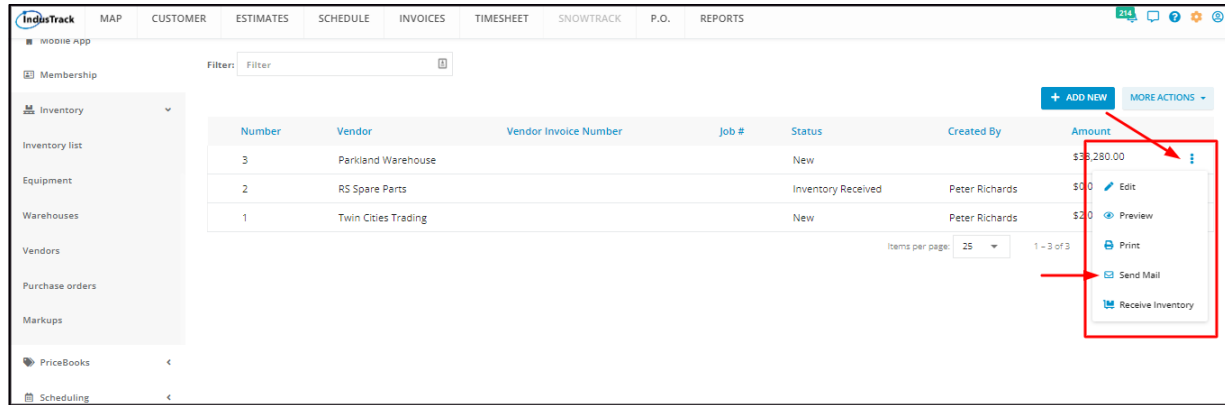


Send Purchase Orders and Receive Inventory

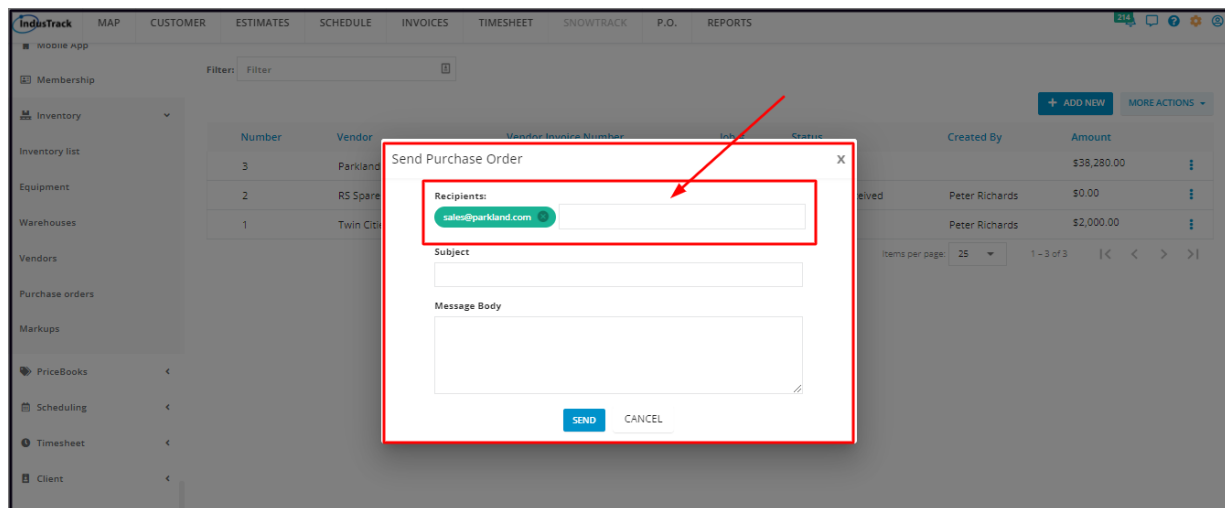
Email the Purchase Order

Email Purchase Orders to your vendors directly from the IndusTrack system. To do this, go to **Settings > Inventory > Purchase Orders**.

