



Process

Documentation

Department:

Customer Support

Last Updated:

9/22/2025 10:06 AM

NAME OF PROCESS

Creating & Submitting Purchase Orders

Use Case / Objectives

Use the Submit Purchase Order process to formally request goods or services from a vendor. After confirming the need and selecting the vendor, enter key details such as item information, quantities, delivery location, and shipping terms. Submitting the purchase order triggers any required approvals and ensures accurate tracking of costs, timelines, and vendor commitments.

This guide will also cover Auto-creating a PO Summary for items that are due to be reordered and Generating an Empty PO.

Click on one of these links for quick access to the desired section within this guide:

- [Submitting a Purchase Order](#)
- [Adding an Item](#)
- [Auto-creating a PO Summary](#)
- [Generating an Empty PO](#)

Configuration, Training, and Reporting

This document assumes you know how to perform basic Search functionality to find information in the system (i.e., F4 search). The steps for this are not included within this document.

Field definitions for applicable tasks are available in the Reference Glossary. To view these definitions either click on the screen name in the task or scroll to the end of the documentation to view the Glossary.

Menu options to access:

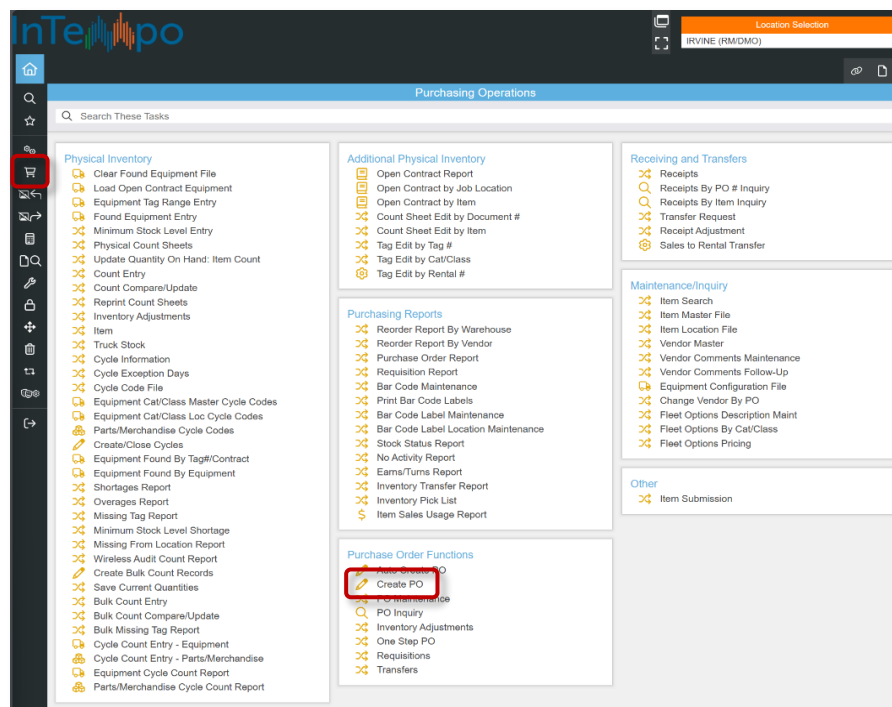
Purchasing Operations > Purchase Order Functions > Create PO
Purchasing Operations > Purchase Order Functions > Auto Create PO

Submitting a Purchase Order

NOTE: Prior to submitting a purchase order, if you are using **PO Buyer Authority** you will need to verify that your users are set up in the **PO Buyer Authorization** file. You can set this up yourself using the **Cross Application File => File Maintenance => PO Buyer Authorization** menu path or you can contact the Customer Support team for assistance.

Process Steps

1. Log into the [Roleplay Environment](#) using your credentials.
2. Click on the **Purchasing Operations** menu.
3. In the **Purchase Order Functions** section, click on **Create PO**.



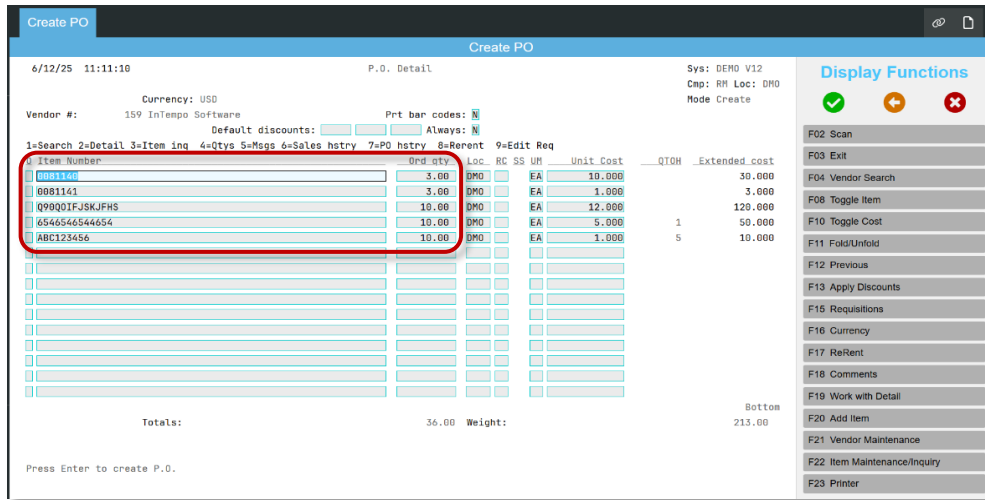
4. Type the **Vendor #** in the field or press F4 on your keyboard or on the **Display Functions** toolbar to search.
 - a. Press Enter.



