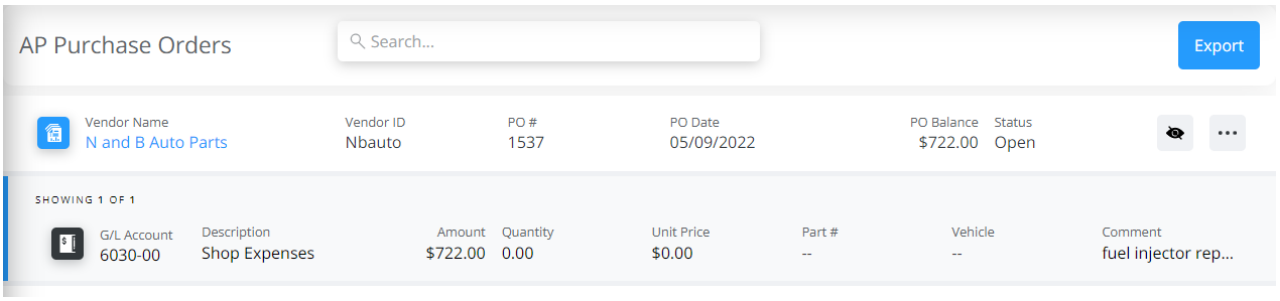
AP Purchase Orders - SKY Vendor

Last Modified on 11/05/2024 9:27 am CST

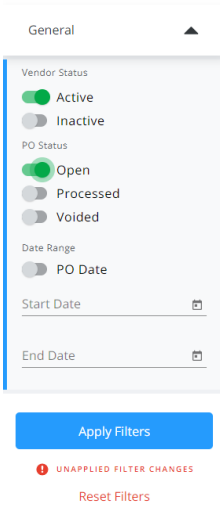
Overview

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.

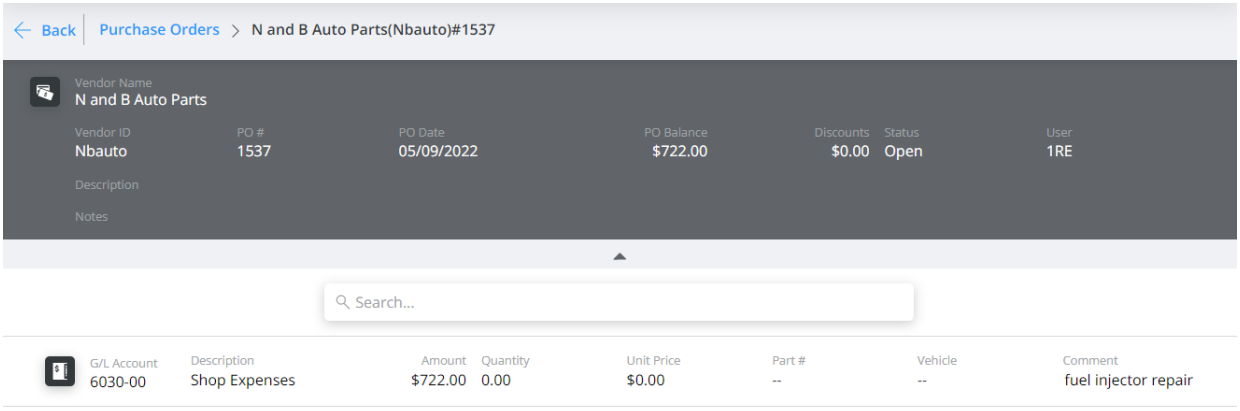


The **Filter** button can be selected to narrow down AP Purchase Orders by *Vendor Status*, *PO Status*, and/or *Date Range*. After selecting desired filter options, choose **Apply Filters**.



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.

