

How to Create a Purchase Order in Acumatica

This guide walks you through how to create a purchase order in Acumatica, from opening the Purchase Orders screen to adding line items, applying discounts, routing the order for approval, and emailing it to your vendor. You will also learn how to track vendor communications and review order activity after the purchase order has been sent.

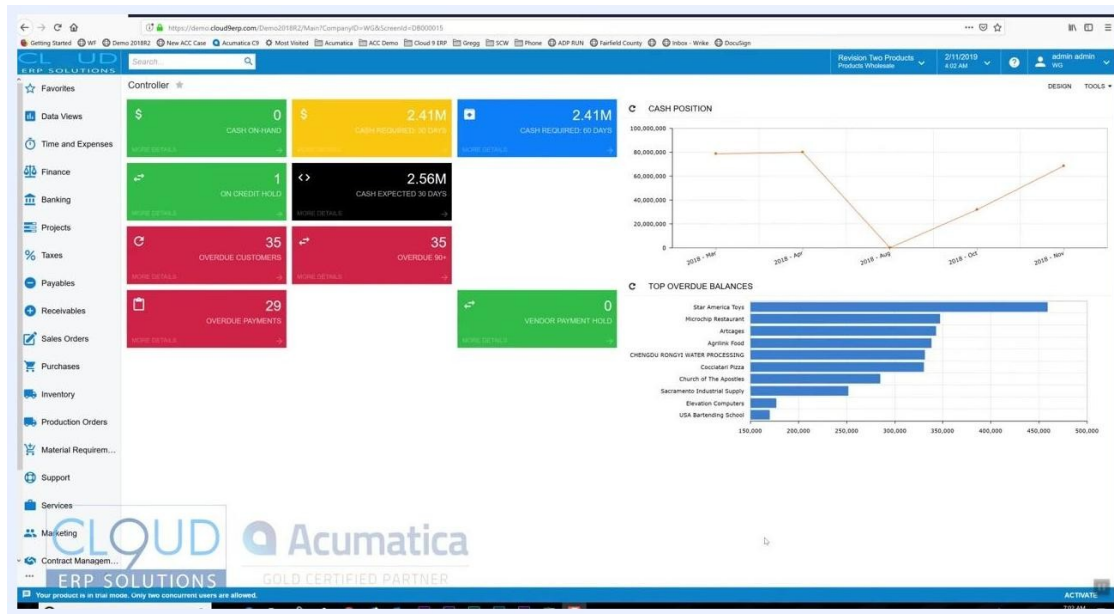
Prerequisites

- Access to your Acumatica instance and valid login credentials.
- Permissions to create and, if applicable, approve purchase orders.
- Knowledge of the vendor and items you need to order.

Step 1: Access the Acumatica dashboard

Open your web browser, navigate to your Acumatica instance, and log in with your credentials. The dashboard displays key financial metrics such as cash on hand, cash required, overdue customers, overdue payments, and top overdue balances.

The left navigation menu gives you access to modules including Data Views, Finance, Banking, Projects, Payables, Receivables, Sales Orders, Purchases, Inventory, and more.



Acumatica dashboard showing financial widgets, navigation menu, and charts

Step 2: Navigate to Purchase Orders

In the left navigation menu, click **Purchases** to expand the section, then select **Purchase Orders** from the submenu.

Purchase orders can be generated automatically through mass processing screens based on inventory demands, dropships, and other triggers. This guide focuses on creating a purchase order manually.

Step 3: Create a new purchase order

Click the option to create a **New Purchase Order**. The Purchase Orders screen opens with a blank purchase order form containing fields for Type, Order Number, Status, Date, Promised On, Vendor, Location, Owner, Currency, and more.

By default, the status shows as **On Hold**, which allows you to make changes before finalizing the order. Notice the **Approved** checkbox and the **Approval Details** tab — these are optional features for routing purchase orders through your company's approval process.

