

WORK ORDER TO PURCHASE ORDER PROCESS

The **Work Order to Purchase Order Process** is designed for copying the details of a customer work order to a corresponding purchase order without having to enter the same information twice.

Straight products, associated products, and non-inventory products can be copied.

Blends cannot be copied.

The Work Order to Purchase Order Process is *not compatible* with the **Work Order Approval Process**.

What you'll find:

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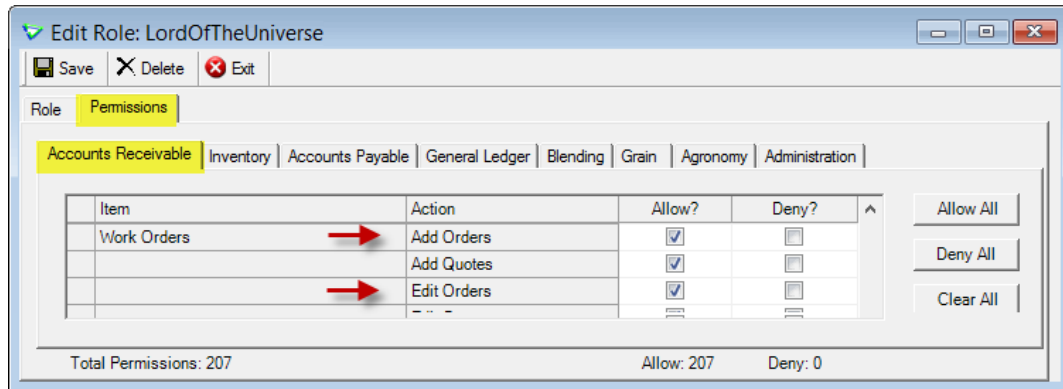
Security Permissions Required

* The minimum permission required to use the WO->PO process is the ability to create a purchase order.

Not all users require permission to do all WO->PO tasks, but at least one user should be allowed to do everything.

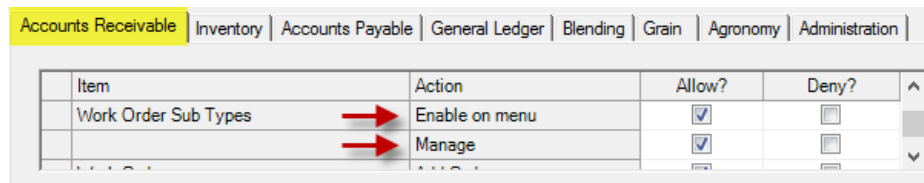
Accounts Receivable

- Work Orders – Add Orders, Edit Orders



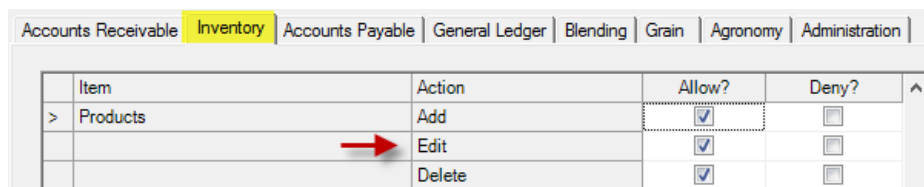
File > Security > Manage Roles

- Work Order Sub Types – Enable on Menu, Manage



Inventory

- Products – Edit



Accounts Payable

- * Purchase Orders – Add, Edit, Delete

Item	Action	Allow?	Deny?	
Purchase Orders	Add	<input checked="" type="checkbox"/>	<input type="checkbox"/>	^
	Copy	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	Edit	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	Delete	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	Enable on menu	<input checked="" type="checkbox"/>	<input type="checkbox"/>	v

- PO Sub Types – Enable on Menu, Manage

Item	Action	Allow?	Deny?	
PO Sub Types	Enable on menu	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	Manage	<input checked="" type="checkbox"/>	<input type="checkbox"/>	v

