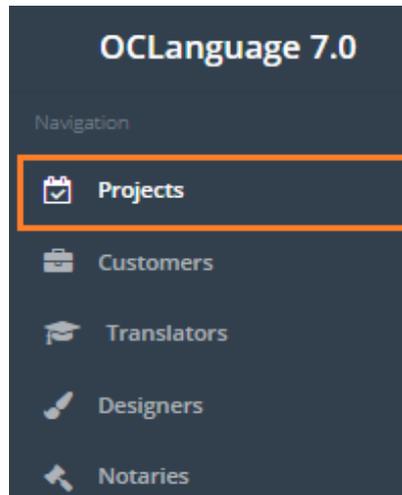


7.15. How to send PO to vendor

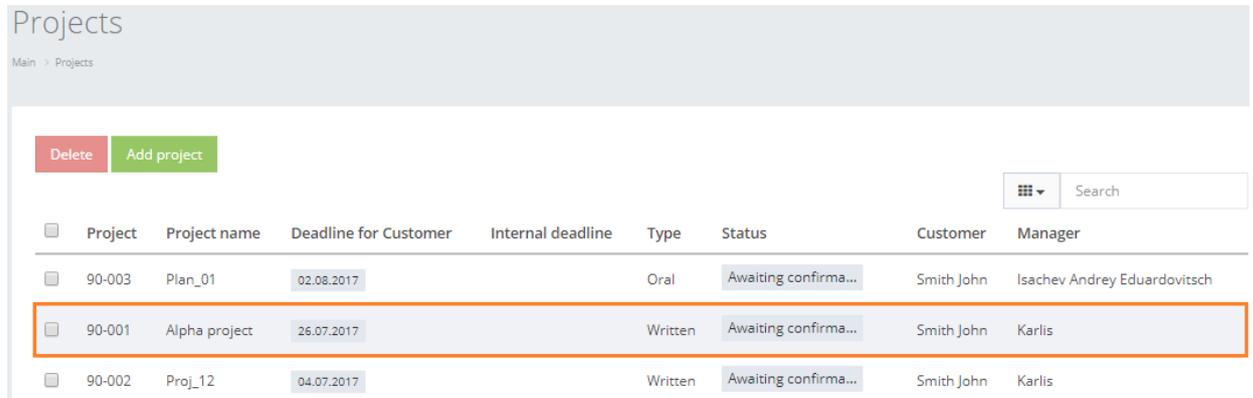
7.15.1. Send from project management window

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:

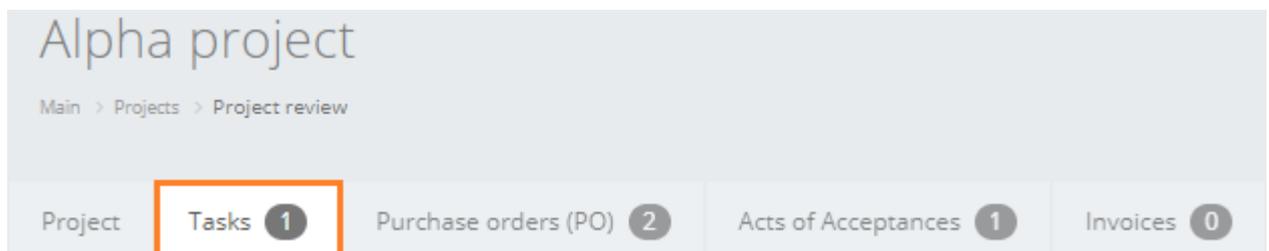
1. Under the main menu click “Projects”.



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



3. Click tab “Tasks” to open the Task window.



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

Include task in PO

Completed

Add task

Save

Issue agreement

Issue invoice

Delete

1. In "Tasks" sheet you can view all data about the actual tasks and see, whether particular task is included in PO.

Alpha project
Main > Projects > Project review

Project Tasks **2** Purchase orders (PO) **1** Acts of Acceptances **1** Invoices **1**

Notary approval	▼	×
Translation task	▼	×

Add task

Save Issue agreement Issue invoice Delete

2. To create PO click sheet "Purchase orders (PO)".

Project Tasks **2** **Purchase orders (PO) **0**** Acts of Acceptances **1** Invoices **1**

3. Click "Issue PO".

Alpha project
Main > Projects > Project review

Project Tasks **2** **Purchase orders (PO) **0**** Acts of Acceptances **1** Invoices **1**

#	Issuance date	Task name	Languages	Vendor	Manager
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Issue PO

Save Issue agreement Issue invoice Delete

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

Alpha project

Main > Projects > Project review

Project Tasks **2** Purchase orders (PO) **1** Acts of Acceptances **1** Invoices **1**

#	Issuance date	Task name	Languages	Vendor	Manager	
149	19.07.2017	Translation task	ENG->HUN	Fast translations Ltd.	Karlis	

[Issue PO](#)

[Save](#) [Issue agreement](#) [Issue invoice](#) [Delete](#)

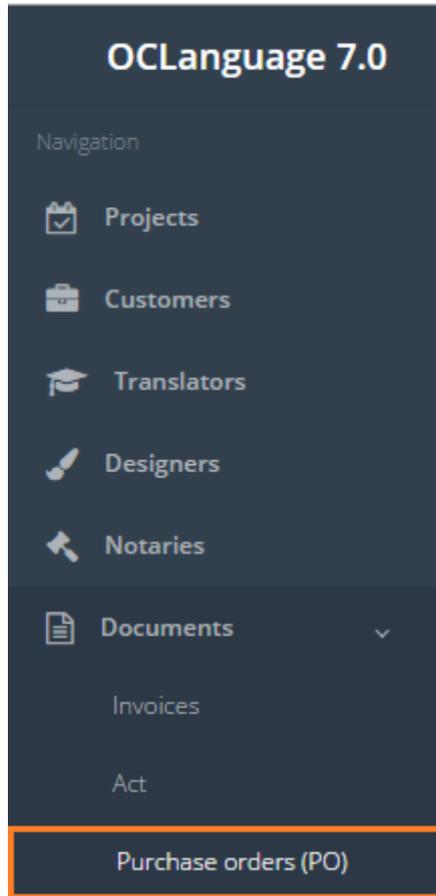
5. Click () to send PO to the vendor.

! 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 () to send an act to the particular vendor's e-mail address.