The screenshot displays the 'Purchase Orders' form in the Cloud 9 ERP system. The form is titled 'Purchase Orders' and includes a 'SAVE & CLOSE' button. The status is 'On Hold'. The vendor is 'EP00000002 - Baker Maxwell, M.'. The date is '2/11/2019'. The form includes tabs for 'DOCUMENT DETAILS', 'TAX DETAILS', 'SHIPPING INSTRUCTIONS', 'VENDOR INFO', 'APPROVAL DETAILS', 'DISCOUNT DETAILS', 'PO HISTORY', 'CHANGE ORDERS', and 'OTHER INFORMATION'. A table at the bottom shows the order lines. A watermark for 'Acumatica Cloud 9 ERP SOLUTIONS' is visible. A logo for 'Gregg Mercede Cloud 9 ERP Solutions' is also present.

Blank purchase order form with fields for type, vendor, status, date, and detail tabs

Step 4: Review the purchase order status

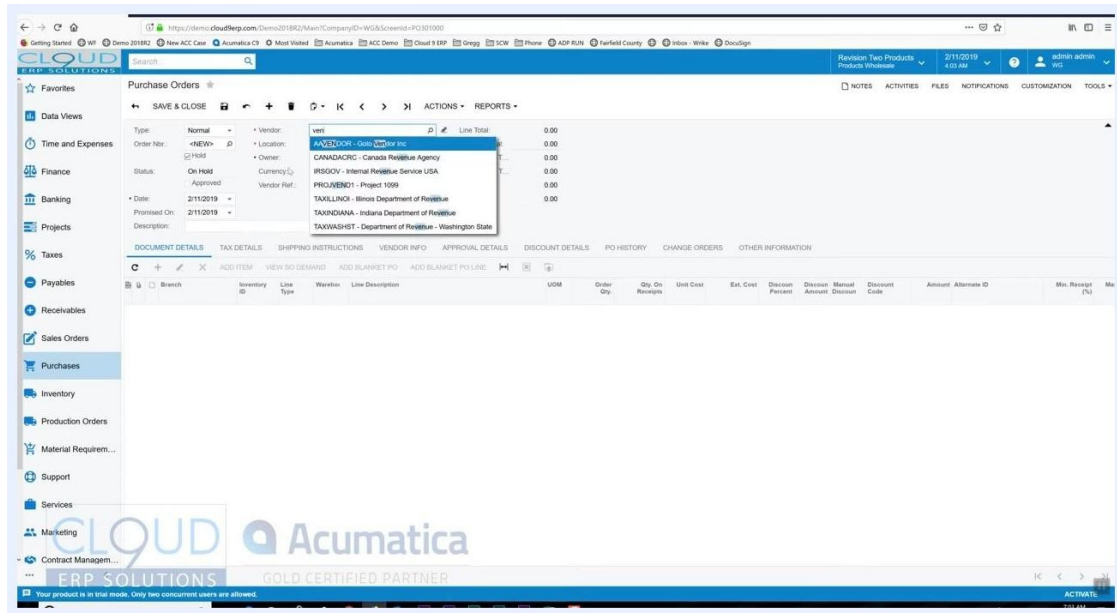
Confirm that the purchase order status is **On Hold**. While on hold, the order remains editable. Once you take the purchase order off hold, it becomes locked for editing.

Step 5: Set the purchase order dates

Enter or confirm the **Date** field (for example, 2/11/2019). Set the **Promised On** date to indicate when you expect the vendor to deliver the goods (for example, 2/11/2019).

Step 6: Select a vendor

Click into the **Vendor** field and begin typing the vendor's name or a few letters of it. Select the appropriate vendor from the dropdown list (for example, "AAVENDOR - Goto Vendor Inc").

