

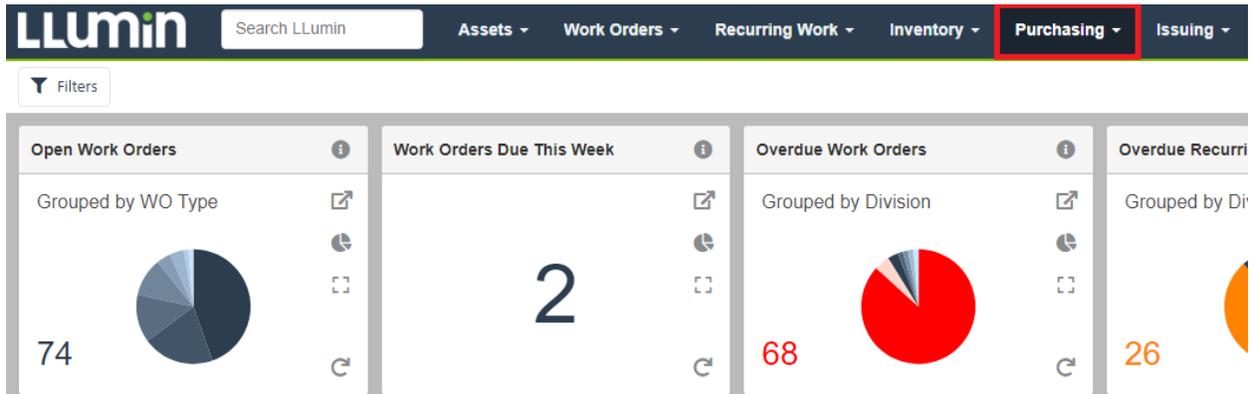
# How to Create a Purchase Order

**Purchase Orders** help you manage your Assets in LLumin CMMS+ by tracking unexpected issues and updating the status of planned maintenance. Technicians, supervisors, and managers can be given permission to create and modify Purchase Orders.

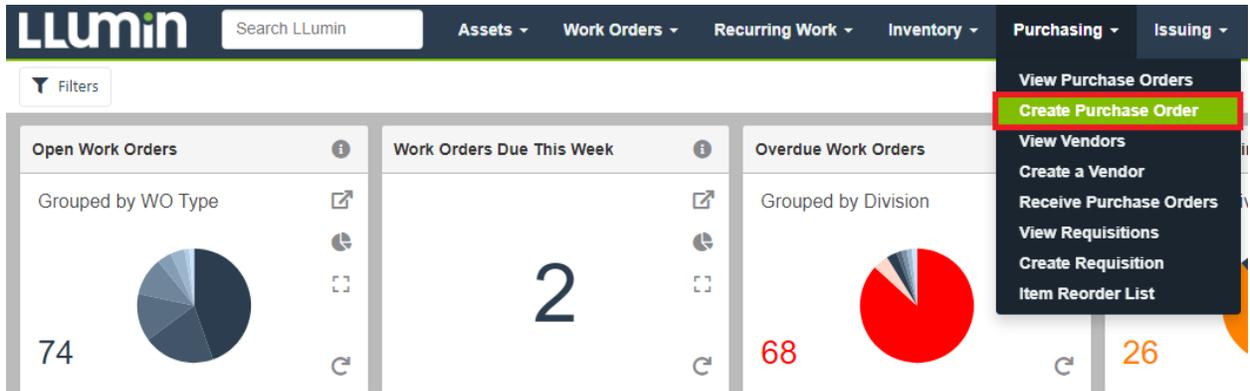
## Instructions

To create a new Purchase Order, perform the following steps:

1. Go to the **Purchasing** drop-down menu on the menu bar.



2. Click **Create Purchase Order**.



- The New Purchase Order screen will open, divided into three sections: **Line Items**, **General Info**, and **Vender Info**.