5. Fill out the relevant information on the **PO Header Information** screen. This would be fields like *Reference #*, *Terms*, *Ship via*, *Ordered from*, and *PO comments*.

- a. The completed header will look like the below when complete.
- b. Press Enter twice to continue.

6. Use the provided fields in the **PO Detail** screen to add items to the purchase order.
 - a. To search for items, type a *1* in the *O* (options) column to search. Otherwise, type the item number in the *Item Number* column(s).
 - b. Provide the *Order Quantity* for each item if you are ordering more than one.



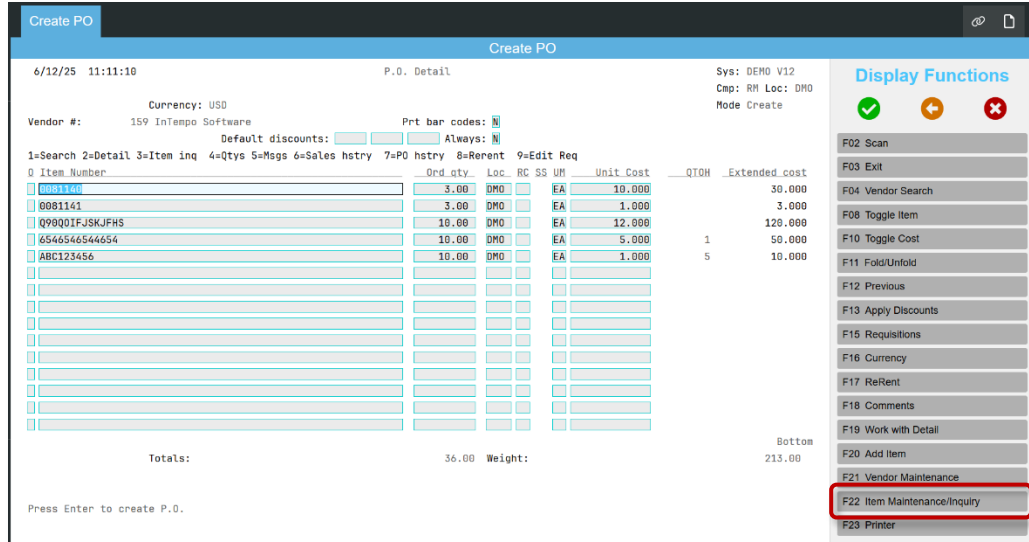
c. Press Enter to create the Purchase Order.

NOTE: If the message below displays, you will need to set up your user in the **PO Buyer Authorization** file. See note at the beginning of this section for details.

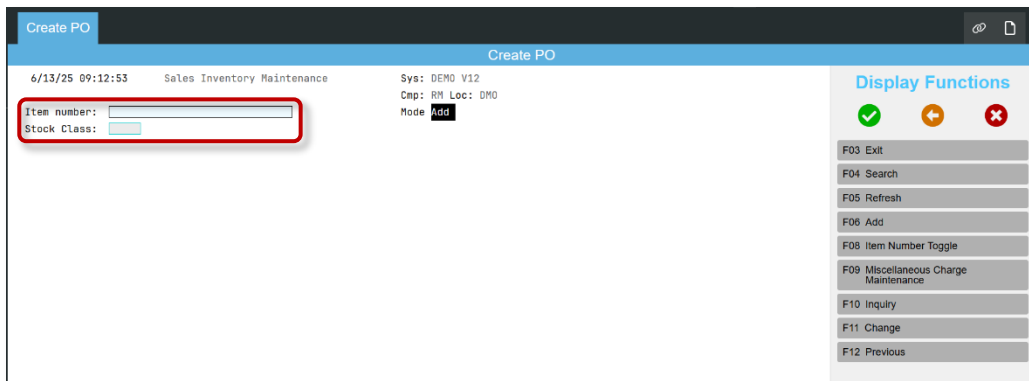


Adding a New Item

1. If new items need to be added, click on [F22 Item Maintenance/Inquiry](#) in the **Display Functions** toolbar.



2. The **Sales Inventory Maintenance** screen populates. Ensure you are in **Add** mode. If you are not in Add mode, click on [F06 Add](#) in the **Display Functions** toolbar.
 - a. Type in the new **item number** and the **stock class** it belongs to. NOTE: As soon as you enter the **Stock Class**, the screen will proceed.



- b. Add the item details in the relevant fields.

- c. NOTE: Make sure you are selecting the correct *P/M/E code*; P = Parts, M = Merchandise, E = Equipment.
- d. NOTE: *Stock Status* is for NS (Non-Stock). Keep the field empty if this is a stock item.

For all other field definitions, see [reference glossary](#).

