Purchase Orders

To add a line to an existing Purchase Order

1. Open the "Items" form
2. Filter for the Item you want to make the purchase order line for
   a. Type the Item # in the Item field followed by a *
   b. Click the magnifying glass to bring up the collection
3. Find the Item # that has the suffix "-P" and select it
4. With the –P selected click the "Actions" menu and go to "List Purchase Orders"
5. With the "Purchase Order Listing (linked)" child form opened and selected find the latest purchase order and select it.
6. From here you can copy and paste the order # into the "Purchase Orders" form and click the magnifying glass or right click on the selected purchase order # and go to "Details"
7. Once the information comes up verify it is the right vendor and right warehouse
8. On the right set of buttons click "Lines"
9. To get a new PO line click the New button in the tool bar or click the Yellow square to the right of the * under the last line #
10. Fill in the following starting with the Item #
    a. Enter the Item # in the Item field and press TAB
    b. Status should equal "Ordered"
    c. Change the due date to the right date
    d. In the "Ordered:" field put the QTY that will be sent for platting
    e. Make sure the warehouse field is correct. Should be set to the warehouse that will send out the Item.
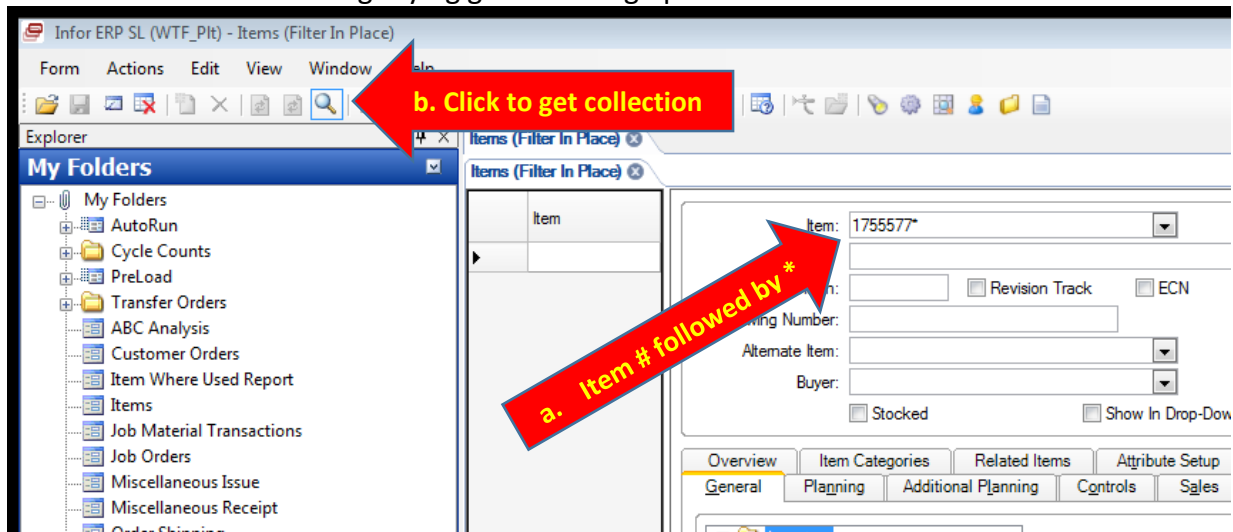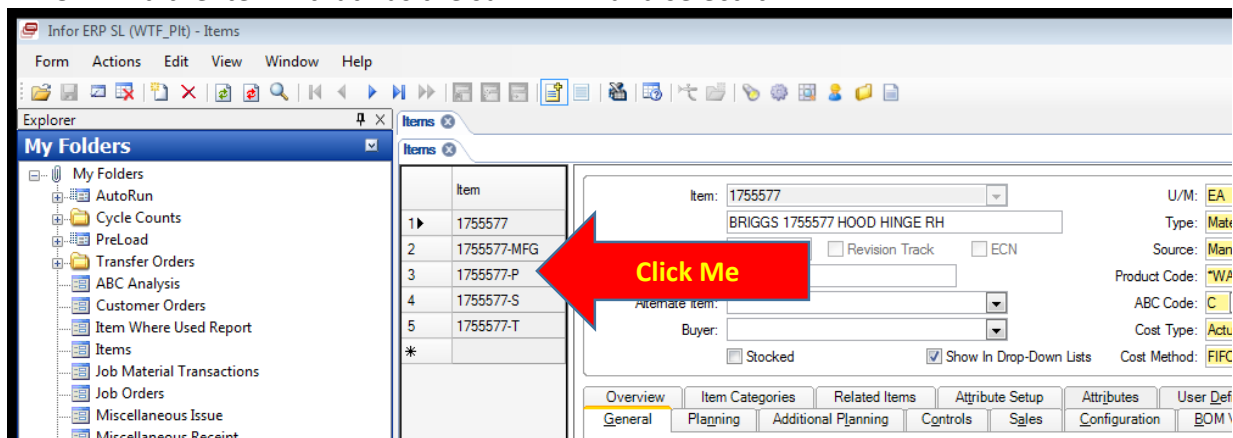11. Click save
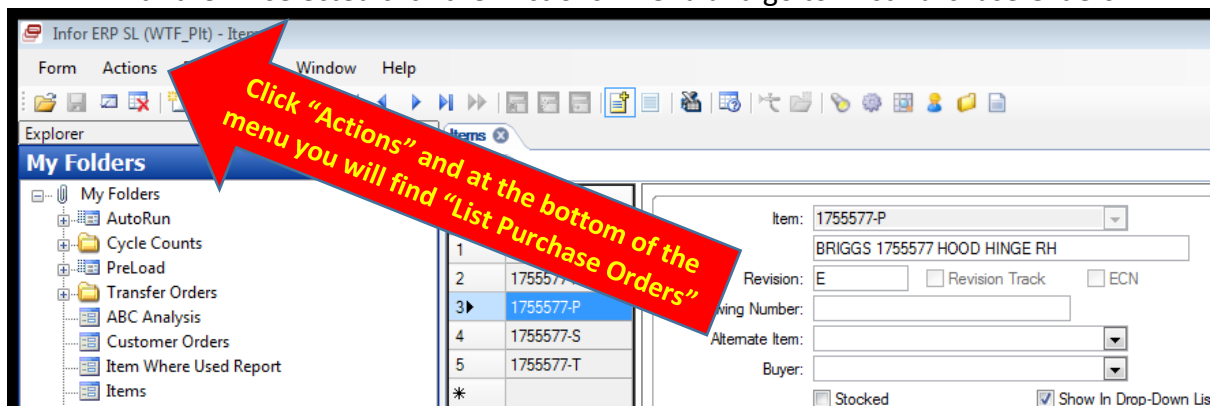

