

## Knowledge Base



### Create a new Purchase Order

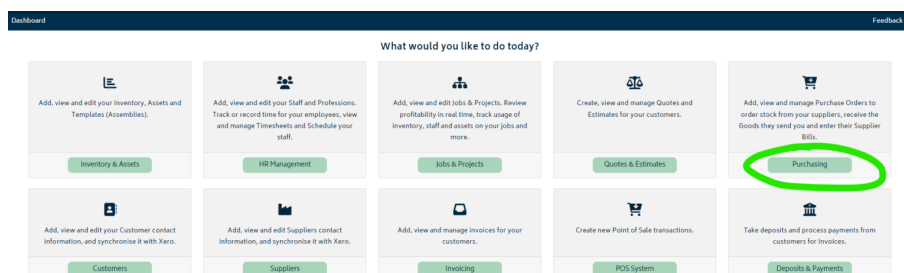
**Prerequisite:** Before you can create a purchase order you will need to have firstly created at least one inventory item in Gojee (refer to [Create a New Inventory Item](#) for more information). It is recommended you also set up the [supplier pricing for inventory items](#) (or [import supplier catalogues](#)) prior to creating purchase orders. You can allocate supplier as part of the process of creating a purchase order, but it will save you time if the pricing is already set up, and it may be less confusing on your first attempt.

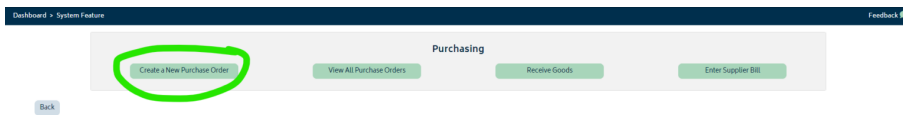
There are three main ways to create a new purchase order:

- Job-specific PO from the Job Actions list on a job
- All PO types from the [Reports > Purchase Orders](#) list
- All PO types from the Navigation screen

For POs created from the lists, just click the green Add or New Order button on the top right of the list.

For the navigation screen, click the Purchasing section and select “Create a New Purchase Order”:





For both this method and the Purchase Orders list, you will be presented with the following options:

A screenshot of a modal window titled 'Create Purchase Order(s)' with a close button (X) in the top right corner. The modal contains four options for creating purchase orders, each with a corresponding button:

- Option 1 - Re-order across all inventory items to replenish low stock**  
**Low Stock Re-order**
- Option 2 - Raise Purchase Order(s) for Specific Jobs**  
Jobs to Fulfill  
Select Jobs.. (dropdown menu)  
**Order for Selected Job(s) Only**
- Option 3 - Order for All Jobs**  
**Order for All Jobs**
- Option 4 - Re-Order Stock and Raise Purchase Order(s) for All Jobs**  
**Order for All Jobs and stock**

You can choose how you would like to proceed the four options in the modal above – a low stock reorder, ordering for specific jobs, ordering for all jobs, and ordering everything at once. Refer to the sections below for details on each option.

## Low Stock Re-order

The low stock re-order function uses the settings on each individual stock item to determine whether or not an order is required for each stock item. This process will raise one or more purchase orders (i.e. orders for one or more suppliers) in the one convenient action.

### Prerequisite:

For your items to be included in this type of order, you will need to firstly have set up both high and low stock levels for each inventory item. Refer to [Create a New Inventory Item](#) for more information on these levels.

Resources > Inventory > Arlec 9W Tri Colour Dimmable LED Downlights (IS002)

Arlec 9W Tri Colour Dimmable LED Downlights (IS002)

General Suppliers Attachments Orders Stock Adjustments Stock on Hand Instances Stock Movement Reservations

Name: Arlec 9W Tri Colour Dimmable LED Downlights

Item Code: IS002

Description: With Plug Bases

Unit of Measure (UoM): Each

Stock Type: Tracked as aggregate qty

Cost per Unit: 6.7143

Price per Unit: 10.0714

Markup %: 50

Set Price by Markup on Cost: ☒

Default Location: WH1

Stock Levels: Re-order at qty: 5 High Stock qty: 10

This function will only work for tracked items, it will not order untracked items, as there is no stock count for these items by design.

