

## Create a Purchase Order in ServTraq

To create a Purchase Order in ServTraq go to: **Inventory>Purchase Orders>Click New Purchase Order**

The screenshot shows the ServTraq web application interface. On the left is a navigation menu with options like Home, Contacts, HEAP, Weatherization, Inventory, Dashboard, Materials, Inventory Checkout, Inventory Check In, Purchase Orders (highlighted with a red box), Vendors, Payment Requests, Reports, and Analytics. The main area is titled 'Purchase Orders' and shows a 'Current View: Open Purchase Orders' dropdown. A 'New Purchase Order' button is highlighted with a red box. Below this is a table of existing purchase orders.

PO Number	Internal Control Code	Date	Date Required	Status	Vendor Name	Address
65354		1/25/2019		OPEN	THE ENERGY	1215 K STREET 17T
65353		1/25/2019		OPEN	BAKER BROS APPLIANCES	31 E. FIFTH STREET
65352		1/25/2019		OPEN	SLAKEY BROTHERS INC	601 WORK STREET
65346		1/24/2019		OPEN	AMAZON	PO BOX 965055
65343		1/23/2019		OPEN	AMAZON	PO BOX 965055
65340		1/23/2019		OPEN	AIRTEC SERVICE	PO BOX 1146
65335		1/23/2019		OPEN	DELTA GLASS	1811 FREEDOM BLV
65334		1/23/2019		OPEN	DELTA GLASS	1811 FREEDOM BLV
65333		1/23/2019		OPEN	DELTA GLASS	1811 FREEDOM BLV
65332		1/23/2019		OPEN	DELTA GLASS	1811 FREEDOM BLV
65331		1/23/2019		OPEN	DELTA GLASS	1811 FREEDOM BLV
65310		1/18/2019		OPEN	AMAZON	PO BOX 965055
65306		1/18/2019		OPEN	JOHNSTONE SUPPLY - SALINAS	5658 E. CLINTON AV
65305		1/17/2019		OPEN	SLAKEY BROTHERS INC	601 WORK STREET
65296		1/15/2019		OPEN	SLAKEY BROTHERS INC	601 WORK STREET
65280		1/14/2019		OPEN	SLAKEY BROTHERS INC	601 WORK STREET
65276		1/14/2019		OPEN	SLAKEY BROTHERS INC	601 WORK STREET

Select the Vendor from the drop down menu.

If the vendor is not in your dropdown menu, you will need to add them first. More information can be found here: <https://support.servtraq.com/support/solutions/articles/4000130775-add-a-vendor>

The screenshot shows the 'Add Purchase Order' form in the ServTraq application. The form is titled 'Add Purchase Order' and 'New Purchase Order'. It contains several fields for 'Purchase Order Info':

- Vendor:** A dropdown menu with 'MORA DOOR' selected.
- Vendor Location:** A dropdown menu with 'MORA DOOR' selected.
- Internal PO#:** A text input field.
- Billing Address:** A text input field with 'SAN MATEO - PO BOX 2707, SAN MATEO, CA 95076'.
- Shipping Address:** A text input field with 'CENTRAL COAST ENERGY SERVICES, INC. - 135 AVIATION WAY, STE 7, WATSONVILLE, CA 95076'.
- Shipping Info:** A dropdown menu for 'Shipping Method' and a text input field for 'Date Required'.
- Order Info:** A dropdown menu for 'Order Method' and a text input field for 'Order Given To'.
- Notes:** A large text area for additional information.

Under the Purchase Order Items, click the Addition Icon.

Purchase Order Items

Purchase Order Line Items										
Material Item	Received	Order Quantity	Received Quantity	Item Cost	Tax Rate	Description	Job ID	Vendor Item Code	Fund	Line Total
<div>No line items exist for this purchase order</div>										
										Total: \$0.00

Purchase Order Lots - Received Items

Purchase Order Lots							
Lot ID	Material Item	Lot Description	Order Quantity	Remaining	Cost w/Tax	Job ID	Line Total - Ordered
<div>No lots exist for this purchase order</div>							

Under the Item enter code: SUB001-

Select the Job ID

Use the description field to be more specific.