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Purchase Orders

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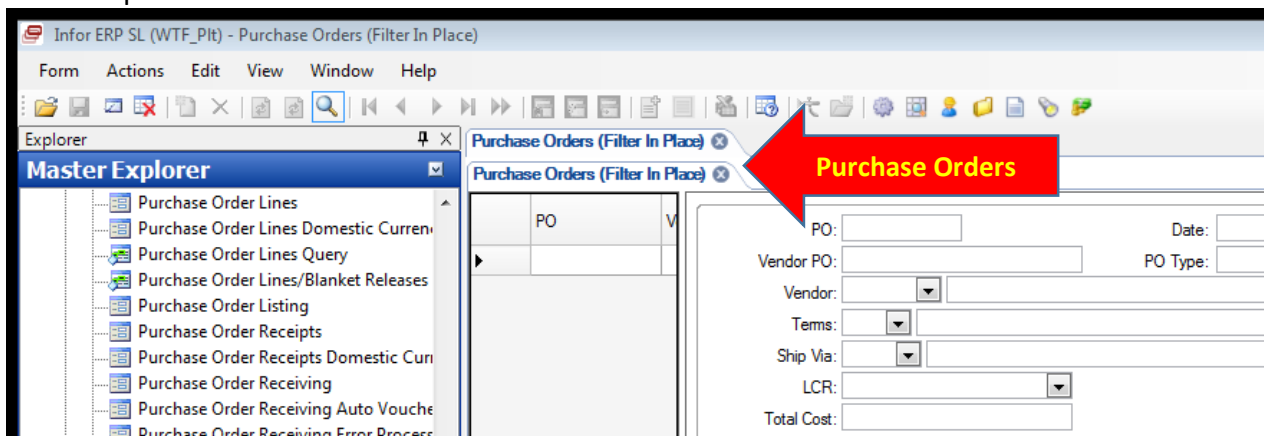

