# ESP+

Purchase Orders

Jennifer M - 2024-05-03 - 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.

In the Quotes/Orders/Invoices tab of the project, make sure the order is the selected sales document. Below the sales document number, click on Purchase Orders from the listed option.
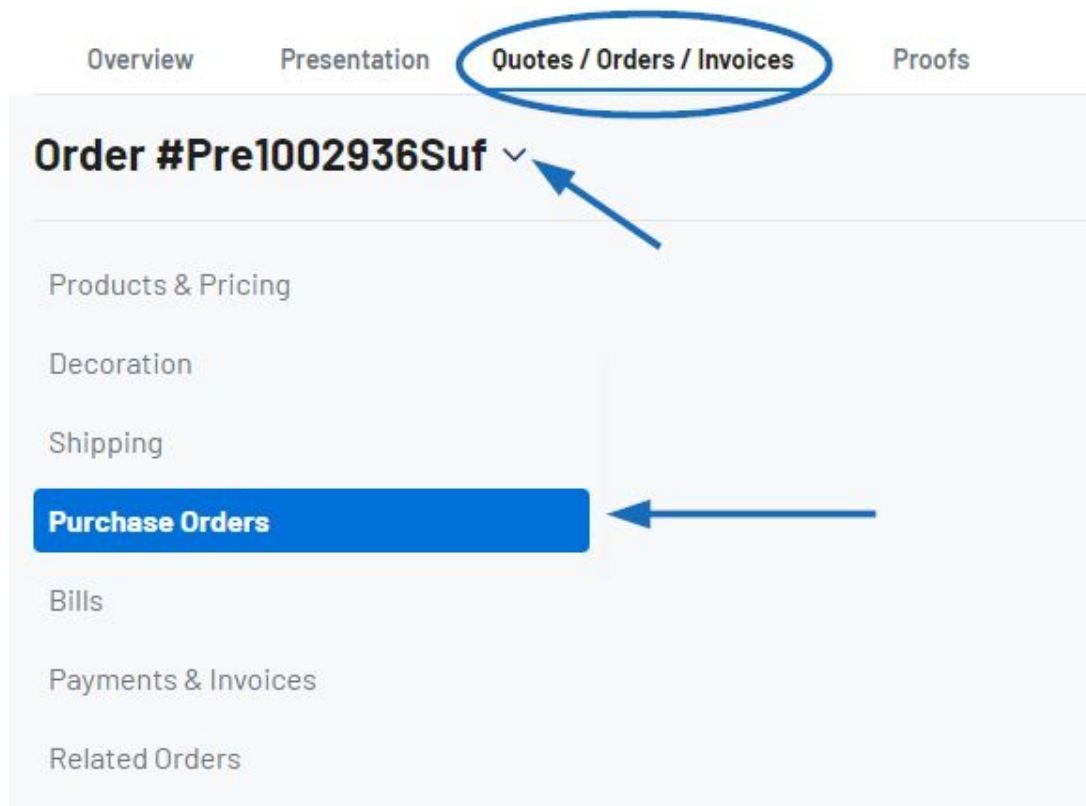

Each purchase order will be listed with a status indictator of "PO Not Sent" or "PO Sent". Click on the three dot icon in the upper right corner of the listing to expand the preview and sending options.
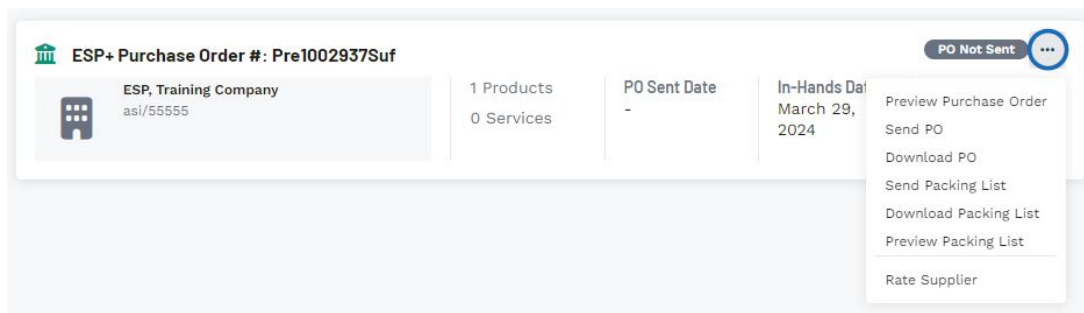
The options in this menu are:

- 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.

