

Knowledge Base



Create a new Purchase Order

Prerequisite: Before you can create a purchase order for inventory you will need to have 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 four main ways to create a new purchase order:

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

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

From the navigation screen, click the Purchasing section and select "Create a New Purchase Order":

What would you like to do today?



Purchasing & Receiving

[Create a New Purchase Order](#)[View All Purchase Orders](#)[Receive Goods](#)[Enter Supplier Bill](#)[Back](#)

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

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 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.

The Purchase Order Creation Page

When any method to create purchase orders is chosen, you will go to the Create Purchase Order page. On this page, one or more purchase orders will be generated. Each will be presented in a card view with the supplier name at the top, all the items being ordered for the supplier in the middle, and delivery details at the bottom. The delivery details can be collapsed so they aren't in the way, and the items can be re-ordered by grabbing the bars on the left side. The total order will be combined at the top of the page as per the image below:

Total Order from ABPA: 54.00
 Total Order from Local Hardware: 117.00
 Total Order from Building Supplies Limited: 1,800.00
 Total AUD Order: 1,971.00
 Amounts shown are tax exclusive

Purchase Order to ABPA

Currency: AUD Lead Time: 7 Date: 10/29/2024 Exp Delivery Date: 11/05/2024 Reference:

Item Code	Name	Unit	Order Qty	Unit Price	Amount	Est Lead Time
IS013	Drill Set	Each	3	18.0000	54.00	7

Total Order: 54.00
(Tax Exclusive)

Delivery Details ^

Purchase Order to Local Hardware

Currency: AUD Lead Time: 2 Date: 10/29/2024 Exp Delivery Date: 10/31/2024 Reference:

Item Code	Name	Unit	Order Qty	Unit Price	Amount	Est Lead Time
IS001	Ceiling Fan	Each	1	108.0000	108.00	1
IS002	Arlec 9W Tri Colour Dimmable LED Downlights	Each	3			

Building Supplies Limited - Order lead time: 1 - 3.50
 ABPA - Order lead time: 7 - 9.46
 + Add new supplier

Total Order: 7.00

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 there are 2 other suppliers that also supply the LED Downlights. Each alternate supplier’s price and lead time is also shown for convenience.

If the system loads an item onto the create purchase order page without any existing supplier information, then the “Items Without Supplier Information” card will be displayed:

Items without supplier information

Currency: AUD Lead Time: Date: 10/29/2024 Exp Delivery Date: 10/29/2024 Reference:

Item Code	Name	Unit	Order Qty	Unit Price	Amount	Est Lead Time
A-9900006	A-Power input - Z70 (2 Poles)	Each	2		0.00	
A-9900016	A-8-conductor micro connector for junction boxes. Red	Each	5		0.00	
A-9900008	A-Output - AudioInRoom - Audio (8 Poles)	Each	1		0.00	

+ Add new supplier

Total Order: 0.00

Note: For each item without a supplier, you will 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. If you are ordering job items,

suppliers can also be set and linked to items via the Suppliers section on the BOM.

To edit the quantity of each item being ordered, click the pencil icon and you will be able to check the details of what is being ordered.

Job Reference	Customer	UoM	On Order Qty	Suggested Order Qty	This Order Qty
Non Job	Stock	Each	4.0000	0.0000	1
J00001	bays	Each	0.0000	2.2500	3
J01798	ABC-CO100	Each	0.0000	33.0000	33
J01389	Steven Stegosaur	Each	1.0000	0.0000	0

Base UoM: Each
Qty on Hand: 0.0000
Available Qty: 0.0000
On Order Qty: 104.0000
Re-order at Qty: 0.0000
High Stock Qty: 0.0000

Change the quantity in the “This order qty” column and then hit the “save changes” button to update how many will be ordered and for which job they are being ordered for. In this case, the system will suggest an order of 33 + 2.25 for required stock for jobs, but we want to order one for stock.

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 wish to do this because you know the particular supplier you’re making an order with stocks other items that are close to the low re-order level and you’d like to include them 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 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 each card, 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.

Delivery Details ▾

Delivery address

8-10 Smith St, RYDE, NSW, 2112, Australia x ▾

8-10 Smith St

Address Line 2

Address Line 3

Address Line 4

City

RYDE

State

NSW

Postcode

2112

Country

Australia

Attention to

H. Y. Smith

Contact number

Apply delivery details to all purchase orders

Delivery Instructions

Deliver to front entrance.

Our usual receptionist is Gladys, she will receive the packages directly.

☒ Save for next time

- Delivery instructions can be saved for each supplier so that they will auto-populate the next time an order is placed with that supplier.
- The delivery details can be copied as a whole to every other purchase order. Note that this will copy the instructions as well, overwriting any custom instructions that may be set for a specific supplier.
- 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 Add

Label ▾	Attention to ▾	Contact number	Address	Source
-	Sam Smith	-	56 Jones St, Armidale, NSW, 2350, Australia	Xero
-	Jason Brown	-	23 Main Street, Marineville, NSW, 2000, Australia	Xero
Warehouse 1	James Smith	0401 234 567	34 Homestead Road, Berwick, VIC, 3806, Australia	Gojee

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.