11. Click Save

Purchase Orders

To make a Purchase Order from scratch

1. Open the "Purchase Orders" form
2. Click the magnifying glass to take the (Filter In Place) off
3. Click the New button to make a new Purchase Order
4. Fill in the Following:
   a. Start with the "Vendor:" field, enter the vendor number. (To find the vendor number see the end of this document.)
   b. "PO Type is typically "Regular" but can be a blanket order
   c. "Status" should be "Ordered" to be visible on the vendor portal
   d. "Warehouse:" should be set to the warehouse that will be sending the Item out to the customer.
   e. "Terms:" will auto fill. Unless told otherwise leave this field set to whatever auto fills.
   f. After the vendor # and the Yellow Fields are filled in click the "General" tab
   g. n the general tab fill in "buyer" with your name and "FOB" with "Vendor" unless the PO is for PPI or JAGEMANN, for these 2 put "WireTech"
5. Save.
6. If notes are necessary click the notes button after you save the PO.

This is the notes button

7. From the set of buttons on the right click the "Lines" button
8. On the "Purchase Order Lines (Linked)" child tab fill in the following fields:
   a. "Item:" this should be the first thing entered and the tab button should be pressed.
   b. "Status:" this needs to be set to ordered to be visible on the vendor portal
   c. "Due Date" should be set to the date Items needs to be platted.
   d. "Ordered" should have the QTY that is being sent to the plater.
   e. "Warehouse" should be set to the warehouse that will send out the item to the customer
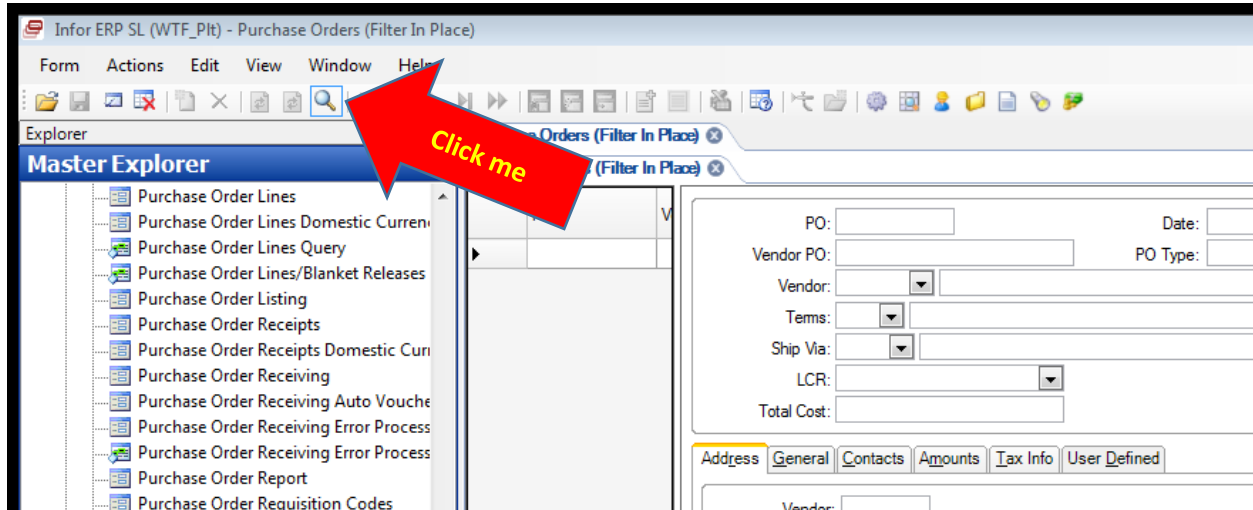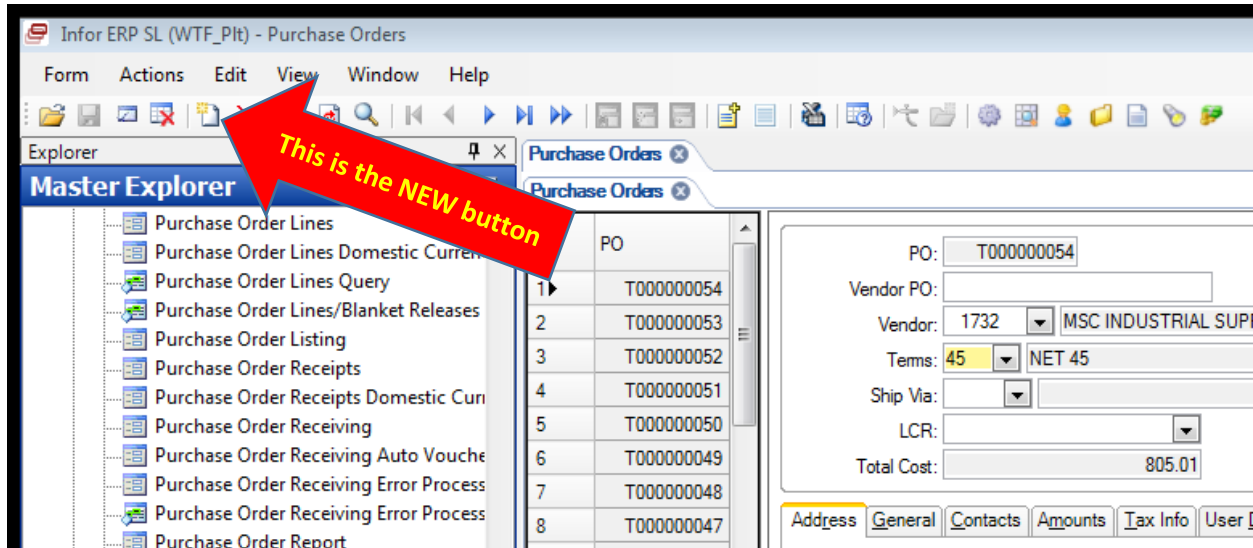9. Click Save