To create a low stock order, choose the first option from the modal:

**Create Purchase Order(s)** ✕

Option 1 - Re-order across all inventory items to replenish low stock

**Low Stock Re-order**

Option 2 - Raise Purchase Order(s) for Specific Jobs

Jobs to Fulfill

Select Jobs.. ▾

**Order for Selected Job(s) Only**

Option 3 - Order for All Jobs

**Order for All Jobs**

Option 4 - Re-Order Stock and Raise Purchase Order(s) for All Jobs

**Order for All Jobs and stock**

You'll be navigated to the create purchase order page:

**Create Purchase Orders**

Jobs: Please select... Branding Theme: Standard Supplier Priority: 1-Item order priority, 2-Supplier order priority, 3-Supplier price, 4-Order lead time

Re-order stock

Total Order from Local Hardware: \$912.00  
Total Order: \$912.00  
Amounts shown are tax exclusive

**Purchase Order to Local Hardware**

Item Code	Name	Unit	Order Qty	Unit Price	Amount	Est Lead Time
IS081	Ceiling Fan	Each	9	108.0000	\$972.00	1

Total Order: \$912.00 (Tax Exclusive)

This page will show a list of all the items where:

- The item has a stock on hand quantity that is less than the item's "Re-order at" quantity
- No open purchase order exists for stock for these items which would put the stock level above the "Re-order at" quantity when received.

**Tip:** from the [inventory list page](#), you get a view to see the status of your items. Use the filters as indicated in the image below to show the stock order levels, stock on hand, and on order levels. Your low stock re-orders will use this information when deciding which items require ordering.

**Inventory**

Filter By: Location Columns: Re-order at qty, High Stock qty

Item Code	Name	Description	Type	UoM	Cost/Unit	Price/Unit	Markup	Qty on Hand	Qty Available	Qty on Order	Re-order at qty	High Stock qty	Stock Value
IS082	Adtec SW To Ceiling Fan	With Plug Boxes	TAA	Each	\$4.71	\$10.07	55.0%	14	10	0	-	-	\$14.00
IS084	Call Out Fee	Carrier Allure 7.0kW	UNT	Each	\$0.00	\$100.00	4%	0	0	0	-	-	\$0.00
IS081	Ceiling Fan	Adtec 120cm White Cld...	TPI	Each	\$113.00	\$108.00	-4.4%	1	0	0	5	10	\$113.00
IS083	Recessed Ceiling Light	Carrier Allure 7.0kW	TAA	Each	\$1,800.00	\$1,848.70	2.1%	3	0	0	-	-	\$5,400.00

Records to display on page: 20

- From the create purchase order page, you will see one or more purchase order being generated, each will be presented in a card view with the supplier name at the top and all the items being ordered for the supplier listed in the card. The total order will be combined at the top of the page as per the image below:

**Create Purchase Orders**

Jobs: Please select... Branding Theme: Standard Supplier Priority: 1-Item order priority, 2-Supplier order priority, 3-Supplier price, 4-Order lead time

Re-order stock

Total Order from Local Hardware: \$912.00  
Total Order from Building Supplies Limited: \$11.00  
Amounts shown are tax exclusive

**Purchase Order to Local Hardware**

Item Code	Name	Unit	Order Qty	Unit Price	Amount	Est Lead Time
IS081	Ceiling Fan	Each	9	108.0000	\$972.00	1

Total Order: \$912.00 (Tax Exclusive)

**Purchase Order to Building Supplies Limited**

Item Code	Name	Unit	Order Qty	Unit Price	Amount	Est Lead Time
IS082	Adtec SW To Ceiling Fan	Each	5	2.2000	\$11.00	1

Total Order: \$11.00 (Tax Exclusive)

- You have the option to change a supplier to another existing supplier, or add a new supplier for the item on the fly. Simply click on the "change supplier" button on the line item and select an option. The existing suppliers will be shown in the list, in this case Building Suppliers Limited can also supply the Ceiling Fan. Each alternate suppliers price and lead time is also shown for convenience:

Reports > Purchase Orders > Create Purchase Order

Create Purchase Orders

Info > Branding Theme > Supplier Priority

Please select... Standard > Item order priority > Supplier order priority > Supplier price > Order lead time

g the order stock

Total Order from Local Hardware: \$112.00  
Total Order from Building Supplies Limited: \$0.00  
Total Order: \$112.00  
Amounts shown are tax inclusive

### Purchase Order to Local Hardware

Item Code	Name	Unit	Order Qty	Unit Price	Amount	Est Lead Time
15001	Ceiling Fan	Each	9	124.44	\$112.00	1

Buildings Supplies Limited - Order lead time: 2 - \$11.00  
+ Add new supplier  
Total Order: \$112.00  
(Tax Excluded)