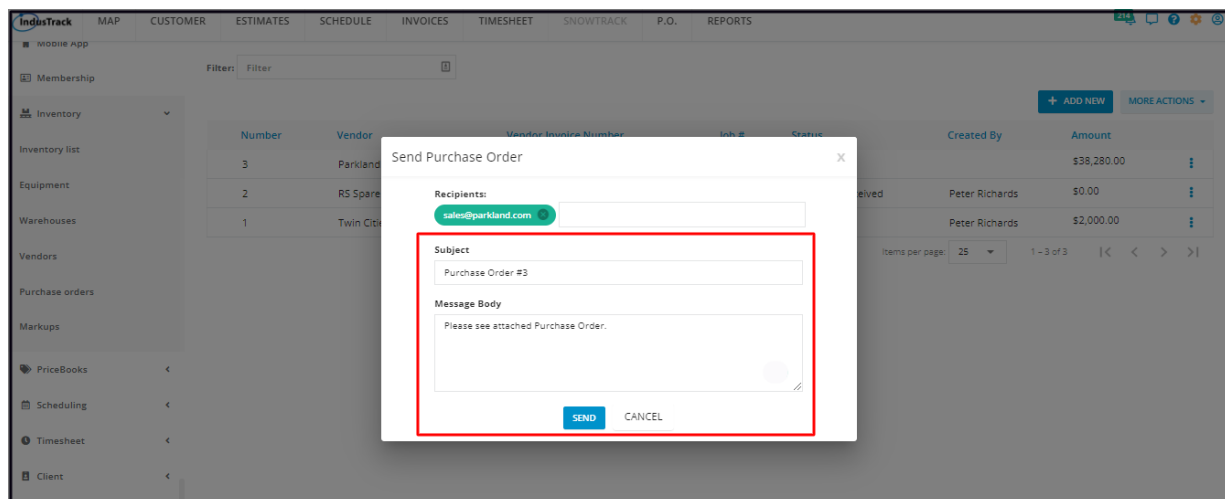
From the Purchase Order list, find the Purchase Order to send. Click the 3-dot menu and select **Send Mail**.



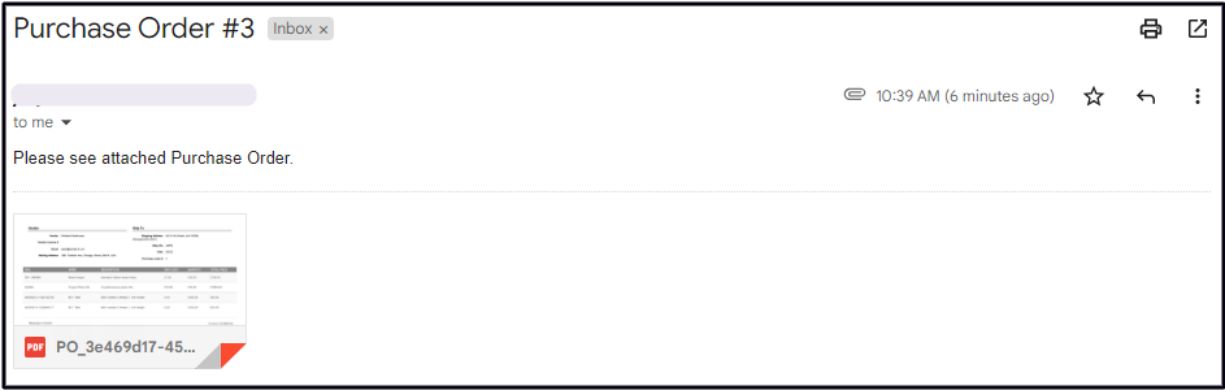
From the **Send Purchase Order** window, the vendor's email address will already be indicated in the Recipients field. Add other email addresses as needed.



Add the email **Subject** and **Message**. Send the email.



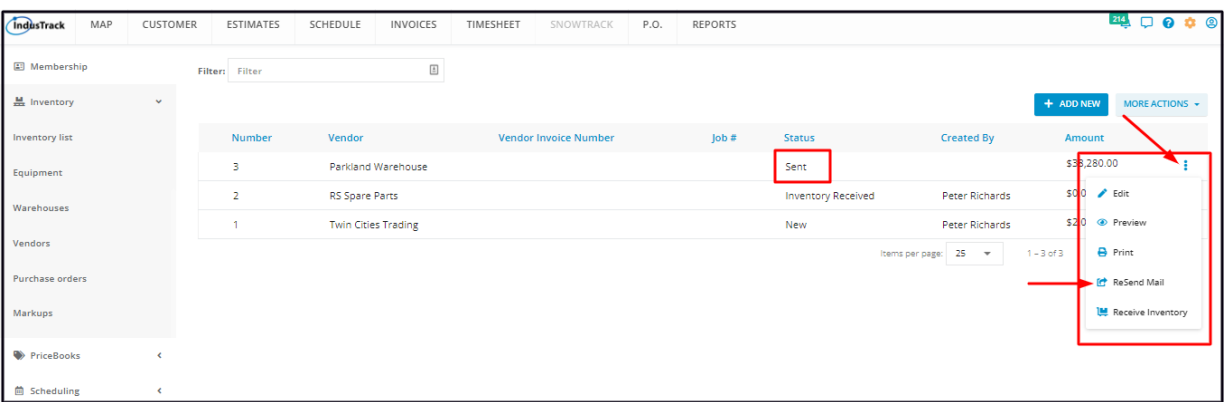
Your vendor will receive the email with a PDF copy of the Purchase Order attached.