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Purchase Orders

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Purchase Orders

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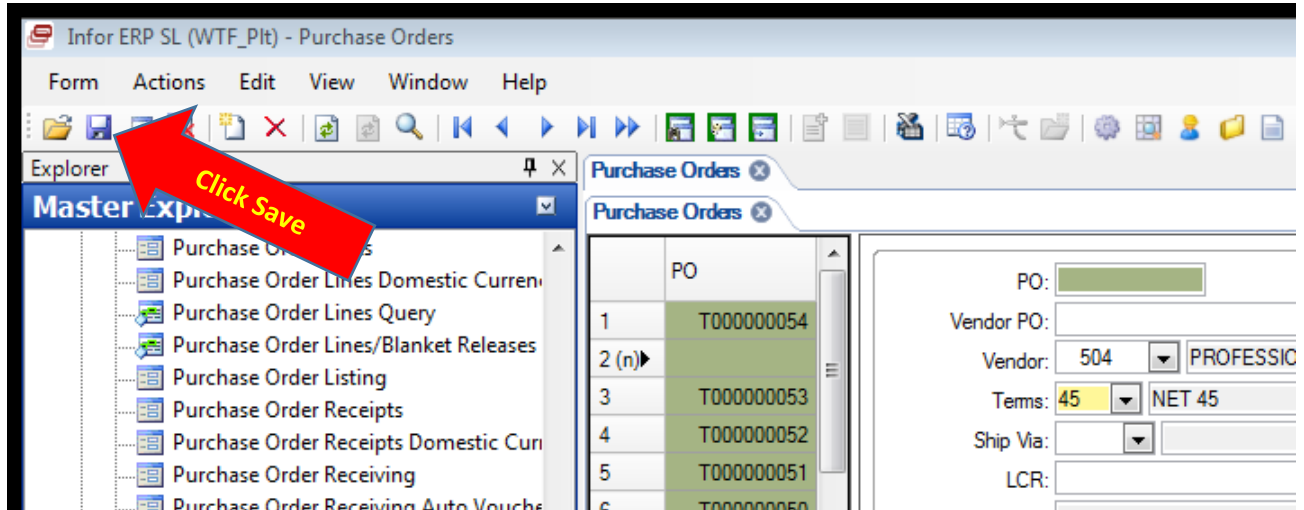# Purchase Orders