The screenshot shows the 'Create PO' window with the following fields and values:

- Item number: 23232323
- Stock class: ACBAT BATTERY
- Stock status: (highlighted)
- Description: (highlighted)
- P/M/E code: P (highlighted)
- Mode: Add
- Status code: A
- Search word:
- MF6 item#: 23232323
- G/L category: 100
- Regular price:
- Preferred price:
- Dealer price:
- Usual vendor:
- 1st U/M: EA
- Rental cat/class:
- Serialized (Y/N): N
- Inventoried (Y/N): Y
- Inventory class:
- Freight %:

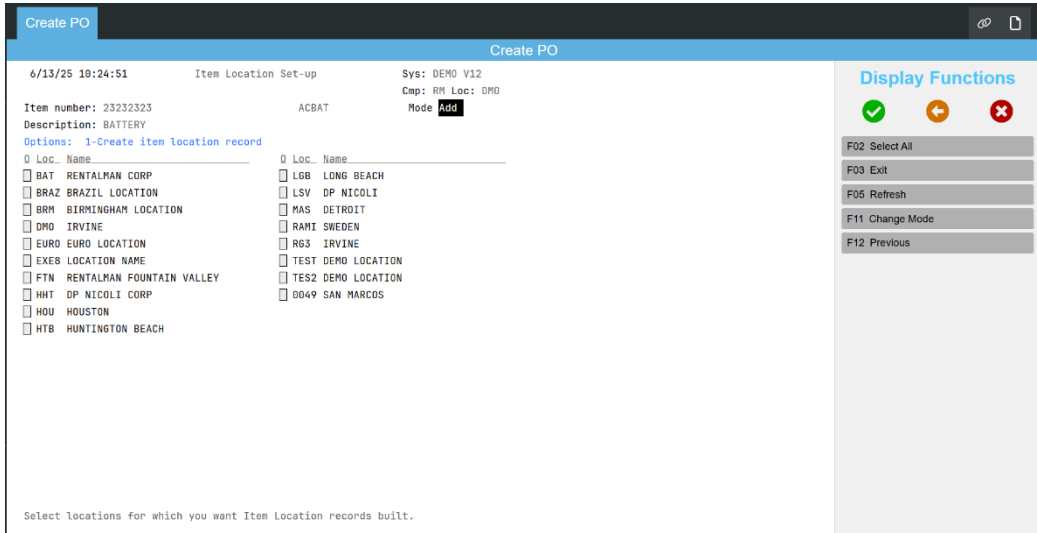
The 'Display Functions' menu on the right includes options like F02 UPC, F03 Exit, F04 Search, F05 Refresh, F06 Sales History, F07 Reorder, F08 Hierarchy, F10 Purchase Order History, F12 Cancel, F14 Serial Number Maintenance, F15 Location Maintenance, F16 Item Message, F17 Item Discount, F18 Tax Product Map, F19 Print Bar Code, and F23 Delete.

- e. The completed item might look like the below image when completed.
- f. Press enter to continue.

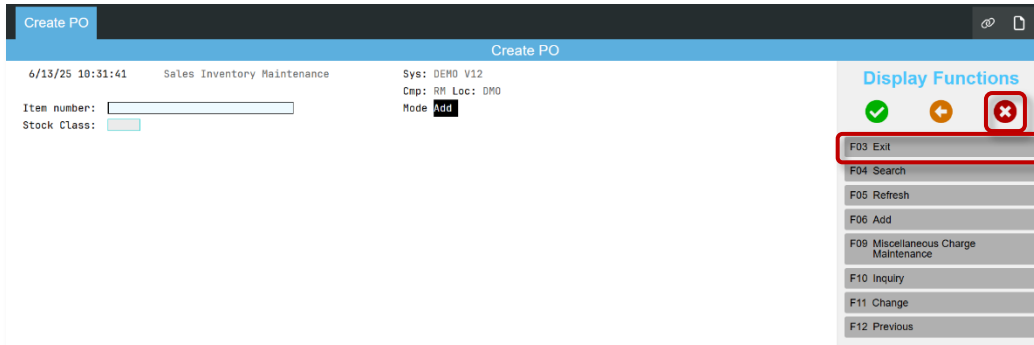
The completed item details are as follows:

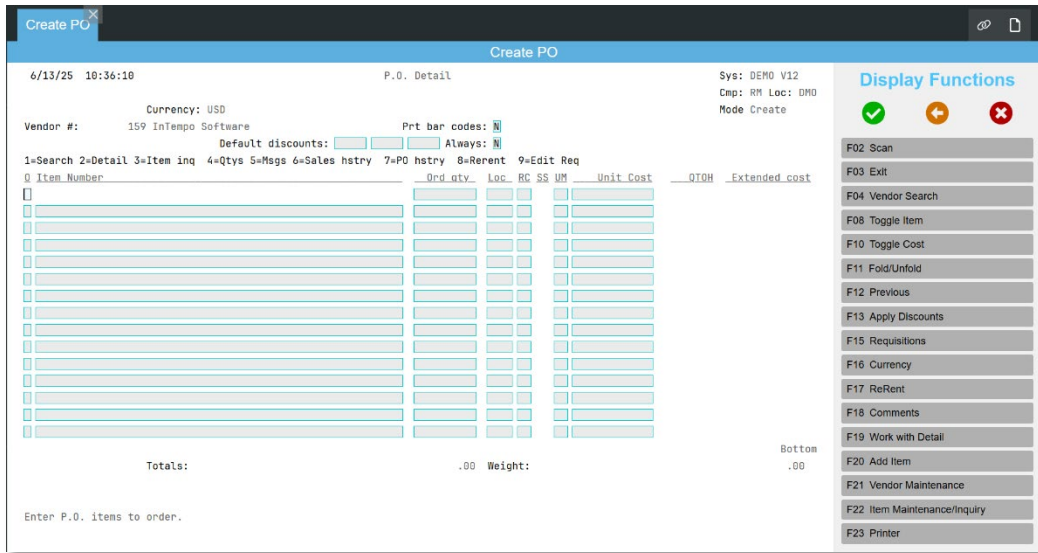
- Item number: 23232323
- Stock class: ACBAT BATTERY
- Stock status:
- Description: BATTERY
- Mode: Add
- Status code: A
- P/M/E code: P
- Search word: AC BATTERY
- MF6 item#: 23232323
- G/L category: 100
- Last/current cost: 10.000
- List price: 10.000
- Regular price: .100
- Preferred price: .100
- Dealer price: .100
- Usual vendor: 159 InTempo Software
- 1st U/M: EA
- Rental cat/class: 20 110 INDUSTRIAL FORKLIFT-PROPANE
- Serialized (Y/N): N
- Inventoried (Y/N): Y
- Inventory class:
- Freight %:

- g. If you have multiple locations, the **Item Location Set-Up** screen may populate. Type a 1 next to all locations that also carry the item added.
- h. Press enter to continue.



- i. You will be returned to the **Sales Inventory Maintenance** screen. Press F03 Exit, or the red X to exit back to the PO Detail screen.





3. Continue the process from [step 6](#) to add items to the PO.

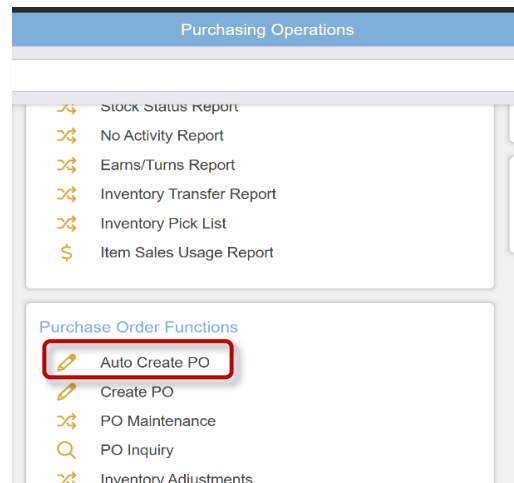
Auto Create PO

Use this process to enter the parameters for pulling in items that are due to be reordered, so that they can be selected for requisition or purchase.

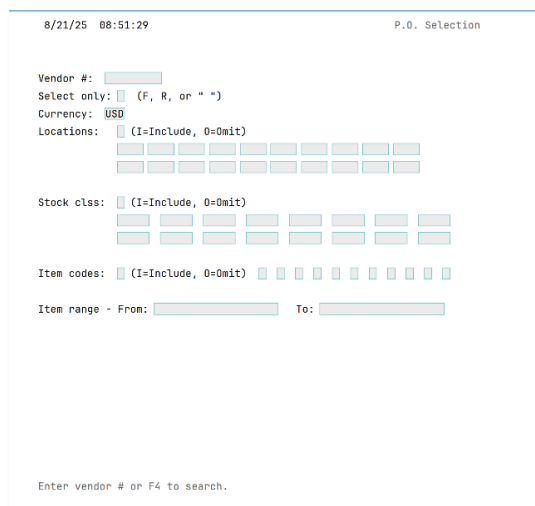
NOTE: To optimize processing time, it is recommended to first run the **Reorder Report by Vendor** and update the item master files with reorder calculations. You can then enter specific codes (R or F) in the **Select Only** field on the **P.O. Selection** screen to process records based on requisition history or the last reorder point calculation.

Process Steps

1. Log into the [Roleplay Environment](#) using your credentials.
2. Click on the **Purchasing Operations** menu.
3. In the **Purchase Order Functions** section, click on **Auto Create PO**.



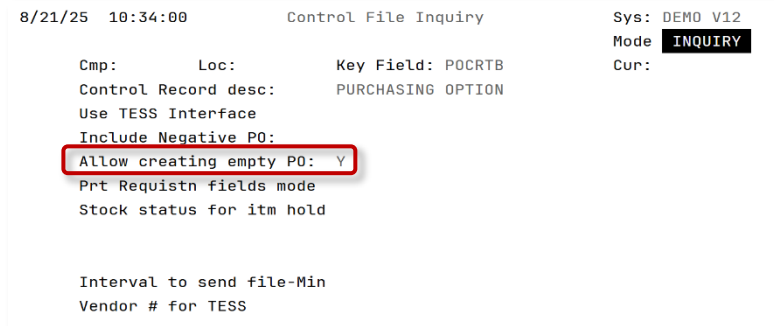
- a. The **P.O. Selection** screen opens.

A screenshot of the 'P.O. Selection' screen. The screen displays the following fields and options: Vendor #: [text input]; Select only: [checkbox] (F, R, or " "); Currency: USD; Locations: [checkbox] (I=Include, 0=Omit) followed by a grid of 10 small input boxes; Stock class: [checkbox] (I=Include, 0=Omit) followed by a grid of 10 small input boxes; Item codes: [checkbox] (I=Include, 0=Omit) followed by a grid of 10 small input boxes; Item range - From: [text input] To: [text input]; and a footer instruction: Enter vendor # or F4 to search.

