Full Help site can be found here

https://helpdesk.next15.com

For support, please contact your local finance department

PURCHASE ORDER ENTRY

** PURCHASE ORDERS SHOULD BE CREATED AND APPROVED BEFORE A PURCHASE IS MADE **

ENTERING A PURCHASE ORDER

- Select **Purchase Order** from the Time & Expense Menu
- Click on the New Purchase Order button
- Select the **Vendor** (supplier) by typing in their name or click on the magnifying glass and selecting from the list
- Select a **Project** by either typing in the name or click on the magnifying glass and selecting from the list (Non-client related purchases should be assigned to internal/admin projects)
- Enter the description of the purchase order
- Press the **Create** button
- **Click on an empty line** in the 'Allocation' tab
- **Select the Task** from the dropdown list which best suits the type of item you are purchasing
- Enter the **description**
- Enter the **quantity** of items being purchase
- In the **Unit Price** field, enter the amount of each item
- Press Enter to save
- Repeat for a new line by click on a new row

SUBMIT FOR APPROVAL

- Once all lines have been entered, the next step is to submit your purchase order for approval
- Click on the Submit button
- The purchase order will be sent to the project manager of the project for approval. Once approved, you will receive a notification that the PO has been approved

MY PURCHASE ORDER HAS BEEN APPROVED, WHAT NEXT?

- Once your purchase order has been approved, you can now place the order
- Make sure you quote the purchase order number to the supplier and ask them to quote on their invoice

WHERE DO I FIND THE PURCHASE ORDER NUMBER?

- Once the purchase order has been approved, go back to **Purchase Order** workspace and click on the "**Approved Purchase Orders**" tab
- Using the filter "**My Purchase Orders**" you should be able to see your Purchase order or you can filter by Vendor
- You can also print the Purchase Order, click on the icon in the Purchase Order screen