- Suppliers – Edit

Item	Action	Allow?	Deny?	
Suppliers	Add	<input checked="" type="checkbox"/>	<input type="checkbox"/>	^
	Edit	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	Delete	<input checked="" type="checkbox"/>	<input type="checkbox"/>	v

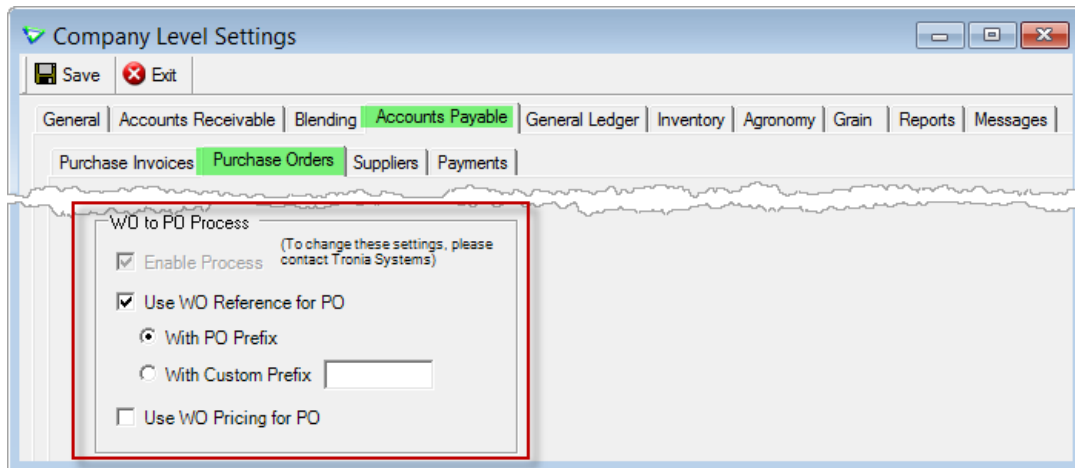
Setup Tasks

Setup tasks need done only once.

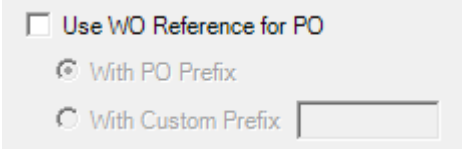
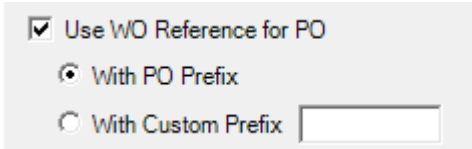
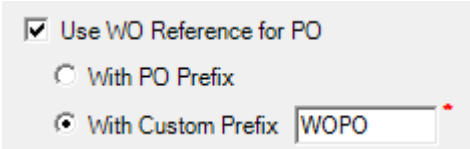
Once Tronia has enabled the WO->PO Process, you'll see additional **Company Config Options** on the Accounts Payable / Purchase Order tab and the Accounts Receivable / Work Order tab. Choose the options that best fit the way your company will use the process.

Accounts Payable Company Config Options

Purchase Orders

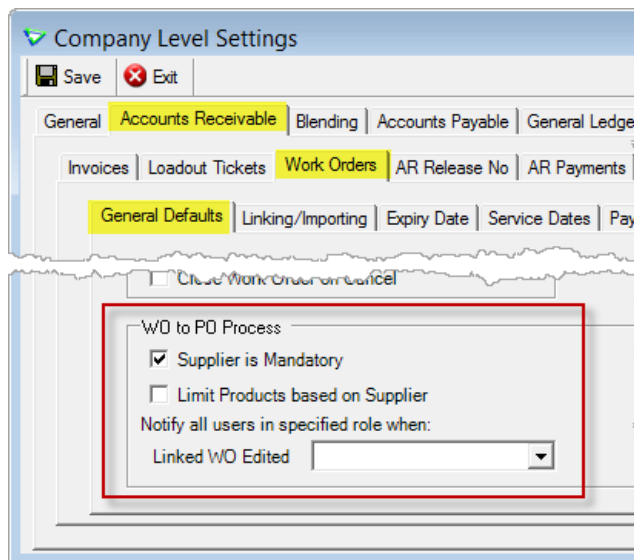


File > Config Option > Company

- WO to PO Process: **Enable Process** Tronia will turn this on
- **Use WO Reference for PO** the default purchase order reference number will either:
 - follow usual location PO standards (same as if the PO was added manually and not created from a work order)