+ Change Supplier

- If the system loads an item onto the create purchase order page, however there is no existing supplier set for the item, then the following card will be displayed:

Reports > Purchase Orders > Create Purchase Order

Create Purchase Orders

Info > Branding Theme > Supplier Priority

Please select... Standard > Item order priority > Supplier order priority > Supplier price > Order lead time

g the order stock

Total Order: \$0.00  
Amounts shown are tax inclusive

### Items without supplier information

Item Code	Name	Unit	Order Qty	Unit Price	Amount	Est Lead Time
15001	Ceiling Fan	Each	9		\$0.00	

Total Order: \$0.00  
(Tax Excluded)

+ Change Supplier

Note: For these items without a supplier, you will firstly need to click on the “change supplier” button for each line item and allocate a new supplier for this item to be eligible for ordering.

- To edit the quantity of each item being ordered, simply hover your mouse over the pencil icon, and the details of what is being ordered will be displayed.

### Purchase Order to Local Hardware

Lead Time: 1

Required Qty Summary

Item Code	Name	Unit	Order Qty	Job Reference	Customer	On Order Qty	Suggested Order Qty	This Order Qty
15001	Ceiling Fan	Each	9	Non Job	Stock	0	9.0000	9

Qty on Hand: 1  
Available Qty: 0  
On Order Qty: 0  
Re-order at Qty: 5  
High Stock Qty: 10

Save Reset

+ Add a new line

- Change the quantity in the “This order qty” column and then hit the save button to update how many will be ordered, and for which job they are being ordered for. In this case, the system is suggesting an order of 9 items, but the order qty has been updated manually to 10. All of these 10 items will be ordered for stock.

Changes saved

### Required Qty Summary

Job Reference	Customer	On Order Qty	Suggested Order Qty	This Order Qty
Non Job	Stock	0	9.0000	10

Qty on Hand: 1  
 Available Qty: 0  
 On Order Qty: 0  
 Re-order at Qty: 5  
 High Stock Qty: 10

Save Reset

The quantity columns shown in the table above are detailed as follows:

- On Order Qty: The amount already on order, awaiting receipt for this item.
- Suggested Order Qty: This is the default amount the system has calculated that should be ordered on this order.
- This Order Qty: This will default to the “Suggested Order Qty” but can be edited as required. This will be the quantity that will show on the purchase order sent to the supplier.
- In addition to changing the quantity of items added to the order by default (i.e. items which met the criteria of re-order), you can also add additional items onto the order that don’t meet the re-order requirements.
- You may like to do this because you know the particular supplier you’re making an order with stocks another items that’s close to the low re-order level, and you’d like to include it in the order to save on shipping costs. To do this, simply click on the “+ Add a new line” button at the bottom of the page, and you’ll be presented with a modal to choose the item you’d like to add:

### Add to purchase order

Stock Items Add Bill of Material...

Selected Bill of Material

Item Code: IS002

Item Name: Arlec 9W Tri Colour Dimmable LED Downlights Type: Stock

Description: With Plug Bases

Unit Cost: \$ 6.71 Unit Price: \$ 10.07

Qty on Hand: 14 Qty Available: 10

Qty Reserved: 4 Qty on Order: 0

Re-order at qty: No Desirable Quantity Set High Stock qty: No Desirable Quantity Set

Add Cancel

- Once you’ve selected the item as per the above image, click add at the bottom of the modal and the item will be added to the order list and placed into a supplier card (based off the supplier priorities chosen at the top of the page). The item will be loaded with a suggested qty of 0 items. Simply repeat the process above to change the quantity:

### Purchase Order to Local Hardware

Lead Time: 2      Date:

Item Code	Name	Unit	Order Qty
IS001	Ceiling Fan	Each	9
IS002	Arlec 9W Tri Colo...	Each	5

**Required Qty Summary**

Job Reference	Customer	On Order Qty	Suggested Order Qty	This Order Qty
Non Job	Stock	0	0.0000	5

Qty on Hand: 14  
Available Qty: 10  
On Order Qty: 0  
Re-order at Qty: -  
High Stock Qty: -

Save Reset

- Note that the Date and Delivery Date for the order. The Date is when you anticipate to send the order (as it may need to be approved internally first), and the Delivery Date will be automatically generated based on the highest lead time among the items in the order.
  - This will not take national holidays, weekends, etc. into account as every supplier and delivery method varies, so if you have a preferred delivery date you can also set this freely.
- At the bottom of the page, you can complete the standard order details including the delivery address, the person to address the items to, and the delivery instructions. The delivery address is the first field. You can simply select an existing delivery address, or add your own custom address into this field as per the image below:

Delivery address

Warehouse 1

Warehouse 1

56 Jones St, Armidale, NSW, 2350, Australia

23 Main Street, Marneville, NSW, 2000, Australia

Address Line 4

City

Berwick

State

VIC

Postcode

3800

Country

Australia

Attention to

James Smith

Contact number

0401 234 567

Delivery Instructions

Create Purchase Order Cancel

- The “Attention To:” and “Contact Number” fields in the image above will default to the name and contact number attached to the delivery address if one exists. See an example below, as set in the [organisation settings](#) page.

Delivery Addresses					<span>Add</span>
Label	Attention to	Contact number	Address	Source	
-	Sam Smith	-	56 Jones St, Armidale, NSW, 2350, Australia	Xero	
-	Jason Brown	-	23 Main Street, Marneville, NSW, 2000, Australia	Xero	
Warehouse 1	James Smith	0401 234 567	34 Homestead Road, Berwick, VIC, 3800, Australia	Groje	<span>X</span>

**Tip:** Take a moment to set up all your delivery addresses in the organisation settings in order to speed up the process of creating new orders.

- Delivery instructions can also be added to the purchase order in the field shown below:

Delivery address

Warehouse 1

34 Homestead Road

Address Line 2

Address Line 3

Address Line 4

City

Berwick

State

VIC

Postcode

3800

Country

Australia

Attention to

James Smith

Contact number

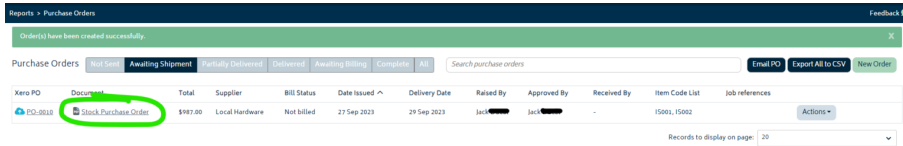
0401 234 567

Delivery Instructions

Proceed to delivery dock and call bell at the office on arrival.

- Once you have completed all the information, ensure the “Branding Theme” chosen at the top of the page is correct (this will default to the theme chosen for purchase orders in [organisation settings](#)) and then hit the “Create Purchase Order” button at the bottom of the page.

Your order(s) will be generated and you’ll be navigated to the Purchase Order list page, where you’ll see the order(s) in the “Awaiting Shipment” list:

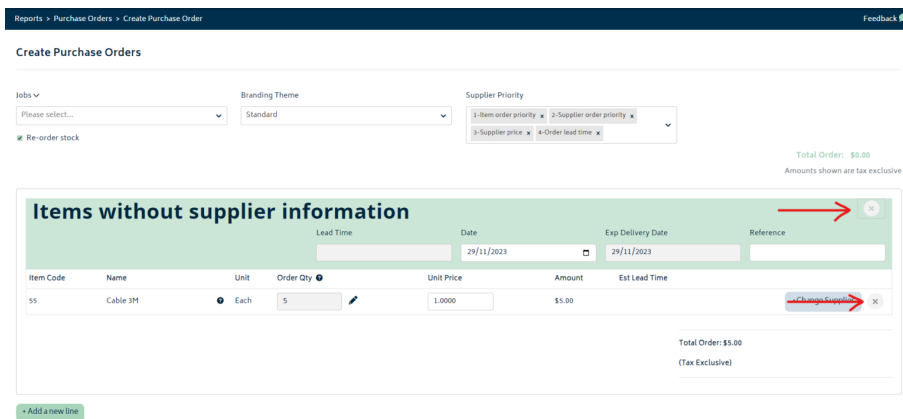


Reports > Purchase Orders												
Orders have been created successfully												
Purchase Orders												
	Not Sent	Awaiting Shipment	Partially Delivered	Delivered	Awaiting Billing	Complete	All	Search purchase orders				
Xero PO	Docu	Total	Supplier	Bill Status	Date Issued	Delivery Date	Raised By	Approved By	Received By	Item Code List	Job references	
PO_0010	Stock Purchase Order	\$187.00	Local Hardware	Not billed	27 Sep 2023	29 Sep 2023	Jan	Jan	-	15001, 15002		Actions
												Records to display on page: 20

Refer to the [view, edit and email](#) section for more information on actions relating to purchase orders.