Click the floppy disk to save.

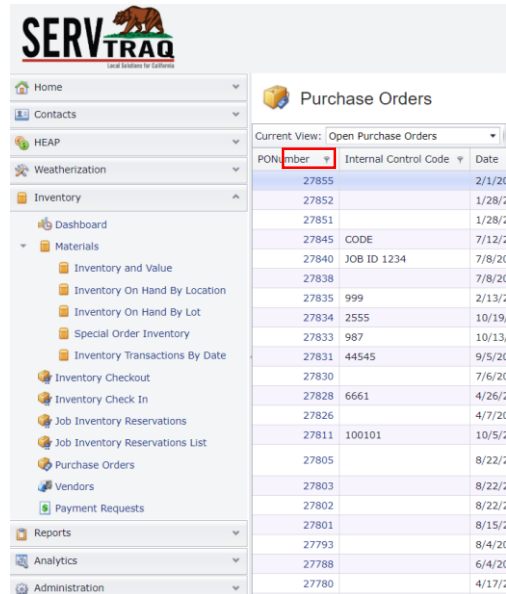
Purchase Order Items

Purchase Order Line Items										
Material Item	Received	Order Quantity	Received Quantity	Item Cost	Tax Rate	Description	Job ID	Vendor Item Code	Fund	Line Total
Item:	SUBC001 - SUBCONTRACTOR INSTALLED ITEM			Order Quantity: 1						
Cost:	\$1.00			Tax Rate: 0.00 %						
JobID:	86541			Fund: 100 - GENERAL						
Vendor Part #:				Description: SUBCONTRACTOR INSTALLED ITEM						
Received Quantity:	0			Line Total: \$1.00						
										<div><div></div><div></div></div>
										Total: \$0.00

Purchase Order Lots - Received Items

## Closing a Purchase Order in ServTraQ

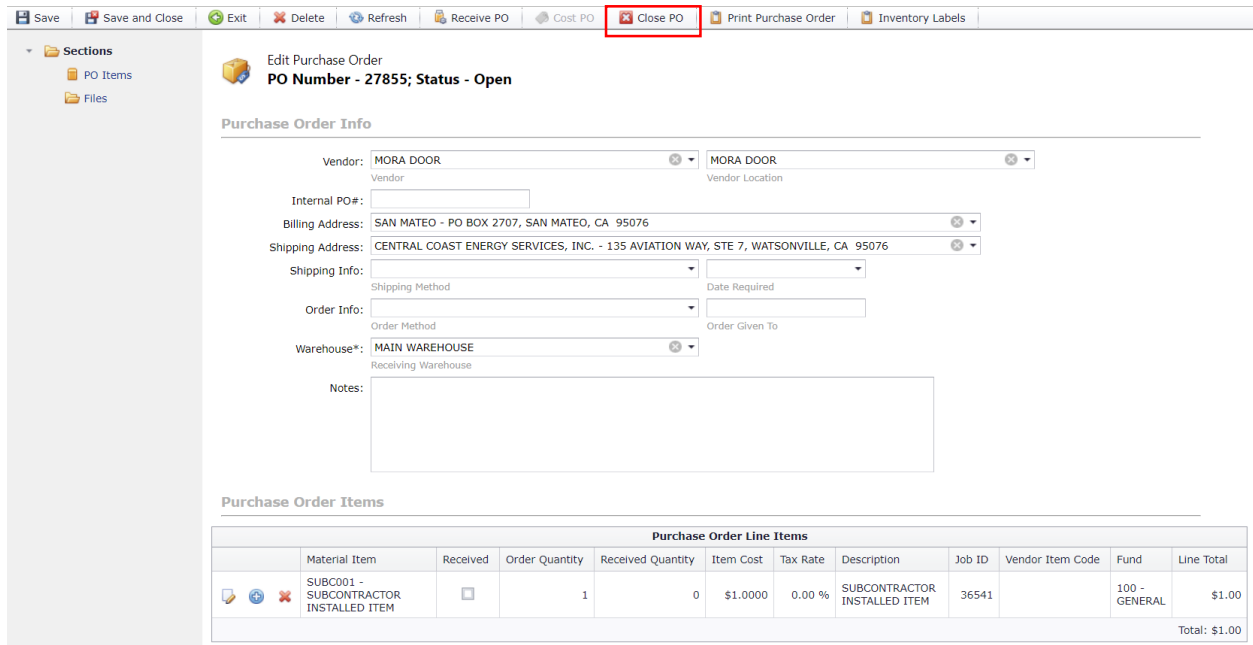
To close a Purchase Order in ServTraQ go to: **Inventory>Purchase Orders** and click on the purchase order to be closed.



