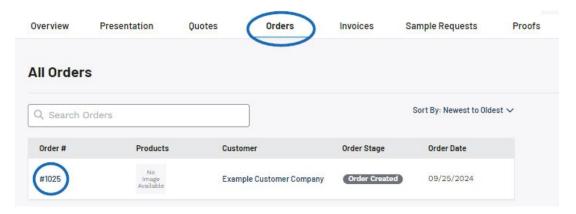# ESP+

Purchase Orders

Jennifer M - 2024-09-27 - Purchase Orders

When an order is created or a quote is converted to an order, a purchase order is automatically generated for each supplier within the main order.
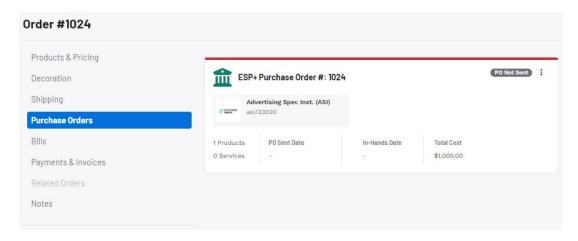

What if the order contains multiple products from the same supplier?   (click for answer)

If the order contains multiple items a supplier, all items will appear on the same purchase order. For example, if the order contained three products, two shirts from Supplier A and a hat from Supplier B, two purchase orders will be generated: one for Supplier A listing both shirts and a second for Supplier B listing the hat.

To access the purchase order(s) for an order, go to the Orders section of the project and on the order number.
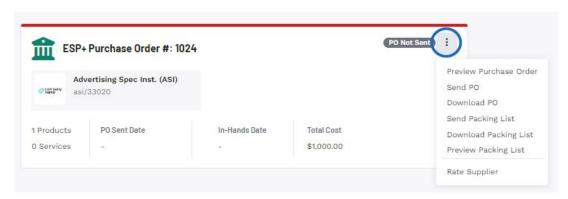

From the order details, click on Purchase Orders from the options on the left.

Each purchase order will be listed with a status indictator of "PO Not Sent" or "PO Sent".

Click on the three dot icon in the upper right corner of the listing to expand the preview and sending options.

The options in this menu are:

- **Preview Purchase Order**

  This will open the purchase order in a new tab on your browser. When you are finished reviewing the information, close the tab to return to ESP+.

- **Send PO**

  The Send Purchase Order window will open with the supplier's information automatically entered in the Purchase Order Vendor and Recipients fields. The Subject line and Email Message can be customized in the Email and Message Templates section of the Account - Settings section. If the Attach PDF box is checked, the purchase order will be included in the email as a PDF attachment. Click on Send Email to send the purchase order to the supplier.

- **Download PO**

  The purchase order will be downloaded to your computer in a PDF format.

- **Send Packing List**

  The Send Packing List window will open with the supplier's information automatically entered in the Packing List Vendor and Recipients fields. The Subject line and Email Message can be customized in the Email and Message Templates section of the Account - Settings section. If the Attach PDF box is checked, the packing list will be included in the email as a PDF attachment. Click on Send Email to send the packing list to the supplier.

- **Download Packing List**

  The packing list will be downloaded to your computer in a PDF format.

- **Preview Packing List**

  This will open the packing list in a new tab on your browser. When you are finished reviewing the information, close the tab to return to ESP+.

- **Rate Supplier**
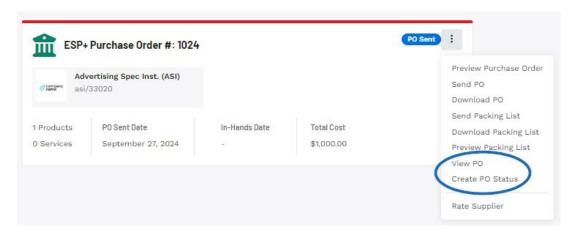
  Submit a supplier rating for the vendor.

After using the Send PO or Download PO options, the status for that purchase order will update to "PO Sent" and two additional options will appear in the three dot menu:

- **View PO**
  Enables you to see the main information and pricing for the items, as well as create a PO status and send the PO.
- **Create PO Status**
  Use the PO status options to track the progress of the order and update the order stages on the right.

Related Content

- [Create Custom PO Number](#)