# **Purchase Orders**

Last Modified on 15/04/2025 4:46 pm EDT

**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



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. Filters

Use the filter icon

T

to control the scope of the items you would like to see in the grid

		Sort Sequence		Look At	
		Primary Sequence	;	<ul> <li>Current Data</li> </ul>	
Filters		Code		✓ ○ Archive Data	
		Secondary Seque	nce		
T	Ordered Date 🗸	Vendor		<b>v</b>	
New 🔽	Open 🔒 Print 🎲 V	Vork			
show 10	v entries	Scope		Invoiced Status	
	entries	Month Year Filter	March 2023	<ul> <li>All</li> </ul>	
Code	Vendor	Sub rentals	Purchases	O Not Invoiced	
TP100	Technical Devolution	2023 O All	O Not Posted	<ul> <li>Partly Invoiced</li> </ul>	
VA	Audrey Daly	2023 O Not Approved	O Not Received	<ul> <li>Fully Invoiced</li> </ul>	
VA2	add tech	2023		Closed without Invoice	
Dharrin a d d					
snowing i t	o 3 of 3 entries	Region		Location	
•		0 - FAST	~	0 - Main 🗸	
		I All			

### 2. Menu

Access the r	menu options via	≡₀	or right clie	ck or from the t	op of the g	rid window		
= Renta	al <i>Point3</i> DB [12.0.20	0.4] Rev [46	512]					
t t						Purc	hase Orders	
▼ ≡	Ordered Date	2023	-03-16	2023-03-27	<b>C</b> +	0 - EAST	✓ 0 - Main	•
New 🗹	Open 🔒 Print 🔅 V	Vork 💿 \	view 💠 A	dmin				
<b>Show</b> 10 •	∽ entries							
Code	Vendor	Date	♦ P.O. ;	# 🔶 P.O. Amou	nt 🍦 Ap	proved  Postec	Received	∲ Pr
TR100	Technical Revolution	2023/03/1	6 196	200.00 CAD	No	Yes	No	
VA	Audrey Daly	2023/03	C Opon		Yes	Yes	Yes	
VA2	add tech	2023/03/	la Open	,	No	Yes	No	
Showing 1 to	o 3 of 3 entries	-	View	+				
•			🔅 Work	•				
			😂 Admin	•				
			🔒 Print	•				

### 3. Date Range

Set the grid to either show entries based on Ordered Date or the date the ordered item is expected to arrive.

ĒF	Renta	IPoint3 DB [12.0.2	0.4] Rev [4612]							
							Purc	ha	se Orders	
T	≡	Ordered Date	2023-03-16	2023-03-27	C	+	0 - EAST	~	0 - Main 🗸 🌔	•
New	<b></b>	Ordered Date Expected Date	prk 💿 View 💠 A	dmin						
Show	10 🗸	entries	_							

#### 4. Quick Add

Use this option to quickly add a Purchase Order

	1
	Purchase Orders
▼ ≡ Ordered Date ∨ 2023-03-16         2023-03-27         2         +	0 - EAST 🗸 0 - Main 🗸 🏟
New	

#### 5. Region & Location

۲ Select the region and location to work within OR click for all locations (needs multi location license) RentalPoint3 DB [12.0.20.4] Rev [4612] hase Orders Choose Region ≡ Ordered Date 2023-03-16 2023-03-27 C + 0 - EAST 0 - Main ۲ T ~ ~ 0 - EAST 🖹 New 🕼 Open 🛛 🔒 Print : Work 🏟 Admin View WEST 1 2 - SOUTH - E Show 10 v entries 3 - NORTH

#### 6. Search

Enter the details you wish to search for and the software will narrow the display to items that match the search