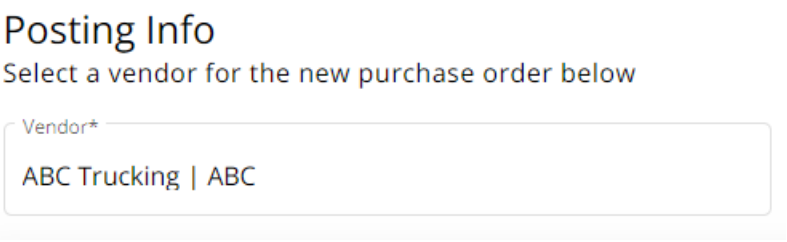


Add an AP Purchase Order

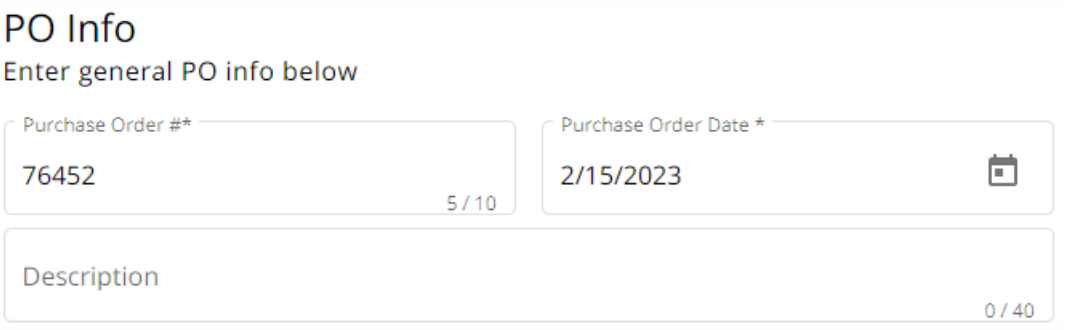
Adding AP Purchase Orders is available for those with *Add/Edit AP Purchase Orders* turned on in SKY Admin.

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

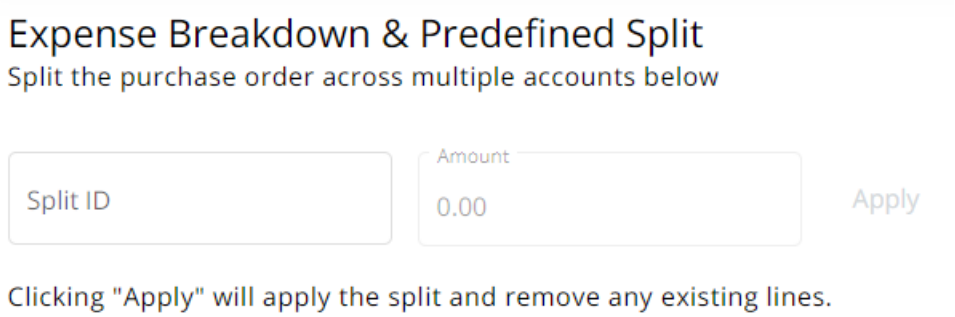
1. Select the **+** button to add an AP Purchase Order.
2. Choose the appropriate *Vendor* from the drop-down.



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.



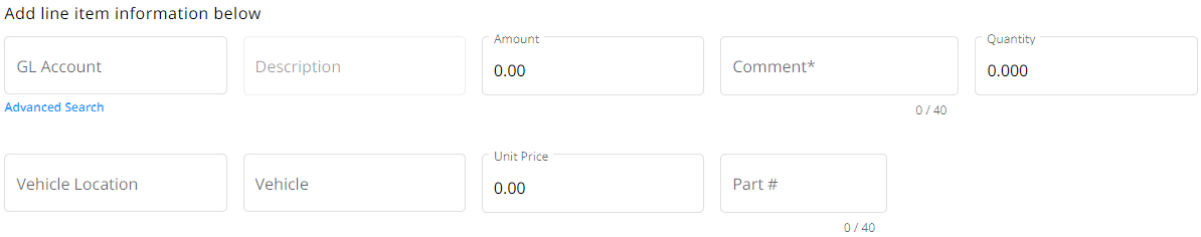
4. Indicate the *Split ID* and *Amount* if the Purchase Order is to be split across multiple accounts. Choose **Apply**. This will apply the split and remove any existing lines.



