

Purchase Orders

Last Modified on 14/02/2024 3:39 pm EST

A Cross Rental – (aka Sub Rental) is a rental from an outside source to temporarily supplement your inventory during an internal shortage.

Purchase Order – is a purchase of equipment that is to be added to your inventory count.

Both Cross Rentals and Purchase Orders display on the Purchase Order Grid, and may be referred to as a Cross Rental PO or a PO respectively

The Purchase Order Grid

Code	Vendor	Date	P.O. #	P.O. Amount	Approved	Posted	Received	Project	Archived	CR	Assigned To	Invoice Status	Date Expected
TR100	Technical Revolution	2023/03/16	196	200.00 CAD	No	Yes	No		No	Yes	300100013	Not Invoiced	2023/03/16
VA	Audrey Daly	2023/03/22	AB197	0.00 CAD	Yes	Yes	Yes		No	No		Not Invoiced	2023/03/29
VA2	add tech	2023/03/16	198	100.00 CAD	No	Yes	No		No	Yes	300100013	Not Invoiced	2023/03/16

The Purchase Order Grid displays all Cross Rental and Standard Purchase Orders within the filter details. See below for an explanation of the grid features

- ① 1. Filters
- ② 2. Menu
- ③ 3. Date Range
- ④ 4. Quick Add
- ⑤ 5. Region & Location
- ⑥ 6. Search
- ⑦ 7. Sort
- ⑧ 8. Pages

Create/Edit a Purchase Order

CREATE, EDIT & APPROVE ORDER

+ Create/Edit

+ Details

+ Dates

+ Equipment

+ Delivery Address

+ Notes


Print a Purchase Order

An option to print the Purchase Order is provided on save

You can also print any highlighted PO from the Print menu

The screenshot shows the RentalPoint3 interface with a table of Purchase Orders. The first entry is highlighted in blue. A context menu is open over this entry, with a red arrow pointing to the 'Print Order' option.

Code	Vendor	Date	P.O. #	P.O. Amount	Approved	Posted	Received	Project
VMCC	Marcel Crosby	2023/04/26	AB204	4000.00 CAD	No	No	No	

Highlight the template you would like to use, then check/uncheck template options as needed and click  to proceed

The screenshot shows the 'Select Report' dialog box. The 'Purchase Order - Default' template is highlighted. The 'Print Purchase Order Notes' checkbox is checked, while 'Print Vendor Notes' is unchecked.

Save or send to printer



Choose template

Close



MY TEST Company
1623 Maria Street
Burbank CA 91504
Phone: 818 565-3333
Fax:



PURCHASE ORDER # AB204

From:		Ship To:	
Contact:	Marcel Crosby	Deliver To:	Rentals r Us
Company:	Marcel Crosby	Address:	15 Curtis Ave
Address:	344 Norway Drive		Paris
	Franklin 06001	Contact:	Brant N3L 3W1
Phone:		Delivery by:	Wed, 03-May-2023 1:00 PM
Fax:		Via:	They Deliver
E-mail:	add@eee.com		
Order Date:	Wed, 26-Apr-2023	Assigned To:	

Code	Part No	Description	Quantity	Unit Price	Disc	Total
AAAD80		d&b D80 amplifier	1	1,000.00	0.00	1,000.00
BDRK		Beyer Opus Drum Mic Kit	1	3,000.00	0.00	3,000.00
		Sundry item	1	N/C	0.00	N/C

	Equipment Total:	CAN 4,000.00
	Discount @ 0%	CAN 0.00
	Total inc discount:	CAN 4,000.00
	Carriage:	CAN 0.00
	Tax:	CAN 0.00
	Total Amount:	CAN 4,000.00

Wed Apr 26 2023 16:39:02 GMT-0400 (Eastern Daylight Time) by: RP Enter PO Notes here

Approve a Purchase Order

There are several status levels for a purchase order:

- **Approved** – the purchase order has been reviewed and approved by the appropriate people.
- **Posted** – the purchase order is ready to be ordered from the supplying company.
- **Received** – the purchase order has been processed and received, equipment that was requested is now in stock.

To place a purchase order into Approved status open the purchase order and click the 'Approved' checkbox. Permissions can be set to prevent unauthorized users from approving purchase orders. PO limits are set on a

per operator basis that determine how much a given operator is allowed to order.

