AP Purchase Orders - SKY Vendor
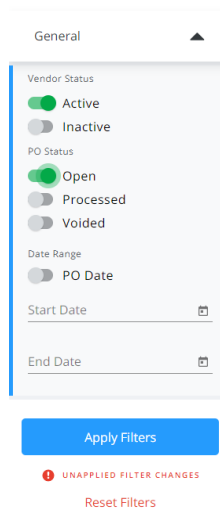
Overview

AP Purchase Orders are available in the left navigation. Search for specific AP Purchase Orders by *Vendor Name*, *Vendor ID*, *PO #*, *PO Date*, and *Status*.

Select the **Eye** button to view additional details. The **Ellipsis** can be selected to **Edit** or **Void** the Purchase Order.

The **Filter** button can be selected to narrow down AP Purchase Orders by *Vendor Status*, *PO Status*, and/or *Date Range*. After selecting desired filter options, choose **Apply Filters**.

Choose **Export** to export all results displayed on the screen as a CSV file based on current searches/filters in place.

Select an AP Purchase Order to view more details and optionally search for specific line item details.

Vendor Name
N and B Auto Parts

Vendor ID	PO #	PO Date	PO Balance	Discounts	Status	User
Nbauto	1537	05/09/2022	$722.00	$0.00	Open	1RE

Description

Notes

▲

🔍 Search...

	G/L Account	Description	Amount	Quantity	Unit Price	Part #	Vehicle	Comment
🔳	6030-00	Shop Expenses	$722.00	0.00	$0.00	--	--	fuel injector repair

Add an AP Purchase Order

Adding AP Purchase Orders is available for those with *Add/Edit AP Purchase Orders* turned on in SKY Admin.

AP Purchase Orders can be added to accounts in SKY Vendor using the process below:

1. Select the **+** button to add an AP Purchase Order.
2. Choose the appropriate *Vendor* from the drop-down.

Posting Info
Select a vendor for the new purchase order below

Vendor*

ABC Trucking | ABC

3. In the *PO Info* section, enter the *Purchase Order #* and *Purchase Order Date*. The PO number may default in if auto numbering is set up in Agvance. Also, the date defaults as today's date but can be modified. A *Description* can optionally be entered.

PO Info
Enter general PO info below

Purchase Order #*

76452

5 / 10

Purchase Order Date *

2/15/2023 📅

Description

0 / 40

4. Indicate the *Split ID* and *Amount* if the Purchase Order is to be split across multiple accounts. Choose **Apply**. This will apply the split and remove any existing lines.

Expense Breakdown & Predefined Split
Split the purchase order across multiple accounts below

| Split ID | Amount 0.00 | Apply |

Clicking "Apply" will apply the split and remove any existing lines.

Note: Split IDs must first be set up in Agvance at *Accounting / Setup / G/L / G/L Splits*.

-OR-

Select in the *GL Account** field and choose the appropriate account for this PO. The *Description* defaults in as the description entered on the account in Agvance. Optionally enter the *Amount*, a brief *Comment*, and the *Quantity*. Select a *Vehicle Location* and/or *Vehicle* from the drop-down. Optionally enter a *Unit Price* and/or *Part #*. Select **Add New Line Item** to create additional lines.

Add line item information below

| GL Account | Description | Amount 0.00 | Comment* | Quantity 0.000 |
| Advanced Search | | | 0 / 40 | |

| Vehicle Location | Vehicle | Unit Price 0.00 | Part # |
| | | | 0 / 40 |

Optionally select **Advanced Search** under the *GL Account* field to filter the GL Account drop-down. Filter by *Profit Center*, *GL Account ID*, and/or *GL Account Description*. Once filters are indicated, choose **Apply**. Select in the *GL Account* drop-down on the left to display GL Accounts matching the filters applied.

Select GL Account

GL Account

1010000-00
Checking Account - 1st National

1020000-00
Checking Account Grain

1100000-00
Undeposited Cash

1100000-01
Undeposited Cash

1100000-02
Undeposited Cash

1100000-03

GL Account Filters

Profit Center

GL Account ID
- ○ Starts With
- ● Contains
- ○ Ends With

GL Account Description
- ○ Starts With
- ● Contains
- ○ Ends With

Text

Text

[Apply]

Cancel   Done

5. Select in the *Preset Terms* field to set terms for this Purchase Order. The *Discount GL* defaults from the Location setup but can be changed by selecting from the drop-down.

Terms & Discounts
Select a discount term or set custom terms

Preset Terms
2/10n30

Discount GL
4100-00

If Paid By
2/25/2023 📅

% Disc
2.00

$ Disc
10.00

Net
490.00

Set Custom Terms

Note: An *Amount* must be present in the *Expense Breakdown & Predefined Split* section for this option to be available.

6. The *If Paid By* date(s) default if a Preset Term is selected but can be modified. If a Purchase Order was imported, any applicable discount information will be populated but can be altered.

   ○ Select **Set Custom Terms** to enter discount information not currently saved as Preset Terms. Choose **Add Custom Terms** to apply this discount to the Purchase Order.

Set Custom Terms
Select a discount type

⦿ % Disc   ○ $ Disc   ○ Net

If Paid By		% Disc	$ Disc	Net
2/25/2023	📅	2.00	10.00	490.00
If Paid By	📅	0.00	0.00	0.00
If Paid By	📅	0.00	0.00	0.00
If Paid By	📅	0.00	0.00	0.00
If Paid By	📅	0.00	0.00	0.00

Dates are saved and arranged in chronological order. Please verify dates and discounts.

Clear

Cancel   Add Custom Terms

7. Enter any additional *Notes* and review the *Total*, *Discount*, and *Net* amounts. Select **Post & Start New** to post this Purchase Order and enter another or **Post Purchase Order** to post the Purchase Order and return to the *AP Purchase Orders* screen.

Notes

Notes

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