 - use the usual PO location prefix and set the numerical portion to match the work order reference number

 - use a custom PO prefix (5 char max) while still maintaining the numerical portion of the work order reference number

- **Use WO Pricing for PO**: check to copy work order prices to the purchase order (\$0 margin) (paying less to the supplier than what you charge the customer is one way retailers increase profit, but that may not be your business model for this process)

Accounts Receivable Company Config Options

Work Orders – General Defaults



File > Config Options > Company

- **Supplier is Mandatory** (optional) if checked:
 - applies to ALL work orders (regardless if creating a purchase order from it or not)
 - but keep in mind only work orders with a **Supplier** can be turned into a purchase order
- **Limit Products based on Supplier** (optional) if checked:
 - **applies to ALL work orders** (regardless if creating a purchase order from it or not)
 - remember to link Suppliers to products (see [Product Setup](#) below)
 - supplier must be selected before products can be added to work orders, and *only products* linked to the selected supplier can be added
 - quotes cannot be turned into orders (the Order button becomes inactive as soon as products are added)
- **Notify all users in specified role when: Linked WO Edited** (optional) select a security role to receive [messages](#) when a WO linked to PO is edited.

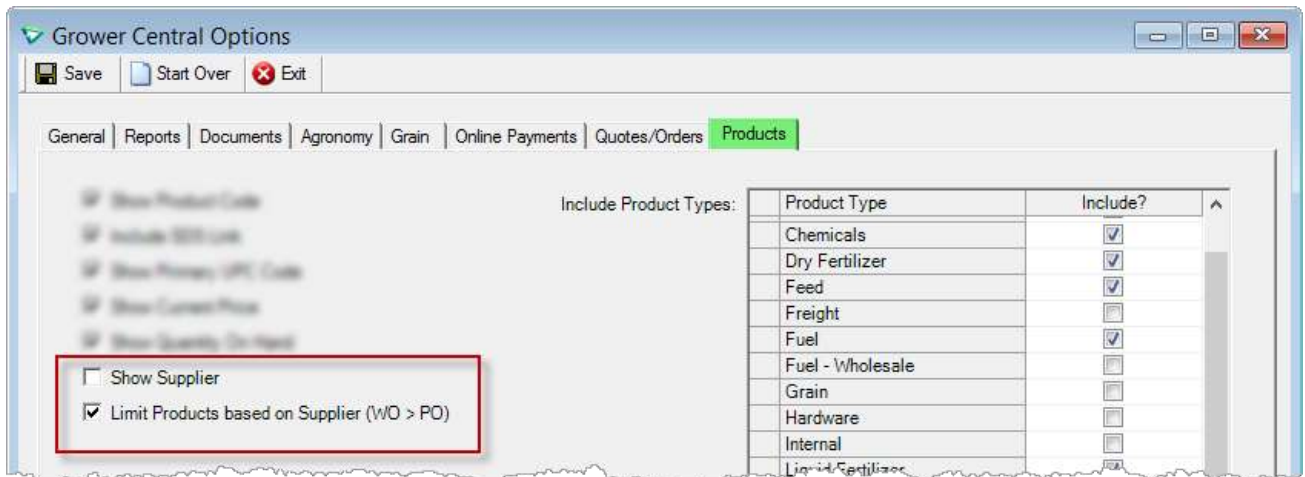
Tip Take advantage of the other work order and purchase order config options to customize the process to match your workflow, from requiring customer shipping addresses to making pricing mandatory.