## Ordering any Stock Item

To order any item from your inventory list, you can simply use any method to generate a purchase order and remove unwanted items from the order by clicking on one of the (x) icons shown in the image below:



Reports > Purchase Orders > Create Purchase Order

Create Purchase Orders

Jobs: Please select... Branding Theme: Standard Supplier Priority: 1-Item order priority, 2-Supplier order priority, 3-Supplier price, 4-Order lead time

☒ Re-order stock

Total Order: \$5.00  
Amounts shown are tax exclusive

**Items without supplier information**

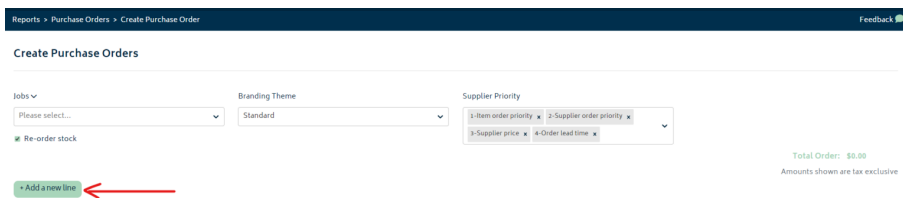
Lead Time: Date: 29/11/2023 Exp Delivery Date: 29/11/2023 Reference:

Item Code	Name	Unit	Order Qty	Unit Price	Amount	Est Lead Time
55	Cable 3M	Each	5	1.0000	\$5.00	

Total Order: \$5.00  
(Tax Exclusive)

+ Add a new line

To add a new item that isn’t shown by default on the purchase order, simply click on the “+ add new line” button as indicated in the image below:



Reports > Purchase Orders > Create Purchase Order

Create Purchase Orders

Jobs: Please select... Branding Theme: Standard Supplier Priority: 1-Item order priority, 2-Supplier order priority, 3-Supplier price, 4-Order lead time

☒ Re-order stock

Total Order: \$5.00  
Amounts shown are tax exclusive

+ Add a new line

After clicking the add new line button, you will be presented with a modal to choose the inventory item you’d like to order. Use the search bar at the top right of the modal and choose the item you’d like to add. Then hit the “Add” button at the bottom right of the modal.



**Add to purchase order**

Stock Items ▼ Add Bill of Material... ▼

**Selected Bill of Material**

Item Code: IS001  
Item Name: Ceiling Fan  
Description: Arlec 120cm White Chicago 4 Blade With light AC

Arlec 9W Tri Colour Dimmable LED Downlights (IS002)  
Blue Cable (10031)  
Business Logo (508)  
Cable 3M (55)  
Call Out Fee (IS004)  
**Ceiling Fan (IS001)**  
Core Cable (10030)

Unit Cost: \$ 113.00  
Unit Price: \$ 108.00  
Qty on Hand: 0  
Qty Available: 0  
Qty Reserved: 0  
Qty on Order: 0  
Re-order at qty: No Desirable Quantity Set  
High Stock qty: No Desirable Quantity Set

→ Add Cancel

- Once you have added the item, you can now enter the qty you would like to order. Simply click on the pencil icon next to the “Order Qty” field, and add the order quantity into the field as shown below. Be sure to hit “Save” before moving your mouse away from the modal.
  - Note that once you click the field, you can use the Tab key on your keyboard to cycle through the fields and hit Save with enter for efficiency.

**Purchase Order to Local Hardware**

Lead Time: 1

Item Code	Name	Unit	Order Qty
IS001	Ceiling Fan	Each	0

**Required Qty Summary**

Job Reference	Customer	On Order Qty	Suggested Order Qty	This Order Qty
Non Job	Stock	0	0.0000	10

Qty on Hand: 0  
Available Qty: 0  
On Order Qty: 0  
Re-order at Qty: -  
High Stock Qty: -

Save Reset

- You can repeat this process to add more items as required. Once you’re ready to raise the order, simply complete the delivery details and any other necessary fields (as explained in the section above), then click on the Create Purchase order button at the bottom left of the page to create the purchase order(s).

## Job Stock Orders

**Prerequisite:** Before you can create a purchase order for a job, you will need to have added an inventory item onto the job BOM page. Refer to the [BOM section](#) for more information.

This function will add items to the purchase order that are required for the job(s).

Note: when the items are loaded for this order type, the system will firstly check if existing stock items have been reserved for the job. The system will order the difference between the quantity required for the job(s) and the stock that's already reserved for the job(s).