= Renta	al <i>Point3</i> DB [12.0.2	0.4] Rev [4612]										ا 🐍	mandy@rentp.com -
									Tests 🝷	Test Dat	es - Reports -	Assets - Setup -	Others - Help -
						Purcha	ase Orders						
▼ ≡	Ordered Date	2023-03	3-16	2023-03-27	<b>+</b>	0 - EAST 🗸	0 - Main	•					
New 🕑	Open 🔒 Print 🗇 V	Nork 👁 Vie	w 🕸 Adm	in								1	
Show 10	∽ entries											Search: tec	×
0 Code	• Vendor	0 Date	¢ P.O. #	P.O. Amount	Appr	oved 🔶 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
VA2	add tech 🔫	2023/03/16	198	100.00 CAD	No	Yes	No		No	Yes	300100013	Not Invoiced	2023/03/16
Showing 1 t	o 2 of 2 entries (filtere	ed from 3 tota	I entries)							_		Previo	ous 1 Next

### 7. Sort

Use the arrows to the left of each cell tag to sort the grid in ascending/descending order

Renta	alPoint3 DB [12.0.2	0.4] Rev [4612]										&	mandy@rentp.com
									Tests -	Test Dat	tes - Reports -	Assets - Setup -	Others - Help -
						Purcha	ase Orders						
▼ ≡	Ordered Date v	2023-03	3-16	2023-03-27	<b>+</b> 0-E	AST 🗸	• 0 - Main	• <b>(</b> )					
🖹 New 🕜	Open 🔒 Print 🗇 V	Vork   View	w 🕸 Adm	in									
Show 10	✓ entries		/	1								Search: tec	
0 Code	Vendor	Date	♦ P.O.#	P.O. Amount	Approved	Posted	Received	Project	Archived	¢CR	Assigned To	Invoice Status	Date Expected
VA2	add tech	2023/03/16	198	100.00 CAD	No	Yes	No		No	Yes	300100013	Not Invoiced	2023/03/16
TR100	Technical Revolution	2023/03/16	196	200.00 CAD	No	Yes	No		No	Yes	300100013	Not Involced	2023/03/16
Showing 1 to	to 2 of 2 entries (filtere	ed from 3 tota	l entries)									Previ	ious 1 Ne

#### 8. Pages

Move through pages of the grid via Previous, Page Number and Next options.

Select how many entries you would like to see on the grid via the **Show** 10 items per page.

Show 10 ➤ entries	option, default is
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Rent	alPoint3 DB [12.0.2	0.4] Rev [4612]	I									🕹 г	nandy@rentp.com -
									Tests 🝷	Test Dat	es - Reports	Assets - Setup -	Others - Help -
						Purcha	ase Orders						
▼ ≡	Ordered Date	2023-03	3-16	2023-03-27	<b>; +</b> 0-E/	AST 🗸	0 - Main 🥆	•					
New 📝	Open 🔒 Print 🗇 V	Vork   Vie	w 🕫 Admi	In									
Show 10	✓ entries	_										Search: tec	
	Vendor	Date	≑ P.O. #	P.O. Amount	+ Approved	Posted	Received	Project	Archived	¢CR	Assigned To	Invoice Status	Date Expected
VA2 50	add tech	2023/03/16	198	100.00 CAD	No	Yes	No		No	Yes	300100013	Not Invoiced	2023/03/16
TR100	Technical Revolution	2023/03/16	196	200.00 CAD	No	Yes	No		No	Yes	300100013	Not Invoiced	2023/03/16
Showing 1 t	to 2 of 2 entries (filtere	ed from 3 tota	l entries)									Previo	ous 1 Next

Create/Edit a Purchase Order

### Create/Edit

To create a new purchase order, right click in the PO grid, then click New or use the top menu icon.