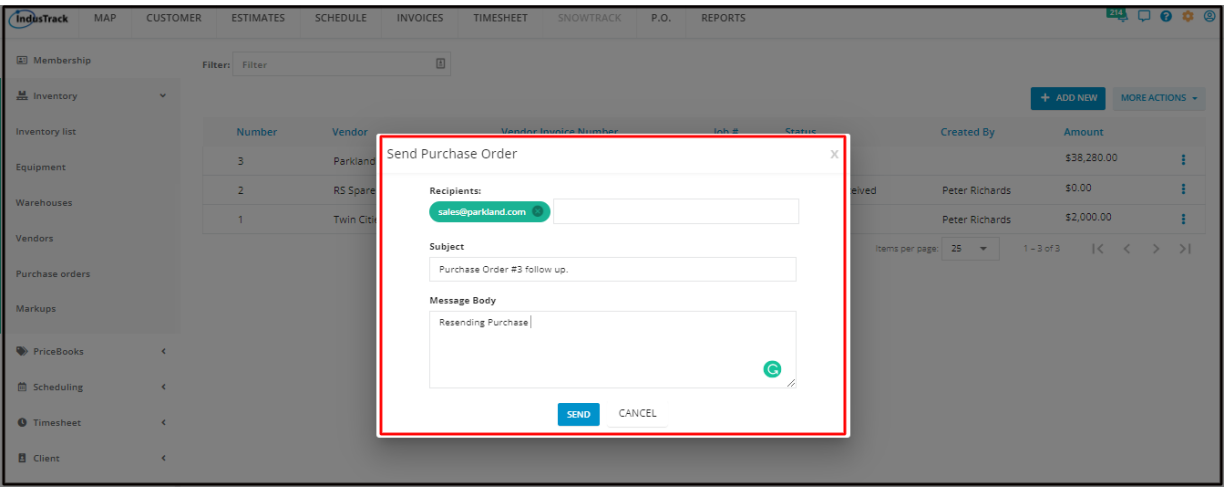
Resend the Purchase Order

The **Resend Purchase Order** option is available only for Purchase Orders that have a **Sent status**.

From the Purchase Order list, find the Purchase Order to resend. Click the 3-dot menu and select **Resend Mail**.



Similar to what was done when the Purchase Order was first sent, fill in the email Subject and Message Body. Add other Recipients, if needed. Send the email.



Receive Inventory

Once the ordered items are received at the main warehouse or at the specified location, quickly update the Purchase Order, that is of course after the items have been manually checked against the Purchase Order and the vendor's invoice.

With IndusTrack, when a Purchase Order's status is updated to Received, the item's Quantity on Hand at the selected warehouse is also automatically updated.

Before marking the Purchase Order as received, update the Purchase Order with the delivery details.

Find the Purchase Order to be updated from the list. Open the record in edit mode.

IndusTrack MAP CUSTOMER ESTIMATES SCHEDULE INVOICES TIMESHEET SNOWTRACK P.O. REPORTS

Membership Filters: Filter

Inventory

Inventory list

Equipment

Warehouses

Vendors

Purchase orders

Markups

PriceBooks

Number	Vendor	Vendor Invoice Number	Job #	Status	Created By	Amount
3	Parkland Warehouse			Sent		\$38,280.00
2	RS Spare Parts			Inventory Received	Peter Richards	\$0.00
1	Twin Cities Trading			New	Peter Richards	\$2,000.00

Items per page: 25 1 - 3 of 3

Indicate the invoice number on the Vendor Invoice # field.