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 Feedback

Order(s) have been created successfully. x

Purchase Orders Not Sent Awaiting Shipment Partially Delivered Delivered Awaiting Billing Complete All Search purchase orders 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	Actions
PO-0010	Stock Purchase Order	\$987.00	Local Hardware	Not billed	27 Sep 2023	29 Sep 2023	Jack	Jack	-	IS001, IS002		

Records to display on page: 20

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

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 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

Cost per Unit 6.7143

Markup % 50

Default Location WH1

Stock Type Tracked as aggregate qty

Price per Unit 10.0714

Set Price by Markup on Cost ☒

Re-order at qty 5

High Stock qty 10

Stock Levels

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, either 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

Or choose the “Re-order Low Stock” option on the [inventory list page](#):

Inventory

Active

Archived

Add

Refresh

Actions ▾

Filters ▾

- Import/Update Items
- Export Items to CSV
- Set Initial Quantities
- Bulk Stock Adjustments
- Re-order Low Stock

Item
Code

Name ▾

Description ▾

IS001

Ceiling Fan

[Arlec 120cm White Chi...](#)

IS002

Arlec 9W Tri Colour D...

With Plug Bases

TAA

Each

3.74

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 x
- 2-Supplier order priority x
- 3-Supplier price x
- 4-Order lead time x

☒ Re-order stock

Total Order from ABPA: 900.00

Total AUD Order: 900.00

Amounts shown are tax exclusive

Purchase Order to
ABPA

Currency

AUD

Lead Time

7

Date

10/29/2024

Exp Delivery Date

11/05/2024

Reference

Item Code	Name	Unit	Order Qty	Unit Price	Amount	Est Lead Time	
IS013	Drill Set	Each	50	18.0000	900.00	7	Change Supplier

Total Order: 0.00

(Tax Exclusive)

Delivery Details ▾

Delivery address

23 Main Street, Marineville, NSW, 20... x ▾

23 Main Street

Address Line 2

Address Line 3

Attention to

Rembrandt McLeod

Contact number

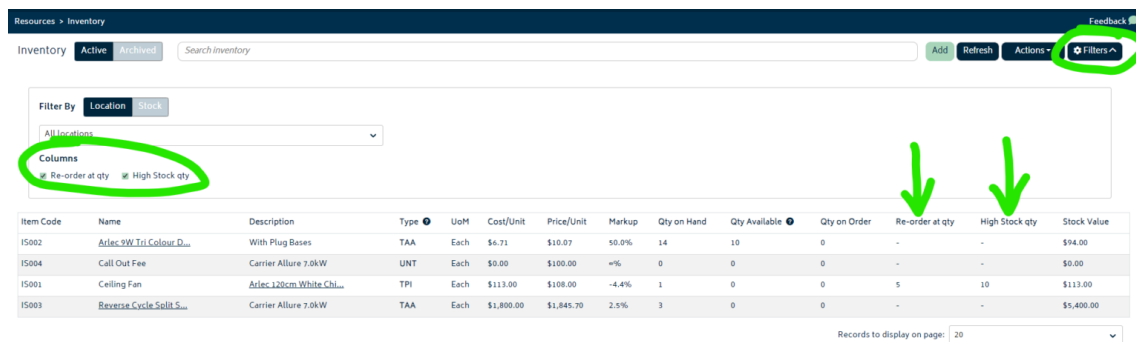
Apply delivery details to all purchase orders

Delivery Instructions

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.



Resources > Inventory

Inventory **Active** **Archived** Search inventory Add Refresh Actions **Filters**

