

# Purchase Orders

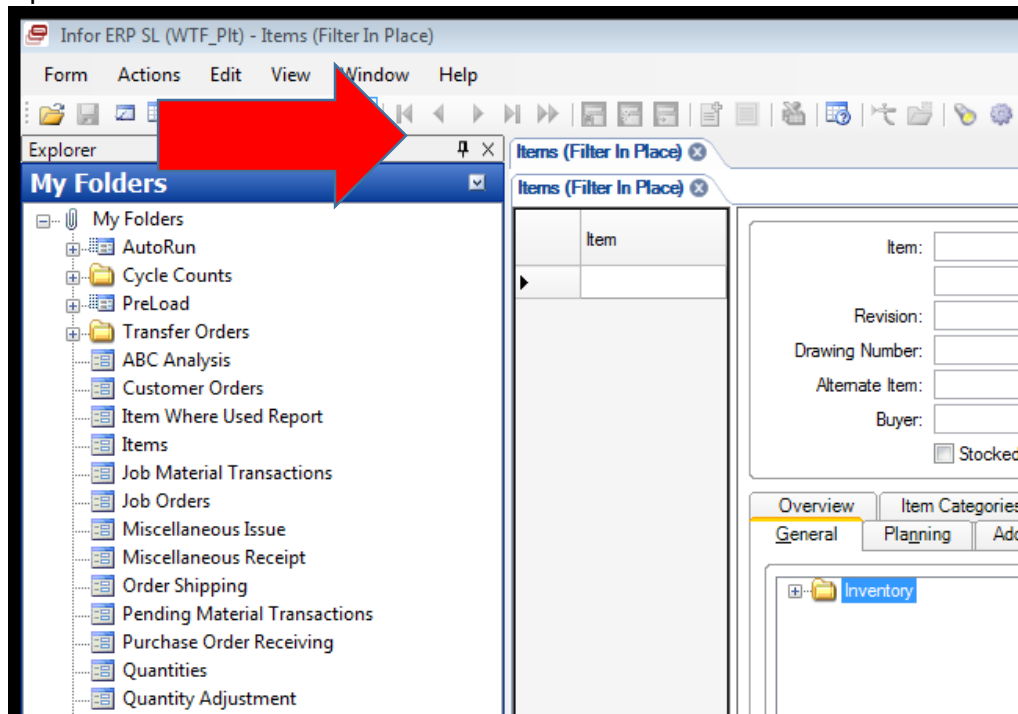
[Add a line](#) [New PO](#) [Find A Vendor](#) [Receive PO](#) [Change Warehouse](#)

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## 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 plating
  - e. Make sure the warehouse field is correct. Should be set to the warehouse that will send out the Item.
11. Click save

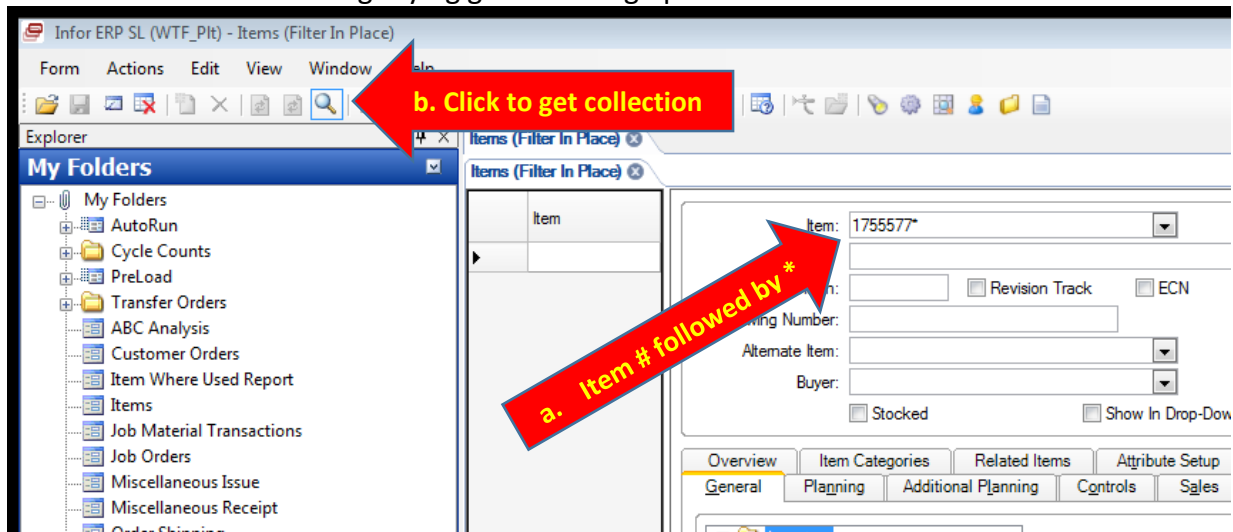
1. Open the "Items" form



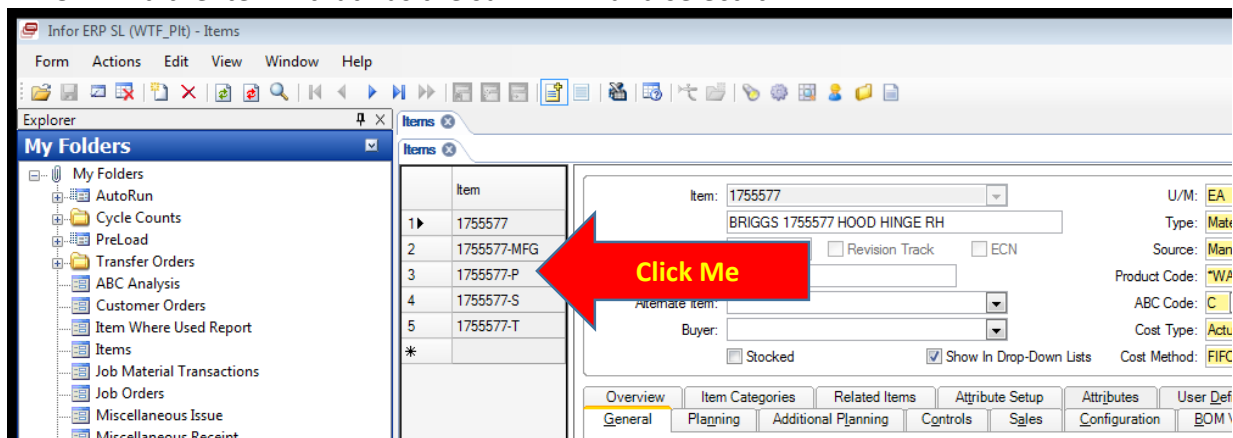
# Purchase Orders

[Add a line](#) [New PO](#) [Find A Vendor](#) [Receive PO](#) [Change Warehouse](#)

