

Knowledge Base



View All Purchase Orders

To view all your purchase orders in the one spot, simply navigate to the [Reports > Purchase Orders](#) page:

Reports > Purchase Orders Feedback

Purchase Orders Not Sent Awaiting Shipment Partially Delivered Delivered Awaiting Billing Complete All Email PO Export All to CSV New Order

| Xero PO | Document | Total | Supplier | Bill Status | Date issued | Delivery Date | Raised By | Approved By | Received By | Item Code List | Job references | |
|---------|----------|----------|--------------------|------------------|-------------|---------------|-----------|-------------|-------------|----------------|----------------|----------------------|
| PO-0493 | JOB-123 | \$92.00 | ABC co | Not billed | 11 Apr 2024 | 11 Apr 2024 | Gojee | Gojee | Gojee | 9900015 | JOB-123 | Actions |
| PO-0497 | JOB-123 | \$80.00 | ACME | Fully billed | 11 Apr 2024 | 11 Apr 2024 | Gojee | Gojee | Gojee | IS004 | JOB-123 | Actions |
| PO-0498 | JOB-123 | \$34.00 | Amazon | Not billed | 11 Apr 2024 | 11 Apr 2024 | Gojee | Gojee | Gojee | IS018 | JOB-123 | Actions |
| PO-0496 | JOB-123 | \$7.50 | Jacks New Supplier | Partially billed | 11 Apr 2024 | 11 Apr 2024 | Gojee | Gojee | Gojee | egg, IS012 | JOB-123 | Actions |
| PO-0495 | JOB-123 | \$123.00 | BDF Corp | Not billed | 11 Apr 2024 | 11 Apr 2024 | Gojee | Gojee | Gojee | 9900038 | JOB-123 | Actions |
| PO-0489 | J01616 | \$5.00 | ACME | Fully billed | 29 Jan 2024 | 29 Jan 2024 | Gojee | Gojee | Gojee | fooAAA | J01616 | Actions |
| PO-0490 | J01616 | \$4.00 | ABC co | Fully billed | 29 Jan 2024 | 29 Jan 2024 | Gojee | Gojee | Gojee | 00-PO | J01616 | Actions |
| PO-0486 | J01613 | \$5.00 | ACME | Not billed | 25 Jan 2024 | 25 Jan 2024 | Gojee | Gojee | Gojee | fooAAA | J01613 | Actions |

The items in the image above are described below:

| | | | | | | |
|----------|-------------------|---------------------|-----------|------------------|----------|-----|
| Not Sent | Awaiting Shipment | Partially Delivered | Delivered | Awaiting Billing | Complete | All |
|----------|-------------------|---------------------|-----------|------------------|----------|-----|

Status filter: select any of these buttons to filter the purchase order list to orders with this status. i.e. if you'd like to see all the purchase orders that are yet to be emailed, click on the "Not Sent" filter.









Email POExport All to CSVNew Order

Search: Searches for partial matches from the Xero PO, document/job reference number, supplier, and item code list.

Email PO: Click on this to email the order. See the section below for more information.

Export to CSV: This will export a complete list of all your purchase orders. Note that it will not filter the list to what's shown on the screen.

New Order: This will enable you to raise a new order. Refer to [Create Purchase Orders](#) for more information.

| Xero PO | Document |
|---|--|
|  PO-0025 |  J00004 |
|  PO-0023 |  J00004 |
|  PO-0015 |  Stock Purchase Order |
|  PO-0014 |  Stock Purchase Order |

Xero PO deep link: Takes you into Xero to show you the purchase order as it is in Xero.

PO PDF link: Retrieves the PDF copy of the purchase order..

Job references

| | |
|--------|-----------|
| J01614 | Actions ▾ |
| J01613 | Actions ▾ |
| J01592 | |
| J01561 | |

Actions: This button enables you to receive goods, raise supplier bills, view reservations that are linked to this PO, and send it as an email. Each of these actions are explained in the following sections.

View Job Purchase Orders

You can also access purchase orders that are directly related to one job from that job's Purchasing page.