To modify an existing purchase order, right click on the PO grid, then click Open or use the top menu icon

Rental Point	RentalPoint3 DB [12.0.21.4] Rev [4738]	
🕜 Dashboard		
🚍 Bookings		Purchase Orders
🗠 Shortages	▼ = Ordered Date × 2023-04-26 2023-05-03 G +	0 - FAST V 0 - Main V 🇰
💄 Card file		
🏋 Products 🗸	New Z Open → Print ↔ Work    View    Admin	
🏛 Venues		
🗰 Schedule	Code Vendor Date P.O. # P.O. Amount Approved	Posted     Received     Project
わ Crew Planner		
E Purchase Orders	Showing 0 to 0 of 0 entries	
✓Ξ Action Lists <	4	
J Contacts		

Once the PO is saved, click

to see the PO on the grid

≡ Rent	al <i>Point3</i> DB [	[12.0.21.4] Rev	(4738]										🚴 mandy@rentp.	com <del>-</del>
									Tes	ts 🝷 Tes	t Dates 🝷 Reports	s - Assets - Seti	up - Others - He	elp 🝷
					1	Pu	rchase Ord	ers						
▼ ≡	Ordered Date	e 🗸 20	)23-04-26	2023-05-03	<b>2</b> +	0 - EAST	✓ 0 - Mai	n 🗸 🌐						
New 🕑	Open 🔒 Print	Work -	View	C Admin										
Show 10	✓ entries											Search:		
¢ Code	Vendor	Date	♦ P.O.#	P.O. Amount	Approved	Posted	Received	Project	Archived	¢CR	Assigned To	Invoice Status	Date Expected	¢ F
VMCC	Marcel Crosby	2023/04/26	AB204	4000.00 CAD	No	No	No		No	No		Not Invoiced	2023/05/03	
Showing 1 t	to 1 of 1 entries	_	_		_		_	_					Previous 1	Next

### Details

The details tab contains information about the operator and the vendor that are involved in the order. Each operator has a PO limit, which is defined in the operator properties. This prevents operators from creating POs that exceed the acceptable amount.

The PO # will be assigned on save.

#### Status

- 1. A purchase order must be Approved before it can be posted or received, check the box in the status window to approve the PO
- 2. The Invoice Status field offers four options for recording the invoice status of a purchase order. Users would manually set the invoice status from within the Details tab of the Purchase Order.

Purchase			Operator Max: 6,000.00 Approved Amount: 0.00 Vendor minimum: 0		Total 0.00	×
Details Dates	Equipment Delivery Address Notes					
Vendor	VMCC 😋			Assigned to		
	Marcel Crosby			enter booking #	t)	×
P.O. #						
Region	0 - EAST			enter project #		÷)
Location	0 - Main ~					
Description				Status		
Air bill #			1.			
Ordered by	RP	€ <b>1</b>	2 -	Invoiced		
Requested by	Request by	¢.	-	Not Invoiced Not Invoiced		<b>_</b>
Month year filter	April, 2023			Partly Invoiced Fully Invoiced		
				Closed Without Invoice		
						0

#### Dates

The dates tab contains the delivery method and times of when equipment should be in the warehouse.

Check the box to include the PO arrival date on the delivery and return schedule if needed.

Purchase	Operator Max: 5,000.00 Approved Amount: 0.00 Vendor minimum: 0	Total 0.00	×
Details     Dates     Equipment     Delivery Address     Notes       Ordered     2023-04-26			
Equipment In Wed 2023-05-03	13:00 <b>O</b>		
Other	Their number 🗸		
Include on delivery/return schedule			
		<b>1</b>	

### Equipment

This tab contains all the equipment that you will be purchasing. As you enter equipment into the grid, RentalPoint will add up the cost from the cost price in the sales tab of the product properties.