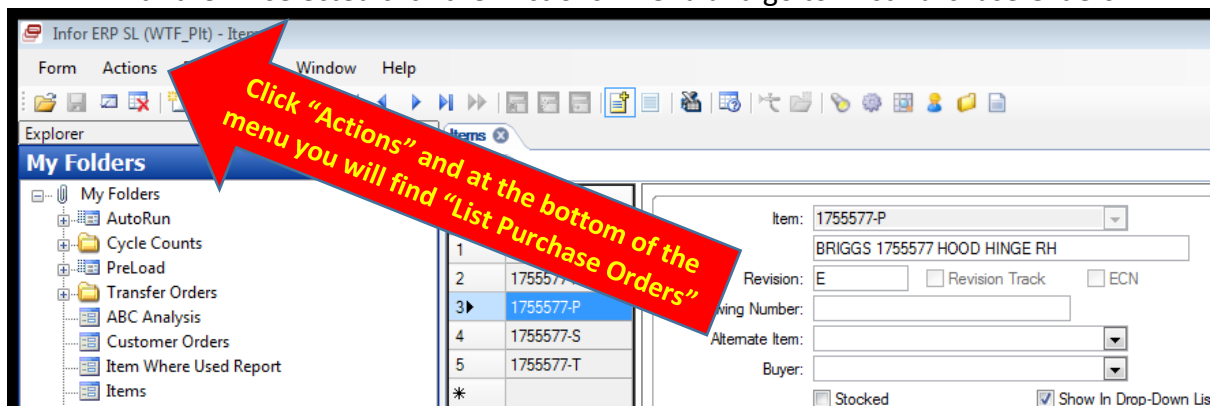
2. Filter for the Item you want to make the purchase order line for
  - a. Type the Item # in the Item field followed by a \*
  - b. Click the magnifying glass to bring up the collection



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"



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5. With the “Purchase Order Listing (linked)” child form opened and selected find the latest purchase order and select it.

Order Listing (Linked)

Window Help

Items

Items Purchase Order Listing (Linked)

**Purchase Order Listing (Linked)**

	PO	Name	Status	Line	Release	Ordered	Received	Due Date	Item
1	32848	PROFESSIONAL PLATING INC	Filled	1	0	5.000	5.000	12/19/2012	1755577-P
2	33013	PROFESSIONAL PLATING INC	Filled	1	0	500.000	500.000	01/14/2013	1755577-P
3	33013	PROFESSIONAL PLATING INC	Filled	2	0	524.000	524.000	01/16/2013	1755577-P
4	33013	PROFESSIONAL PLATING INC	Filled	3	0	411.000	500.000	01/17/2013	1755577-P
5	33013	PROFESSIONAL PLATING INC	Filled	5	0	620.000	620.000	02/11/2013	1755577-P
	33013	PROFESSIONAL PLATING INC	Filled	6	0	1,005.000	1,005.000	03/06/2013	1755577-P
	33013	PROFESSIONAL PLATING INC	Filled	7	0	521.000	816.000	04/17/2013	1755577-P
	33013	PROFESSIONAL PLATING INC	Filled	8	0	500.000	521.000	04/18/2013	1755577-P
	33013	PROFESSIONAL PLATING INC	Filled	9	0	538.000	538.000	07/17/2013	1755577-P
	33013	PROFESSIONAL PLATING INC	Filled	10	0	449.000	449.000	08/12/2013	1755577-P

**Latest Purchase order. Copy this #**

6. From here you can copy and paste the order # into the “Purchase Orders” form and click the magnifying glass

Infor ERP SL (WTF\_PIT) - Purchase Orders (Filter In Place)

Form Actions Edit View Window Help

Explorer

**Master Explorer**

- Purchase Order Lines
- Purchase Order Lines Domestic Current
- Purchase Order Lines Query
- Purchase Order Lines/Blanket Releases
- Purchase Order Listing
- Purchase Order Receipts
- Purchase Order Receipts Domestic Current
- Purchase Order Receiving
- Purchase Order Receiving Auto Voucher
- Purchase Order Receiving Error Process
- Purchase Order Receiving Error Process
- Purchase Order Report

**Click here after pasting**

PO: 33013 Date:

Vendor PO: Vendor: PO Type:

Terms:

Ship Via:

LCR:

Total Cost:

Address General Contacts Amounts Tax Info User Defined

**Paste # here**

7. Once the information comes up verify it is the right vendor and right warehouse

Purchase Orders

Purchase Orders

PO	V
1	33013
*	

**Set this to the warehouse that will ship item to customer**

PO: 33013 Status: Ordered

Vendor PO: Vendor: 504 PRO Change: 0

Terms: 45 NET 45 Change Status: Opened

Ship Via: GEN GENCO Builder PO:

LCR: Originating Site:

Total Cost: 2,989.70

Address General Contacts Amounts Tax Info User Defined

Vendor: 504

PROFESSIONAL PLATING INC  
705 NORTHWAY DRIVE  
PO BOX 67  
BRILLION WI 54110-0067

**Verify this is the vendor that is plating item**

Lines Releases Landed Cost Purchase Order Report Interactions Copy PO PO Receiving Link Source Site CO

Detail

# Purchase Orders

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8. On the right set of buttons click "Lines"

The screenshot shows the 'Purchase Orders' form. On the right side, there is a vertical stack of buttons: 'Lines', 'Releases', 'Landed Cost', 'Purchase Order Report', 'Interactions', 'Copy PO', 'PO Receiving', and 'Link Source Site CO'. A red arrow points from the text 'Click "Lines"' to the 'Lines' button. The form also displays fields for PO number (33013), Date (01/07/2013), Vendor (504), Warehouse (MAIN), and a list of buttons at the bottom: 'Address', 'General', 'Contacts', 'Amounts', 'Tax Info', and 'User Defined'.