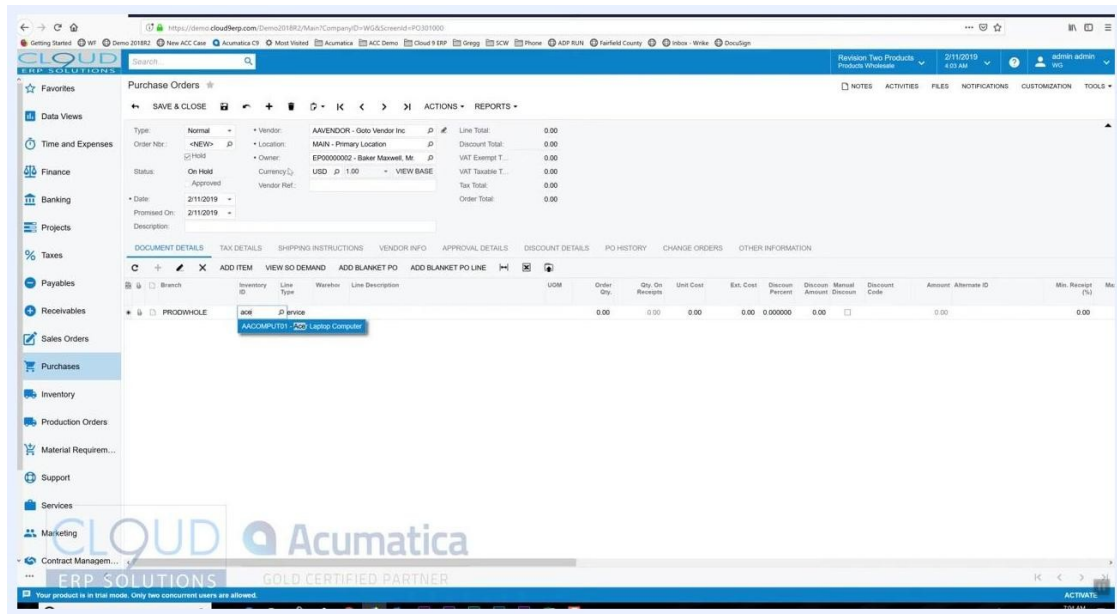


Vendor selection dropdown showing multiple vendor options

Step 7: Add items to the purchase order

Scroll down to the **Document Details** section and click **Add Item**. Type a few letters of the inventory ID or item description in the Inventory ID field, then select the desired item from the suggestions (for example, "AACOMPUT01 - Acer Laptop Computer").

If a pop-up note appears — for example, indicating a three-year warranty is available — review the information before continuing. Enter the required order quantity (for example, 5 units).



Adding an item to the purchase order by typing the inventory ID and selecting from suggestions

Step 8: Adjust the unit cost for a line item

Locate the **Unit Cost** field for the item you added (for example, "Acer Laptop Computer"). The default value reflects the last cost received for this item (for example, 247.07).

If needed, click into the **Unit Cost** field and enter a new value (for example, 245.00). The last cost can be updated based on your organization's preferences, such as upon receipt of the vendor's bill.

The screenshot displays the Acumatica Purchase Orders interface. The top navigation bar includes a search bar and various application tabs. The left sidebar lists navigation options such as Favorites, Data Views, Time and Expenses, Finance, Banking, Projects, Taxes, Payables, Receivables, Sales Orders, Purchases, Inventory, Production Orders, Material Requirement Planning, Support, Services, Marketing, and Contract Management. The main content area is titled 'Purchase Orders' and shows a summary of a purchase order for 'AAVENDOR - Odo Vendor Inc.' with a total of 1,235.35. Below this, a table lists the line items. The first line item is for 'ACCOM Clouds WHOL... Acer Laptop Computer' with a quantity of 5.00 and a unit cost of 245.00. The 'Unit Cost' field is highlighted with a blue border, indicating it is editable. The bottom of the screen features the Acumatica logo and the text 'ERP SOLUTIONS GOLD CERTIFIED PARTNER'.