#### Glossary



Remove the highlighted item from the grid



Add a Sundry item

	Show sh	nortages for	the higl	hlighted iten	n							
	Plot the	highlighted	product	:								
Ż	Display F	Running Bala	ance for	the highligh	nted prod	uct						
	Display	Availability (	Calenda	r for the high	nlighted p	oroo	duct					
Purch	ase				Operator Max: 6,000.0 Approved Amount: 0.00 Vendor minimum: 0	0					Total 4,000.00	×
Details	Dates Equip	ment Delivery Address	Notes									
Pricing											Canadian Do	ollars 🗸
	Net days		0				Sub t	otal	4000 0	0		
	Discount %	0.00					Exer	npt	0.0	0		
	Equipment	4000.	00				Exer	npt	0.0	0		
	Freight	0.	00				T	otal	4000.0	0		
+	<b>Z</b> – (*)	<b>~</b> ] (#) (#)										
	Code		Part No.	Description	(	Qty	Unit/M	Unit rate	% Disc.	Price	Qty Received	GL code
	AAAD80			d&b D80 amplifier			1	1,000.0	0 0.00	1,000.00	0	
	BDRK			Beyer Opus Drum Mic Kit			1	3,000.0	0.00	3,000.00	0	

**Delivery Address** 

Add product

The default delivery address comes from the customer record or location for multi location systems.

Clear the address to complete it manually.

+

#### Glossary

**1** 

Ship to Contact



Ship to Venue



Copy Address from Booking



Ship to Warehouse Location

< Clear address

Purchase			Operator Max: 6,000. Approved Amount: 0.0 Vendor minimum: 0	00 00			Total 4,000.00	×
Details Dates Equipment	Delivery Address Notes							
Delivery to				<u>~</u>				
Rentals r Us								
Address	15 Curtis Ave							
	Paris							
City	Brant				State	ON		
Country	Canada			Zip Code		N3L 3W1		
Contact								
Phone 1	Country	Area		Number			Ext.	
Fax								

### Notes

Any extra information pertaining to the PO can be added here. Check the box to include PO notes on the printed purchase order.

Purchase	Operator Max: 6,000.00 Approved Anount: 6.00 Vendor minimum: 0	Total 4,000.00	×
Details Dates Equipment Delivery Address Notes			
Wed Apr 26 2023 16:39:02 GMT-0400 (Eastern Daylight Time) by: RP			
Enter PO Notes here			
Stamp			
			1

## 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

= Renta	alPoint3 DB [	12.0.21.4] Rev	[4738]						
							Pu	rchase Ord	ers
▼≡	Ordered Date	e 🗸 20	)23-04-26	2023-05-03	C	+	0 - EAST	✓ 0 - Main	n 🗸 🄃
🖹 New 📝	Open 🔒 Print	: Work	View \$\$	Admin					
Show 10	✓ ent B	rint Order							
🔶 Code	Vendor	Date	♦ P.O.#	P.O. Amount	🔶 App	roved	Posted	Received	Projec
VMCC	Marcel Crosby	2023/04/26	AB204	4000.00 CAD	No		No	No	
Showing 1 t	o 1 of 1 entries	1 row selec	ted						