Generating an EMPTY PO

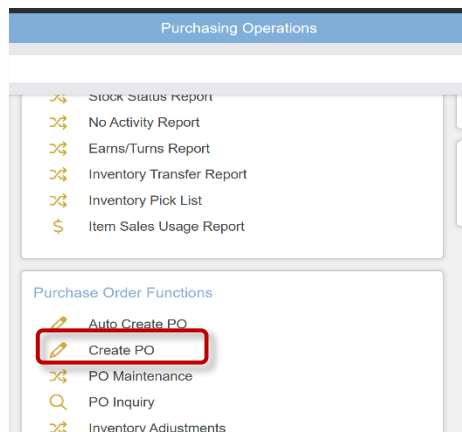
In some cases, you may need to create an EMPTY PO when the specific item needed is unknown. This is not used by all locations and in order for your location to perform this process, Control Record **ROCRTB** must be set to **Y**. This can be determined by navigation to the **Control File Inquiry** screen and verifying *Allow creating empty PO* = **Y**.

System File Maintenance > File Maintenance > System Control Maintenance

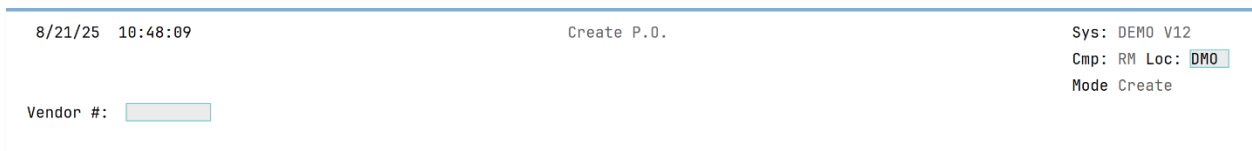


Process Steps

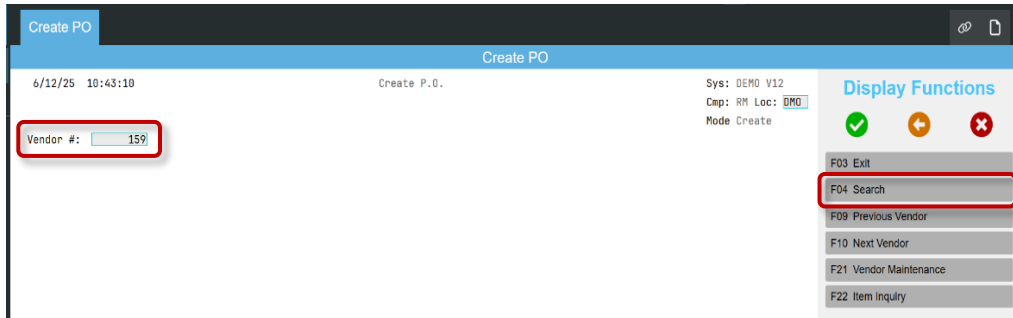
1. Log into the [Roleplay Environment](#) using your credentials.
2. Click on the **Purchasing Operations** menu.
3. In the **Purchase Order Functions** section, click on **Create PO**.



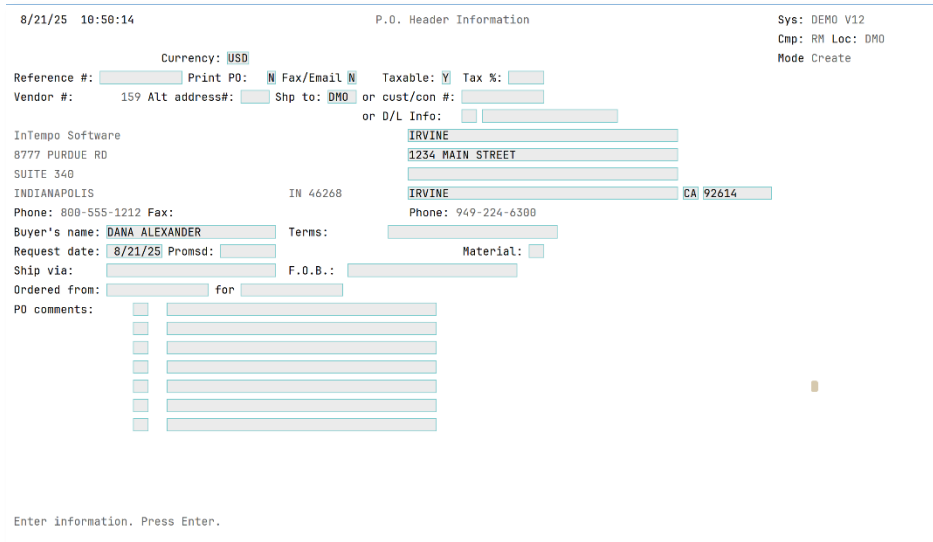
a. The **Create P.O** screen displays.



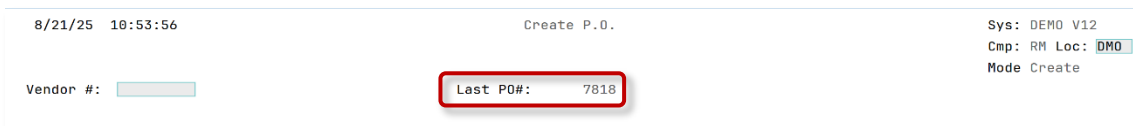
4. Type the Vendor # in the field or press F4 on your keyboard or on the **Display Functions** toolbar to search.



5. Press Enter.
 - a. The **P.O. Header Information** screen opens displaying the information for the vendor entered.



6. Type in any additional information and press Enter.
7. Review changes and press Enter to continue.
 - a. The **P.O. Detail** screen opens displaying a blank purchase order.
8. Press Enter.
 - a. The **Create P.O.** screen displays and the *Last PO#* field is visible. **NOTE:** This will be the number of the **EMPTY** purchase order you created.



