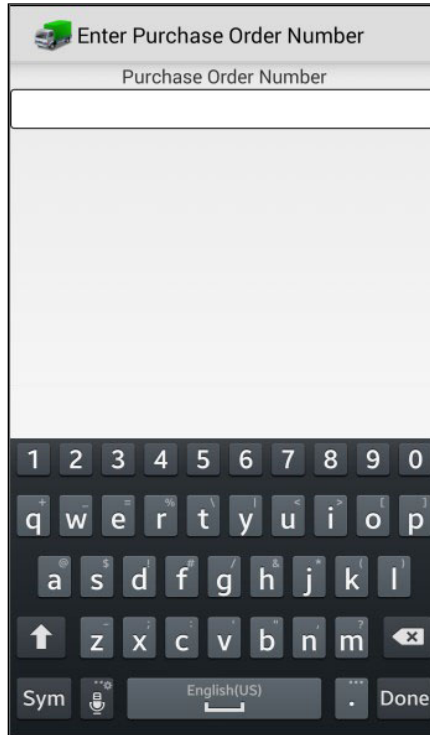
		
		
		
		
		

Invoice004041

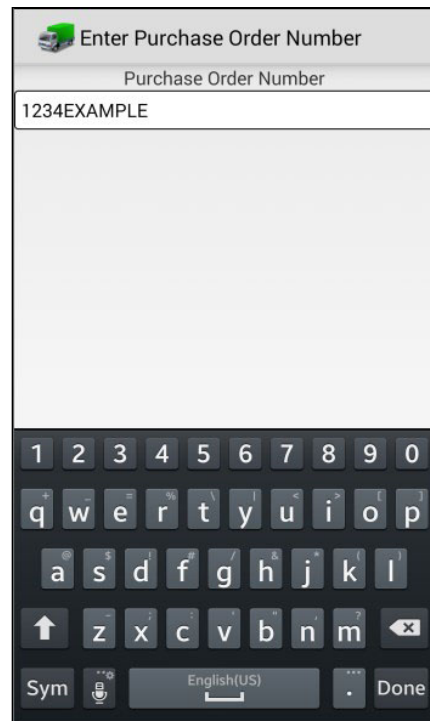
Number of copies to print: -  +



Once the *P.O.* key has been selected, the alphanumeric keypad will be displayed:



Enter the new P.O. and press the arrow key to save the new information.



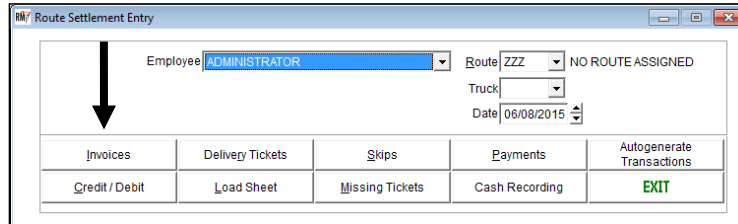


## Desktop Invoices

*Purchase Orders* can be entered per invoice during desktop entry. Each option is discussed below.

### Route Settlement Entry

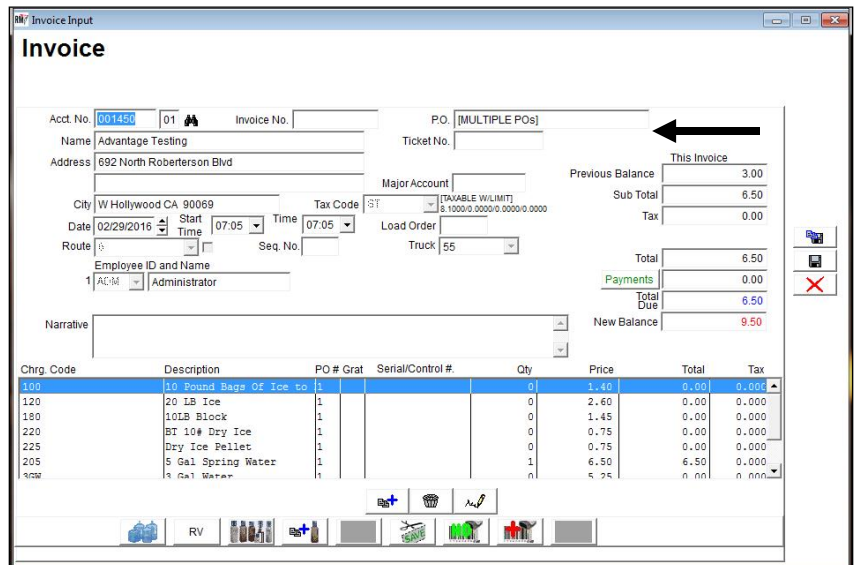
The *Route Settlement Entry* screen is used for manually entering route data at the end of the delivery day, and can be found under the *Transactions* menu.