The suggested workflow for ordering for jobs is as follows:

- Add the required quantities onto the job BOM page(s).
- Reserve the stock available for the jobs.
- Run the job stock function to order the remaining requirements for the job.
- To get started, click on the dropdown from option 2 and select one or more jobs from the list (refer to the section at the top of this page for how to navigate to this modal):
- You will be presented with the create purchase order screen. This is the same page as detailed in the low stock re-order section above, and has exactly the same functionality. The main difference with a job(s) order is that there will be a list of jobs in the jobs section at the top left of the page:

The screenshot shows the 'Create Purchase Orders' interface. At the top, there's a 'Jobs' dropdown menu which is highlighted with a green circle. Below it, the 'Purchase Order to Local Hardware' table is displayed. The table has columns for Item Code, Name, Unit, Order Qty, Unit Price, Amount, and Est Lead Time. Three items are listed: 'Reverse Cycle Sol...' (Qty: 6, Price: \$136.0000, Amount: \$816.00), 'Ceiling Fan' (Qty: 8, Price: \$108.0000, Amount: \$864.00), and 'Artec vW Trl Colo...' (Qty: 14, Price: \$40.00, Amount: \$560.00). The total order amount is \$1,240.00.

Note: from the job field at the top of the page, you can make changes to the requirements for the order by adding or removing jobs from the list and the order will be updated as you go.

- With the exception of the job list field itself, the main difference between a job order and a stock order is simply what goes into the “Order Qty” field on each line of the order. An example is provided below, which is presented when hovering over the pencil icon next to the Order Qty field:

The screenshot shows the 'Create Purchase Orders' interface with a 'Required Qty Summary' modal open. The modal displays a table with the following data:

Job Reference	Customer	On Order Qty	Suggested Order Qty	This Order Qty
Non Job	Stock	0	0.0000	0
/00006	Alan Williams	0	5.0000	5
/00005	Berry Brew	0	5.0000	5
/00004	Bayside Club	0	4.0000	4

Below the table, the following stock information is shown:

- Qty on Hand: 14
- Available Qty: 10
- On Order Qty: 0
- Re-order at Qty: -
- High Stock Qty: -

The 'Save' button is highlighted in green.

- As can be seen in the order above, the item “IS002, Arlec 9W ...”, is being ordered to meet the requirements of three different jobs. You can see the quantity being ordered for each job in the list, and you can modify each of those lines to change the order.

You can then follow the same instructions as listed above in the Low Stock Re-order section to complete the order.

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## Combined Stock and Job Order

If you'd like to create purchase orders which fulfil the requirements of low stock re-order, and job requirements, all in one, this is also possible in Gojee.

- To get started, select the job option 2, and select one or more jobs from the list:

**Create Purchase Order(s)**

Option 1 - Re-order across all inventory items to replenish low stock

**Low Stock Re-order**

Option 2 - Raise Purchase Order(s) for Specific Jobs

Jobs to Fulfill

J00001 - City Limousines - Replace Fan & D... x

J00002 - Bayside Club - Air Cond Installation

J00003 - 7-Eleven

J00004 - Bayside Club

- You'll be navigated to the create purchase order page. Select the option at the top left of the page to "Re-order Stock"

## Create Purchase Orders

Jobs ▾

J00001 - City Limousines - Replace Fan & Downlights x

☒ Re-order stock

- The create purchase order screen is now the same page as detailed in the low stock re-order section above, and has exactly the same functionality. The difference in this use case is that the requirements for the purchase order will now combine the requirements for stock and the jobs selected:

### Purchase Order to Local Hardware

Lead Time: 3

Item Code	Name	Unit	Order Qty
IS003	Reverse Cycle Spl...	Each	6
IS001	Ceiling Fan	Each	17
IS002	Arltec 2W Tri Colo...	Each	14

#### Required Qty Summary

Job Reference	Customer	On Order Qty	Suggested Order Qty	This Order Qty
Non Job	Stock	0	9.0000	9
J00006	Alan Williams	0	4.0000	4
J00005	Berry Brew	0	4.0000	4

Qty on Hand: 1  
Available Qty: 0  
On Order Qty: 0  
Re-order at Qty: 5  
High Stock Qty: 10

Save Reset

As can be seen in the image above, this order is going to combine the requirements for stock and two jobs all in the one for the item ceiling fan. You can then follow the same instructions as listed above in the sections above for Low Stock Re-order and Job Stock Orders and complete the order.

Next: [View, Edit and Email Purchase Orders](#).