Reference Glossary

Field Definitions for Tasks

PO Header Information

- *Currency* - Enter or accept the currency specific to this purchase order.
- *Reference Number* - If applicable, enter a special notation that can be used for reporting or querying purposes.
- *Print/Reprint PO* - Indicate whether you want to print the purchase order once it is created. The default setting for this field is set in control record **POCRT1**. When in **PO Maintenance** or **PO Inquiry**, you have the option to reprint the purchase order.
- *Fax PO* - Indicate whether you want to fax or e-mail the purchase order once it is created. If you enter Y, the Fax/E-mail Window displays at the end of the transaction.
- *Taxable* - Indicate whether the items on the purchase order are taxable. You can override this setting at the line item level.
- *Tax Percentage* - For taxable purchase orders, enter the appropriate tax percentage the vendor will charge.
- *Vendor Number* - Displays the number, name, address, phone number, and fax number for the vendor on the purchase order.
- *Alternate Address Number* - If applicable, enter the number assigned to alternate vendor address you want to use for this purchase order. Alternate addresses are set up in the vendor master record.
- *Ship To* - Enter or accept the location to which the items on the purchase order will ship. The location name and address appear below, and you can change them. If you are ordering **re-rent** equipment or items for a specific customer or drop shipping items or equipment directly to a customer, complete the **Customer/Contract Number** field as well.
- *Customer/Contract Number* - If you are ordering **re-rent** equipment or items for a specific customer or contract, or you are entering a **re-rent** purchase order for a charge customer, enter the number of the customer or the customer's rental contract for shipping purposes.
- *Driver's License Information* - If you are entering a **re-rent** purchase order for a cash customer, enter the customer's driver's license state and number.
- *Ship To Name and Address* - If applicable, modify the name and address where the purchase order items are to be shipped. This information defaults when you enter the Ship To location or the customer information, but you can change it for this purchase order.
- *Buyer's Name* - Enter or accept the name of the buyer associated with this purchase order.

- *Terms* - Enter or accept the vendor's payment terms in days. The value defaults from the vendor's master record, but it can be changed.
- *Request Date* - Enter or accept the date that you want delivery of the purchase order items. The default is today's date plus the number of lead time days set in the vendor master record.
- *Promised* - Enter the date that the vendor promised delivery. Use control record **POCRT4** to make this field mandatory.
- *Discount Days* - Enter or accept the number of days the vendor allows for payment where they will still offer a discount on the invoice.
- *Discount Percentage* - Enter or accept the percentage of the discount the vendor gives when their invoice is paid within **Discount Days**.
- *Material* - Enter a code that represents the type of purchase order you are entering. This code is type **MT** in the Miscellaneous Reason Code file. Use the code to filter records in the **PO Search** screen and when running various purchasing reports. Material code **RR** is reserved specifically for **re-rent** purchase orders.
- *Ship Via* - Enter or accept the shipper information. The default can come from control record **POCRT1**.
- *Freight on Board (FOB)* - Enter the freight on board code for the purchase order. The code represents when you (the purchaser) accept responsibility for the items being delivered.
- *Ordered from/for* - Enter the contact at the vendor with whom you placed the order. Enter the name of the person or customer for whom you placed the order.
- *PO Comments* - Enter comments for this purchase order. Based on how your purchase order print program is set up, the comments might or might not print on the purchase order. You can also use the first two-character field to enter a code (type **PO** in the Miscellaneous Reason Code file) that populates the field with commonly used comments.

P.O. Detail/P.O. Selection

- *Currency* - Displays the currency for the purchase order. Use F16 to change it.
- *Vendor Number* - Displays the number of the vendor from whom you are ordering.
- *Print Bar Codes* - Indicate whether you want to print bar code labels for the items on the purchase order.
- *Only Display Type (PO Selection screen only)* - Enter a code to focus the list of suggested items to only that type. For example, type **R** is for Requisitioned.
- *Default Discounts* - Enter up to three discount percentages to apply to items that are entered on the purchase order **AFTER** you enter the discounts. For example, if there are two items for which you do not want to calculate discounts, enter those two items on the purchase order, and then enter your first discount to apply to items subsequently entered on the purchase order. If you enter additional discounts after the first one, and then you enter more items on the purchase order, all the previously entered discounts apply to those items.

Example: Item 4524 is entered on the purchase order. Then a default discount of 10% is entered, and the next item 8883 is entered. Finally, a second default discount of 10% is entered, and the final item 1016 is entered. Item 4524 has no discount applied to it. Item 8883 has a 10% discount applied to it. Item 1016 has a 19% discount applied to it. The system discounts the cost of item 1016 by 10%, and then it applies a 10% discount to that discounted cost for a total of a 19% discount off the original cost.