Purchase 204

Operator Max: 6,000.00
Approved Amount: 4,000.00
Vendor minimum: 0

Total: 4,000.00

Details | Dates | Equipment | Delivery Address | Notes

Vendor: VMCC
Marcel Crosby

P.O. #: AB 204

Region: 0 - EAST

Location: 0 - Main

Description:

Air bill #:

Ordered by: RP

Requested by: Request by

Month year filter: April, 2023

Assigned to:
enter booking #
enter project #

Status:
 Approved By RP On 2023-04-26 5:21 PM

Invoiced:
Not Invoiced

Post a Purchase Order

There are several status levels for a purchase order:

- **Approved** – the purchase order has been reviewed and approved by the appropriate people.
- **Posted** – the purchase order is ready to be ordered from the supplying company.
- **Received** – the purchase order has been processed and received, equipment that was requested is now in stock.

To place a purchase order into *Posted* status, the purchase order may need to be approved (depending on the setting for operational parameter #159)

Post/UnPost the highlighted PO from the Purchase Order Grid *Work* menu

RentalPoint3 DB [12.0.21.4] Rev [4738] mandy@rentp.com

Tests | Test Dates | Reports | Assets | Setup | Others | Help

Purchase Orders

Ordered Date: 2023-04-26 to 2023-05-03 | 0 - EAST | 0 - Main

Show 10 entries

Code	Vendor	P.O. Amount	Approved	Posted	Received	Project	Archived	CR	Assigned To	Invoice Status	Date Expected
VMCC	Marcel Crosby	4000.00 CAD	No	No	No	No	No	No		Not Invoiced	2023/05/03

Showing 1 to 1 of 1 entries | 1 row selected

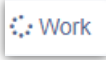
Receive a Purchase Order

There are several status levels for a purchase order:

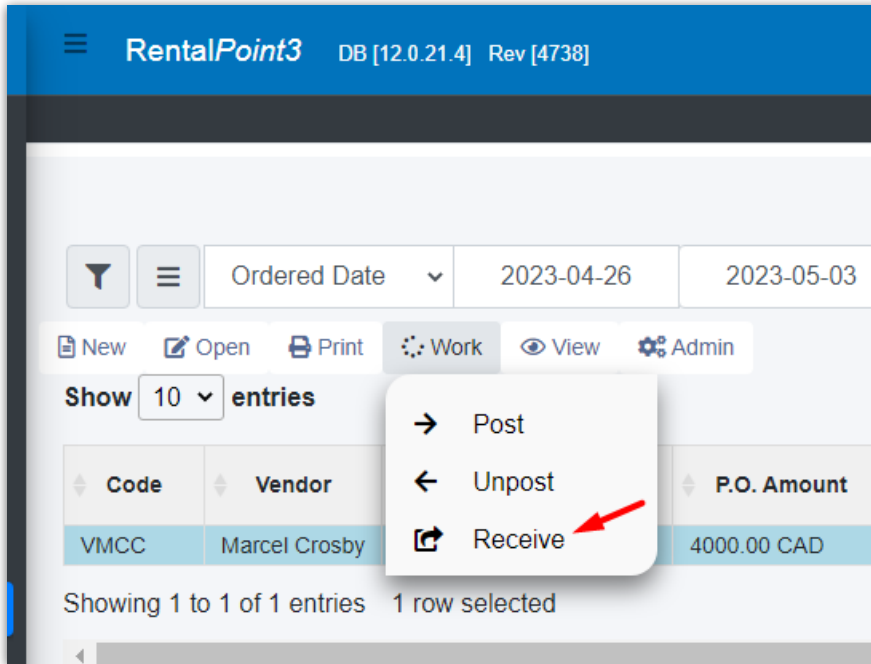
- **Approved** – the purchase order has been reviewed and approved by the appropriate people.
- **Posted** – the purchase order is ready to be ordered from the supplying company.

- **Received** – the purchase order has been processed and received, equipment that was requested is now in stock.

Only Posted Purchase Orders can be received.

Highlight any posted purchase order, then click *Receive* from the  menu.