Edit Purchase Order

Vendor

Select Vendor * Parkland Warehouse

Vendor Address 1881 Fullerton Ave, Chicago, Illinois, 60614, USA

Mailing Address 1881 Fullerton Ave, Chicago, Illinois, 60614, USA

Email sales@parkland.com

Vendor invoice # Inv279

Job #

Ship To

Shipping Address 400 S 4th Street, Unit 1000M, Minneapolis MN 55415

Ship Via USPS

Date 9/6/2022

Purchase order # 3

SKU	Name	Description	Unit Cost	Quantity	Total Price
INV - 986968	Brass hinges	standard interior brass hinge	21	100	\$2,100.00
fp3838	Forged Piston Kit	Hi-performance piston kits	318	100	\$31,800.00
8000001D-1426192795	#3 1" Bolt	Bolt: number 3 thread, 1 inch length	0.4	1000	\$400.00

CANCEL SAVE

Check that the item Quantity and Cost of the Invoice match with that of the Purchase Order. They should, but always check these to be sure. Review the company policy on how these discrepancies are to be handled before making any adjustments.

- If P.O. adjustments after delivery are allowed, update the unit cost and/or the quantity.
- Add notes on the Internal Memo field to document the changes.
- Save once done.

Edit Purchase Order

Vendor

Select Vendor * Parkland Warehouse

Vendor Address 1881 Fullerton Ave, Chicago, Illinois, 60614, USA

Mailing Address 1881 Fullerton Ave, Chicago, Illinois, 60614, USA

Email sales@parkland.com

Vendor invoice # Inv279

Job #

Ship To

Shipping Address 400 S 4th Street, Unit 1000M, Minneapolis MN 55415

Ship Via USPS

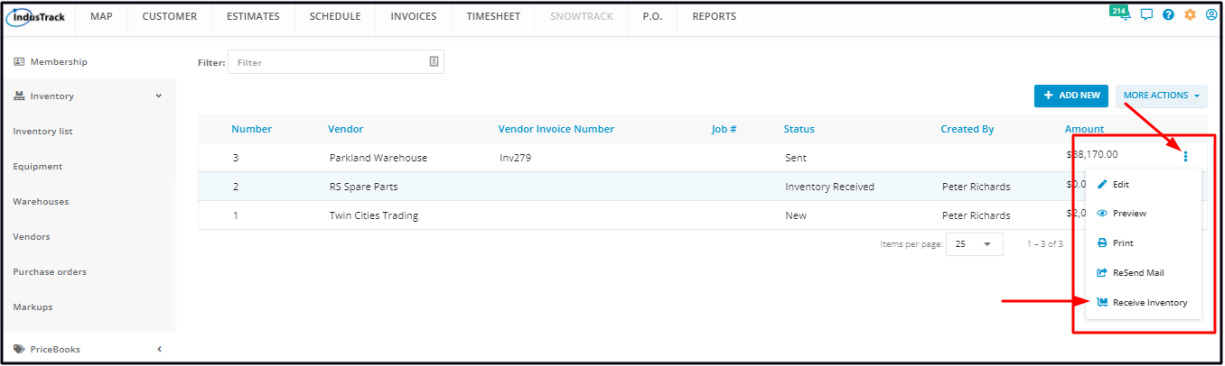
Date 9/6/2022

Purchase order # 3

SKU	Name	Description	Unit Cost	Quantity	Total Price
INV - 986968	Brass hinges	standard interior brass hinge	20	100	\$2,000.00
fp3838	Forged Piston Kit	Hi-performance piston kits	318	100	\$31,800.00
8000001D-1426192795	#3 1" Bolt	Bolt: number 3 thread, 1 inch length	0.4	1000	\$400.00