*On the **Messages** tab you can setup **more notifications** for WOs and POs!*



Grower Central Config Options

Products

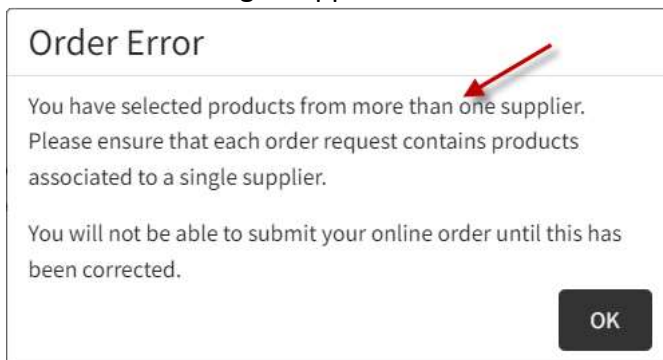


File > Config Option > Crower Central

- **Show Supplier:** (optional) check to display the supplier on the Products page



- **Limit Products based on Supplier (WO->PO):** (optional) check to limit online orders to products from a single supplier



Direct Supplier Setup

- Only Suppliers flagged as a **Direct Order Supplier (WO)?** can be **selected** as the supplier on a work order
- If **Supplier is Mandatory** (company config option) is checked, at least 1 supplier must be flagged as a Direct Order Supplier

Supplier Code: 0058
Supplier Name: IRM
Supplier Alias:
Add Characteristic Remove Characteristic

Active
 Sensitive
Primary Phone:
Mapping Code:
 Trucking/Delivery Company?
 Direct Order Supplier (WO)?

Accounts Payable > Manage > Suppliers

Product Setup

- If **Limit Products based on Supplier** (company config option) is checked, at least 1 product needs to be linked to a **direct order supplier** on the product's **Inventory tab**
- Products can be linked to one or multiple suppliers

Supplier Product Code Mappings:

Supplier	Supplier Product Code
Soil Survivor (1058)	WT-B185
> Parkland Ag Supply (1044)	34529

