

# 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

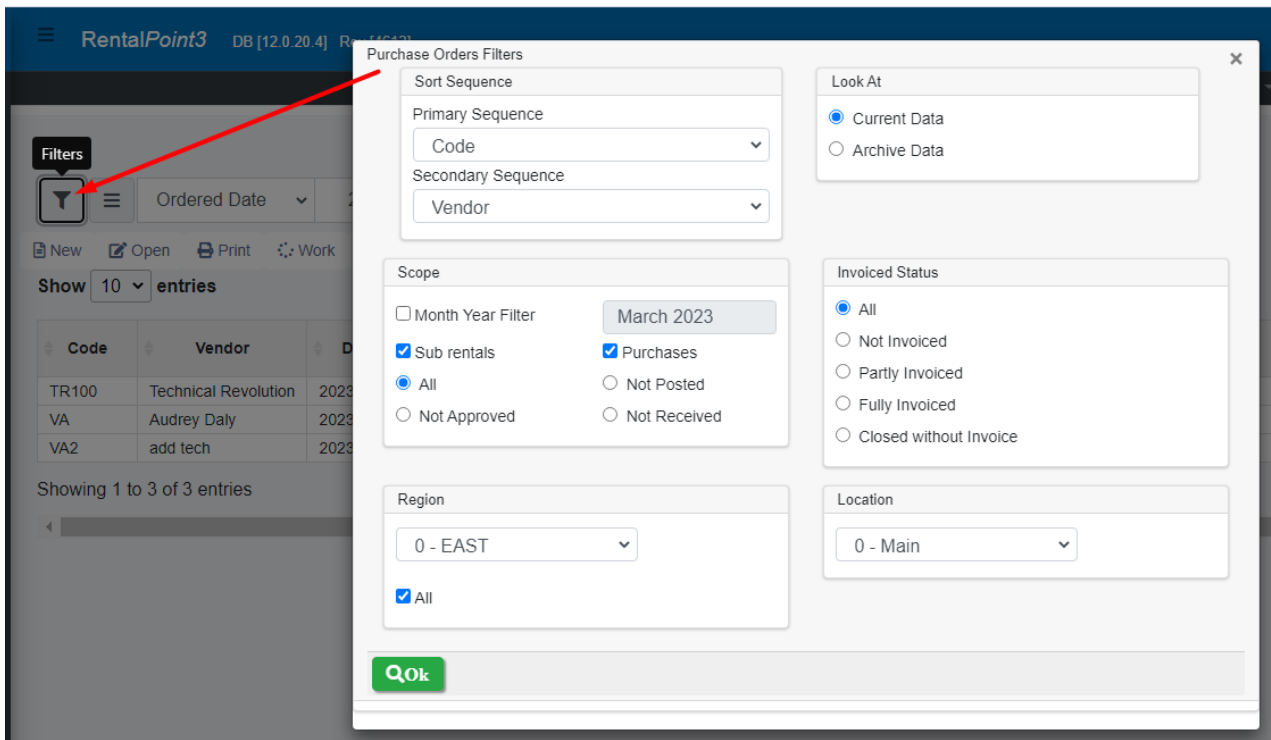
## The Purchase Order Grid

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

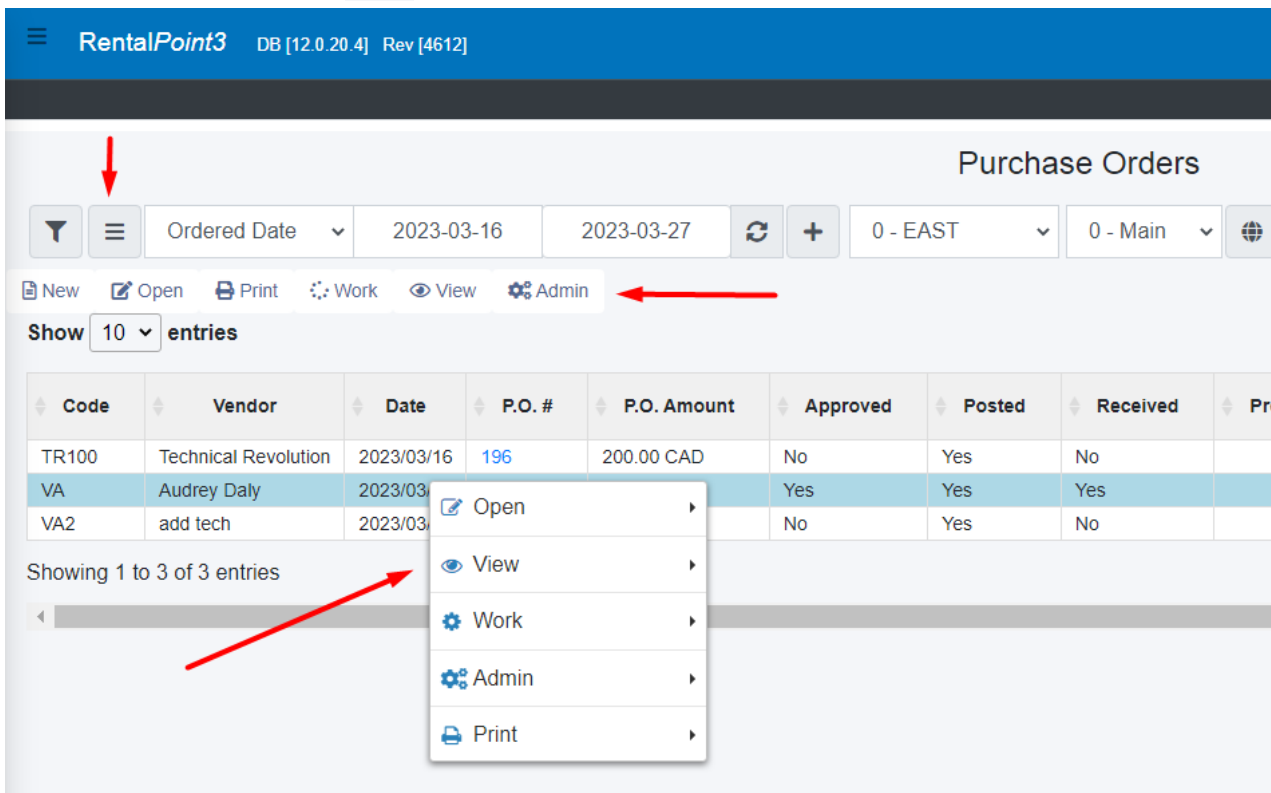
### 1. Filters

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



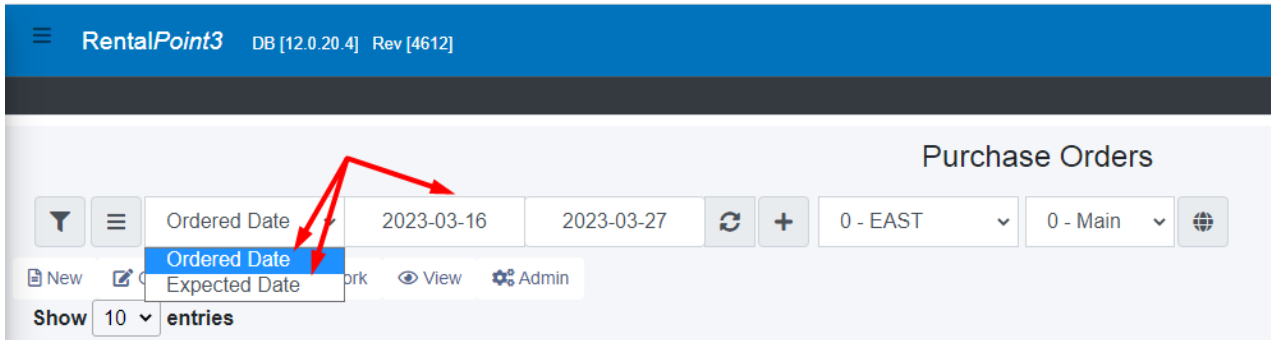
## 2. Menu

Access the menu options via  or right click or from the top of the grid window



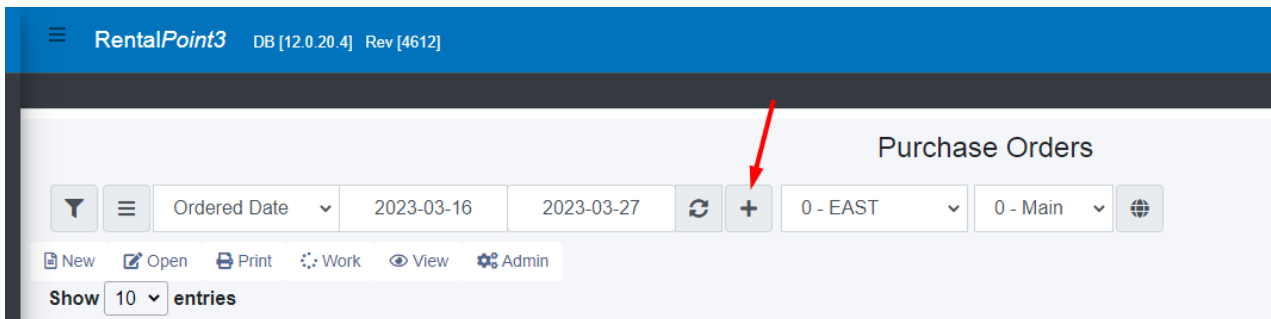
## 3. Date Range

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



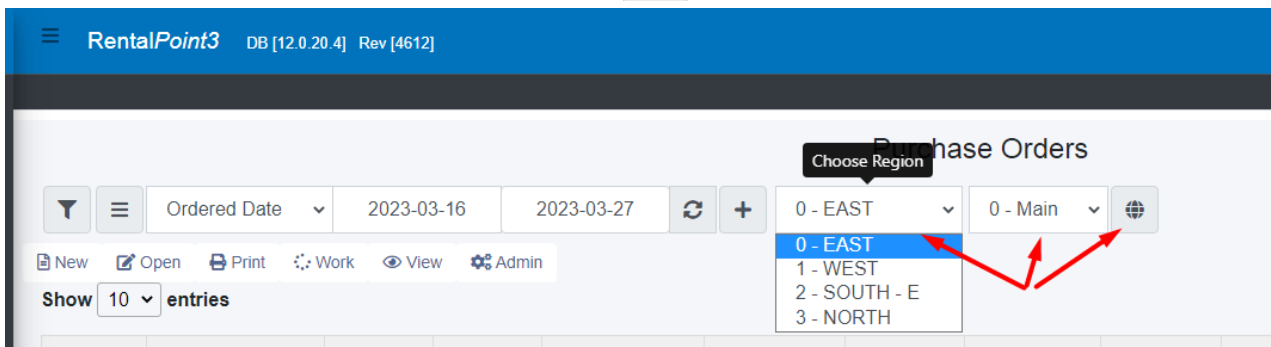
## 4. Quick Add

Use this option to quickly add a Purchase Order



## 5. Region & Location

Select the region and location to work within OR click  for all locations (needs multi location license)



## 6. Search

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

Purchase Orders

Ordered Date: 2023-03-16 to 2023-03-27

Show 10 entries

Search: tec

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
VA2	add tech	2023/03/16	198	100.00 CAD	No	Yes	No		No	Yes	300100013	Not Invoiced	2023/03/16

Showing 1 to 2 of 2 entries (filtered from 3 total entries)

Previous 1 Next

## 7. Sort

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

Purchase Orders

Ordered Date: 2023-03-16 to 2023-03-27

Show 10 entries

Search: tec

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 Invoiced	2023/03/16

Showing 1 to 2 of 2 entries (filtered from 3 total entries)

Previous 1 Next

## 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 entries** option, default is 10 items per page.

Purchase Orders

Ordered Date: 2023-03-16 to 2023-03-27

Show 10 entries

Search: tec

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 Invoiced	2023/03/16

Showing 1 to 2 of 2 entries (filtered from 3 total entries)