Employee: ADMINISTRATOR | Route: ZZZ | NO ROUTE ASSIGNED  
 Truck: | Date: 06/08/2015

Invoices	Delivery Tickets	Skips	Payments	Autogenerate Transactions
Credit / Debit	Load Sheet	Missing Tickets	Cash Recording	EXIT

After selecting the *Invoices* key, a unique P.O. number can be added to each invoice during the data entry process:



Invoice Input

Acct. No. 001450 | 01 | Invoice No. | P.O. [MULTIPLE POS] ←

Name: Advantage Testing | Ticket No. |

Address: 692 North Robertson Blvd

City: W Hollywood CA 90069 | Tax Code: | Major Account: |

Date: 02/29/2016 | Start Time: 07:05 | Time: 07:05 | Load Order: | Truck: 55

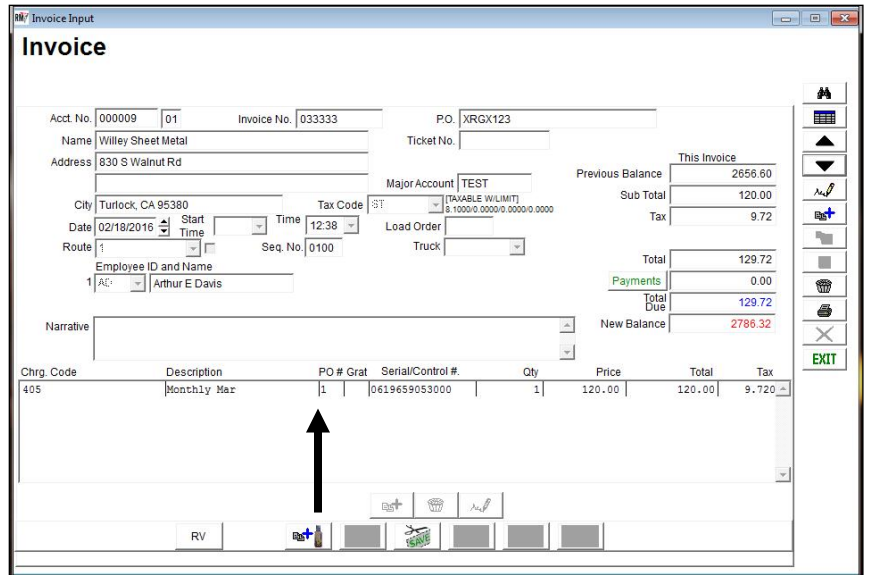
Employee ID and Name: 1 | AC: M | Administrator

Narrative: |

Chrg. Code	Description	PO #	Grat	Serial/Control #	Qty	Price	Total	Tax
100	10 Round Bags Of Ice to				0	1.40	0.00	0.000
120	20 LB Ice				0	2.60	0.00	0.000
180	10LB Block				0	1.45	0.00	0.000
220	BT 10# Dry Ice				0	0.75	0.00	0.000
225	Dry Ice Pellet				0	0.75	0.00	0.000
205	5 Gal Spring Water				1	6.50	6.50	0.000
300	3 Gal Water				0	5.25	0.00	0.000

Summary: Previous Balance 3.00, Sub Total 6.50, Tax 0.00, Total 6.50, Payments 0.00, Total Due 6.50, New Balance 9.50

Alternatively, existing P.O. numbers will automatically be added per item on the invoice in the *P.O. No* field — depending on the number of P.O. on each account, the number displayed will vary:



**Invoice**

Acct. No. 000009 01 Invoice No. 033333 P.O. XRGX123  
 Name Willey Sheet Metal Ticket No.  
 Address 830 S Walnut Rd  
 City Turlock, CA 95380 Tax Code 3T Major Account TEST  
 Date 02/18/2016 Start Time 12:38 Load Order (TAXABLE W/LIMIT) 0.1000/0.0000/0.0000/0.0000  
 Route 1 Seq. No. 0100 Truck  
 Employee ID and Name: 1 AL Arthur E Davis