5. Save.

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Purchase Orders

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    c. "Due Date" should be set to the date Items needs to be platted.
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    e. "Warehouse" should be set to the warehouse that will send out the item to the customer

8. Click Save

Purchase Orders

To find a Vendor

1. Open the "Vendors" from
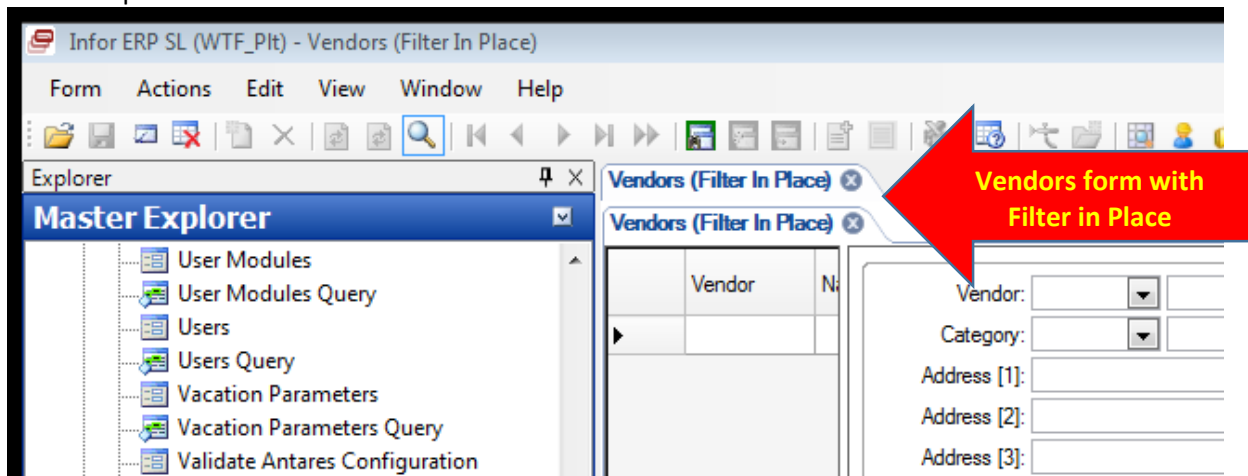
2. Next to the "Vendor:" drop down menu type the beginning of the vendor name followed by *
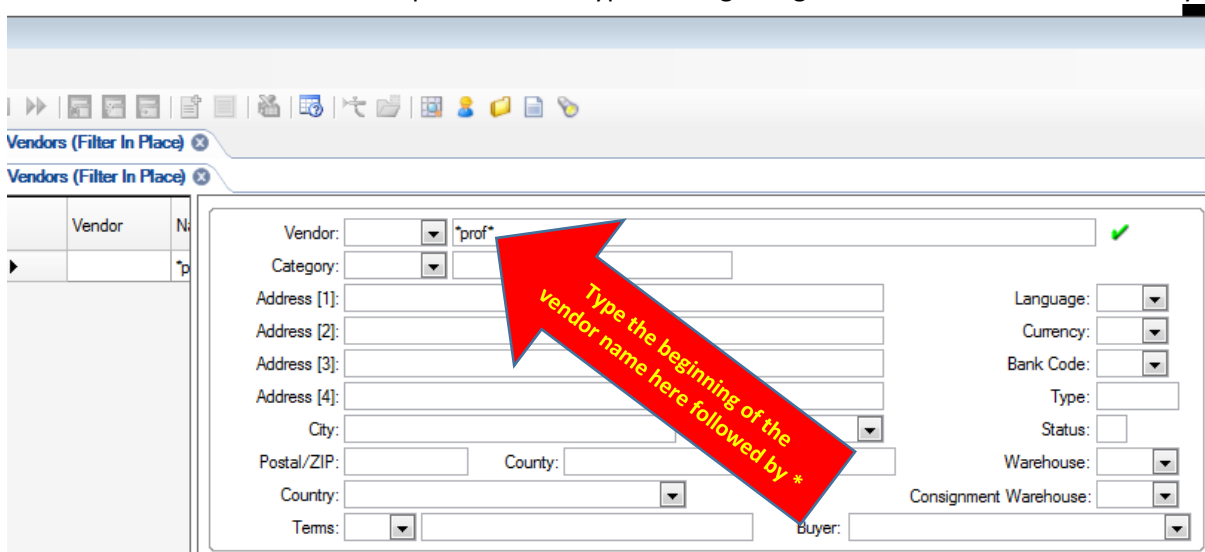
3. Click the magnifying glass to show results
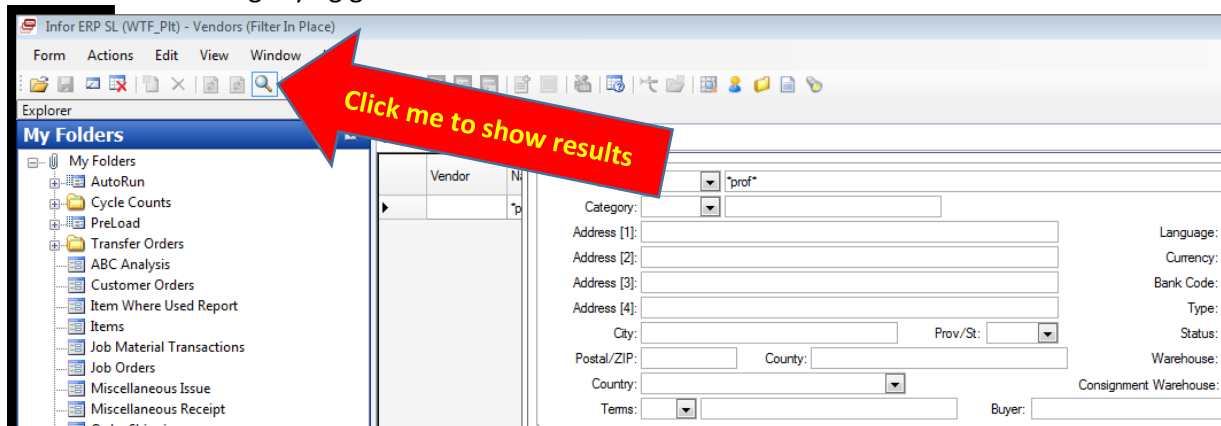
Purchase Orders

