

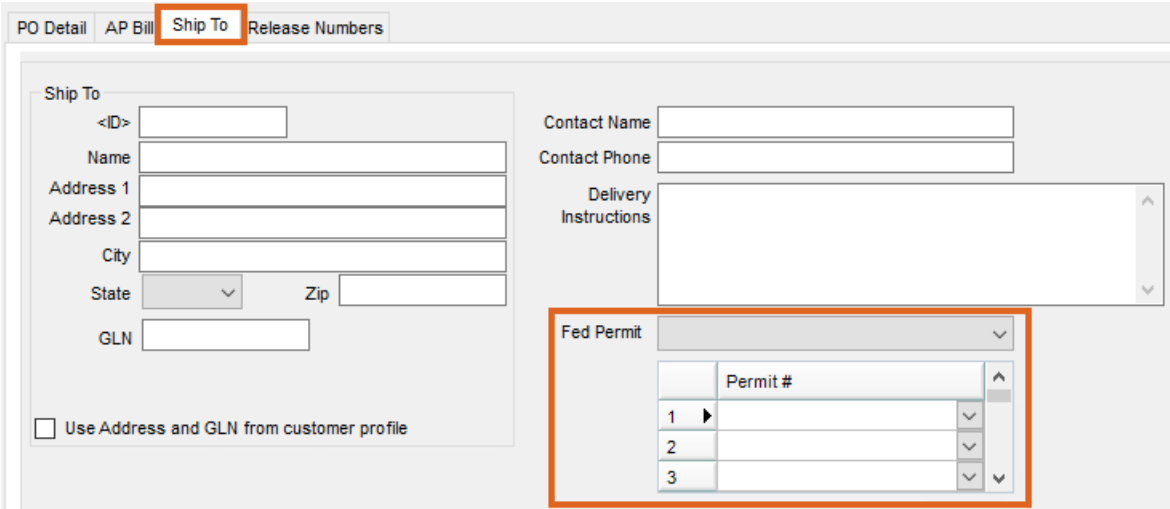
Direct Ship Purchase Orders

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Overview

Product purchased for a customer and delivered directly to the customer’s site may be entered as a Direct Ship Purchase Order. The vendor invoices the company and the company invoices the customer, but the product is never physically delivered to the company’s site. When a Purchase Receipt is entered against the Direct Ship Purchase Order, a priced Delivery Ticket is automatically created for the customer.

A direct ship Purchase Order includes the selection of a federal and state/county permits to be used in the permit checking when the transaction is saved. This information is then passed onto the Delivery Ticket. These permits are from the customer selected for the direct shipment.



Direct Ship Purchase Orders have a few requirements:

1. If the Direct Ship option is selected, a customer must be chosen.
2. Voiding the Purchase Receipt is only allowed if the Delivery Ticket that it created has not been invoiced.
3. Voiding the drop ship Delivery Ticket is not allowed. (Voiding the Purchase Receipt voids the Delivery Ticket.)
4. A preference is available to not allow a drop ship Purchase Receipt to be saved if there is an open drop ship Delivery Ticket for this product. This requires that the open drop ship Delivery Ticket be billed to the customer before receiving against another drop ship Purchase Order.
5. A Direct Ship PO is not able to be selected on the *Direct* tab of the Purchase Invoice.

Direct Ship Purchase Order Process

For shipments direct from the vendor to the customer, Direct Ship Purchase Order automatically create a priced Delivery Ticket when imported into a Purchase Receipt.

1. Navigate to *Accounting / Inventory / Purchase Orders*.
2. On the *Select a Purchase Order* window, choose **Add**.

Note: Create a new Purchase Order using information from an existing Purchase Order by highlighting the existing order and choosing **Start With** on the *Select a Purchase Order* window.

3. Select the vendor and choose **Select**.
4. On the *Add a Purchase Order* window, double-click in the *Customer* area to choose the customer.
5. Select the *Direct Ship* option.
6. On the *Add a Purchase Order* window, select the products by double-clicking the *Product Name* column. Select the products, enter the *Quantity*, and choose **Done**.
7. Choose the *Price By* type, and enter the price by *\$/Unit* or *\$Total*. Optionally enter the *Selling Price* for the customer. Select **Apply**.

Note: By selecting *Direct Ship*, adding the customer, and choosing the *Selling Price*, a priced loaded Delivery Ticket will be created when the Purchase Order is imported into a Purchase Receipt.

8. Enter the *Freight* amount if applicable. From the drop-down, select *Actual \$/Unit*, *Actual Total\$*, *Actual per Load*, *Estimated \$/Unit*, *Estimated Total\$*, or *Estimated per Load*. If an estimated option is selected, double-click in the *Freight Vendor* area and choose the vendor. Select **Apply Freight** to distribute the cost among the products in the grid.
9. Optionally, double-click in the *Add-On* area to add any purchase add-on charges or select **Terms** to add any discount terms. Enter any *Comments*, *Delivery Ticket Notes*, and a *Start Date* and *Expiration Date*.
10. On the *Ship To* tab, enter a *Ship To Address* or select an existing *Ship To Address* by double-clicking in the *ID* area.
11. Select **Save**.