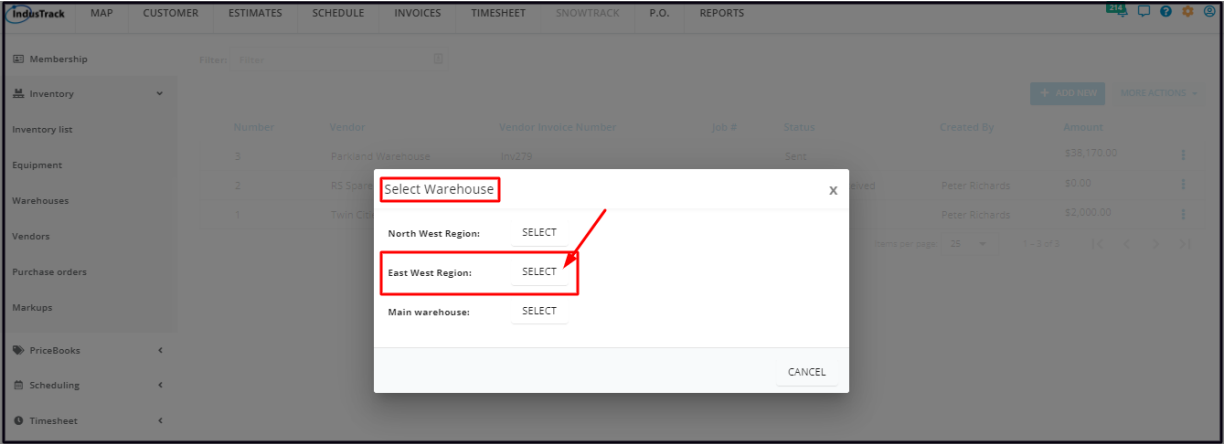
CANCEL SAVE

Go back to the Purchase Order list and click the 3-dot menu to the right of the record. Select **Receive Inventory**.



From the **Select Warehouse window**, identify the warehouse where the items were delivered or would be accountable for the purchased items, most especially if these were shipped directly to a job site.

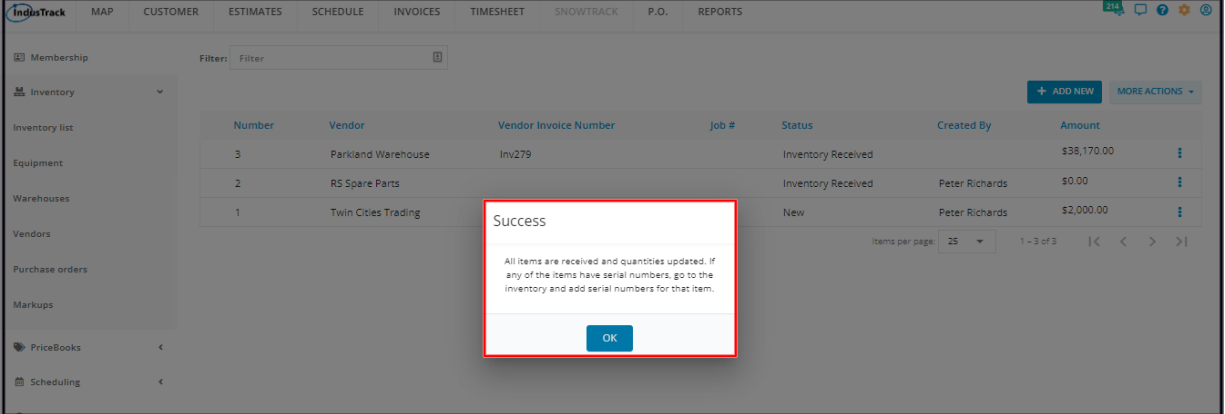
- Find the Warehouse from the list. If the Warehouse has not been added to the system, go back to the Warehouses page to create a new one.
- Click **Select**.



Regular Inventory

If all of the items delivered do not require Serial numbers to be recorded, the **Success** window will come up. This is a confirmation that all items on the Purchase Order have been received with quantities on hand updated. Click **OK**. This will complete the documentation of the receipt of the purchased items and the Purchase Order's Status will be updated to **Inventory Received**.

- The items received will be added to the Quantity on Hand at the selected warehouse. Go ahead and review the item(s)' records on the Inventory page to make sure that these were updated.



Number	Vendor	Vendor Invoice Number	Job #	Status	Created By	Amount
3	Parkland Warehouse	Inv279		Inventory Received		\$38,170.00
2	RS Spare Parts			Inventory Received	Peter Richards	\$0.00
1	Twin Cities Trading			New	Peter Richards	\$2,000.00

Edit Inventory

General

Name * Brass hinges
 SKU INV - 996968
 Vendor Tradeland Supply
 Non taxable
 Income Account Construction Income
 Sales price/rate 52
 Sales description standard interior brass hinge
 Expense Account Construction Materials Costs
 Cost 21

Stock

Asset Account Inventory Asset
 Main warehouse quantity on hand * 0
 Reorder point 35
 Use serial #s (Quantity calculates automatically depending serial numbers)