Previous Balance 2656.60  
 This Invoice Sub Total 120.00  
 Tax 9.72  
 Total 129.72  
 Payments 0.00  
 Total Due 129.72  
 New Balance 2786.32

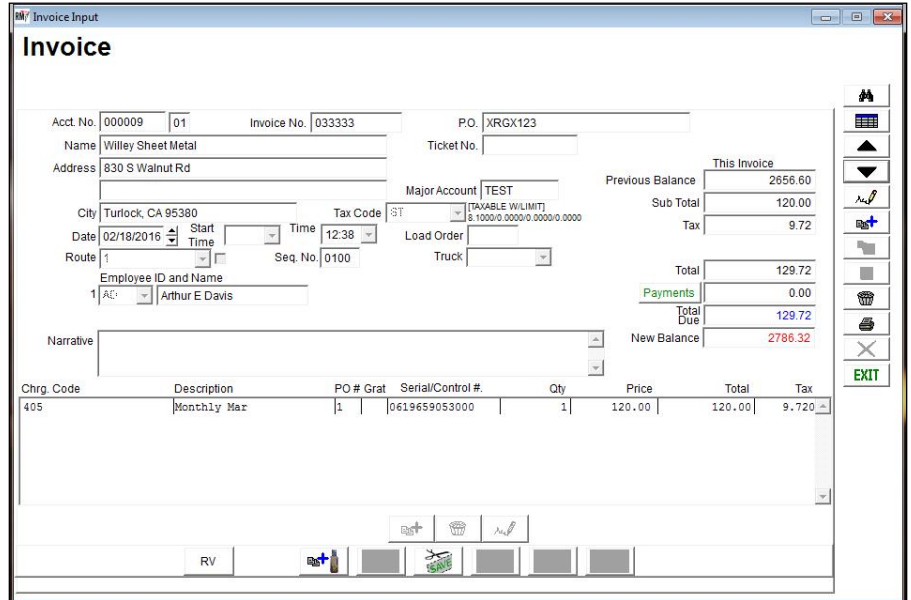
Chrg. Code	Description	PO # Grat	Serial/Control #.	Qty	Price	Total	Tax
405	Monthly Mar	1	0619659053000	1	120.00	120.00	9.720

The *P.O. No* field is populated by the numbers 1-3, signifying the P.O. assigned in the corresponding field within the customer’s account.

**NOTE:** For further information on the *Route Settlement Entry* screen, refer to *User Guide A*.

## Invoices and Adjustments

The *Invoices and Adjustments* screen is used when manually entering desktop invoices, and can be found under the *Transactions* menu.



**Invoice**

Acct. No. 000009 01 Invoice No. 033333 P.O. XRGX123  
 Name Willey Sheet Metal Ticket No.  
 Address 830 S Walnut Rd  
 City Turlock, CA 95380 Tax Code ST Major Account TEST  
 Date 02/18/2016 Start Time 12:38 Load Order  
 Route 1 Seq. No. 0100 Truck  
 Employee ID and Name  
 1 AL Arthur E Davis

Previous Balance 2656.60  
 This Invoice  
 Sub Total 120.00  
 Tax 9.72  
 Total 129.72  
 Payments 0.00  
 Total Due 129.72  
 New Balance 2786.32

Chrg. Code	Description	PO #	Grat	Serial/Control #	Qty	Price	Total	Tax
405	Monthly Maz	1		0619659053000	1	120.00	120.00	9.720