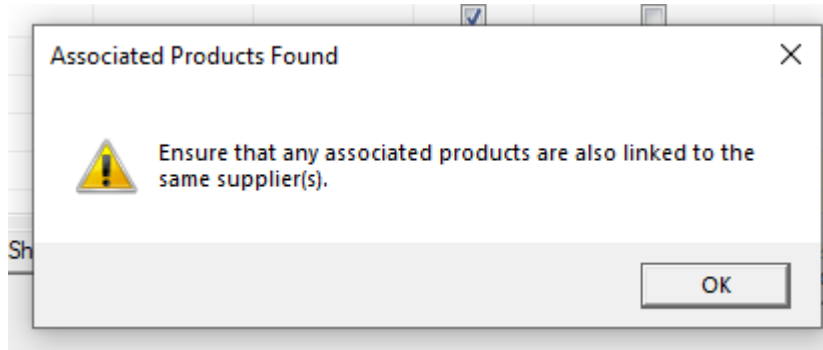
Add Code Row Edit Code Row Remove Code

Product Programs:
Programs
>
Add Remove

Inventory > Manage > Products

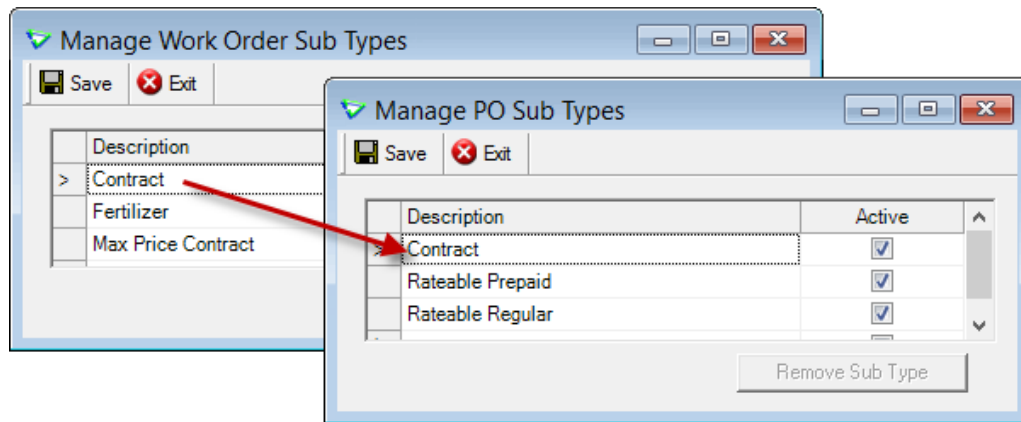
Associated Product Setup

- If **Limit Products based on Supplier** is checked, any associated products added to the work order will also need to have the same supplier setup; a warning will be displayed after adding a supplier



Common Work Order/Purchase Order Sub Types

- For the **Sub Type** to copy over from WO to PO, it must exist for *both* Work Orders and Purchase Orders



Accounts Receivable > Manage > WO Sub Types

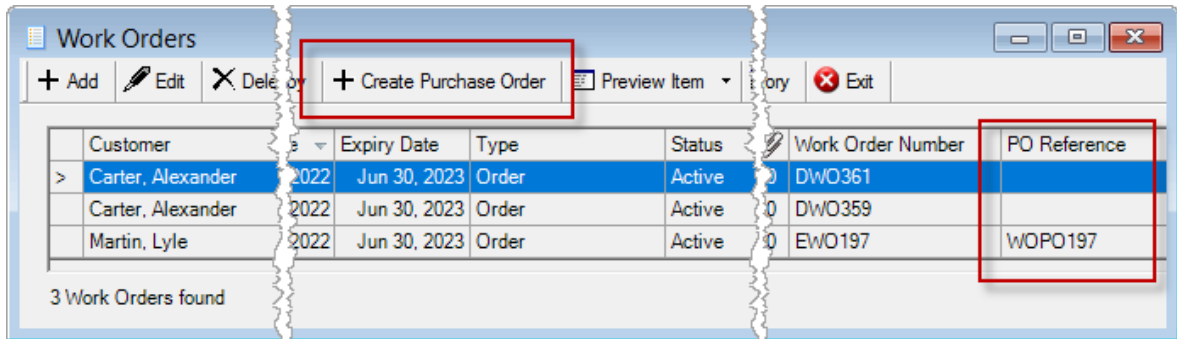
Accounts Payable > Manage > PO Sub Types

Creating the Work Orders

Work Order Home Form

Work Orders can be created from the Customer Account or the **Work Orders** home form, but turning one into a Purchase Order can be done only from the **Work Orders** window.

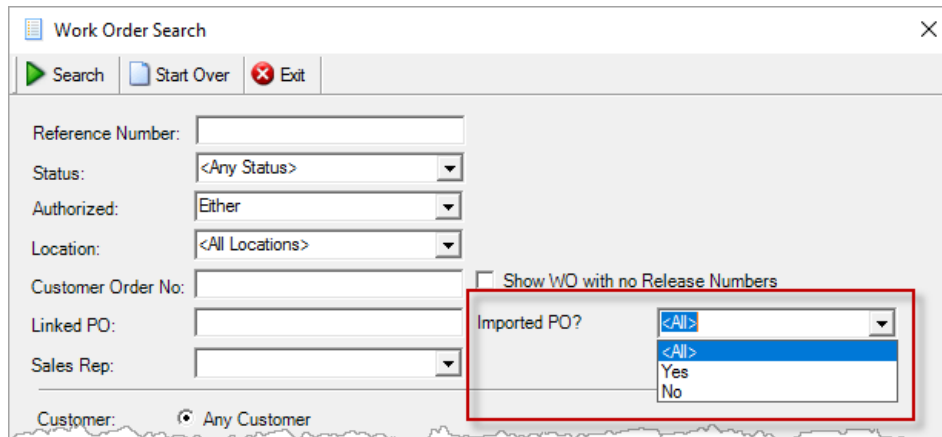
Work Orders already linked to a Purchase Order display the **Purchase Order Reference Number** and cannot be linked again (but you can delete the linked PO and start the process over).