Warehouse	Bin #	Isle #	QTY
East West Region			100
Total quantity:			100

Serial Numbers Required

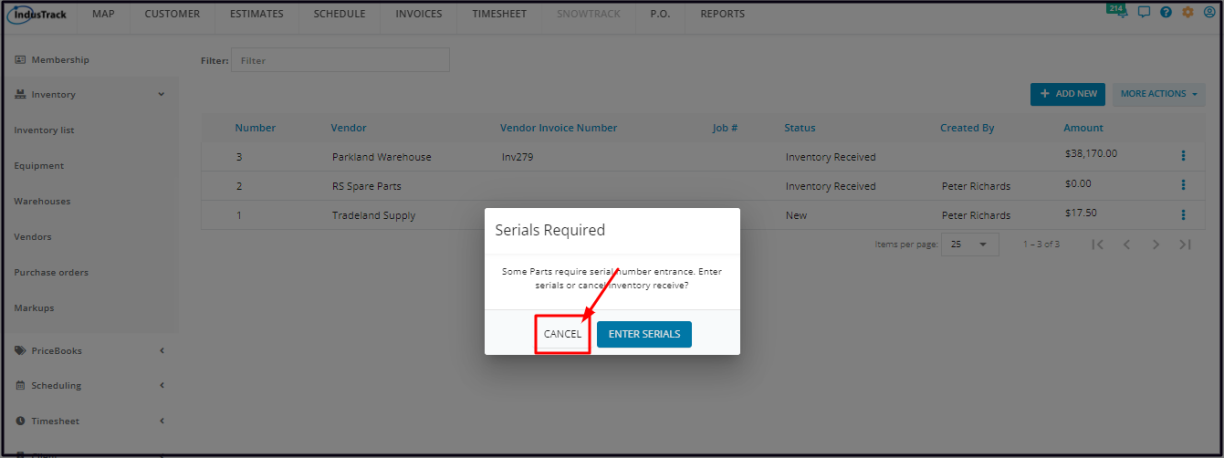
If one or more of the items delivered requires serial numbers to be entered, the **Serials Required window** will come up. You have the option to enter the numbers immediately or cancel the action of updating the P.O.

Serials Required

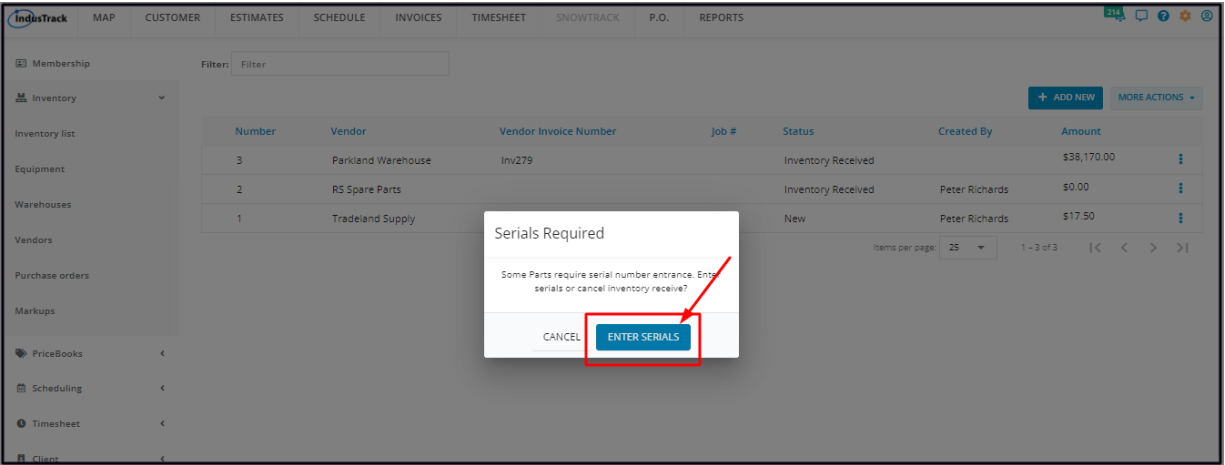
Some Parts require serial number entrance. Enter serials or cancel inventory receive?

CANCEL ENTER SERIALS

Select **Cancel** to abandon the process of receiving the inventory. The screen will return to the Purchase Order page.