The screenshot shows the 'New Purchase Order' interface. At the top, there are fields for PO # (NEW), Status (Being Built), Type (Purchase Order), and a checkbox for 'Create as Blanket'. Below these are fields for Vendor, Vendor Quote #, Cost Center, and Currency. A sidebar on the left contains 'Purchase Order Details', 'Line Items' (highlighted), 'General Info', and 'Vendor Info'. The main 'Line Items' section has a table with columns: Item #, Description, Qty Order..., Unit Cost, UM, and Tax. The table is currently empty, and a message in the center reads 'A vendor is required in order to add lines'. Above the table are fields for Stockroom (Springfield Main Stockroom), GL Acct, and Date Expected. There are also '+ Add Line' and 'Create Item' buttons.

- Fill out the purchase order and relevant details:
  - Assign a **Vendor** from a list at the top of the screen. This is the only required step to create the Purchase Order.
  - Optionally, include a **Vendor Quote #** and specify the **Cost Center** related to the Work Order.
  - Check **Create as Blanket** if you want to create a blanket order.
  - Enter the currency.

This screenshot shows the 'New Purchase Order' form with the following values filled in: PO # (NEW), Status (Being Built), Type (Purchase Order), 'Create as Blanket' (unchecked), Vendor (Acme Products), Vendor Quote # (\$500), Cost Center (Manufacturing), and Currency (USD).

## Line Items

1. In the **Line Items** section, complete the following:
  - Choose a Stockroom and GL Account from the list to associate with the Purchase Order.
  - Assign the **Date Expected** for the Purchase Order completion.
  - Click **Add Line** to add a blank line to the Purchase Order. This line is not linked to an item and can be used for services, for example. Enter the description and the cost, such as hiring an external vendor like a plumber.

The screenshot shows the 'Line Items' interface. At the top, there are three dropdown menus: 'Stockroom' (Springfield Main Stockroom), 'GL Acct' (empty), and 'Date Expected' (8/4/2024). Below these is a toolbar with a quantity selector (1.00), a search box, a magnifying glass icon, a red-bordered '+ Add Line' button, a 'Create Item' button with a gear icon, and a refresh icon. The main table has columns: L, Item #, Description, Qty Order..., Unit Cost, UM, and Tax. A single row is visible with '1' in the L column, an empty Item #, 'Plumbing' in the Description, '1' in Qty Order..., '\$300.0000' in Unit Cost, 'EA' in UM, and '\$0.0...' in Tax.

- Search for Items to reorder or use **Create Item** to add a new item.

The screenshot shows the 'Line Items' interface with a list of items. The 'Stockroom' is 'Springfield Main Stockroom', 'GL Acct' is '01-01-15900-16 - CIP - Bin Masters', and 'Date Expected' is '7/23/2024'. The toolbar includes a quantity selector (1.00), a search box, a magnifying glass icon, a '+ Add Line' button, a red-bordered 'Create Item' button with a gear icon, and a refresh icon. The table has columns: L, Item #, Description, Qty Order..., Unit Cost, UM, and Tax. Five rows are visible, each with a blue 'x' icon in the L column and a blue arrow icon in the Item # column.

L	Item #	Description	Qty Order...	Unit Cost	UM	Tax
▶ x	BOLT0003	Bolt Standard 1/2" X 2"	1	\$19.0000	EA	\$0.0...
▶ x	AF0008	Pump Filter 5 x 8	1	\$9.2800	EA	\$0.0...
▶ x	AF0011	Air Filter 4 x 7	2	\$31.0000	EA	\$0.0...
▶ x	SEAL0024	8 inch diameter seal #9464	3	\$31.7000	EA	\$0.0...
▶ x	FLT0007	Pleated 5 x 8 filter #3454	3	\$47.0000	EA	\$0.0...

- If there are items on the Reorder List associated with the entered Item, a **Light Bulb** button will appear for Recommended Items.