The software will increment the inventory quantity of received items

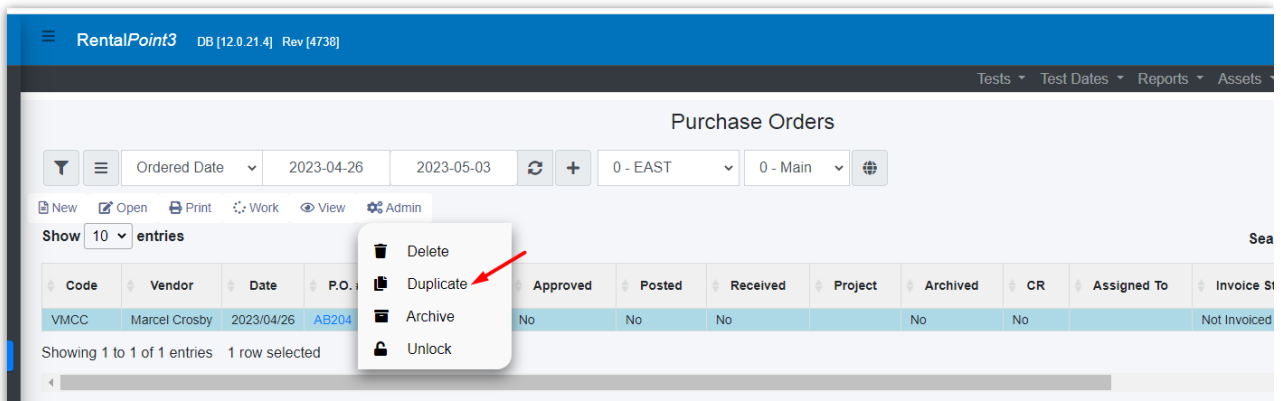


Duplicate a Purchase Order

To duplicate a Purchase Order or Cross Rental, click the duplicate option from the Admin menu

All information from the highlighted purchase order or cross rental will be copied to a new order.

See Purchase Order Operator Privileges if access is denied.

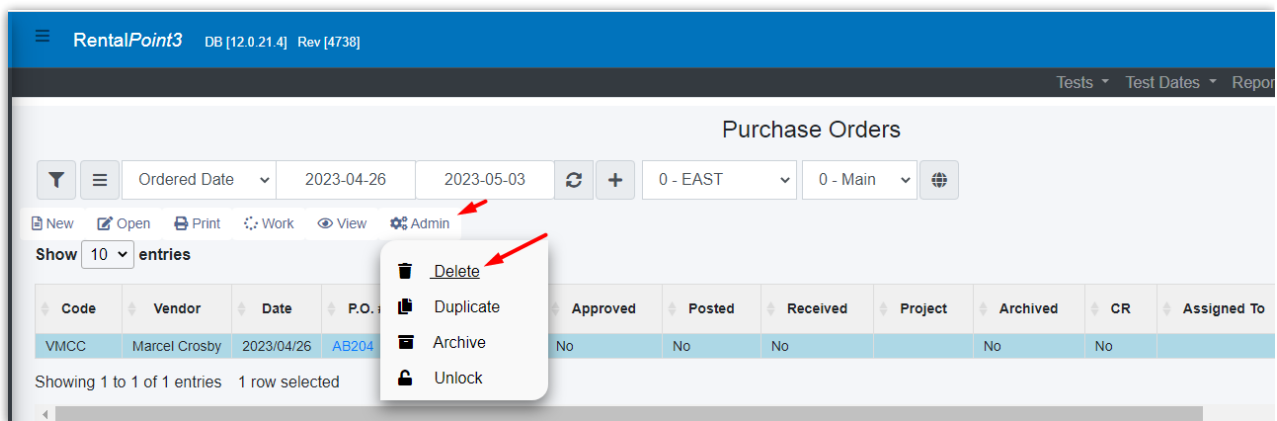


Delete a Purchase Order

First highlight the purchase order, then click the delete option from the Admin menu.

The system will prompt you for confirmation. If confirmed the purchase order will be deleted.

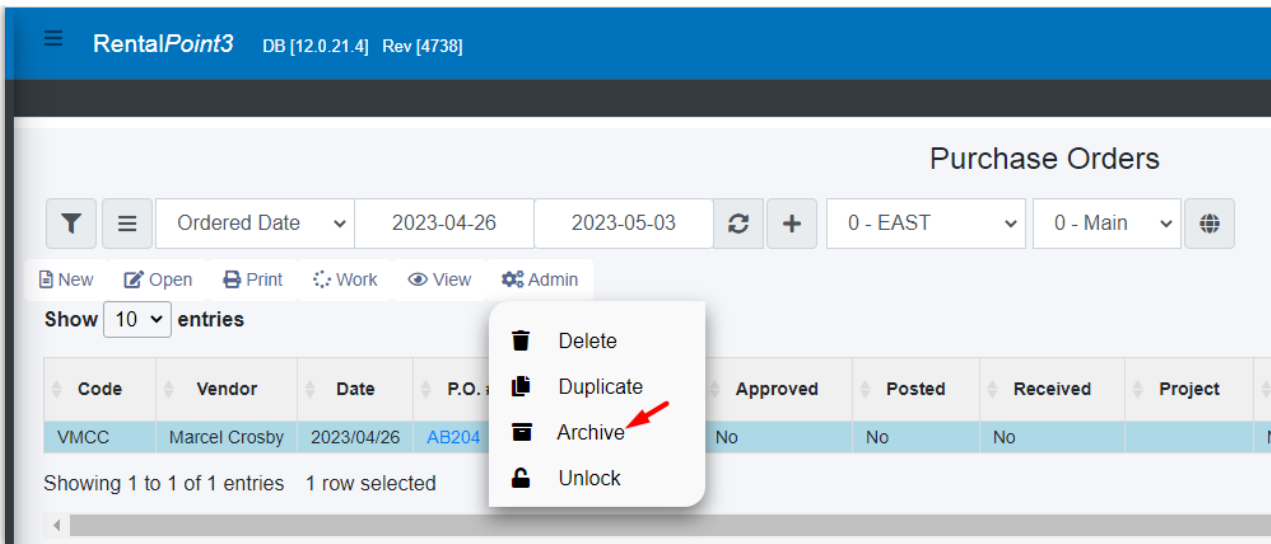
Note that both normal purchase orders and cross rental purchase orders are contained within the Purchase Order grid. The system will prevent the operator from removing cross rentals from the purchase order area. To delete a cross rental the operator must delete the cross rental from the bookings area.



