7.15. How to send PO to vendor 7.15.1. Send from project management window

The system allows the user to issue Purchase Order (PO) document and send it to the vendor automatically. Take following steps to process the PO document:

1. Under the main menu click "Projects".



2. Click the project you want to issue PO for.

Ρ	roje	ects								
Mair	> Proj	ects								
	Dele	ete Add	project							
									III - Search	
		Project	Project name	Deadline for Customer	Internal deadline	Туре	Status	Customer	Manager	
		90-003	Plan_01	02.08.2017		Oral	Awaiting confirma	Smith John	Isachev Andrey Eduardovitsch	
		90-001	Alpha project	26.07.2017		Written	Awaiting confirma	Smith John	Karlis	
		90-002	Proj_12	04.07.2017		Written	Awaiting confirma	Smith John	Karlis	

3. Click tab "Tasks" to open the Task window.

Alpha	a project	-		
Main → Proje	ects > Project review			
Project	Tasks 1	Purchase orders (PO) 2	Acts of Acceptances 1	Invoices 0

4. To issue PO for this task check the box "Include task in PO". Click "Save".

Include task in PO						
Completed						
					A	dd task
			Save Issue as	reement Is	sue invoice	Delete
 In "Tasks" shee particular task 	et you can view all data a is included in PO.	about the actu	ual tasks and see,	whether		
Alpha project						
Project Tasks 2 Purchase	orders (PO) 1 Acts of Acceptances	1 Invoices 1				
Notary approval					*	×
Translation task					~	×
						Add task
			Save	ssue agreement	Issue invoice	Delete
2. To create PO c	lick sheet "Purchase ord	ers (PO)".				
Project Tasks	2 Purchase orders	(PO) ()	Acts of Acceptanc	es 🚺	Invoices	0
3. Click "Issue PO	<i>"</i> .					
Alpha project Main > Project > Project review						
Project Tasks 2 Purchase	orders (PO) 0 Acts of Acceptances 1	Invoices 1				
# Issuance date	lask name	Languages	Vendor	Manager	lssu	e PO
			Carrow			Daleta -
			Save	issue agreement	issue involce	Delete

4. The system interface will be automatically reloaded and you will see a new PO generated.

A p Main → P	ha pro	Oject iject review										
Project	Task	s 2	Purchase orders	(PO) 1	Acts of Acceptance	es 🚺	Invoices 1					
	#	Issuanc	e date	Task nan	ne	Langu	ages	Vendor		Manager		
	149	19.07.20	17	Translati	on task	ENG->	HUN	Fast translations Ltd.		Karlis	📑 1	Ì
											Issu	ie PO
									Course		Income formation	Dela

5. Click () to send PO to the vendor.

! Please note that the system will send PO to the vendor's e-mail address each time, when the user checks the box "Send Purchase Order (PO) to vendor", click "Save" in task data and clicks "Issue PO" under "Purchase orders (PO) tab. By default, when the task view window is opened the box "Send Purchase Order (PO) to vendor" is unchecked and no POs are sent by the system.

7.15.2. Send from "Purchase orders (PO)" database view

In order to send a Purchase order from "Purchase orders (PO)" database view, take the following steps:

1. Browse "Documents -> Purchase orders (PO)".



Click (void an act to the particular vendor's e-mail address.