**Line Items**

Stockroom: Springfield Main Stockroom | GL Acct: 01-01-15900-16 - CIP - Bin Masters | Date Expected: 7/23/2024

1.00 | Search... | + Add Line | Create Item | **Light Bulb**

Item #	Description	Qty Order...	Unit Cost	UM	Tax
<input type="checkbox"/> BOLT0003	Bolt Standard 1/2" X 2"	1	\$19.0000	EA	\$0.0...
<input type="checkbox"/> AF0008	Pump Filter 5 x 8	1	\$9.2800	EA	\$0.0...
<input type="checkbox"/> AF0011	Air Filter 4 x 7	2	\$31.0000	EA	\$0.0...

- Click this **Light Bulb** button to open the Recommended Items window.
- Choose the items you want to add, then click **Select** to add them to the Purchase Order.

**Recommended Items**

Item #	Vendor Part #	Qty To Order	Confidence
<b>Reason: Items on Reorder List</b>			
<input type="checkbox"/> FLT0007 Pleated 5 x 8 filter #3454	3454	3	100%
<input type="checkbox"/> SEAL0024 8 inch diameter seal #9464	9464	3	100%

1 - 2 of 2 items

**Select** | Cancel

## General Info

1. In **General Info**, complete the following:

- Associate a **WO #** with the reorder, which will link related Assets.
- If not associated with a Work Order, you can enter Assets under the **Asset** category.
- Relate a **Project** and correlate a specific **Task** of that Project with the reorder, if applicable.
- Add a **Voucher #** if applicable.
- On the right-hand side, manually adjust any additional costs (Tax, Freight, Misc. Cost) to calculate the Order Total.

The screenshot shows a web interface for a Purchase Order. On the left is a sidebar with navigation options: 'Purchase Order Details', 'Line Items', 'General Info' (highlighted in green), and 'Vendor Info'. The main area is titled 'General Info' and contains the following fields:

- Date Entered:** 8/15/2023 2:12 PM
- Placed By:** Supervisor One
- WO #:** 327283
- Asset:** AGSL-180-040 - METERING BE...
- Project:** 2019-1000 - New conveyor system
- Task:** (empty)
- Voucher #:** (empty)

On the right side, there is a summary section with the following values:

- Lines Total:** \$496.5500
- Tax:** \$0.0000
- Freight:** \$30.0000
- Misc. Cost:** \$0.0000
- Order Total:** \$526.5500

Below these fields is a 'Comments' section with a text area and two buttons: 'Add a File' and 'Attach Existing File'.

## Vendor Info

1. In **Vendor Info**, complete the following:
  - From the Auto Send Format dropdown, select Email or Fax to send updates on the Reorder to.
  - Enter an email / fax number, website, and account number as needed.
  - Vendor information will automatically appear here if it was selected in the previous steps.
  - Relevant lead time information will also appear on this screen.

The screenshot shows a web interface for entering vendor information. On the left is a sidebar with navigation options: 'Purchase Order Details', 'Line Items', 'General Info', and 'Vendor Info' (which is highlighted in green). The main area is titled 'Vendor Info' and contains several input fields and sections:

- Auto Send Format:** A dropdown menu set to 'Email'.
- Email To:** A text field containing 'Supervisor1@lumin.com'.
- Vendor ID \*:** A text field containing 'ACME'.
- Name \*:** A text field containing 'Acme Products'.
- Email:** An empty text field.
- Website:** An empty text field.
- Account Number:** An empty text field.
- Expected Lead Time:** A text field containing '7'.
- Last Lead Time ⓘ:** A spinner field containing '4.00'.
- Average Lead Time ⓘ:** A spinner field containing '47.25'.
- Notes:** A large text area containing the text 'Call to confirm orders. or not.'
- Contact Information Table:**

Contact	Phone	Email
Acme Products	413-739-73	dansuini@appliedst.com

At the bottom of the form, there is a green 'Create' button on the left and a 'Go Back' button on the right.

2. Select **Create** to submit the Purchase Order.