Purchase Orders

To create a Purchase Order:

1) From the HOME page choose 'Purchase Orders'

2) Choose the Vendor

3) If necessary, adjust the Vendor address, ship to address and/or date

4) Select the Item(s)

5) Enter the quantities

6) If necessary, adjust the Rate and Price

7) If the purchase can be attributable to a specific customer, select the appropriate Customer:Job

8) Click Save & Close

To E-Mail the Purchase Order:

1) If the e-mail option was not selected when creating the purchase order, edit the order

2) From top menu bar select File then Send Forms

3) A pop up window Select Forms to Send will appear containing a list of all the purchase orders ready to be sent, each order will have a checkmark on the right indicating it has been selected for transmission

4) To de-select a particular purchase order, click on it

5) To edit the cover e-mail for a particular purchase order, highlight the invoice then click Edit E-mail

6) Click Send Now to transmit the e-mail, QuickBooks will check for an internet connection

To Print the Purchase Order:

7) If the print option was not selected when creating the purchase order, open the order and from top menu bar select File and Print Purchase Orders

8) If the print option was selected when creating the purchase order, from the top menu bar select File then Print Forms and Purchase Orders

9) A pop up window Select Purchase Orders to Print will appear containing a list of all the orders ready to be printed, each purchase order will have a checkmark on the right indicating it has been selected

10) To de-select a particular order, click on it

11) Click OK to send the purchase orders to the printer