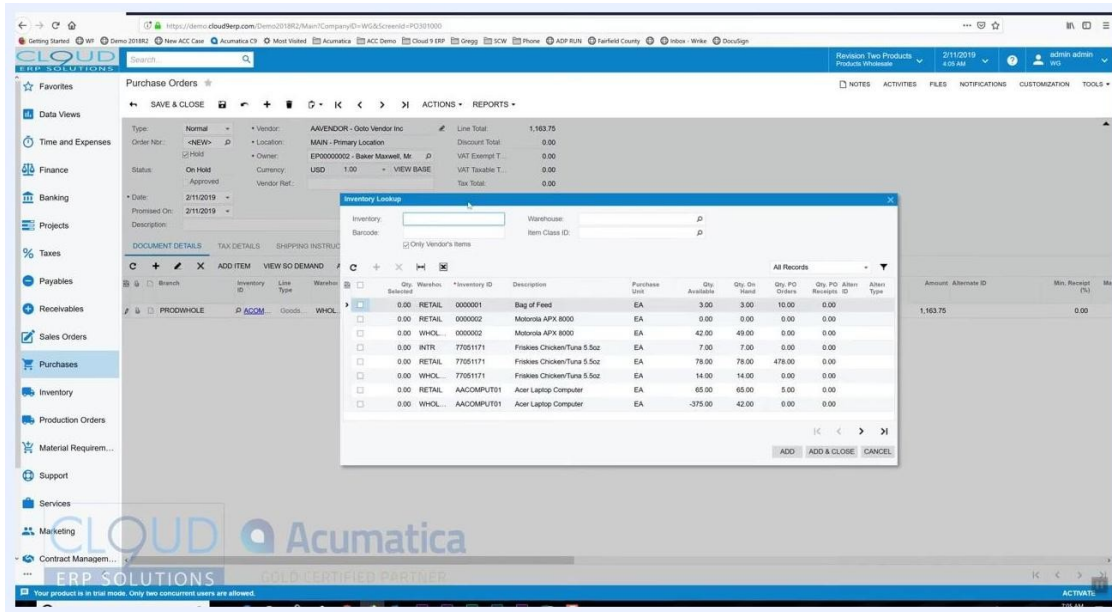
Line	Branch	Inventory ID	Line Type	Warehouse	Line Description	UOM	Order Qty	Qty On Receipts	Unit Cost	Ext. Cost	Discount Percent	Discount Amount	Manual Discount	Discount Code	Amount	Alternate ID	Min. Receipt (%)	Max. Receipt (%)
1		ACCOM	Clouds	WHOL...	Acer Laptop Computer	EA	5.00	0.00	245.00	1,235.35	0.000000	0.00			1,235.35			0.00

Purchase order screen with an editable Unit Cost field for a line item

Step 9: Apply a discount to a line item

If the vendor offers a discount (for example, 5%), enter the discount percentage in the **Discount Percent** field for the item. The **Discount Amount** calculates automatically (for example, 61.25 for a 5% discount on 5 units at \$245.00 each).

Confirm that the **Manual Discount** checkbox is checked if you entered the discount manually, and review the updated **Amount** field, which reflects the discounted total for the line item.



Purchase order screen with a discount applied to a line item, showing the calculated discount amount