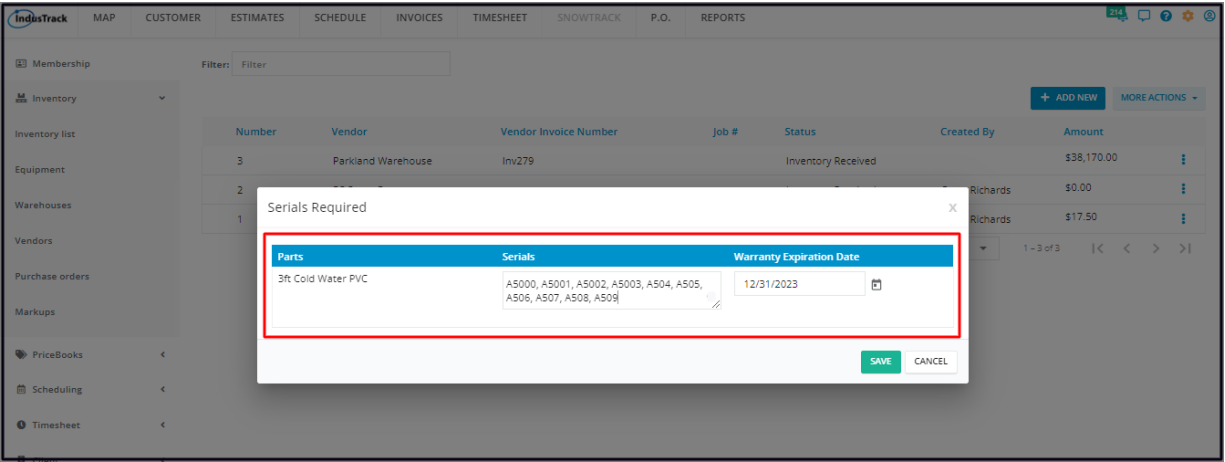


Select **Enter Serial** to quickly record the serial numbers.

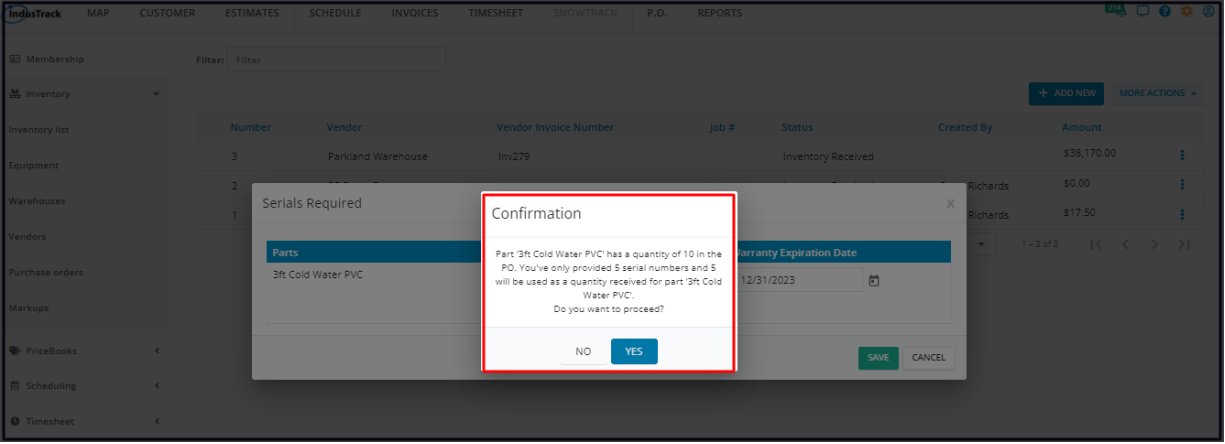


Key in all of the serial numbers on the **Serials** field. Use a comma (,) in between numbers.

Add the **Warranty Expiration Date** on the provided field.