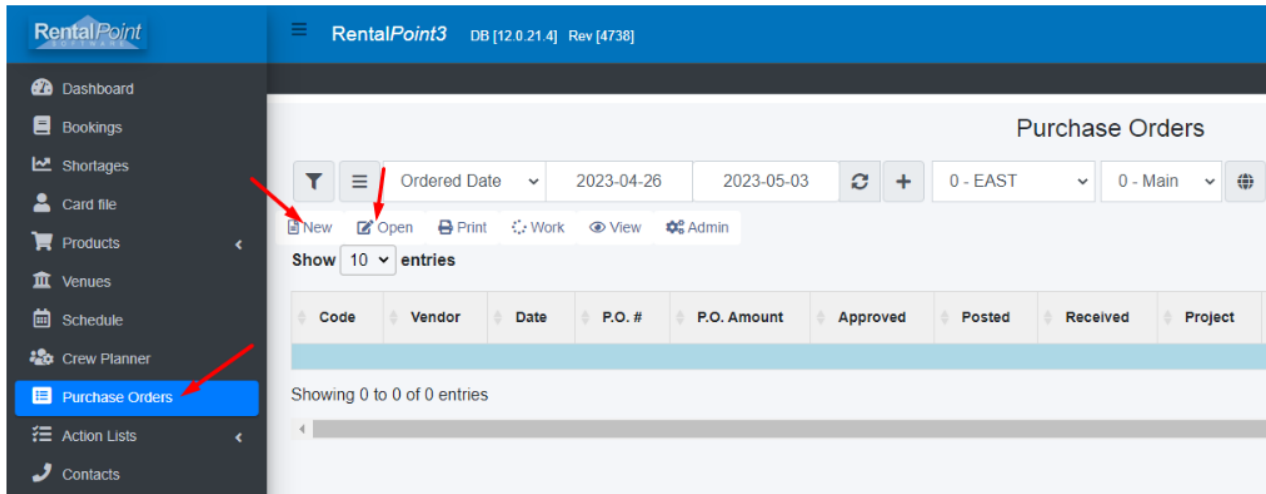
Previous 1 Next

## Create/Edit a Purchase Order

## Create/Edit

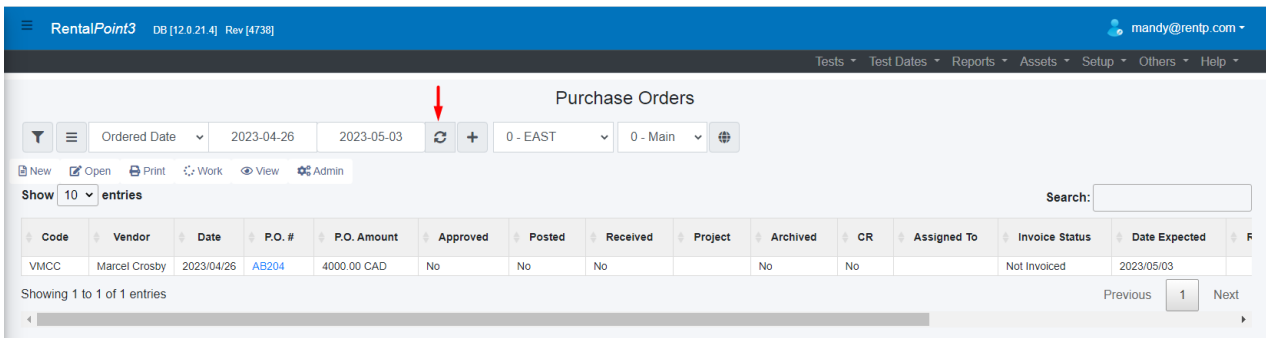
To create a new purchase order, right click in the PO grid, then click New or use the top menu icon.

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



The screenshot shows the RentalPoint3 interface. On the left, a sidebar menu has 'Purchase Orders' highlighted with a red arrow. In the main area, the 'Purchase Orders' grid header has a top menu icon (three horizontal lines) with a red arrow pointing to it. Below the header, there are filters for 'Ordered Date' (2023-04-26 to 2023-05-03), a '+', and location filters '0 - EAST' and '0 - Main'. Action buttons include 'New', 'Open', 'Print', 'Work', 'View', and 'Admin'. A 'Show 10 entries' dropdown is visible. The grid table has columns: Code, Vendor, Date, P.O. #, P.O. Amount, Approved, Posted, Received, Project. Below the table, it says 'Showing 0 to 0 of 0 entries'.

Once the PO is saved, click  to see the PO on the grid



The screenshot shows the RentalPoint3 interface after a purchase order has been saved. A red arrow points to the refresh icon (circular arrow) in the grid header. The grid now shows one entry. The table has columns: Code, Vendor, Date, P.O. #, P.O. Amount, Approved, Posted, Received, Project, Archived, CR, Assigned To, Invoice Status, Date Expected. The entry is: VMCC, Marcel Crosby, 2023/04/26, AB204, 4000.00 CAD, No, No, No, No, No, Not Invoiced, 2023/05/03. Below the table, it says 'Showing 1 to 1 of 1 entries'.

## 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 ✎  
Marcel Crosby

P.O. #

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  
Invoiced  
Not Invoiced 1 2  
Not Invoiced  
Partly Invoiced  
Fully Invoiced  
Closed Without Invoice

📄 🚫

## 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: 6,000.00  
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 🕒

Delivery via They Deliver ▼ Their number ▼

Other

Include on delivery/return schedule

📄 🚫

## 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



Add an item to the grid



Edit the highlighted item on the grid



Remove the highlighted item from the grid



Add a Sundry item



Show shortages for the highlighted item



Plot the highlighted product



Display Running Balance for the highlighted product



Display Availability Calendar for the highlighted product

**Purchase** Operator Max: 6,000.00  
Approved Amount: 0.00  
Vendor minimum: 0 Total  
4,000.00 ✕

Details Dates **Equipment** Delivery Address Notes

Pricing Canadian Dollars

Net days	<input type="text" value="0"/>	Sub total	<input type="text" value="4000.00"/>
Discount %	<input type="text" value="0.00"/>	Exempt	<input type="text" value="0.00"/>
Equipment	<input type="text" value="4000.00"/>	Exempt	<input type="text" value="0.00"/>
Freight	<input type="text" value="0.00"/>	Total	<input type="text" value="4000.00"/>

Code	Part No.	Description	Qty	Unit/M	Unit rate	% Disc.	Price	Qty Received	GL code
AAAD80		d&b D80 amplifier	1		1,000.00	0.00	1,000.00	0	
BDRK		Beyer Opus Drum Mic Kit	1		3,000.00	0.00	3,000.00	0	
<input type="text" value="Add product"/>									

## Delivery Address

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

Clear the address to complete it manually.

### Glossary



Ship to Contact



Ship to Venue



Copy Address from Booking



Ship to Warehouse Location



Clear address

**Purchase** Operator Max: 6,000.00  
Approved Amount: 0.00  
Vendor minimum: 0 Total  
4,000.00 ✕

Details Dates Equipment Delivery Address Notes

Delivery to

Rentals r Us

Address: 15 Curtis Ave

City: Paris

Country: Canada State: ON

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 Amount: 0.00  
Vendor minimum: 0 Total  
4,000.00 ✕

Details Dates Equipment Delivery Address Notes

Print on P.O.