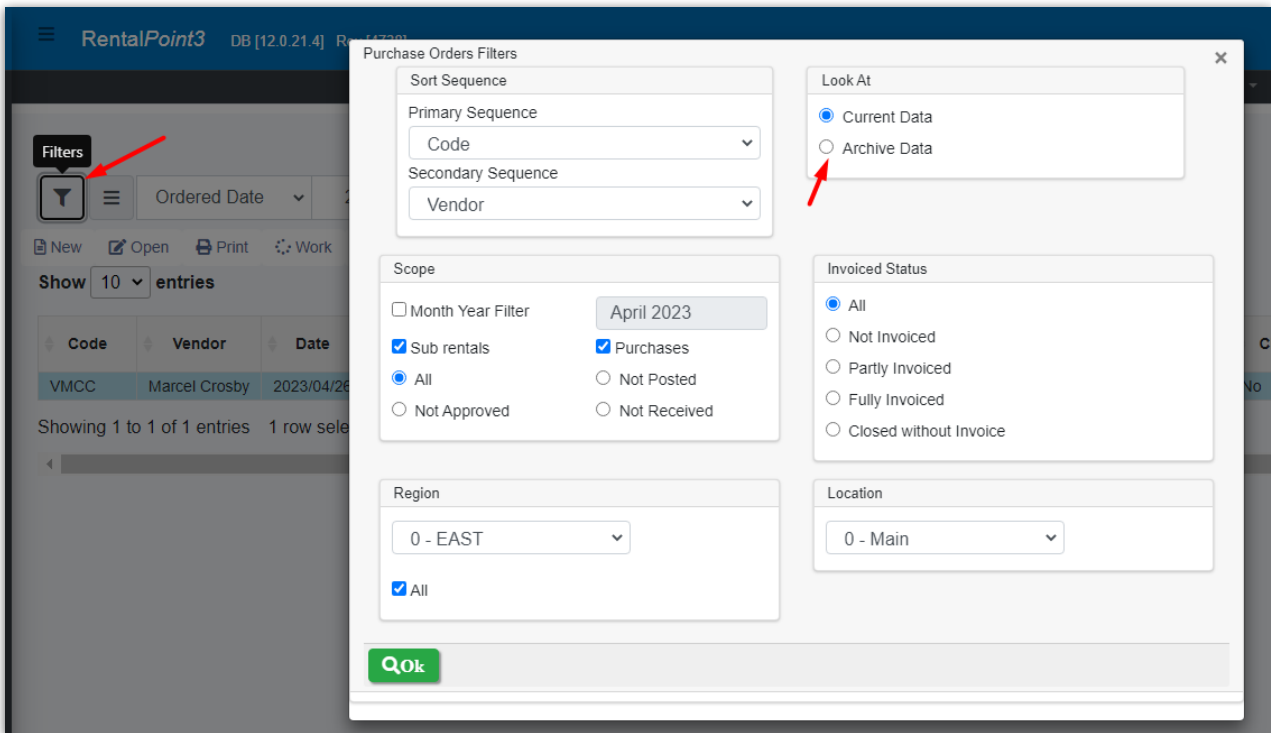
Archive a Purchase Order

Archiving is a tool designed to improve performance and remove the clutter of non-relevant or old items in the RentalPoint system database.

Archive a single received purchase order from the Purchase Order Grid via the Admin menu



Archived POs are still visible on the archive grid



Operator Privileges & Parameters

+ Group Privileges

+ Operator Privileges

⊕ Parameter Settings