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 #

The screenshot shows the 'Purchase Order Lines (Linked)' window. On the left, there is a 'Master Explorer' tree. In the center, there is a table with columns 'Line Status' and 'Item Description'. The table contains several rows, each with a line number and a status of 'Filled'. A red arrow points from the text 'Click the new button or the Yellow box to get a new line' to the 'New' button in the toolbar and the yellow square at the end of the last line in the table. On the right, there are fields for PO number (33013), Vendor (504), and a 'Vendor PO' field. Below these, there are fields for 'Line' (1), 'Item' (1755577), 'Vendor Item' (PPI QT#), and 'Manufacturer'. At the bottom, there are tabs for 'General', 'Costs', and 'Drop Shi', and a 'Warehouse' field.

# Purchase Orders

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## 10. Fill in the following starting with the Item #

- Enter the Item # in the Item field and press TAB
- Status should equal "Ordered"
- Change the due date to the right date
- In the "Ordered:" field put the QTY that will be sent for plating
- Make sure the warehouse field is correct. Should be set to the warehouse that will send out the Item.

The screenshot shows the 'Purchase Order Lines (Linked)' form. A green arrow points to the 'Item' field with the text 'Enter Item # First and press tab'. Three red arrows point to the 'Status' (set to 'Planned'), 'Due Date' (set to '01/07/2013'), and 'Ordered' (set to '0.000') fields, with the text 'This should say Ordered', 'Change Me', and 'QTY sent to Platter' respectively. A red arrow points to the 'Warehouse' field (set to 'MAIN') with the text 'This field should be set to the warehouse that will send out the Item'. The form includes fields for Vendor, Vendor PO, Date, Status, Due Date, Promise Date, Item, Ordered, Item Cost, Extended Cost, Manufacturer, and Warehouse. There are also buttons for 'PO', 'Material Transactions', 'Receipts', 'GRN Lines', and 'Price Request'.

## 11. Click Save

The screenshot shows the 'Purchase Order Lines (Linked)' form with the 'Save' button highlighted by a red arrow. The form displays a list of purchase order lines on the left, with the following data:

Line	Status	Item Description
1	Filled	BRIGGS 1755577 HOOD
2 (n)	Ordered	BRIGGS 1755577 HOOD
3	Filled	BRIGGS 1755577 HOOD
4	Filled	BRIGGS 1755577 HOOD
5	Filled	BRIGGS 1755577 HOOD
6	Filled	BRIGGS 1755577 HOOD
7	Filled	BRIGGS 1755577 HOOD
8	Filled	BRIGGS 1755577 HOOD
9	Filled	BRIGGS 1755577 HOOD
10	Filled	BRIGGS 1755577 HOOD
11	Filled	BRIGGS 1755577 HOOD
*		

The right side of the form shows the details for the selected line (Line 11). The 'Status' is 'Ordered', 'Due Date' is '09/24/2013', 'Promise Date' is blank, 'Item' is '1755577-p', 'Ordered' is '1,000.000', 'Item Cost' is '0.56900', and 'Extended Cost' is '569.00'. The 'Warehouse' is set to 'PPI'. The 'Save' button is highlighted in the top left corner of the form.

# Purchase Orders

[Add a line](#) [New PO](#) [Find A Vendor](#) [Receive PO](#) [Change Warehouse](#)

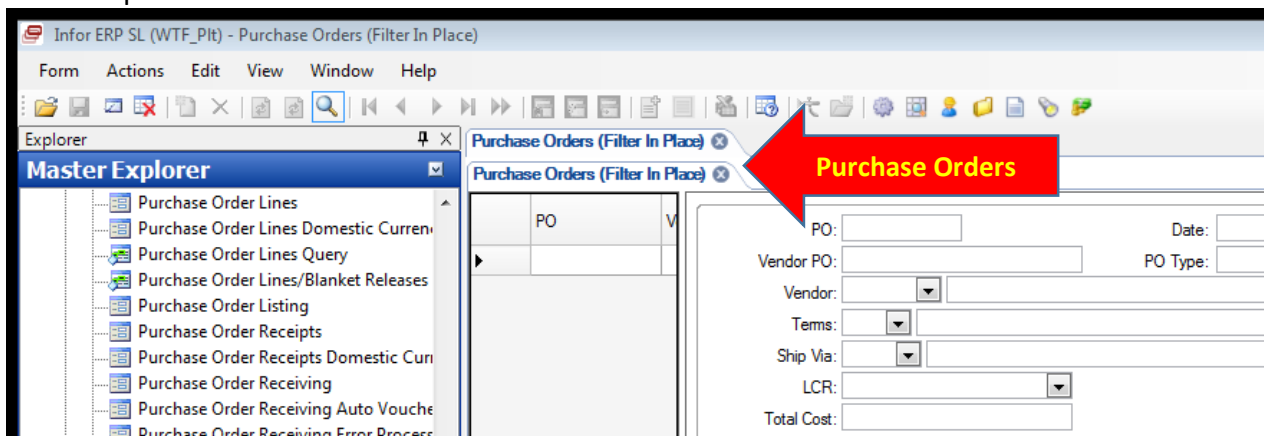
## To make a Purchase Order from scratch

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. In 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.