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

Enter PO Notes here

## 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



RentalPoint3 DB [12.0.21.4] Rev [4738]

### Purchase Orders


Ordered Date 2023-04-26 2023-05-03 0 - EAST 0 - Main

New Open Print Work View Admin

Show 10 entries **Print Order**

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	

Showing 1 to 1 of 1 entries 1 row selected



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

Select Report :

- Purchase Order - Default**
- Rentalpoint Purchase Order
- Rentalpoint Purchase Order Collection Note

Print Vendor Notes

Print Purchase Order Notes

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	Assigned To:	
Order Date:	Wed, 26-Apr-2023		

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
	<b>Total Amount:</b>	<b>CAN 4,000.00</b>

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

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:

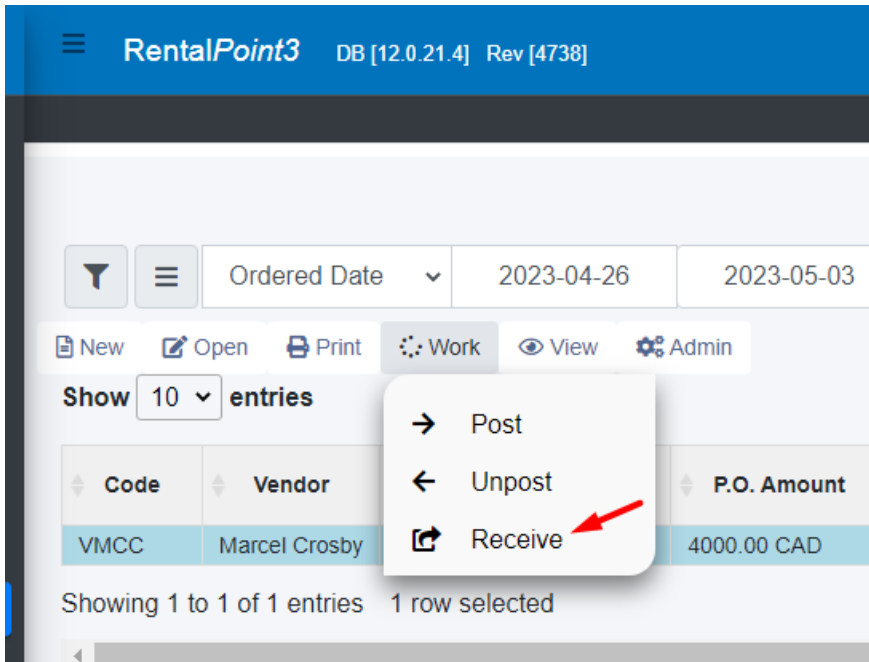
- **Approved** – the purchase order has been reviewed and approved by the appropriate people.
- **Posted** – the purchase order is ready to be ordered from the supplying company.

- **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

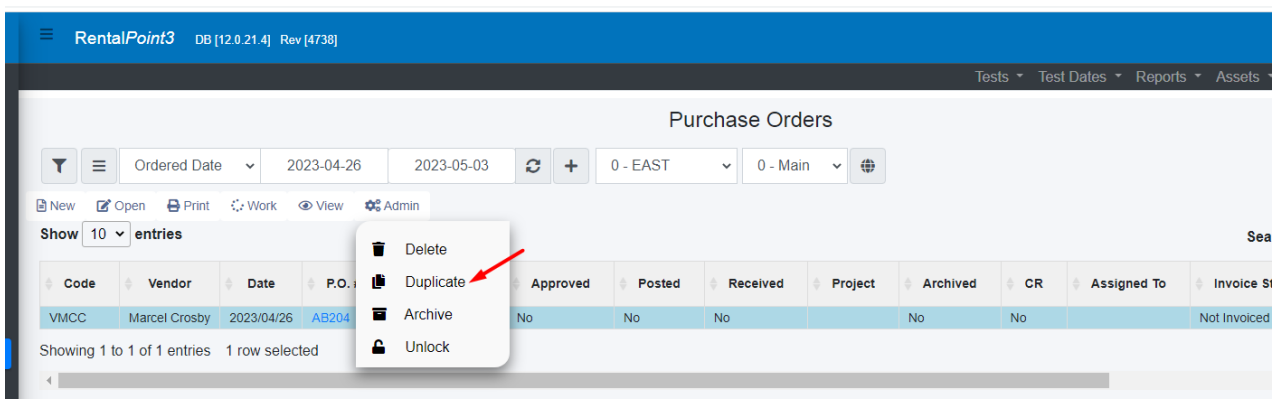


## Duplicate a Purchase Order

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.