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



Save or send to printer

oose templa		_		_		
MY TEST Con 1623 Maria S Burbank CA S Phone: 818 S Fax:	<b>npany</b> Street 91504 565-3333			Eav		
	PURCHA	SE ORDER # AB2	04			
	From:		:	Ship To:		
Contact:	Marcel Crosby	Deliver To:	Rentals	r Us		
Company: Address:	Marcel Crosby 344 Norway Drive	Address:	15 Curti Paris Brant Ni	s Ave 3L 3W1		
Phone: Fax:	Franklin 06001	Contact: Delivery by: Via:	Wed, 03 They De	8-May-2023 1:0 liver	00 PM	
Phone: Fax: E-mail:	Franklin 06001 add@eee.com	Contact: Delivery by: Via:	Wed, 03 They De	8-May-2023 1:0 liver	00 PM	
Phone: Fax: E-mail: Order Date:	Franklin 06001 add@eee.com Wed, 26-Apr-2023	Contact: Delivery by: Via: Assigned To:	Wed, 03 They De	B-May-2023 1:0	Directory	Ŧ.L.1
Phone: Fax: E-mail: Order Date: C <b>ode Pa</b> VAAD80	Franklin 06001 add@eee.com Wed, 26-Apr-2023 art No Description d&b D80 amplifier	Contact: Delivery by: Via: Assigned To:	Wed, 03 They De Quantity	8-May-2023 1:0 liver Unit Price 1,000.00	DO PM Disc 0.00	<b>Total</b> 1,000.00
Phone: Fax: E-mail: Drder Date: Code Pa AAAD80 BDRK	Franklin 06001 add@eee.com Wed, 26-Apr-2023 art No Description d&b D80 amplifier Beyer Opus Drum Mic Kit	Contact: Delivery by: Via: Assigned To:	Wed, 03 They De Quantity 1 1	8-May-2023 1:0 liver Unit Price 1,000.00 3,000.00	DO PM Disc 0.00 0.00	<b>Total</b> 1,000.00 3,000.00
Phone: Fax: F-mail: Drder Date: Code Pa AAAD80 BDRK	Franklin 06001 add@eee.com Wed, 26-Apr-2023 art No Description d&b D80 amplifier Beyer Opus Drum Mic Kit Sundry item	Contact: Delivery by: Via: Assigned To:	Wed, 03 They De Quantity 1 1 1	B-May-2023 1:0 liver Unit Price 1,000.00 3,000.00 N/C	DO PM Disc 0.00 0.00 0.00	Total 1,000.00 3,000.00 N/C
Phone: Fax: E-mail: Drder Date: Code Pa AAAD80 BDRK	Franklin 06001 add@eee.com Wed, 26-Apr-2023 art No Description d&b D80 amplifier Beyer Opus Drum Mic Kit Sundry item	Contact: Delivery by: Via: Assigned To: Equip	Wed, 03 They De Quantity 1 1 1 2 ment Tota	B-May-2023 1:0 Iliver Unit Price 1,000.00 3,000.00 N/C	Disc 0.00 0.00 0.00 0.00 CAN	Total 1,000.00 3,000.00 N/C 4,000.00
Phone: Fax: E-mail: Drder Date: Code Pa AAAD80 BDRK	Franklin 06001 add@eee.com Wed, 26-Apr-2023 art No Description d&b D80 amplifier Beyer Opus Drum Mic Kit Sundry item	Contact: Delivery by: Via: Assigned To: Equip Disco	Wed, 03 They De Quantity 1 1 2 0ment Tota punt @ 0%	B-May-2023 1:0 liver Unit Price 1,000.00 3,000.00 N/C	Disc 0.00 0.00 0.00 0.00 CAN	Total 1,000.00 3,000.00 N/C 4,000.00 CAN 0.00
Phone: Fax: E-mail: Drder Date: Code Pa AAAD80 BDRK Wed Apr 2	Franklin 06001 add@eee.com Wed, 26-Apr-2023 art No Description d&b D80 amplifier Beyer Opus Drum Mic Kit Sundry item 26 2023 16:39:02 GMT-0400 (Eastern	Contact: Delivery by: Via: Assigned To: Equip Disco Total	Wed, 03 They De Quantity 1 1 1 0 ment Tota ount @ 0% inc discour	8-May-2023 1:0 liver 1,000.00 3,000.00 N/C I:	Disc 0.00 0.00 0.00 CAN CAN	Total 1,000.00 3,000.00 N/C 4,000.00 CAN 0.00 4,000.00
Phone: Fax: E-mail: Drder Date: Code Pi AAAD80 BDRK Wed Apr 2 Daylight Ti	Franklin 06001 add@eee.com Wed, 26-Apr-2023 art No Description d&b D80 amplifier Beyer Opus Drum Mic Kit Sundry item 66 2023 16:39:02 GMT-0400 (Eastern ime) by: RP Enter PO Notes here	Contact: Delivery by: Via: Assigned To: Equip Disco Total Carri	Wed, 03 They De Quantity 1 1 1 oment Tota ount @ 0% inc discour age:	8-May-2023 1:0 liver Unit Price 1,000.00 3,000.00 N/C I:	Disc 0.00 0.00 0.00 CAN	Total 1,000.00 3,000.00 N/C 4,000.00 CAN 0.00 CAN 0.00 CAN 0.00
Phone: Fax: E-mail: Drder Date: Code Pi AAD80 3DRK Wed Apr 2 Daylight Ti	Franklin 06001 add@eee.com Wed, 26-Apr-2023 art No Description d&b D80 amplifier Beyer Opus Drum Mic Kit Sundry item C6 2023 16:39:02 GMT-0400 (Eastern ime) by: RP Enter PO Notes here	Contact: Delivery by: Via: Assigned To: Equip Disco Total Carri. Tax:	Wed, 03 They De Quantity 1 1 1 0 ment Tota ount @ 0% inc discour age:	B-May-2023 1:0 liver <b>Unit Price</b> 1,000.00 3,000.00 N/C I:	Disc 0.00 0.00 0.00 CAN	Total 1,000.00 3,000.00 N/C 4,000.00 CAN 0.00 CAN 0.00 CAN 0.00