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

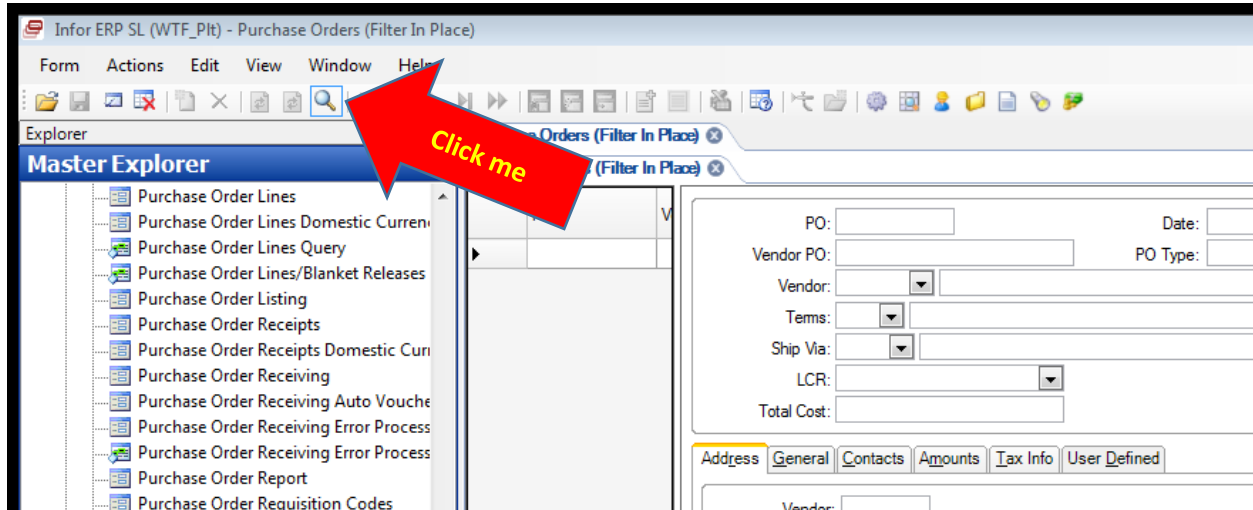
1. Open the "Purchase Orders" form



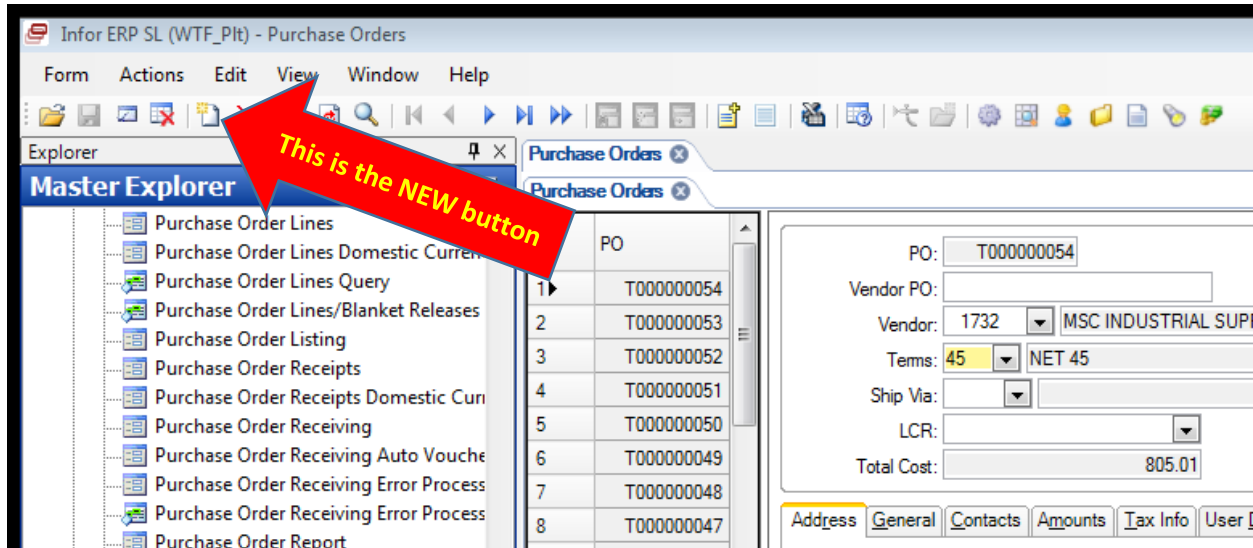
# Purchase Orders

[Add a line](#) [New PO](#) [Find A Vendor](#) [Receive PO](#) [Change Warehouse](#)

2. Click the magnifying glass to take the (Filter In Place) off



3. Click the New button to make a new Purchase Order





# Purchase Orders

[Add a line](#) [New PO](#) [Find A Vendor](#) [Receive PO](#) [Change Warehouse](#)

## 4. Fill in the Following:

- Start with the "Vendor:" field, enter the vendor number. (To find the vendor number see the end of this document.)
- "PO Type" is typically "Regular" but can be a blanket order
- "Status" should be "Ordered" to be visible on the vendor portal
- "Warehouse:" should be set to the warehouse that will be sending the Item out to the customer.
- "Terms:" will auto fill. Unless told otherwise leave this field set to whatever auto fills.
- After the vendor # and the Yellow Fields are filled in click the "General" tab

This screenshot shows the 'Purchase Orders' form with several red and green arrows pointing to specific fields. The arrows are labeled: 'Typically Regular' pointing to the 'PO Type' dropdown, 'Set to Ordered' pointing to the 'Status' dropdown, 'Set to warehouse that will ship Item' pointing to the 'Warehouse' dropdown, 'Start here! Enter the vendor # and press tab' pointing to the 'Vendor' field, 'Will auto fill' pointing to the 'Terms' dropdown, and 'Click General tab last' pointing to the 'General' tab button. The form includes fields for PO number, Date, Status, PO Type, Warehouse, Vendor, Terms, Ship Via, LCR, Total Cost, Change, Change Status, Builder PO, and Originating Site. A list of PO lines is visible on the left.