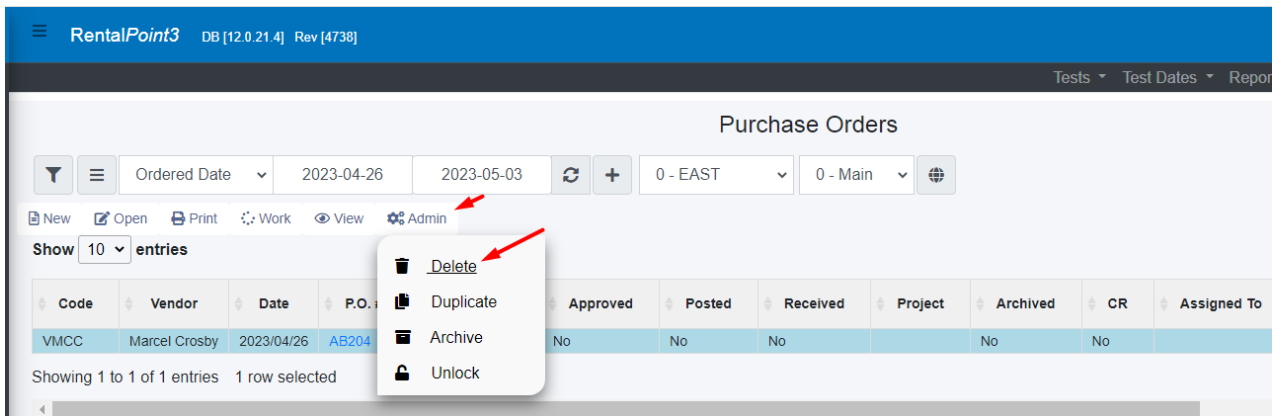
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## Delete a Purchase Order

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.