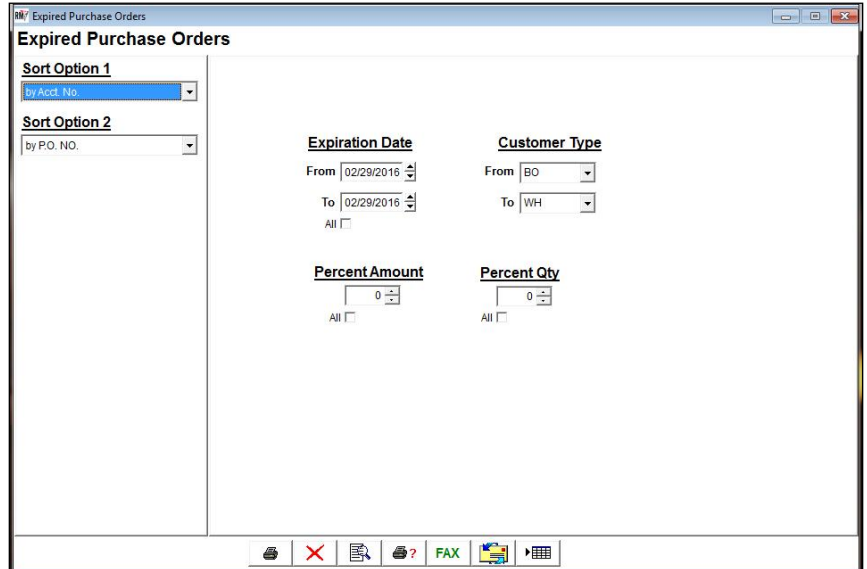
The P.O. options available within this screen match the *Route Settlement Entry* process discussed earlier. Refer to the previous section for further information.

**NOTE:** For further information on the *Invoices & Adjustments* screen, refer to *User Guide A*.

## Expired Purchase Orders Report

The *Expired Purchase Orders* report will provide you with any P.O. numbers that have or are going to expire, and their available credit amounts.

Navigate to *Reports > Management Reports > Expired Purchase Orders*.



## Statements

Your customer's monthly statements will contain all of the *Purchase Orders* associated with each transaction:

STATEMENT																
DATE	INVOICE	DESCRIPTION				CHARGE	PAYMENT	BALANCE								
						<b>Balance Forward</b>		404.16								
P.O. No. 1234EXAMPLE																
10/07/2010	109263	5 Gallon Spring	Qty	5@5.50		27.50		431.66								
10/19/2010	109545	10 lb Dry Ice	Qty	1@8.10		8.10		439.76								
		P.O. No. 5678EXAMPLE														
10/19/2010	109547	10 lb Dry Ice	Qty	1@8.10		8.10		447.86								
		P.O. No. 5678EXAMPLE														
10/19/2010	109547	3 Gallon Spring	Qty	1@3.00		3.00		450.86								
		P.O. No. 1234EXAMPLE														
Credit		PAST DUE AMOUNTS				PREV. BALANCE	CHARGES @	PAYMENTS @	AMOUNT DUE							
46.70		31 Days	61 Days	91 Days	121 Days	Over 150 Days										
		0.00	0.00	0.00	0.00	404.16	404.16	46.70	0.00	450.86						
<p><b>Thank you for being our customer!</b>            Tracy be sure to remit funds with the PO number attached.</p> <table border="1"> <thead> <tr> <th>STATEMENT DATE</th> <th>ACCT. NO.</th> <th>CUSTOMER NAME</th> </tr> </thead> <tbody> <tr> <td>10/19/2010</td> <td>000100</td> <td>Easy Mart 2</td> </tr> </tbody> </table> <p>Advantage Water Company            147 South Broadway            Turlock CA 95380            999-999-9999            support@advantagers.com</p>											STATEMENT DATE	ACCT. NO.	CUSTOMER NAME	10/19/2010	000100	Easy Mart 2
STATEMENT DATE	ACCT. NO.	CUSTOMER NAME														
10/19/2010	000100	Easy Mart 2														

---

## Summary

By understanding the above principles, you should be able to enter, save, and track all *Purchase Orders* successfully for your clients, resulting in improved P.O. accuracy. If you need additional assistance or clarification, please contact Advantage Route Systems.

Copyright © 1994-2016 by Advantage Route Systems, Inc. All Rights Reserved.

Printed in the United States of America.

**Advantage Route Systems, Inc.**

3201 Liberty Square Parkway

Turlock, CA 95380 USA

Phone: 1.209.632.1122

Web Site: [www.AdvantageRS.com](http://www.AdvantageRS.com)

Email: [info@AdvantageRS.com](mailto:info@AdvantageRS.com)

**Warning**

All information in this document and the on-line help system, as well as the software to which it pertains, is proprietary material of Advantage Route Systems, Inc. and is subject to a Route Manager license and non-disclosure agreement. Neither the software nor the documentation may be reproduced in any manner without the prior written permission of Advantage Route Systems, Inc.

Series 7: Version Date, February 29, 2016