Step 10: Add additional items using the Inventory Lookup

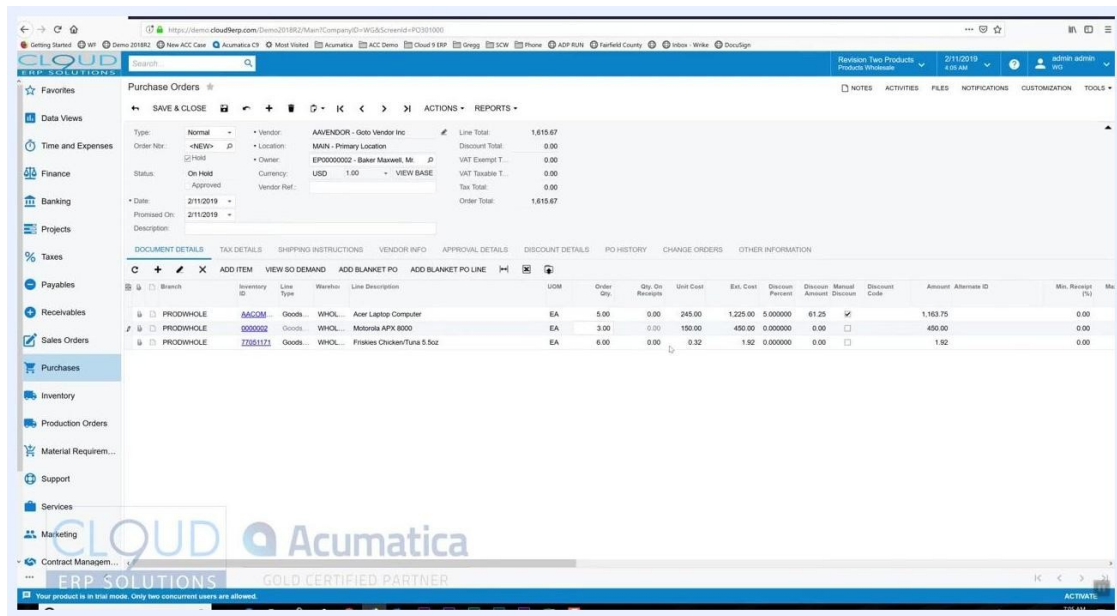
Click **Add Item** above the Document Details grid to open the **Inventory Lookup** window, which is filtered to show items available from the selected vendor. Browse or search for additional items you want to add.

Enter the desired order quantities directly in the **Qty. Ordered** column (for example, 3 for "Motorola APX 8000" and 6 for "Friskies Chicken/Tuna 5.5oz"). Click **Add & Close** to add the selected items to your purchase order.

Step 11: Review and edit line items

After adding items, review the updated list in the **Document Details** section. Double-click any line to edit quantities, unit costs, or discounts as needed.

Confirm that all items, quantities, and costs are correct. The purchase order remains **On Hold** at this stage, allowing you to make further changes.



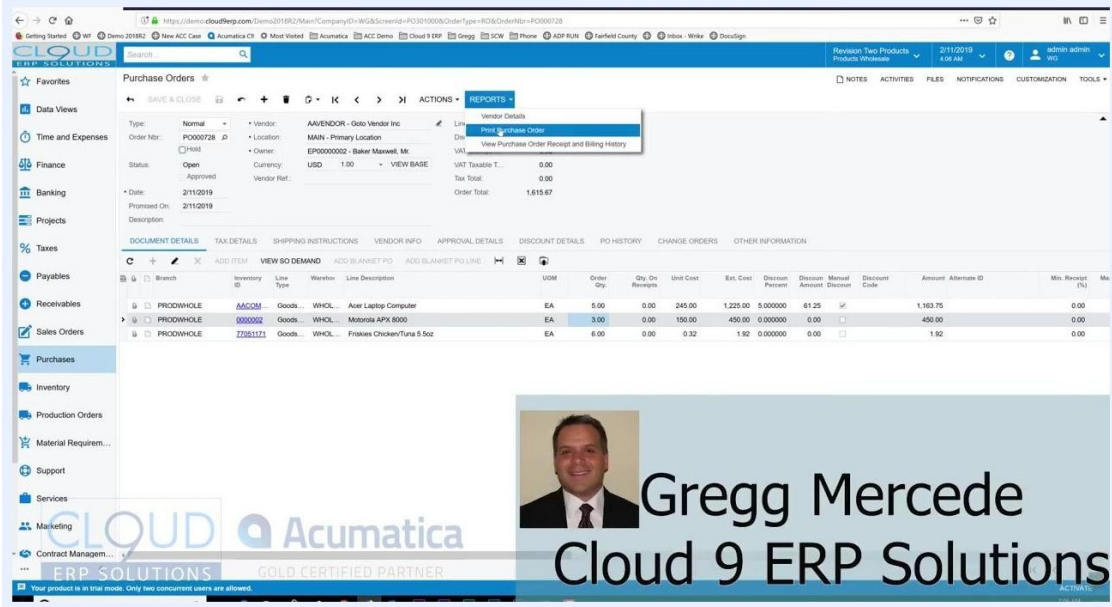
Purchase order screen with multiple line items and editable fields for quantity, cost, and discount

Step 12: Approve the purchase order

Once you take the purchase order off hold, it proceeds through your organization's approval workflow if approvals are enabled. Approval rules can be configured based on criteria such as order amount, vendor, or item type.