- In 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"

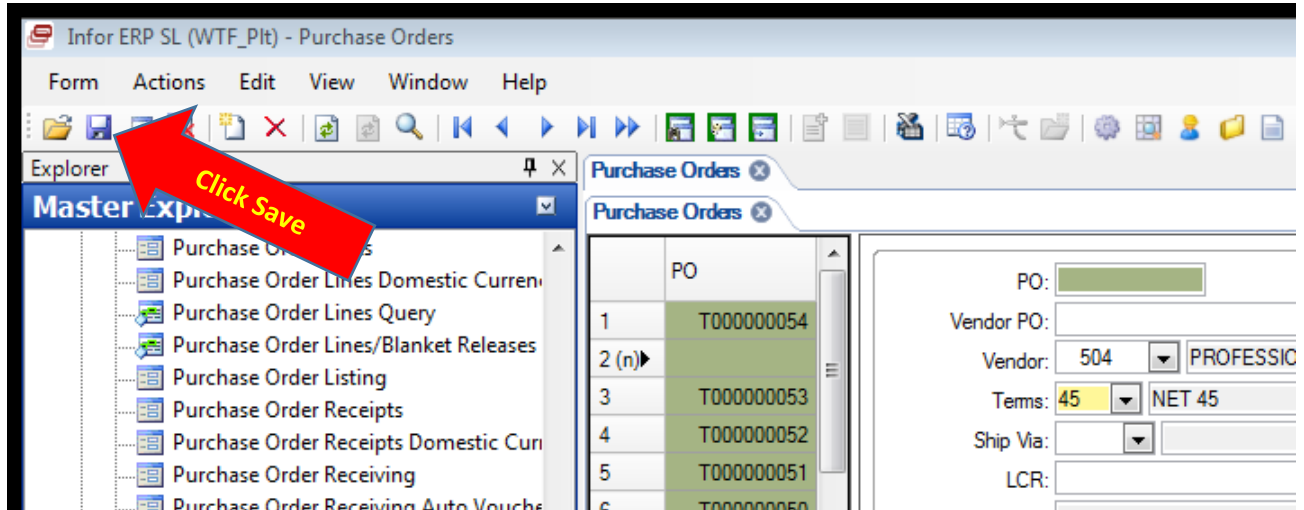
This screenshot shows the 'Purchase Orders' form with the 'General' tab selected. Red arrows point to the 'Buyer' field (labeled 'Your name here') and the 'FOB' field (labeled '"Vendor" or "WireTech" goes here'). The form includes fields for PO number, Date, Status, PO Type, Warehouse, Vendor, Terms, Ship Via, LCR, Total Cost, Change, Change Status, Builder PO, and Originating Site. A list of PO lines is visible on the left.



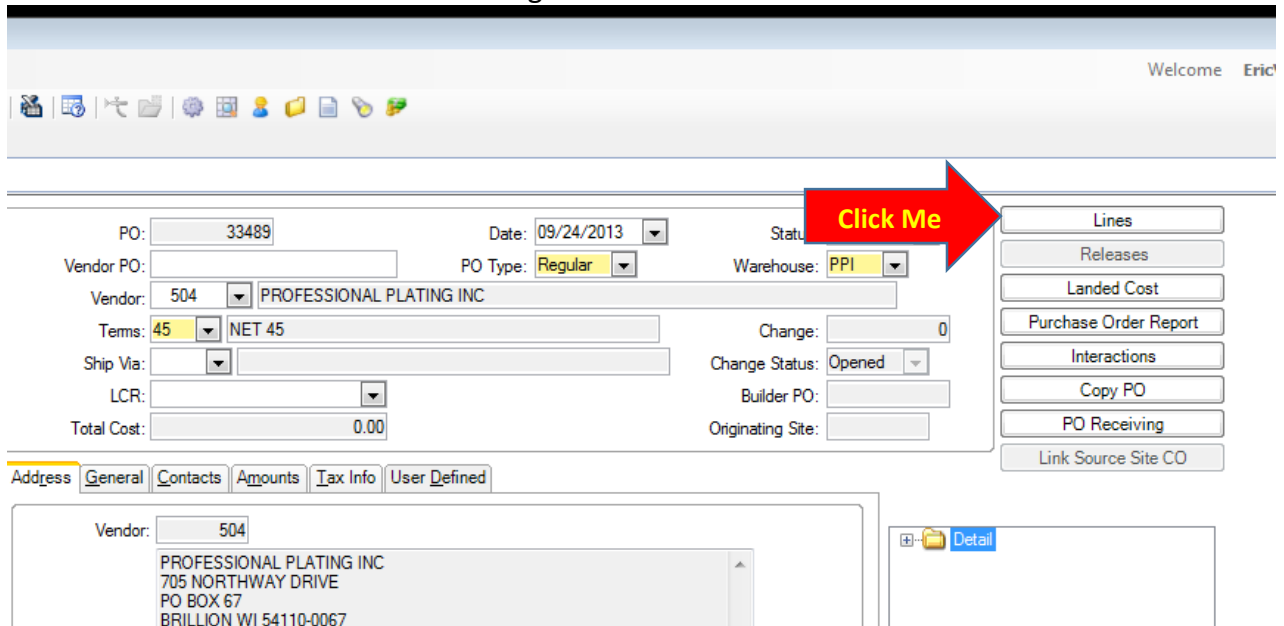
# Purchase Orders

[Add a line](#) [New PO](#) [Find A Vendor](#) [Receive PO](#) [Change Warehouse](#)

## 5. Save.



## 6. From the set of buttons on the right click the “Lines” button



# Purchase Orders

[Add a line](#) [New PO](#) [Find A Vendor](#) [Receive PO](#) [Change Warehouse](#)

7. 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

The screenshot shows the 'Purchase Order Lines (Linked)' form. Annotations with red arrows point to specific fields:

- Enter Item # First and press tab**: Points to the 'Item' field.
- This should say Ordered**: Points to the 'Status' dropdown menu.
- Change Me**: Points to the 'Due Date' field.
- QTY sent to Platter**: Points to the 'Ordered' quantity field.
- This field should be set to the warehouse that will send out the Item**: Points to the 'Warehouse' dropdown menu.