Accounts Receivable > Work Orders

Work Order Search

The **Imported PO?** search criteria can filter for work orders linked to a purchase order, or for those that are not.



Accounts Receivable > Work Orders

Adding Work Orders

When adding a work order, the fields highlighted in yellow will be copied to the purchase order. Copying prices is [configurable](#).

Work Order Header & Customer and Order Tab

Accounts Receivable > Work Orders > Add

- **Sub Type** to be copied, it must exist for **both** WO and PO
- **Supplier** may be **mandatory** (configurable), is limited to **Direct Order Suppliers** only (becomes the supplier on the PO)

Accounts Payable > Manage > Suppliers

Work Order Products Tab

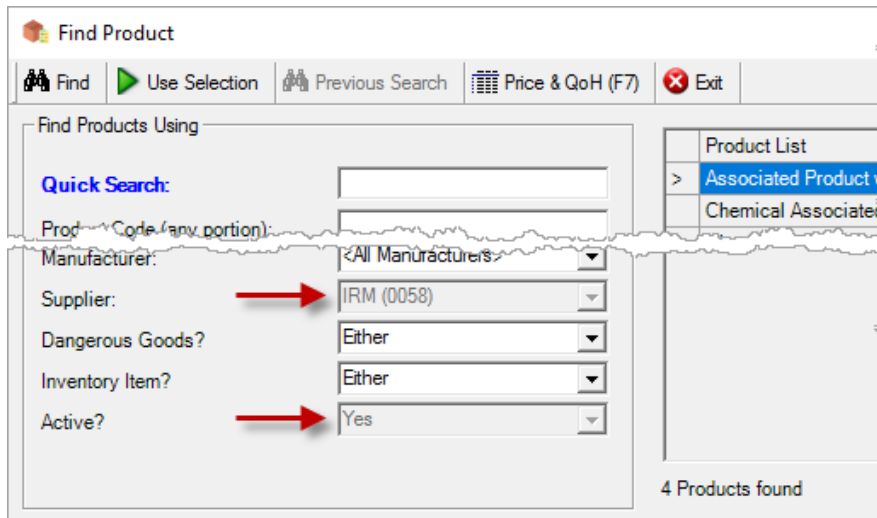
Product	Quantity	Unit Price	Line Total	Committed	Taken	Limit	Location	Status	Release	Prepay?
4600 - 46-0-0 (MT)	42.0	\$800.00	\$33,600.00	<input checked="" type="checkbox"/>	0.0	42.0	Dog River	Active	<input type="checkbox"/>	<input type="checkbox"/>
11-52-0 - 1152 (MT)	42.0	\$500.00	\$21,000.00	<input checked="" type="checkbox"/>	0.0	42.0	Dog River	Active	<input type="checkbox"/>	<input type="checkbox"/>
> 0-0-60 - 0060 (MT)	42.0	\$664.00	\$27,888.00	<input checked="" type="checkbox"/>	0.0	42.0	Dog River	Active	<input type="checkbox"/>	<input type="checkbox"/>

Accounts Receivable > Work Orders

Accounts Receivable > Work Orders

- if **Limit Products based on Supplier** (config) is checked, products cannot be added until a Supplier is selected

- if **Limit Products based on Supplier** (config) is checked, **Products** added are limited to only those **linked** to the selected supplier through **Manage Products**



- If **Use WO Pricing for PO** (config) is checked, Unit Price will be copied.
- **AR Release Numbers** are *not* copied to the PO – but - you *can* copy AP release numbers from a purchase order.