Filter By Location Stock

All locations

Columns

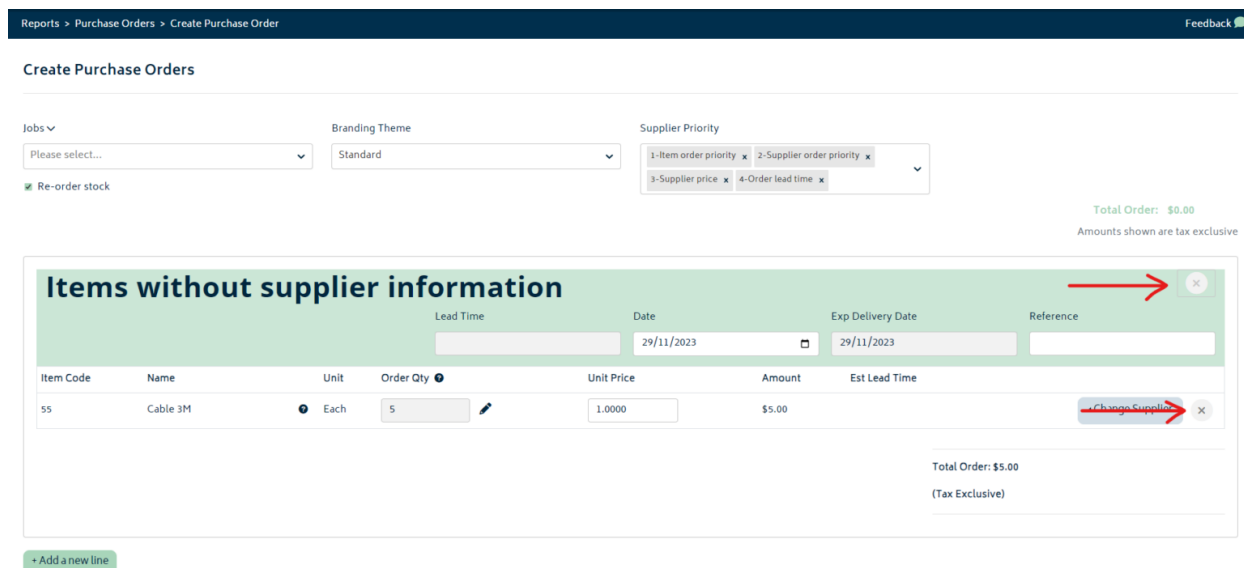
☒ Re-order at qty ☒ High Stock qty

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
IS002	Arlec 9W Tri Colour D...	With Plug Bases	TAA	Each	\$6.71	\$10.07	50.0%	14	10	0	-	-	\$94.00
IS004	Call Out Fee	Carrier Allure 7.0kW	UNT	Each	\$0.00	\$100.00	=%	0	0	0	-	-	\$0.00
IS001	Ceiling Fan	Arlec 120cm White Chi...	TPI	Each	\$113.00	\$108.00	-4.4%	1	0	0	5	10	\$113.00
IS003	Reverse Cycle Split S...	Carrier Allure 7.0kW	TAA	Each	\$1,800.00	\$1,845.70	2.5%	3	0	0	-	-	\$5,400.00

Records to display on page: 20

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 Branding Theme Supplier Priority

☒ Re-order stock

Total Order: \$0.00
Amounts shown are tax exclusive

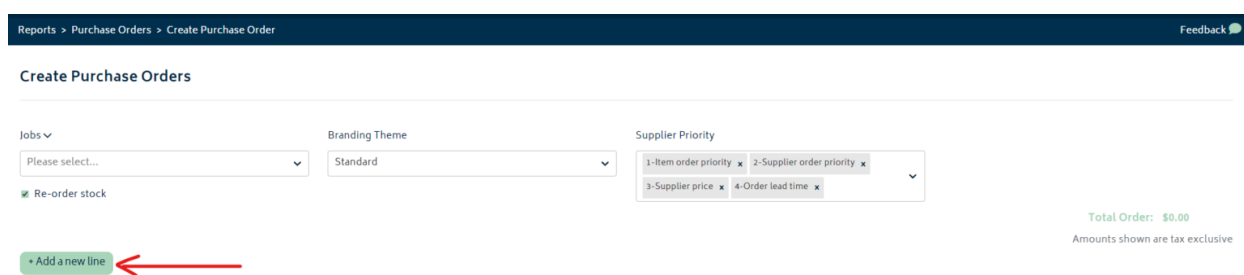
Items without supplier information

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 Branding Theme Supplier Priority

☒ Re-order stock

Total Order: \$0.00
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.

- 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.

- 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 or single-use 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 sections above, and has exactly the same functionality. The main difference with a job order is that there will be a list of jobs in the jobs section at the top left of the page:

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:

Create Purchase Orders

Jobs ▼ Branding Theme Supplier Priority

J00002 - Bayside Club - Air Cond Installation x
J00003 - 7-Eleven x
J00004 - Bayside Club x
▼
Standard
1-Item order priority x
4-Order lead time x

☐ Re-order stock

Purchase Order to Local Hardware

Lead Time 3 Date

Item Code	Name	Unit	Order Qty
IS003	Reverse Cycle Spl...	Each	6
IS001	Celling Fan	Each	8
IS002	Arlec 9W Tri Colo...	Each	14

Required Qty Summary

Job Reference	Customer	On Order Qty	Suggested Order Qty	This Order Qty
Non Job	Stock	0	0.0000	0
J00006	Alan Williams	0	5.0000	5
J00005	Berry Brew	0	5.0000	5
J00004	Bayside Club	0	4.0000	4

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

Save Reset

- 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 to complete the order.

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) [X]

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] [v]

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"

[Reports](#) > [Purchase Orders](#) > [Create Purchase Order](#)

Create Purchase Orders

Jobs [v]

J00001 - City Limousines - Replace Fan & Downlights [X] [v]

☒ 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	Arlec 9W 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

SaveReset

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](#).