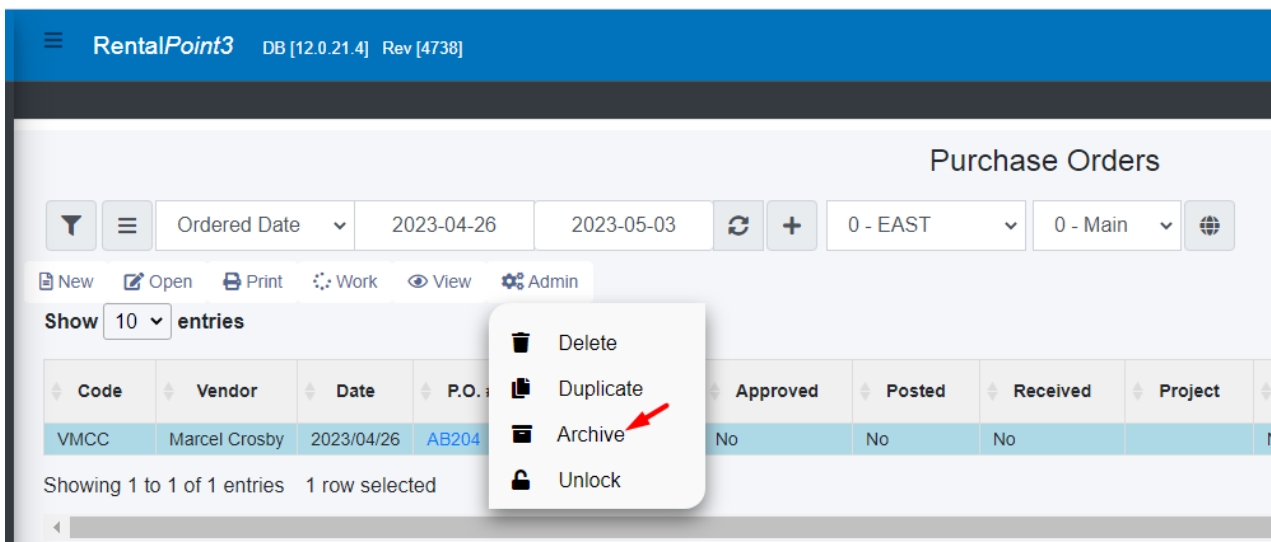


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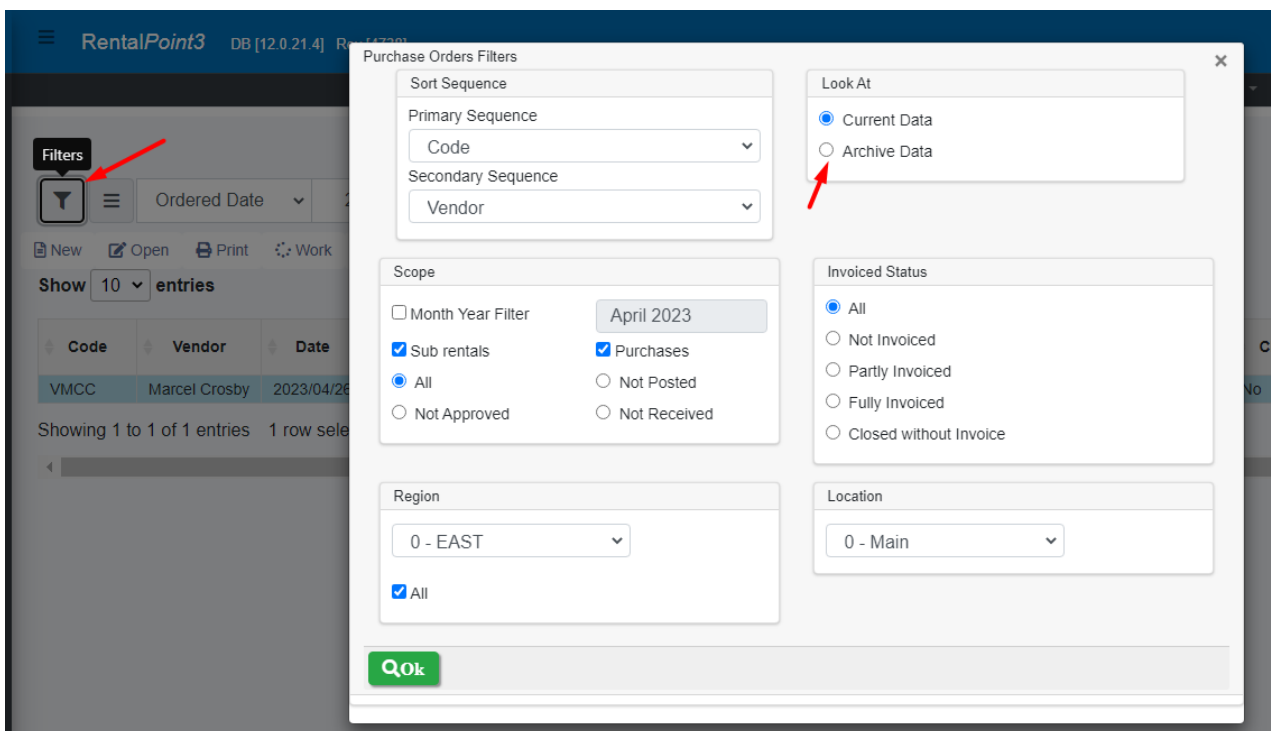
## Archive a Purchase Order