*I want to read the **AR Release Number** white paper (with lots of screenshots).*

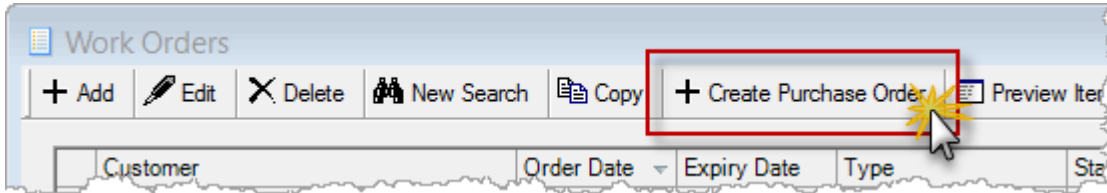
What Will Be Copied from WO to PO?

The following fields will be copied from the Work Order when the Purchase Order is created:

Work Order	Purchase Order	Notes
Reference Number	Reference Number	PO: company config option
Date Ordered	Date Ordered	
Expiry Date	Expiry Date	WO: can be mandatory
WO Sub Type	PO Sub Type	must exist in both AR and AP
Header Location	Header Location	
Header Comments	General tab Comments	
Customer	Customer	
Billing Address	Customer Billing Address	
Ship To	Customer Ship To	WO: can be mandatory
Service Dates	Expected Delivery	WO: can be mandatory
AR Sales Rep	AR Sales Rep	WO: can be mandatory
Customer Contact	Customer Contact	WO: can be mandatory
Supplier	Supplier	WO: Direct Order Suppliers only, can be mandatory
Products	Products	Quantity, Units, Location; Price: config option

Creating the Purchase Orders

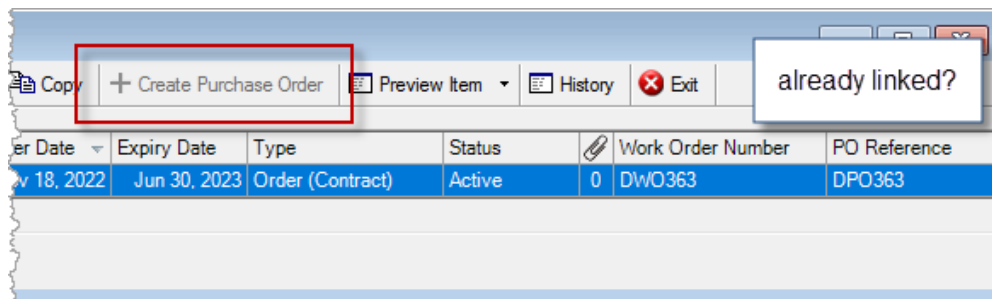
- Select **Create Purchase Order** from the **Work Order** home form to create the linked PO.



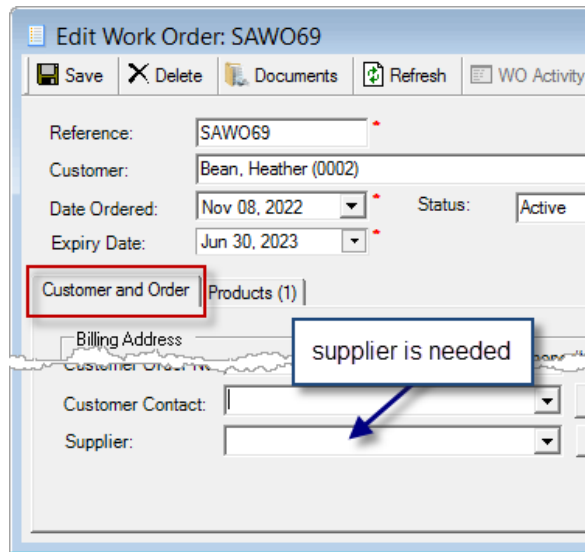
Accounts Receivable > Work Orders

Is the Create Purchase Order Button Greyed Out?

- If the button is inactive, ensure the PO Reference column is empty.



- Also ensure a **Supplier** was selected on the work order.



Accounts Receivable > Work Orders

- After **Create Purchase Order** is selected, a new Purchase Order opens and a number of fields default based on the Work Order. **Details are copied** to the header and to all 3 tabs.

- Fields highlighted in yellow are linked to the work order and **some cannot be edited** (if they are incorrect, **Exit** without saving the PO, correct the work order, then start the **Create Purchase Order Process** again).