Using the Send PO or Download PO options from the three dot menu options or the corresponding buttons at the top, the status for that purchase order will update to "PO Sent".
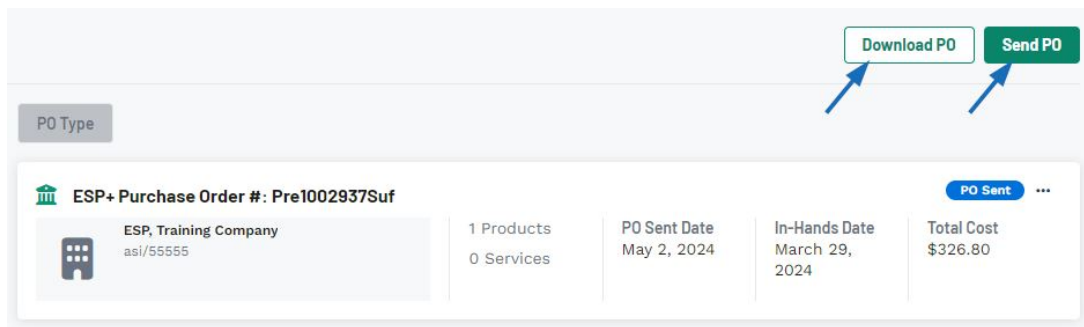

What is the difference between the Download and Send options in the three dot menu and the buttons up top?   (click for answer)

The only difference is that the buttons up top require you to select the vendor while the options available via the three dot icon will automatically fill in the supplier's information.

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

  After the vendor confirms receipt of the purchase order, you can enter the vendor order number and select a PO status to track the progress of the order.
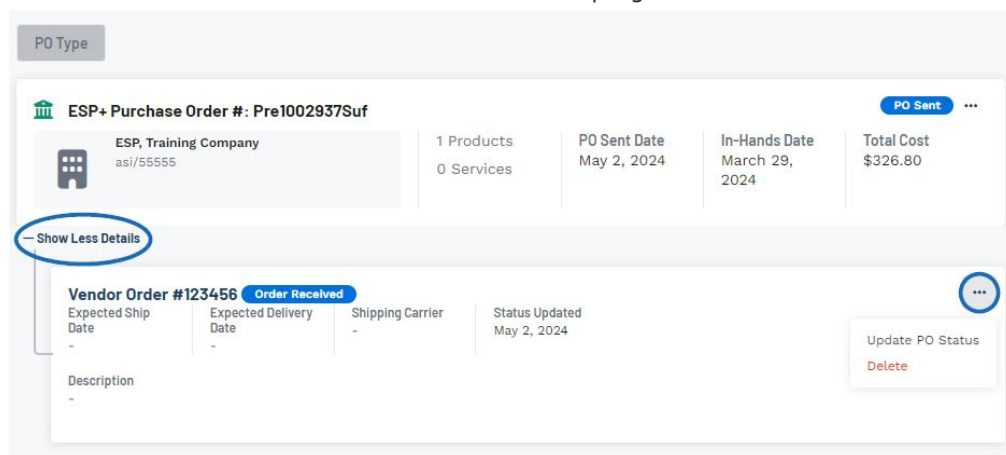
  If a status has been set, click on the Show More Details link to expand the purchase order listing to view the status information. Status updates are the responsibility of the distributor and need to be manually updated. In the Status Details section, click on the three dot icon and select Update PO Status to enter updated information for the purchase order status.

Related Content

- Create Custom PO Number