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



Archived POs are still visible on the archive grid

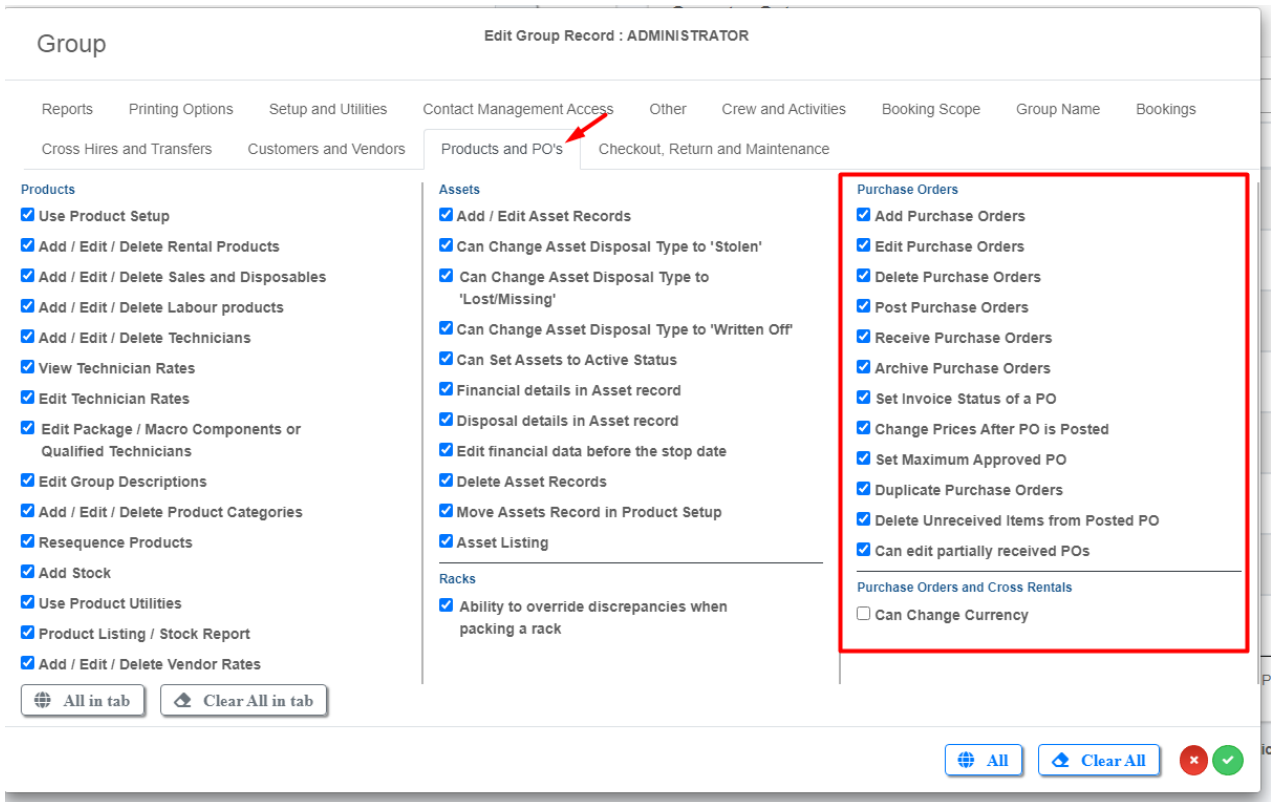
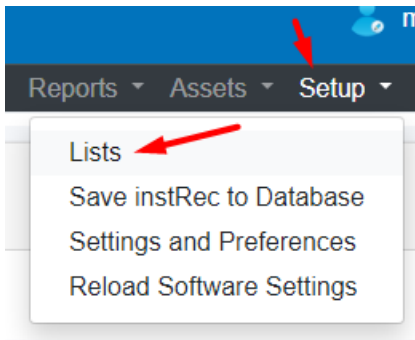