Purchase Order Header & General Tab

Reference: **DPO363** Generate Reference Automatically

Supplier: IRM (0058) Find Add

Date Ordered: Nov 18, 2022

Expected Delivery: Dec 19, 2022 to Dec 31, 2022 Not Specified

Expiry Date: Jun 30, 2023 No Expiry Date

Sub Type: Contract

Location: Dog River

Status: Ordered

Requested By (Staff):

Confirmation No:

General Products (3) Customer and Order

Supplier Location: Contract Number: Hedge Rate:

Comments: Direct Shipment

Prepay Submitted?

Accounts Receivable > Work Orders

Purchase Order Products Tab

Reference: DPO363 Generate Reference Automatically

Supplier: IRM (0058) Find Add

Date Ordered: Nov 18, 2022

Expected Delivery: Dec 19, 2022 to Dec 31, 2022 Not Specified

Expiry Date: Jun 30, 2023 No Expiry Date

Sub Type: Contract

Location: Dog River

Status: Ordered

Requested By (Staff):

Confirmation No:

General Products (3) Customer and Order

Product/Description	Qty Ordered	Received	Remaining	Unit Price	Prepay	Status	Location	Release	Inventory
> 4600 - 46-0-0 (MT)	42.0	0.0			<input type="checkbox"/>	Active	Dog River	<input type="checkbox"/>	<input checked="" type="checkbox"/>
1152 - 11-52-0 (MT)	42.0	0.0			<input type="checkbox"/>	Active	Dog River	<input type="checkbox"/>	<input checked="" type="checkbox"/>
0060 - 0-0-60 (MT)	42.0	0.0			<input type="checkbox"/>	Active	Dog River	<input type="checkbox"/>	<input checked="" type="checkbox"/>

what you pay the supplier, not what the customer pays you (can be copied - config option)

Add Product Row Add Non-Inventory Row

Edit Row Remove Row Reopen All Auto Order

Total: \$0.00

Purchase Order Customer and Order Tab

- Most of the customer information will be populated from the work order
 - **Sales Rep, Customer Contact, and Ship To** can be changed
 - if other details are incorrect: exit the purchase order without saving, correct the information on the Work Order, and start the WO->PO Process again.
- **Save** the purchase order.

Purchase Order Home Form

The Purchase Order home displays the associated work order reference number.

The Work Order home form displays the associated purchase order reference number.

Supplier	Date	Reference	Expiry Date	Delivery Date	Status	Sub Type	Contract #	Linked WO	Location
IRM	Nov 18, 2022	DPO363	Jun 30, 2023	Dec 19, 2022	Ordered	Contract		DWO363	Dog River

Customer	Order Date	Expiry Date	Type	Status	Work Order Number	PO Reference
Campbell Park Fertilizer	Nov 18, 2022	Jun 30, 2023	Order (Contract)	Active	0 DWO363	DPO363

Editing

- Both Work Order and Purchase Order can be edited (to the extent allowed by your chosen [configuration options](#)).
- Subsequent changes to the Work Order will **not** be reflected on the linked Purchase Order, nor vice versa.
- Unlinking happens only when the purchase order is deleted.

Business Rules for WO > PO Process

- Work Order to Purchase Order will always be on a 1:1 basis
- If config option [Limit Products based on Supplier](#) is checked:
 - applies to WO only
 - quotes cannot be turned into an order (toggle button is greyed out)
- Process is initiated only from the Work Order (it's a push from WO, there is no pull from PO)
 - manually selecting a Customer and Work Order on a Purchase Order can still be done, but none of the product information is copied
- After the Purchase Order has been created, the Work Order can still be edited but the Purchase Order is not updated to match
- Copied Purchase Order fields that cannot be edited are: Supplier, Customer & Work Order Reference; all other details can be edited
- If the created Purchase Order is deleted, the link to the Work Order is released; the Work Order can then be used to create a NEW Purchase Order