## 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	4,0	Total 000.00	×
Details Dates	Equipment Delivery Address Notes					
Vendor	VMCC Su			Assigned to		
	Marcel Crosby			enter booking #	Û	×
P.O. #	AB 204					
Region	0 - EAST Y			enter project #		÷)
Location	0 - Main 🗸					
Description				Status		
Air bill #				Approved By RP On 2023-04-26 5:21 PM		
Ordered by	RP	¢₁		Invoiced		
Requested by	Request by	¢₁		Not Invoiced		~
Month year filter	April, 2023					
					1	0
					_	

## 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.o	com <del>-</del>
						Te	sts 👻 Test	Dates - Reports	s 🔹 Assets 👻 Seti	up - Others - He	elp ▼
			Pu	rchase Ord	ers						
▼	2023-05-03	<b>C</b> +	0 - EAST	✓ 0 - Mai	n ~ ()						
🖹 New 😰 Open 🖶 Print 🔅 Work 👁 View 🗱	Admin										
Show 10 → entries → Post ✓									Search:		
🕆 Code 🔅 Vendor 🗲 Unpost 🗡	P.O. Amount	Approved	Posted	Received	Project	Archived	¢CR	Assigned To	Invoice Status	Date Expected	¢ F
VMCC Marcel Crosby C Receive	4000.00 CAD	No	No	No		No	No		Not Involced	2023/05/03	
Showing 1 to 1 of 1 entries 1 row selected										Previous 1	Next
											•

### **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 Work menu.

The software will increment the inventory quantity of received items

= Renta	l <b>Point3</b> DB [	12.0.21.	4] Rev [4738]		
TE	Ordered Date	) <b>v</b>	2023-04-	-26	2023-05-03
New 🕜	Open 🔒 Print	::w	ork 💿 View	( <b>\$</b> \$)	Admin
Show 10	✓ entries	→	Post		
🔶 Code	• Vendor	÷	Unpost		P.O. Amount
VMCC	Marcel Crosby	6	Receive		4000.00 CAD
Showing 1 to	o 1 of 1 entries	1 row	selected		

### 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 id denied.

RentalPoint3 DB [12.0.21.4] Rev [4738]									
						Te	sts 🝷 Tes	st Dates - Report	s - Assets
			Pu	rchase Ord	ers				
▼	2023-05-03	<b>C</b> +	0 - EAST	✓ 0 - Mair	n 🗸 🌘				
🖹 New 😰 Open 🖶 Print 😳 Work 💿 View 🐟 A	dmin								
Show 10 v entries	Delete								Sea
Code	Duplicate	Approved	Posted	Received	Project	Archived	¢CR	Assigned To	Invoice S
VMCC Marcel Crosby 2023/04/26 AB204	Archive	No	No	No		No	No		Not Invoiced
Showing 1 to 1 of 1 entries 1 row selected	Unlock								
4		-							