- **Always** - Enter Y to always use the discounts entered in the Default Discounts field and override any other discounts that might apply at the line-item level.
- **Item Number** - Enter the number of the item you are ordering. When entering re-rent items, put a prefix of RR in front of the item number. When entering non-stock items, put a * in front of the item number/description. Press F8 to toggle this field to the manufacturer's item number or the item description.
- **Order Quantity** - Enter the quantity of the item that you want to order. Based on settings in control record **POCRT1**, the system might calculate the extended cost of the item and compare that to your purchase order buying authority and gives a hard halt error message if the extended cost exceeds your buying authority.
See control record **POCRT1** settings Limit by **PMEC** code. Limit **PO IMPMEC** code amt and the **PO Buyer Authorization** quick guide for more information.
- **Location** - Enter or accept the location for which you are ordering the item.
- **Pricing Schedule** - Displays the code for the vendor's price schedule that includes purchase pricing information for this item.
For more information, see **Price Definition Maintenance** and **Update Items from Vendor Price List**.
- **Stock Status** - Displays the stock status code for the item from its master record.
- **Unit of Measure** - Enter or accept the unit of measure in which the item is being ordered.
- **Unit Cost** - Enter or accept the cost of the item for this purchase order. The default is the cost of the item based on its master record or the applicable location record depending on how the item has been set to cost.
Press F10 to display the extended cost for each item on the order.
- **Discount Percentage** - Displays the discount applied to that item.
- **Quantity on Hand** - Displays the quantity on hand for the item in all locations.
- **Totals** - Displays the total quantity ordered and the total unit cost for all items on the purchase order.
- **Weight** - Displays the total weight of all ordered items. The weight of one unit of an item is entered into the item's master record.

Sales Item Maintenance

- *Item number* - Displays the item number you want to add, change, or inquire on.
- *Stock class* - Displays the stock class associated with the item number.
- *Status code* - Enter or accept the status for the sales item. Valid codes are:
 - *A* - Active
 - *D* - Deleted
 - *S* - Suspended
- *Stock status* - Enter NS if this sales item is considered a non-stock item that is not included on reorder reports and physical inventory count sheets. Use the **Default Codes** program in **Cross Application Maintenance** to set up additional user-defined stock status codes using code SS.
- *P/M/E code* - Enter the code that represents the type of sales item. Valid codes are:
 - *P* - Part
 - *M* - Merchandise
 - *E* - Equipment
- *Description* - Enter a brief description of the item.
- *Search word* - Enter text that you can use to search for this item on inquiry screens.
- *Last cost update* - Enter or accept the date of the last time the Last Cost field was updated by the system. This date is automatically populated by the system, so change it only on an exception basis.
- *Manufacturer's item number* - Enter the manufacturer's item number assigned to this sales item.
- *UPC* - If applicable, enter the UPC number assigned to the item.
- *UPC Code* - If applicable, enter the code associated with the UPC number. Two codes are supported, and the default code is UP.
- *G/L category* - Enter the code that represents the link between this item and the **G/L sales revenue distribution file**. The **G/L distribution** determines the general ledger account numbers used for revenue, inventory and cost of goods sold when this item is sold or purchased. This information might be defaulted from the item's stock class, and it might be protected against changes on this screen.

If field **ZXYON3** of control record **SAITMM** is set to **Y**, this G/L category is defaulted from the master record of the stock class assigned to this item, and you cannot change it.

If control record **SAITM2 - Use G/L Cat in Stock Master** is set to **Y**, the G/L category is always defaulted from the stock class assigned to the item, regardless of any entry made here.
- *Pricing at Company/Warehouse/Location* - Indicate if the pricing for this item is at the company (N), warehouse (W), or location (Y) level. If you enter **N**, the pricing for this item comes from its master record. If you enter **Y**, the pricing for this item comes from the price set at the location where the item is being transacted. If you enter **W**, the pricing for this item comes from the location that is set as its warehouse/supplying location.

Your setting in this field overrides the setting at the location level; however, if you leave this field blank, the setting at the location level is the default for this item.

- *Tax product number* - If you are integrated with a tax software package, and if applicable, enter the tax product category/number that groups this item for special taxation.
- *Last/current cost* - Enter or accept the last or most current cost of this sales item. This field is automatically updated when the item is received against a purchase order in the system.
- *Currency* - Enter or accept the code for the currency in which all monetary amounts on this screen are displayed/entered.
- *Auto calculate cost based on List or Regular* - If you want to use the sales item's list or regular price to automatically calculate its last/current cost, indicate which price to use: List Price (L) or Regular Price (R).
- *Percentage of List or Regular* - If you entered a code in the Based on field, enter the percentage by which the list or regular price should be multiplied to arrive at the last/current cost.
- *List price* - Enter the manufacturer's suggested list price for the item. This amount is not used for invoicing; it may be used for calculation of cost or selling price based on the codes assigned for auto calculations.
- *Regular price* - Enter the retail price normally charged for this item. In the event there are no discounts or other pricing codes assigned for the transaction, this is the price the system uses when this item is being sold.
- *Auto calculate regular price based on Cost or List* - If you want to use the sales item's cost or list price to automatically calculate its regular (retail) price, indicate which one to use: List Price (L) or Cost (C).
- *Percentage of Cost or List* - If you entered a code in the Based on field, enter the percentage by which the list price or cost should be multiplied to arrive at the regular (retail) price.
- *Preferred price* - Enter the price that is used when this item is sold to a customer with a price code of P in their master record.
- *Auto calculate preferred price based on Cost, List, or Regular* - If you want to use the sales item's cost or list price or regular price to automatically calculate its preferred price, indicate which one to use: List Price (L), Cost (C), or Regular Price (R)
- *Percentage of Cost, List, or Regular* - If you entered a code in the Based on field, enter the percentage by which the list price or cost or regular price should be multiplied to arrive at the preferred price.
- *Dealer price* - Enter the price that is used when this item is sold to a customer with a price code of D in their master record.
- *Auto calculate dealer price based on Cost, List, Regular, or M* - If you want to use the sales item's cost, list price, regular price or a formula to automatically calculate its dealer price, indicate which one to use: List Price (L), Cost (C), Regular Price (R), or formula (M).