Other visible fields include PO: 33013, Vendor: 504, Date: 01/07/2013, Line: 11, Status: Planned, Due Date: 01/07/2013, Item Cost: 0.00000, and Warehouse: MAIN.

8. Click Save

The screenshot shows the 'Purchase Order Lines (Linked)' form with the 'Save' button highlighted by a red arrow. The form displays a list of purchase order lines on the left and detailed information for line 11 on the right.

Line	Status	Item Description
1	Filled	BRIGGS 1755577 HOOD
2 (n)	Ordered	BRIGGS 1755577 HOOD
3	Filled	BRIGGS 1755577 HOOD
4	Filled	BRIGGS 1755577 HOOD
5	Filled	BRIGGS 1755577 HOOD
6	Filled	BRIGGS 1755577 HOOD
7	Filled	BRIGGS 1755577 HOOD
8	Filled	BRIGGS 1755577 HOOD
9	Filled	BRIGGS 1755577 HOOD
10	Filled	BRIGGS 1755577 HOOD
11	Filled	BRIGGS 1755577 HOOD
*		

Form details for Line 11:

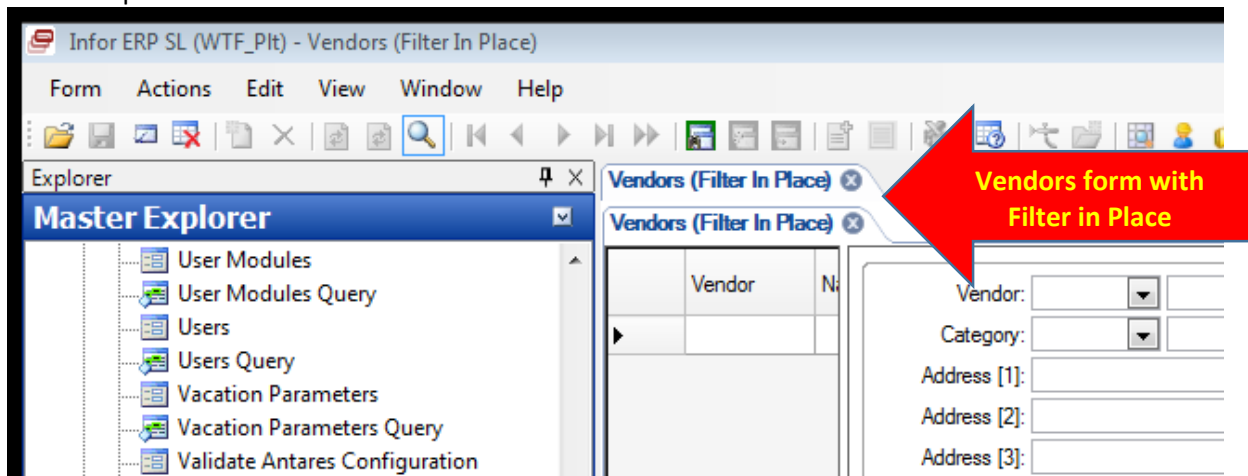
- PO: 33013, Status: Ordered, Date: 01/07/2013
- Vendor: 504, PROFESSIONAL PLATING INC
- Line: 11, Status: Ordered, Due Date: 09/24/2013, Promise Date: [blank]
- Item: 1755577p, Ordered: 1,000.000, EA
- BRIGGS 1755577 HOOD HINGE RH, Item Cost: 0.56900
- Vendor Item: PPI QT# 927250, Extended Cost: 569.00
- Warehouse: PPI

# Purchase Orders

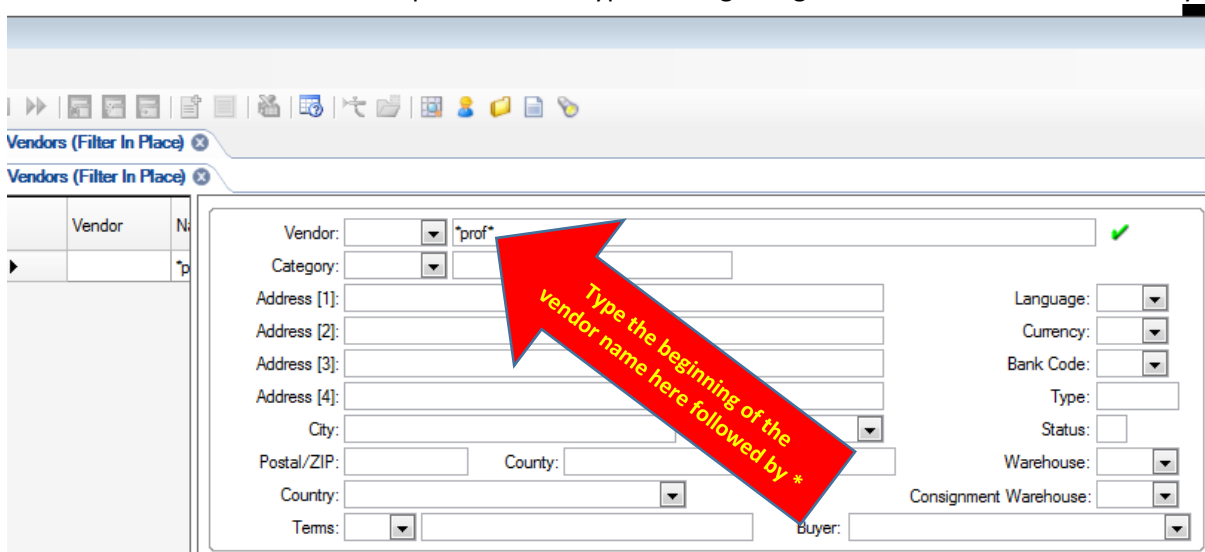
[Add a line](#) [New PO](#) [Find A Vendor](#) [Receive PO](#) [Change Warehouse](#)

