

6. Purchase Orders

A **purchase order** (PO) is your order to a vendor. Open **Purchase Orders** to create and track them.

6.1 The PO list & dashboard

The list shows each PO's **number, vendor, value, reference, status, expected date**, counts of SKUs/items ordered and received, and who created it — all filterable. A dashboard above it summarises open PO value, open POs, vendors with open orders, outstanding units and partially-received POs. If the system has reorder **recommendations**, they appear grouped by vendor with a one-click **Create Recommended PO**.

6.2 Building a PO

Choose **Create Purchase Order**. The header carries the **Vendor** and destination **Warehouse** (required), plus **Expected Delivery Date, Payment Terms** (defaults from the vendor), **Reference #** and a **Note**. Add line items by:

- picking SKUs from the vendor's catalogue grid (with **Add Selected SKUs / Add All SKUs**), which shows available quantity, reorder point, max and a recommended quantity;
- **importing** a CSV/Excel file of SKUs and quantities;
- **loading a previous PO** for the same vendor, or **loading recommended items** from planning.

Each line has an **Ordered Qty** (required), an optional **Unit Cost** and a note. You can also start a PO by **duplicating** an existing one.

6.3 The PO lifecycle

Draft	Being built; freely editable.
Awaiting Approval	Submitted where approval is required.
Approved	Cleared to send to the vendor.
Ordered	Live with the vendor; ready to receive.
Partially Received	Some items received; you can keep receiving or <i>Cancel Balance and Close</i> .
Received	Fully received; read-only.
Cancelled	Cancelled; can be reinstated.

From a draft you **Order** it (or **Submit/Approve** when approvals apply); from an open PO you **Receive** (Chapter 7); and you can **export** any PO to PDF or Excel (with the warehouse delivery details and any disclaimer). Approval-restricted exports are limited to approvers.