The screenshot shows the ServTraQ web application interface. On the left is a navigation menu with options like Home, Contacts, HEAP, Weatherization, Inventory, Reports, Analytics, and Administration. The 'Inventory' section is expanded, showing sub-options like Dashboard, Materials, Inventory and Value, etc. On the right, the 'Purchase Orders' section is active, displaying a table of open purchase orders. The table has columns for PO Number, Internal Control Code, and Date. The first row, with PO Number 27855, is highlighted. The 'PO Number' column header is highlighted with a red box.

PO Number	Internal Control Code	Date
27855		2/1/20
27852		1/28/2
27851		1/28/2
27845	CODE	7/12/2
27840	JOB ID 1234	7/8/20
27838		7/8/20
27835	999	2/13/2
27834	2555	10/19/
27833	987	10/13/
27831	44545	9/5/20
27830		7/6/20
27828	6661	4/26/2
27826		4/7/20
27811	100101	10/5/2
27805		8/22/2
27803		8/22/2
27802		8/22/2
27801		8/15/2
27793		8/4/20
27788		6/4/20
27780		4/17/2

Click on Close PO.



The screenshot shows the 'Edit Purchase Order' form in ServTraQ. The top toolbar contains buttons for Save, Save and Close, Exit, Delete, Refresh, Receive PO, Cost PO, Close PO (highlighted with a red box), Print Purchase Order, and Inventory Labels. The form displays details for PO Number 27855, Status - Open. It includes fields for Vendor (MORA DOOR), Internal PO#, Billing Address, Shipping Address, Shipping Info, Order Info, Warehouse\*, and Notes. Below the form is a table titled 'Purchase Order Line Items' showing one item: SUBC001 - SUBCONTRACTOR INSTALLED ITEM, with a quantity of 1 and a total cost of \$1.00.

**Purchase Order Info**

Vendor: MORA DOOR  
Internal PO#:   
Billing Address: SAN MATEO - PO BOX 2707, SAN MATEO, CA 95076  
Shipping Address: CENTRAL COAST ENERGY SERVICES, INC. - 135 AVIATION WAY, STE 7, WATSONVILLE, CA 95076  
Shipping Info:   
Order Info:   
Warehouse\*: MAIN WAREHOUSE  
Notes:

**Purchase Order Items**

Purchase Order Line Items											
	Material Item	Received	Order Quantity	Received Quantity	Item Cost	Tax Rate	Description	Job ID	Vendor Item Code	Fund	Line Total
	SUBC001 - SUBCONTRACTOR INSTALLED ITEM	<input type="checkbox"/>	1	0	\$1.0000	0.00 %	SUBCONTRACTOR INSTALLED ITEM	36541		100 - GENERAL	\$1.00
Total: \$1.00											


After verifying this is the correct PO to close, click OK.

www.servtraqazure.com says

Do you really want to mark this purchase order as closed? After closing the po, no edits will be allowed.

OK Cancel

The closed PO is now under the “Closed Purchase Orders” list. To view it, change the *Current View* to “Closed Purchase Orders” using the drop down menu.

 Purchase Orders

Current View: Closed Purchase Orders ▼

PONumber ▼	Internal Control Code ▼	Date
27855		2/1/201