## To find a Vendor #

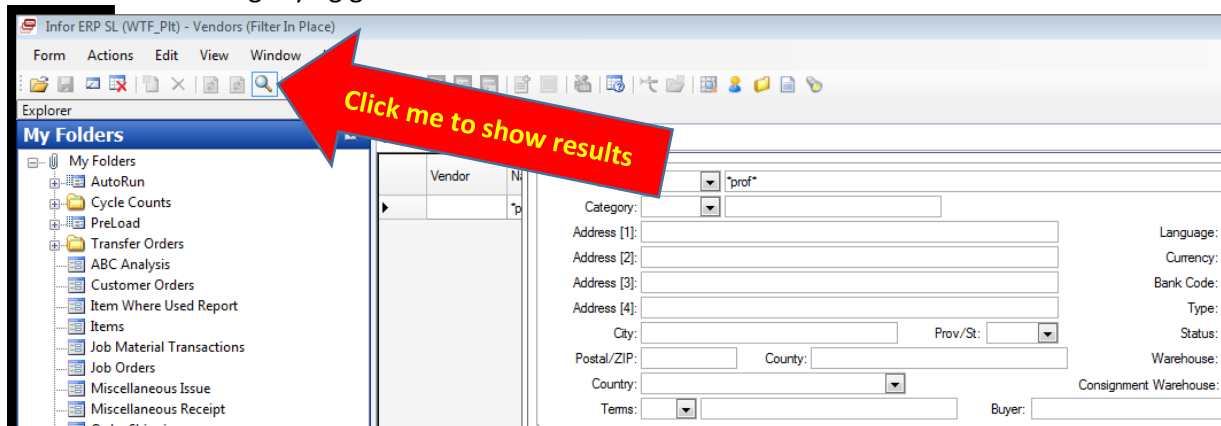
1. Open the "Vendors" from



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

[Add a line](#) [New PO](#) [Find A Vendor](#) [Receive PO](#) [Change Warehouse](#)

## 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

The screenshot shows the Infor ERP SL (WTF\_Plt) - Purchase Order Receiving form. The Explorer pane on the left shows 'My Folders' with various sub-folders. The main form area has a 'Purchase Order Receiving' tab selected. A red arrow points to the 'Purchase Order Receiving' tab in the Explorer pane.

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

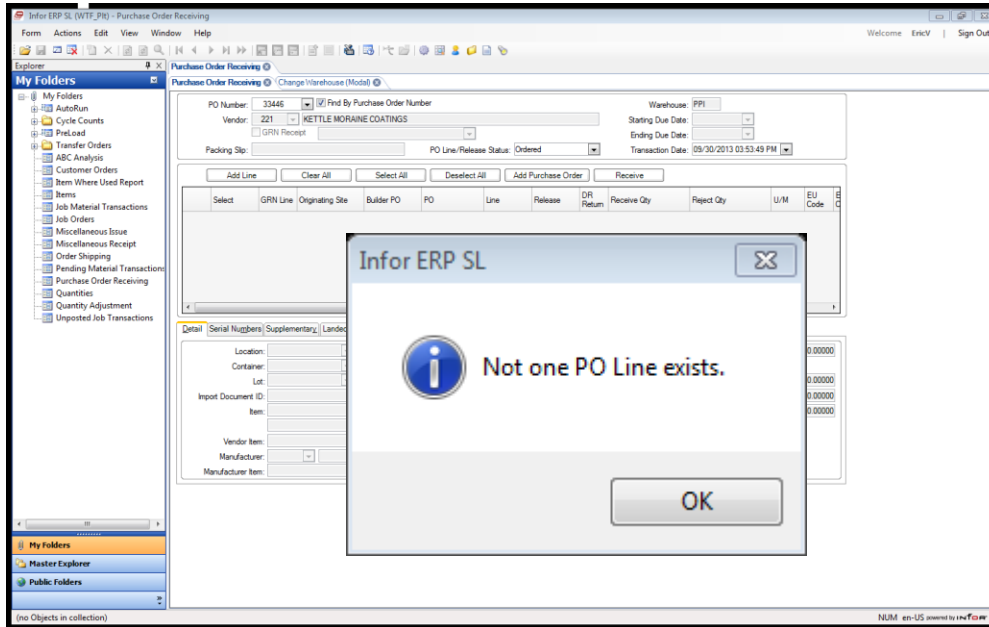
The screenshot shows the Infor ERP SL (WTF\_Plt) - Purchase Order Receiving form. The 'PO Number' field contains the value 33446. A red arrow points to the 'PO Number' field, and a red box with the text 'PO# here then press tab' is overlaid on the arrow.

Select	GRN Line	Originating Site	Builder PO	PO	Line	Release	DR Return	Receive Qty	Reject Qty	U/M
1▶	<input type="checkbox"/>	0		33446	2	0	<input type="checkbox"/>	10,000.000	0.000	EA