## 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.

Test Dates ▼ Report         Purchase Orders         Image: Code       Ordered Date       2023-04-26       2023-05-03       Image: How Code Code Code Code Code Code Code Code	= Renta	al <i>Point3</i> DB [1	12.0.21.4] Rev	/ [4738]								
Image: Show 10 ventries     Code     VMCC     Marcel Crosby   2023/04/26 AB204   Abgroved     Posted   Received   Project   Achive   No   No   No     No										Tes	ts 🔹 Tes	t Dates 🝷 Repor
Image: Code of Vendor Vendor   VMCC Marcel Crosby   2023/04/26   AB204     Approved   Posted   Received   Project   Achive   No    No    No							Pu	rchase Ord	ers			
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## 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

= Renta	al <i>Point3</i> db [	12.0.21.4] R	ev [4738]								
							Pu	rcha	se Orde	ers	
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New C Show 10	Open ➡ Print <ul> <li>entries</li> </ul>	🗘 Work	<ul><li>View</li><li>I</li></ul>	Admin Delete	Ĺ						
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VMCC	Marcel Crosby	2023/04/26	AB204	Archive	No		No	No			
Showing 1 t	to 1 of 1 entries	1 row sele	cted	Unlock							

#### Archived POs are still visible on the archive grid

	Purchase Orders Filters			×
	Sort Sequence		Look At	
	Primary Sequence		<ul> <li>Current Data</li> </ul>	
ilters	Code	*	<ul> <li>Archive Data</li> </ul>	
	Secondary Sequence		4	
▼	Vendor	~	/	
New 🕑 Open 🔒 Print 🔅 Work				
show 10 v entries	Scope		Invoiced Status	
	O Month Year Filter	April 2023	All	
Code Vendor Date	Sub rentals	Purchases	O Not Invoiced	
		Not Posted	O Partly Invoiced	
VMCC Marcel Crosby 2023/04/26	All     Not Approved	Not Posted	O Fully Invoiced	
Showing 1 to 1 of 1 entries 1 row sele			Closed without Invoice	
(				
	Region		Location	
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	QOk			

### **Operator Privileges & Parameters**

### Purchase Order Group Privileges

Operator Privileges governing access to Purchase Order menu options can be found on the 'Products and POs' tab of the Operator Group.

First access Setup-->Lists, then find the Operator List and edit the Operator Group to modify privileges.



