

Purchase Orders

Using Purchase Orders

Using the "Purchase Order" function in MicroBiz is the most efficient way to update your quantity in stock and the weighted unit cost (average) of your products. This function can be used through "Inventory" – "Purchase Orders." You will be given four options: "Create New Purchase Order," "Edit/Receive Purchase Order," "Receive Miscellaneous", and "Purchase History Report."

***Note** - The printer used to print out your Purchase Orders can be selected in "Management" – "Customize" – "Hardware Settings" – "Printers" tab in the top option for "P.O. Printer Name."

"Create New Purchase Order"

Create Reorder List

The "Create Reorder List" option will make use of the "Reorder Level" feature given for your items in "Inventory" – "Add/Edit Inventory." Using the "Reorder Criteria" given in this window, the items will be automatically added to the Purchase Order screen. You may then select the correct "F7-Vendor" and "F3-Items" (if needed) by using the assigned buttons. You may finalize your Purchase Order to be ready to be received by using the "F9-Print" button.

"Order By Vendor"

The "Order by Vendor" option is the most standard way of creating your Purchase Orders in MicroBiz. By opening this window, you will be taken directly to the Purchase Order screen. You will then be able to manually add your "F7-Vendor" and "F3-Items" by using the assigned buttons. You may then finalize your Purchase Order to be ready to be received by using the "F9-Print" button.

"Receive Miscellaneous"

The "Receive Miscellaneous" option is the simplest way of creating and receiving a Purchase Order. It allows both to be done right away at the same time. When using this option, you will be taken to a "Receive Miscellaneous" screen. Again, you may use the "F7-Vendor" and "F3-Item" buttons to the Purchase Order by using these buttons. Your Purchase Order will be created and received by using the "F9-Print" button. When completing the Purchase Order, you will be asked if you would like to print out barcode labels. Choose the correct option for the types of labels needed to print.

"Edit/Receive Purchase Order"

After you have created your Purchase Order by using either the "Create Reorder List" or "Order By Vendor" options, you may receive it by using the "Edit/Receive Purchase Order" option. You will be given a list of Purchase Orders ready to be received. From this screen, you can edit and delete Purchase Orders that have been created if needed by using the respective buttons. When you find the Purchase Order, click on the "Receive" button. You will now be taken to the final "Receive Order" screen. You can make any last changes to the items on your Purchase Order by editing or deleting any items or vendors added to your Purchase Order. Click on the "F9-Print" button to receive your products and update your inventory. Again, choose your label types to print if needed.

"Purchase History Reports"

The "Purchase History Report" option is helpful for viewing information about old Purchase Orders. After entering in the assigned Purchase Order dates in the "Start at" and "End at" fields, you may view any Purchase Orders received based on "SKU," "Department," "Style," "Vendor," and "Description." Click on the "Generate Report" button when you are ready to view your Purchase Order information.

Backordering Inventory

Backordering your inventory is essential if you do not always receive your entire inventory on a purchase order at the same time. You may backorder your inventory through the "Edit/Receive Purchase Order" screen. After choosing to "Receive" your purchase order, you will need to choose the "F6-Edit" button to edit the quantity being received. Choose the correct quantity and check the option for "Always Backorder Balance Qty." Save your changes. After clicking the "F9-Print" button to receive part of the purchase order, you will still see the remaining quantity listed in "Edit/Receive Purchase Order." Lastly, choose the "Receive" button to receive the remaining quantity when necessary.