## Operator Privileges & Parameters

### 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.



## 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 | Workflows | Auto Emailing

**Group** ACCOUNTING

First Name: test

Last Name:

Group (default): ACCOUNTING

RentalPoint3 Password: [Masked]

Access to Mobile Dashboard only

Must assign booking to PO before saving

Maximum PO Approval Amount: 0

Maximum Cross Rental Approval Amount: 0

Maximum Rental Discount %: 0

Maximum Sales Discount %: 0

Default Region: 0-EAST

Default Location: 2-City

Default Division:

Default Salesperson: T

Default Project Manager: JM

Email Settings: Use Custom Email Setting

Email Address: mandyfox.mk@gmail.com

SMTP Address(Host):

SMTP Port: SSL/TLS: Not User

My smtp server requires authentication

Send Test Email | Clear Store Password

Copy from Company Email Settings

Copy from Location Email Settings

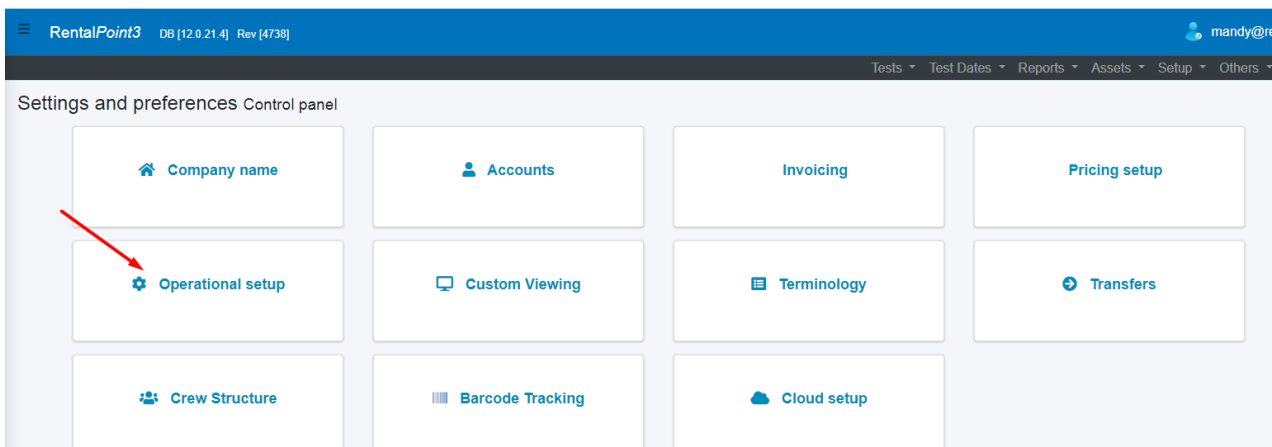
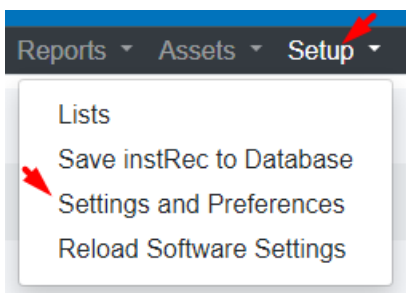
Web Language: English

System Administrator |  Disable Login

✖ ✔

## Purchase Order Parameter Settings

Parameters affecting Purchase Orders are outlined below





### 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