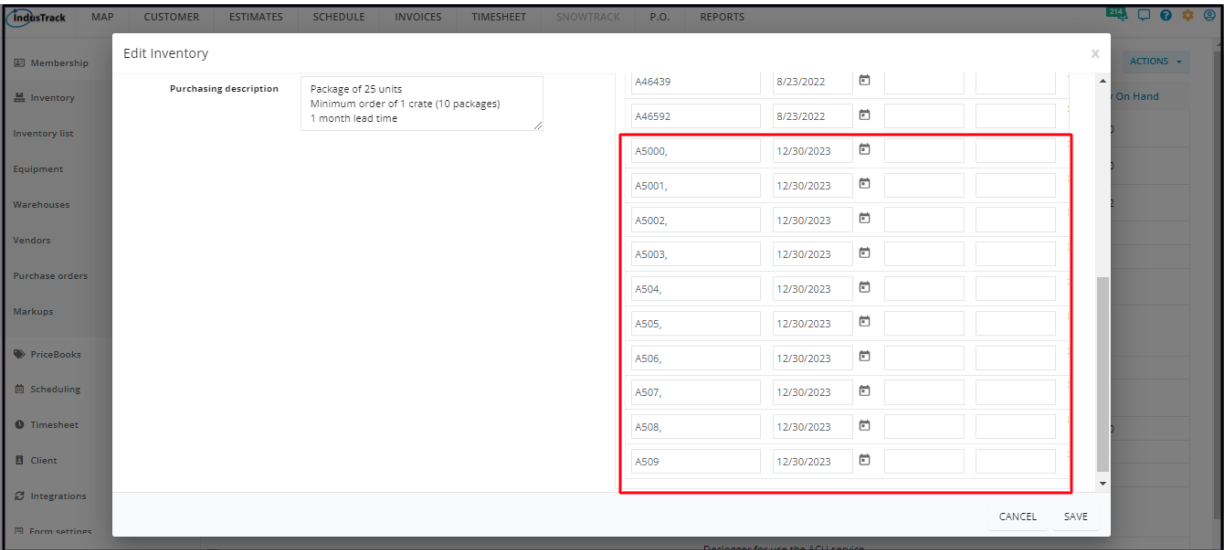
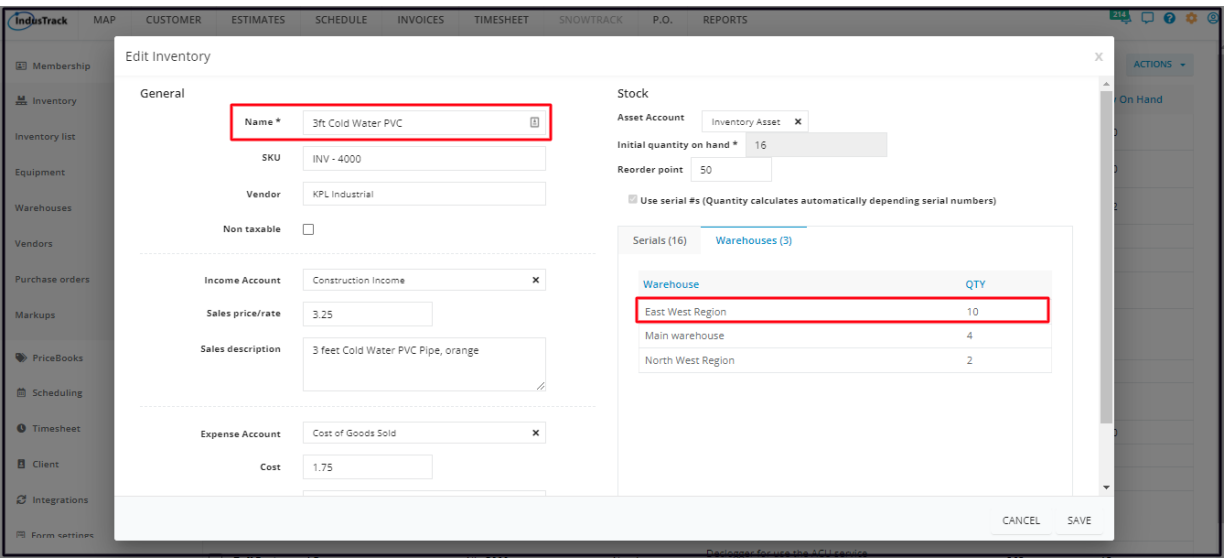


- If the serial numbers entered do not match the Quantity indicated in the PO (either less than or more than), a **Confirmation window** will come up.
 - Select **Yes** to proceed to the next steps. The system will pick up the number of serials entered as the quantity received. This will override the Quantity at the Purchase Order.
 - Select **No** to return to the Serials Required window and complete the recording of the serials.



Save the Serial Numbers.

- The items received including the Serial Numbers will be added to the Quantity on Hand at the selected warehouse. Go ahead and review the item(s)' records on the Inventory page to make sure that these were updated.



The **Success** window will come up. This means that the ordered items have been recorded as received and the quantities on hand have been updated. Click **OK** to complete the process and return to the Purchase Orders page. The P.O.'s status will be updated to Inventory Received.

Success

All items are received and quantities updated. If any of the items have serial numbers, go to the inventory and add serial numbers for that item.

OK

IndusTrack MAP CUSTOMER ESTIMATES SCHEDULE INVOICES TIMESHHEET SNOWTRACK P.O. REPORTS

Membership Filters:

Inventory **+ ADD NEW** MORE ACTIONS

Number	Vendor	Vendor Invoice Number	Job #	Status	Created By	Amount
3	Parkland Warehouse	Inv279		Inventory Received		\$38,170.00
2	RS Spare Parts			Inventory Received	Peter Richards	\$0.00
1	Tradeland Supply			Inventory Received	Peter Richards	\$17.50

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Membership
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