

Manage Purchase Orders

This menu lets you create, view, edit, and delete POs.

Help Files

Click the information icon to access step-by-step instructions for this particular menu.

Search

Search for POs by **Site**, **PO Number**, **Vendor**, and **Creator**. Filter by **Date Range** and **Status**.

The screenshot shows the 'Manage Purchase Orders' interface. At the top, there's a header with the title and a search bar. Below the header, there are filters for 'Select' (Site), 'From' (mm/dd/yyyy), 'To' (mm/dd/yyyy), and 'PO Status' (Open). There are also 'Print' and 'Export' buttons. A table lists purchase orders with columns for PO #, Vendor, Site, and a status icon. One PO is highlighted with a red exclamation mark. Below the table, there's a summary section for the selected PO, showing 'Account #', 'Description', and 'Total'. A 'VIEW/EDIT' button and a 'Close PO' button are also visible.

Print

Click **Print** to generate a **Purchase Order Listing Report** of the POs currently displayed in the grid.

Export

Click **Export** to generate a .csv file of the POs currently displayed in the grid.

Close / Delete

Check the boxes for each PO you wish to delete. Then click **Close** or **Delete POs** at the bottom of the screen.

Over Budget Warning

Hover over this icon view by how much the account is over budget.

View / Edit

Click this button to edit a PO or to see more details on the PO.

Expand

Click this icon to view quick details about the PO.

Manage Purchase Orders SCHOOL LINQ

Select

Site ▼

From

mm/dd/yyyy 📅

To

mm/dd/yyyy 📅

Add

1) Click this link to create a new PO.

Print Export

Open ▼ + **Add**

Order and Delivery Dates

2) Enter the **Order Date** and **Delivery Date**.
Check the **Check Request Only** box if applicable.

↓

Vendor Information

3) Enter or add the vendor information in the fields displayed.

Quantity	Unit	Description	Unit Cost	Vendor Item #	Merch	Tax Type	Tax	Line Total
0.00			0.0000		\$0.00	Goods	%	\$0.00

+ **S & H** + **Add Line**

Ship To

4) Enter the shipping information in the fields displayed.

PO Items

5) Click **Add Account** for every account you wish to add. Enter the information in the fields displayed. **Description, Merch, Tax Rate, Tax, and Line Total** will automatically populate.

Grant Total

6) The **Sub Total, S&H, Tax, and Grand Total** calculates automatically. Verify that the **Grand Total** is correct for this PO.

SubTotal	\$0.00
S & H	\$0.00
Tax	\$0.00
Grand Total	\$0.00