ReportsPrinting OptionsSetup and UtilitiesContact Management AccessOtherCrew and ActivitiesBooking ScopeGroup NameBookingsCross Hires and TransfersCustomers and VendorsProducts and PO'sCheckout, Return and MaintenanceProductsAssetsCheckout, Return and MaintenanceQuadresCan Change Asset Disposal Type to 'Stolen'Can Change Asset Disposal Type to 'Stolen'Checkout, Return and MaintenanceCan Change Asset Disposal Type to 'Stolen'Can Change Asset Disposal Type to 'Stolen'Delete Purchase OrdersAdd / Edit / Delete EachniciansCan Change Asset Disposal Type to 'Written Off'Delete Purchase OrdersPost Purchase OrdersAdd / Edit / Delete TechniciansCan Change Asset Disposal Type to 'Written Off'Disposal details in Asset recordPost Purchase OrdersCald I fackage / Macro Components or Qualified TechniciansDisposal details in Asset recordSet Intinacial data before the stop dateSet Maximum Approved POCald J Edit / Delete Product CategoriesMove Assets RecordsMove Assets RecordsSet Maximum Approved POAdd / Edit / Delete Product CategoriesMove Assets RecordsMove Assets ListingAdd / Edit / Delete Vendor RatesAbility to override discrepancies when packing a rackDelete Unceived Items from Posted POCan Change CurrencyAbility to override discrepancies when packing a rackCan Change Currency	Group	Edit Group Record : ADMINISTRATOR					
Image: Clear All in tab       Image: All All All All All All All All All Al	Reports       Printing Options       Setup and Utilities       Contact Management Access       Other       Crew and Activities       Booking S         Cross Hires and Transfers       Customers and Vendors       Products and PO's       Checkout, Return and Maintenance         Products       I Use Product Setup       I Add / Edit Asset Records       I Add / Edit / Delete Rental Products       I Add / Edit Asset Disposal Type to 'Stolen'       I Edit Purch         I Add / Edit / Delete Rental Products       I Can Change Asset Disposal Type to 'Stolen'       I Delete Purch       I Delete Purch         I Add / Edit / Delete Labour products       I Can Change Asset Disposal Type to 'Written Off'       I Delete Purch       I Delete Purch         I Add / Edit / Delete Technicians       I Can Change Asset Disposal Type to 'Written Off'       I Delete Purch       I Delete Purch         I View Technician Rates       I Can Set Assets to Active Status       I Archive Pirch       I Delete Purch         I Edit Technicians       I Edit Technician Rates       I Financial details in Asset record       I Set Invoic         I Edit Technicians       I Edit financial data before the stop date       I Set Maxim       I Set Maxim         I Edit Group Descriptions       I Delete Asset Records       I Duplicate		s Booking Scope Group Name Bookings Purchase Orders 2 Add Purchase Orders 2 Edit Purchase Orders 3 Delete Purchase Orders 4 Post Purchase Orders 5 Receive Purchase Orders 5 Archive Purchase Orders 5 Set Invoice Status of a PO 5 Change Prices After PO is Posted 5 Set Maximum Approved PO 5 Duplicate Purchase Orders 5 Delete Unreceived Items from Posted PO				
	<ul> <li>Resequence Products</li> <li>Add Stock</li> <li>Use Product Utilities</li> <li>Product Listing / Stock Report</li> <li>Add / Edit / Delete Vendor Rates</li> <li>All in tab</li> <li>Clear All in tab</li> </ul>	<ul> <li>Asset Listing</li> <li>Racks</li> <li>Ability to override discrepancies when packing a rack</li> </ul>	Can edit partially received POs Purchase Orders and Cross Rentals Can Change Currency				

### Purchase Order Operator Privileges

Privileges for PO Approval Amount and mandatory assigning of PO to a booking are found in each operator record

Operator				
Operator Settings Multi	Location Operator Groups We	orkflows	Auto Emailing	
Group ACCO	DUNTING		Default Region	0-EAST \$
First Name test			Default Location	2-City 🗢
Last Name			Default Division	÷
Group (default)		•	Default Salesperson	т + х
RentalPoint3 Password	ACCOUNTING	•	Default Project Manager	л + х
Access to Mobile Dashboar	d only		Email Settings	Use Custom Email Setting
Must assign booking to PO before saving			Email Address	mandyfox.mk@gmail.com
Maximum PO Approval Amour	nt		SMTP Address(Host)	
Maximum Cross Rental Appro	val Amount	0	SMTP Port	SSL/TLS Not User +
Maximum Rental Discount %		0	My smtp server requires authors	entication
Maximum Sales Discount %		0	Send Test Email	r Store Password
			Copy from Company Email	Settings
			Copy from Location Email S	Settings
			Web Language	English \$
			System Administrator	🗆 Disable Login
				8 🗸

### Purchase Order Parameter Settings

Parameters affecting Purchase Orders are outlined below



E Rental Point 3 DB [12.0.21.4] Rev [4738]			💄 mandy@r
		Tests 🝷 Test D	ates • Reports • Assets • Setup • Others •
Settings and preferences Control panel			
Company name	Accounts	Invoicing	Pricing setup
Operational setup	Custom Viewing	Terminology	Transfers
😩 Crew Structure	IIII Barcode Tracking	Cloud setup	

#### **Operational Parameters Numbers:**

- 19 Minimum Booking Status for New PO or Sub Rental
- 25 Set Next Purchase Order Number
- 75 Transport dates in Sub Rentals
- 159 Force PO Approval before allowing posting

If the above parameters are modified, ensure all users are logged out, then reload software settings to avail of the newly modified parameters

-	Reports - Assets - Setup -	Ot				
	Lists					
	Save instRec to Database					
	Settings and Preferences					
	Reload Software Settings					