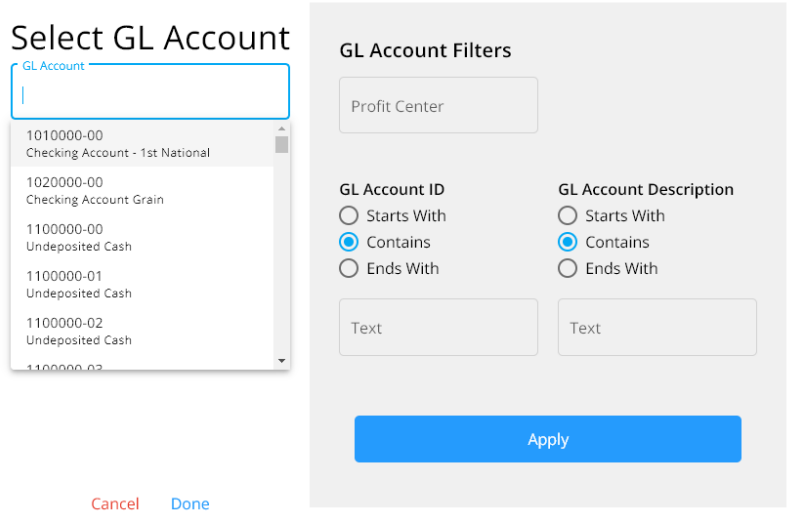
Note: Split IDs must first be set up in Agvance at *Accounting / Setup / G/L / G/L Splits*.

-OR-

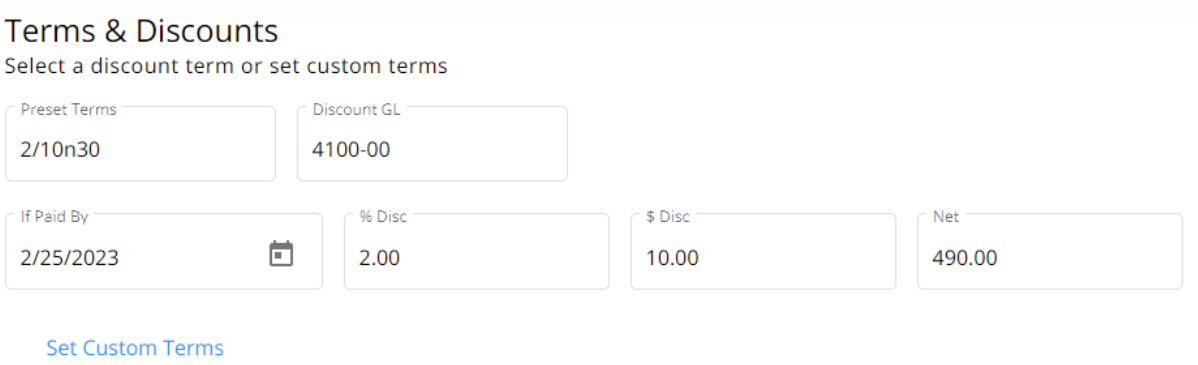
Select in the *GL Account** field and choose the appropriate account for this PO. The *Description* defaults in as the description entered on the account in Agvance. Optionally enter the *Amount*, a brief *Comment*, and the *Quantity*. Select a *Vehicle Location* and/or *Vehicle* from the drop-down.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



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.

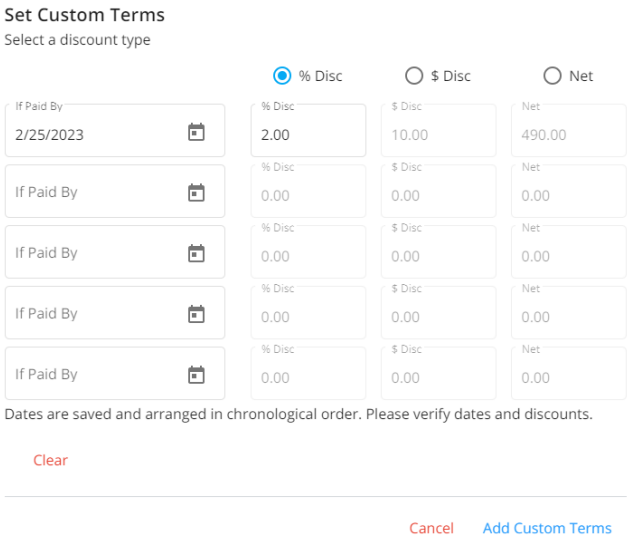


5. Select in the *Preset Terms* field to set terms for this Purchase Order. The *Discount GL* defaults from the Location setup but can be changed by selecting from the drop-down.



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.



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.