Receiving a PO

1. Open "Purchase Order Receiving" form
2. Put the PO # in the "PO Number" field and press Tab
3. If you get an error that says "Not one PO line exists" then you need to change the warehouse. To change the warehouse [click here](#)
4. Fill in the following
   a. Put a check in the box under the select column
   b. If the "Receive QTY" is not correct put the right amount in there.
   c. Click the "Receive" button

1. Open "Purchase Order Receiving" form

2. Put the PO # in the "PO Number" field and press Tab

Purchase Orders

3. If you get an error that says "Not one PO line exists" then you need to change the warehouse.
    To change the warehouse click here

4. Fill in the following
    a. Put a check in the box under the select column
    b. If the "Receive QTY" is not correct put the right amount in there.
    c. Click the "Receive" button

Purchase Orders

To change warehouse

1. Click the "Actions" menu in the upper left of the screen
2. Click "Change Warehouse"
3. Choose the warehouse that platted the item then click ok

1. Click the "Actions" menu in the upper left of the screen
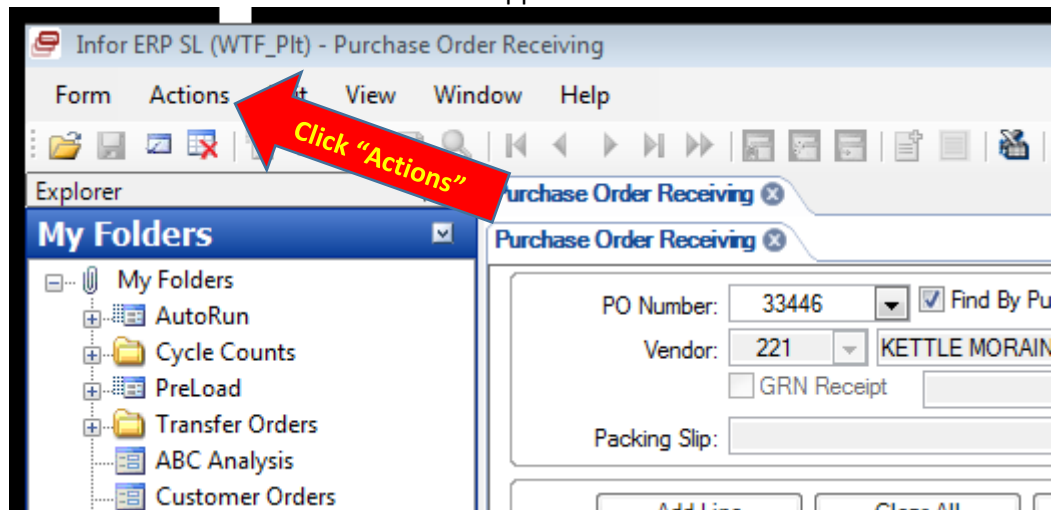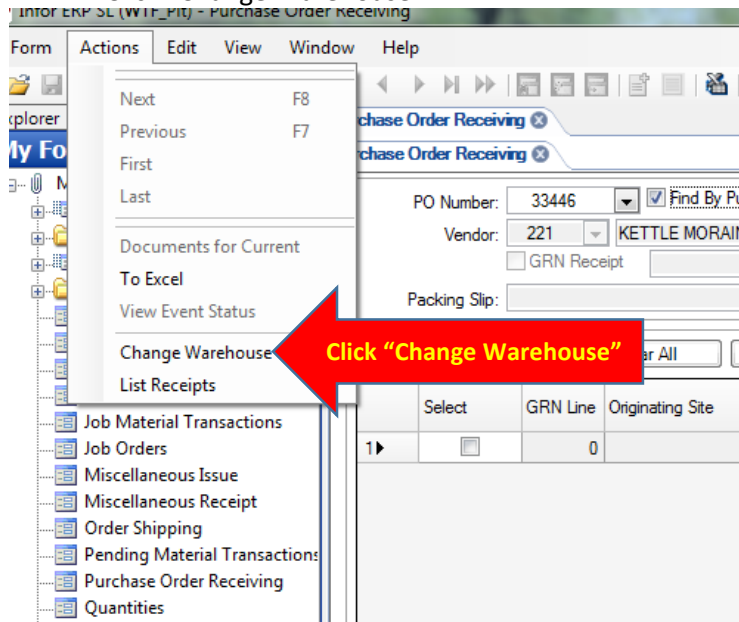
2. Click "Change Warehouse"

Purchase Orders

3. You may or may not get this warning. If you do click ok

Purchase Order Receiving ⊗

Purchase Order Receiving ⊗

PO Number:	33446	▼	☑ Find By Purchase Order Number		Wareh
Vendor:	221	▼	KETTLE MORAINE COATINGS		Starting Due [
	☐ GRN Receipt			▼	Ending Due [
Packing Slip:			PO Line/Release Status: Ordered	▼	Transaction [

| Add Line | Clear All | Select All | Deselect All | Add Purchase Order | Receive |

|	Select	GRN Line	Originating Site	Builder PO	PO	Line	Release	DR Return	Receive Qty
1▶	☐	0			33446	2	0	☐	10,000

Detail | Serial Numbers | Supplementary | Landed Cost | Pieces

Location:	STOCK	▼	☐ To Container
Container:			
Lot:			
Import Document ID:		▼	
Item:	747-06243-P		

Infor ERP SL ✕

❓ This Action Will Clear All

[OK]   [Cancel]

May or may not get this warning if you do click ok ➡

In Cost

Material: 0.33600
Freight: 0.00000

4. Choose the warehouse that platted the item then click ok

Infor ERP SL (WTF_Plt) - Change Warehouse (Modal)

Form   Actions   Edit   View   Window   Help

Explorer

My Folders

- My Folders
  - AutoRun
  - Cycle Counts
  - PreLoad

Choose one of these ➡

- Item Where Used Re|
- Items
- Job Material Transactions
- Job Orders
- Miscellaneous Issue
- Miscellaneous Receipt

Purchase Order Receiving ⊗

Purchase Order Receiving ⊗   Change Warehouse (Modal) ⊗

	Warehouse	Name
1	DCE	
2	JPC	JAGEMANN PLATING CO
3	KI	KRUEGER
4▶	KMC	KETTLE MORAINE COATINGS
5	MAGC	Magna Coat
6	MAIN	Wire Tech Fabricators
7	PPI	PROFESSIONAL PLATING INC

[OK]

Click after you choose Warehouse ⬅