

# ESP+

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## 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.

Overview Presentation Quotes **Orders** Invoices Sample Requests Proofs

### All Orders

Search Orders Sort By: Newest to Oldest

Order #	Products	Customer	Order Stage	Order Date
#1025	No Image Available	Example Customer Company	Order Created	09/25/2024

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

### Order #1024

Products & Pricing  
Decoration  
Shipping  
**Purchase Orders**  
Bills  
Payments & Invoices  
Related Orders  
Notes

ESP+ Purchase Order #: 1024 PO Not Sent

Advertising Spec Inst. (ASI)  
asi/33020

1 Products	PO Sent Date	In-Hands Date	Total Cost
0 Services	-	-	\$1,000.00

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.

1 Products	PO Sent Date	In-Hands Date	Total Cost
0 Services	-	-	\$1,000.00

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.

The screenshot displays the 'ESP+ Purchase Order # 1024' interface. At the top right, a 'PO Sent' button is visible next to a three-dot menu icon. A dropdown menu is open, listing several actions: 'Preview Purchase Order', 'Send PO', 'Download PO', 'Send Packing List', 'Download Packing List', 'Preview Packing List', 'View PO', 'Create PO Status', and 'Rate Supplier'. The 'View PO' and 'Create PO Status' options are circled in blue. Below the menu, a summary table provides key order details.

1 Products	PO Sent Date	In-Hands Date	Total Cost
0 Services	September 27, 2024	-	\$1,000.00

Related Content

- [Create Custom PO Number](#)