Refer to the [Job Actions](#) section on how to navigate to the job purchasing page:

Jobs > Job 00001 > Purchasing

Feedback

Purchase Orders - City Limousines - J00001

Active

All

Search

Email PONew Order

| Document | Total (Tax Exclusive) | Date Issued | Supplier | PO Number | Expected Order Delivery Date | Shipment Status | Bill Status | Status | Raised By | Approved By | Received By | Item Code List |
|---|-----------------------|-------------|---------------------------|-----------|------------------------------|-----------------|--------------|----------|------------|-------------|-------------|----------------|
| <div><div>Stock Purchase Order - J00001 - PO NO: 23100CE3</div></div> | \$127.00 | 21 Sep 2023 | Building Supplies Limited | PO-0008 | 23 Sep 2023 | Delivered | Fully billed | Approved | Jack Ducat | Jack Ducat | Jack Ducat | IS002, IS001 |

Exit

ReceiveBill

Some of the purchase order actions can be executed directly from this page:

- Email PO: Email purchase order(s)
- Receive: Receive Goods (the Receive button)
- Bill: Raise Supplier Bill (the Bill button)
- New Order: This will load up a purchase order with the job and its required items pre-selected.

Edit Purchase Orders

To edit a purchase order, simply click on the row in the list ([Reports > Purchase Orders](#)) and it will open the order edit page.

Purchase order

Edit history

Edit Purchase Order

Date

04/11/2024

Delivery date

04/13/2024

Reference

Stock Purchase Order - J00004

Branding Theme

Standard

| Item Code | Name | Unit | Order Qty | Received Qty | Fully Received | Unit Price | Amount | Supplier SKU Code | Supplier | Est Lead Time |
|-----------|----------------------|------|-----------|--------------|----------------|------------|----------|-------------------|----------------|---------------|
| IS001 | Ceiling Fan | Each | 6 | 6 | Yes | 108.0000 | \$648.00 | LHW-T1 | Local Hardware | 1 |
| IS002 | Arlec 9W Tri Colo... | Each | 20 | 20 | Yes | 3.0000 | \$60.00 | LHW-T2 | Local Hardware | 2 |
| IS018 | Circular Saw | Each | 4 | 4 | Yes | 32.0000 | \$128.00 | 21312 | Local Hardware | 2 |

Delivery address

23 Main Street, Marineville, NSW, 2000

23 Main Street

Address Line 2

Address Line 3

Address Line 4

City

Marineville

State

NSW

Attention to

Paul C

Contact number

Delivery Instructions



You can make the necessary changes, save and exit. The PDF for the purchase order will be regenerated with the new information and Xero will be updated.

Note: if the order has already been sent, you will need to send it again as the status of the order will not be put back to not sent.

You can view any changes already made to the PO by opening the edit page again and clicking on the Edit History button at the top of the page:

Purchase order

Edit history

| Description | Staff name  | Create timestamp  |
|---|--|--|
| Modified delivery date from 2023-09-28 to 2023-09-29, Modified line items | Gojee | 27 Sep 2023, 19:00 |

Note: not all fields are editable in the PO. If you need to change fields that aren't editable you have the option to void the order and start again.

Void


Cancel & Exit


By voiding an order, all the reservations against stock or jobs will be reversed. This will mean you can run and of the new order functions again and it will know that the order has been voided.

Important: For orders which have already had stock received through the Goods Receipt process, the purchase order is locked for editing. If you mistakenly received the stock, you can void the Goods Receipt first.


Email Purchase Orders


To email the purchase order to your supplier, navigate to the [Reports > Purchase Orders](#) page and simply click on the “Email PO” button at the top of the page. Choose the PO number from the prompt and you’ll be presented with the following modal:

Please select a purchase order to email 

PO-0009 - Stock Purchase Order + J00002 - PO-NO-947F1EED 

To

info@buildingsupplies.com 



Subject

Purchase Order PO-0009 from Demo Company (AU) 21 Sep 23 for Building Supplies Limited

Body


Hi Building Supplies Limited,

Here's purchase order PO-0009 for AUD 5400.00.

Delivery due date, address and instructions are included in the purchase order.

If you have any questions, please let us know.

Thanks,

Demo Company (AU) 21 Sep 23 

☒ Send bcc (blind carbon copy) to organisation email

☒ Include purchase order as attachment

Send Email

Cancel

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- The default email for the supplier will show along with some default editable text, a subject line and options to bcc your organisation and attach the pdf of the order. Click Send Email and the email will be sent to the supplier.

Once you have emailed the Purchase Order, it will no longer show in the “Not Sent” filter, and the status of the purchase order in Xero will also be updated to be “Sent”.

Note that there is also the option to manually mark a PO as sent, or if sent by mistake, to mark as unsent. This is useful if you plan to send the PO PDF via your company’s email and update the Gojee status to match.

Next: [Receive Goods](#).