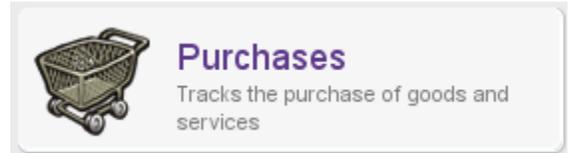


1. Right-click on **Purchases** and select **Add Record** OR **Open By Search** and click **New** from the list/form
2. Enter information into the following fields:



Request Number	This number will default automatically. Use Purchase or Division Preferences to change.
Purchase Type	Enter the appropriate Purchase Type
Purchase Status	Enter the appropriate Purchase Status (<i>this may default based upon the Purchase Type</i>). The first Purchase Status entered must be a Requested Purchase Status Type.
Vendor	The Vendor from who you are purchasing the materials or services <i>NOTE: the following fields will default (if defined within the vendor): Contact, Property, Unit, Department, Delivery, Tracking Number, Customer Number, Project, and Contract</i>
Purchase Contact	This may default from the Vendor selected. If the wrong contact defaulted, update the field accordingly. To bring up the list of Contacts, enter the first few characters of their last name and press Tab. Select from the list by double-clicking the record or highlighting the record and pressing Tab. <div style="border: 1px solid #ccc; padding: 5px; width: fit-content;"> Person Type name here </div> <p>If the person is not in the Contact list - change the field title from <u>Contact</u> to <u>Person</u> by clicking on the down arrow. Then type the person's name in the field.</p>
Client	If you are purchasing on behalf of a Client enter the client code here
Property Unit	Enter the Property and Unit the purchase is for (<i>this may default based upon the Vendor or Client</i>)
Department	Link to the appropriate Department here
Bill To Deliver To	Enter the Bill To and Deliver To addresses for this Purchase record (<i>this may default based upon the Purchase Type</i>)
Description	Enter a brief description of the Purchase here
Notes	Typically this is reserved for comments related to the Purchase after the order is placed with the vendor.

Request Number: 0095 100BE PO Number:

Purchase Type: BUILDING Building Purchase Total: \$3,625.00

Purchase Status: REQUEST Date Approved:

Vendor: LJ Lumber Jack's Wareh... Time Approved:

Person: [Dropdown] Date Ordered: [Calendar]

Tenant: DIG DIG 100 Beacon Time Ordered: 00:00

Property: 100 BEACON 100 Beacon (North an... Delivery: [Dropdown]

Unit: [Dropdown] Tracking Number: [Text]

Department: [Dropdown] Customer Number: [Text]

Bill To: 100 Beacon Boston, MA 02109 Description: [Text]

Deliver To: 100 Beacon Boston, MA 02109 Notes: [Text]

Custom Fields Materials Additional Amounts Approval Dates Other Links Reminders

Material	Description	Extra	Quantity	Measure	Unit Cost	Extension	Account	Part
LUMBER-2X4	Lumber - 2x4 (priced per foot)		1,000.000	ft	2.5000	\$2,500.00		
LUMBER-PLYWOOD	Plywood (priced per square foot)		500.000	sq ft	2.2500	\$1,125.00		
			0.000		0.0000	\$0.00		

1. Enter the necessary information on the **Purchase tabs**. This includes the Materials tab, which allows you to enter materials or services that are needed for this purchase order. When entering Materials you do not have to link to a Material, although this is helpful when entering a request for services or to track Inventory. The Approval tab tracks the threshold amounts which certain permission groups have the ability to approve.
2. The other tab that is helpful to use is the Additional Amounts tab. This tab allows you to add administrative fees, sales tax and freight charges. These amounts can default on the purchase record based on the Purchase Type.

Custom Fields Materials Additional Amounts Approval Dates Other Links Reminders

Account	Description	Markup	Cost
ADMIN FEE	Administrative Fee	0.000	\$35.00

3. **Save** the changes by clicking on the **Save** () icon when you are done. If your permission group allows you to approve the entire amount of the purchase, you will be prompted to approve the purchase upon saving and will be given the ability to the change the purchase to an Approved Purchase Status Type.

To **Save and Print** click the **Printer** icon ()

Depending on your approval process the PO Number will be assigned once the PO Request is approved.