Enter **M** if you want the system to calculate the Dealer Price based on the formula: (List + Last Cost) / 2.

- **Percentage of Cost, List, or Regular** - If you entered a code other than **M** in the Based on field, enter the percentage by which the list price or cost or regular price should be multiplied to arrive at the dealer price.
- **Usual vendor** - Enter the number of the vendor from whom you usually purchase this item. This is the vendor used on reorder and analysis reports for this item.
- **Omit from ENB** - If set to **Y**, the system will not process this item in the **Earned Not Billed** report.
- **1st unit of measure** - Enter the code that represents the smallest unit of measure in which this item is sold, purchased, or stocked.
- **2nd unit of measure** - Enter the code that represents the second unit of measure in which this item is sold, purchased, or stocked.
- **2nd quantity** - Enter the quantity of items in the first unit of measure that is equivalent to one unit in this second unit of measure.
Example: The first unit of measure is EA for each. The second unit of measure is BX for box. There are 10 of this item (in eaches) in one box, so enter 10 in the Quantity field. When this item is sold, purchased, or counted during inventory, you can enter a unit of measure of BX, and the actual boxes sold, purchased, or counted, and the system calculates the amount in eaches based on this quantity.
- **3rd unit of measure** - Enter the code that represents the third unit of measure in which this item is sold, purchased, or stocked.
- **3rd quantity** - Enter the quantity of items in the first unit of measure that is equivalent to one unit in this third unit of measure.
Example: The first unit of measure is EA for each. The third unit of measure is CS for case. There are 100 of this item (in each) in one case, so enter 100 in the Quantity field. When this item is sold, purchased, or counted during inventory, you can enter a unit of measure of CS, and the actual cases sold, purchased, or counted, and the system calculates the amount in each based on this quantity.
- **Rental category** - If this item is used in your rental fleet as either serialized or bulk equipment, enter the category for this item. This information is necessary when completing a sales to rental transaction.
- **Rental class** - If this item is used in your rental fleet as either serialized or bulk equipment, enter the class. This information is necessary when completing a sales to rental transaction.
- **Rental sub-class** - If this item is used in your rental fleet as either serialized or bulk equipment, enter a maintenance sub-class for it.
- **Serialized** - Indicate whether you track this item individually with unique serial numbers. When you set this to **Y**, you must enter serial numbers when selling, receiving, or transferring this item. You can also use Serial Number Maintenance to add or change sales item serial numbers.

- **Taxable** - Indicate whether you apply tax to this item when you sell it. If the customer to whom you are selling the item is marked as non-taxable, this setting is ignored.
- **Discountable** - Indicate whether this item is discountable. If set to **N**, this setting overrides discounts set in the customer master file and sales item discounts set in **Sales Item Discount Maintenance**. This setting does not disallow manually entered discounts.
- **Inventoried** - Indicate whether you track this item in inventory. If set to **Y**, a sales item location record is required for each location that stocks this item. The quantity on hand is automatically updated in the system for items that are marked as Inventoried. If the sales item is considered a kit, set this field to **N**, unless the Use Inventoried kits opt field is set to **Y** in control record **SAKITM**.
- **Commissionable** - Indicate whether sales of this item are calculated for sales representative commissions.
- **Expected profit percentage** - Enter the profit percentage you expect to achieve when this item is sold. You can set the system to warn you during a sales transaction if this profit percentage is not met. Run the **Inventory Profit Analysis** report to review the profit percentage on sales transactions.
- **Inventory class** - Enter a user-defined code to classify the item for query and analysis purposes. If you do not know the code, press F4 to search for it.
- **Cost overhead percentage** - If applicable, enter the percentage to add to this item's cost when the cost is displayed. The inflated cost is displayed for users with security code **Z01** in their user profile. Users with security code **Z02** will see the item's actual cost.
- **Commission percentage inside** - If applicable, enter the percentage used to calculate split commissions for inside sales representatives.
- **Commission percentage outside** - If applicable, enter the percentage used to calculate split commissions for outside sales representatives.
- **Freight percentage** - Enter the percentage of the sale price of the item to charge for freight.
- **Excise tax percentage** - Enter the percentage of excise tax to charge for this item.
- **Material code** - Enter the code that classifies this item for **VAT** taxation purposes.

P.O. Selection

- **Vendor Number** - Enter the number of the vendor for which you want to review suggested items to purchase. If you do not know the number, press F4 to search for it.
- **Select Only** - Enter the appropriate code for the program to use to determine which items to retrieve for the list. Valid codes are:
 - R - List items previously marked for requisition
 - F - List items from the last reorder calculation run from the Reorder Report by Vendor
 - Blank - Recalculate reorder points and return a list of all suggested items for the vendor
- **Currency** - Enter or accept the currency for the resulting purchase order.

- *Locations* - Enter a list of locations that you want to either include (I) or omit (O) from the list after you enter the Include/Omit code. If you want to include all locations, enter O for Omit, but do not enter any location codes.
- *Stock Class* - Enter a list of stock classes that you want to either include (I) or omit (O) from the list after you enter the Include/Omit code. If you want to include all stock classes, enter O for Omit, but do not enter any stock classes.
- *Item Code* - Enter a list of item codes that you want to either include (I) or omit (O) from the list after you enter the Include/Omit code. If you want to include all item codes, enter O for Omit, but do not enter any item codes.
- *Item Range* - From/To - Alternatively, enter a range of item numbers to review.