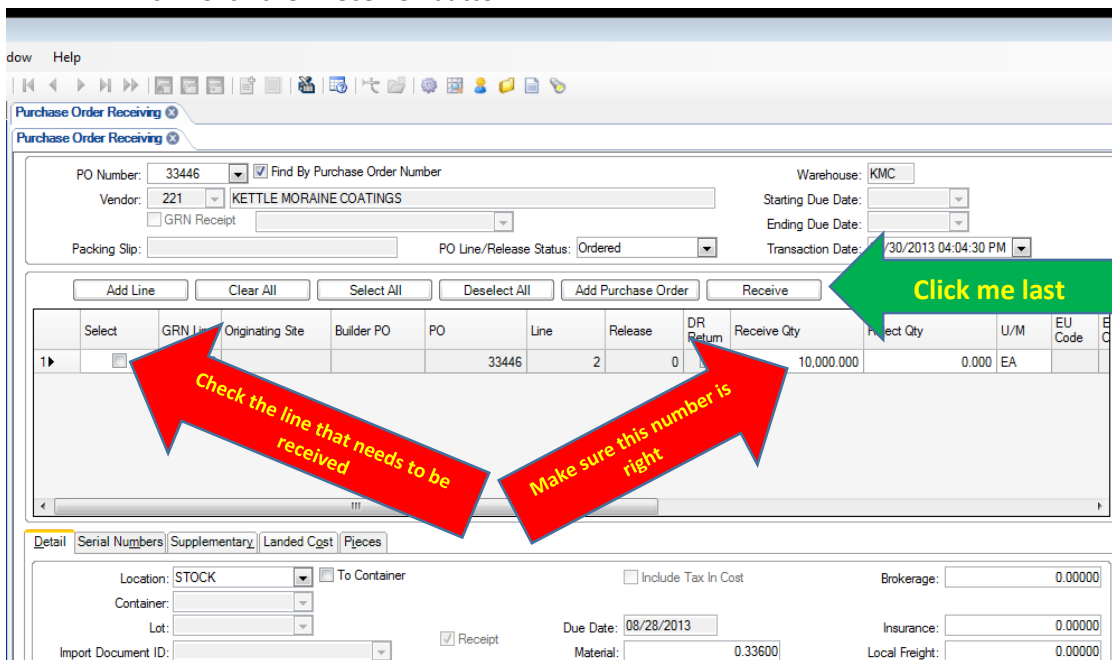
# Purchase Orders

[Add a line](#) [New PO](#) [Find A Vendor](#) [Receive PO](#) [Change Warehouse](#)

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
- Put a check in the box under the select column
  - If the “Receive QTY” is not correct put the right amount in there.
  - Click the “Receive” button



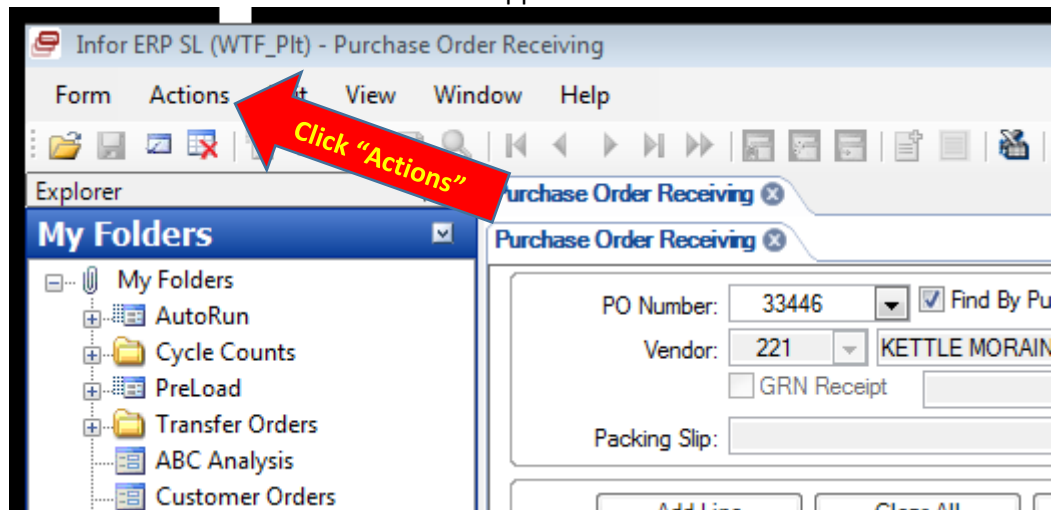
# Purchase Orders

[Add a line](#) [New PO](#) [Find A Vendor](#) [Receive PO](#) [Change Warehouse](#)

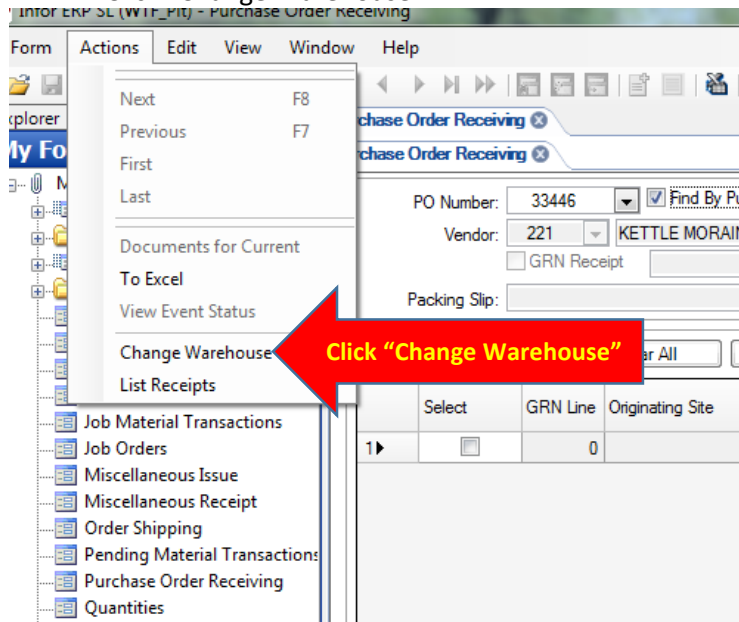
## To change warehouse

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

[Add a line](#) [New PO](#) [Find A Vendor](#) [Receive PO](#) [Change Warehouse](#)

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

**Purchase Order Receiving**

PO Number: 33446 ☒ Find By Purchase Order Number

Vendor: 221 KETTLE MORAIN COATINGS

☐ GRN Receipt

Packing Slip: PO Line/Release Status: Ordered

Warehouse: Starting Due Date: Ending Due Date: Transaction ID:

Buttons: 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▶	<input type="checkbox"/>	0		33446	2	0	<input type="checkbox"/>	10,000

**Infor ERP SL**

? This Action Will Clear All

OK Cancel

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

Location: STOCK ☐ To Container

Container: Lot: Import Document ID: Material: 0.33600

Item: 747-06243-P 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
- Item where Used Re
- Items
- Job Material Transactions
- Job Orders
- Miscellaneous Issue
- Miscellaneous Receipt

**Purchase Order Receiving**

**Change Warehouse (Modal)**

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

OK

Choose one of these

Click after you choose Warehouse