Approval requirements depend on the rules your organization has set. For example, orders over \$2,000 may require approval, while orders under that threshold may not. Approval rules are optional and can be customized to fit your business needs. As an administrator or authorized approver, you may have the ability to approve your own purchase orders.

If you have the necessary permissions, click the **Approve** button. The **Status** field changes from "Pending Approval" to "Open" and "Approved," and the purchase order is ready for further processing.



Purchase Orders

Vendor: AAVENDOR - Odo Vendor Inc
 Order Nbr: PC000728
 Status: Open
 Date: 2/11/2019
 Approved: 2/11/2019

REPORTS

- Approve
- View Purchase Order Receipt and Billing History

Branch	Inventory ID	Line Type	Warehouse	Line Description	UOM	Order Qty	Qty On Receipt	Unit Cost	Ext. Cost	Discount Percent	Discount Amount	Manual Discount	Discount Code	Amount	Alternate ID	Min. Receipt (%)	Max.
PRODWHOLE	ACCOM	Goods	WHOL	Acer Laptop Computer	EA	5.00	0.00	245.00	1,225.00	5.000000	61.25	✓		1,163.75		0.00	
PRODWHOLE	0000002	Goods	WHOL	Motorola APX 8000	EA	3.00	0.00	150.00	450.00	0.000000	0.00	✓		450.00		0.00	
PRODWHOLE	7500172	Goods	WHOL	Friesies Chicken/Turkey 5.5oz	EA	6.00	0.00	0.32	1.92	0.000000	0.00	✓		1.92		0.00	

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Purchase order screen showing the status changed to "Open" and "Approved" after approval

Step 13: Print the purchase order

With the purchase order in the "Open" state, go to the **REPORTS** dropdown menu and select **Print Purchase Order**. The system generates a printable version of the purchase order that includes your company logo and all order details.

The screenshot displays the Cloud 9 ERP interface. On the left, a sidebar menu lists various modules like Time and Expenses, Finance, Banking, Projects, Taxes, Payables, Receivables, Sales Orders, Purchases, Inventory, Production Orders, Material Requirements, Support, Services, Marketing, and Contract Management. The main window shows the 'Purchase Orders' section with a search bar and a list of actions. The 'REPORTS' dropdown menu is open, showing options like 'Print Purchase Order', 'View Purchase Order Receipt and Billing History', and 'View Purchase Order History'. The selected purchase order is 'PO000728' with a status of 'Open'. The vendor is 'AAVENDOR - Goto Vendor Inc.' and the location is 'MAIN - Primary Location'. The order total is '1,615.67'. Below the header, there is a table with columns for Branch, Inventory ID, Line Type, Warehouse, Line Description, UOM, Order Qty, Qty On Receipts, Unit Cost, Ext. Cost, Discount Percent, Discount Amount, Manual Discount, Discount Code, Amount, Alternate ID, and Min. Receipt (%). The table lists three items: 'Acer Laptop Computer' (EA, 5.00, 0.00, 245.00, 1,225.00, 5.000000, 61.25, 1,163.75, 0.00), 'Motorola APX 8000' (EA, 3.00, 0.00, 150.00, 450.00, 0.000000, 0.00, 450.00, 0.00), and 'Fritakes Chicken/Tuna 5.5oz' (EA, 6.00, 0.00, 0.32, 1.92, 0.000000, 0.00, 1.92, 0.00). At the bottom of the screenshot, there is a logo for 'CLOUD Acumatica ERP SOLUTIONS GOLD CERTIFIED PARTNER' and a photo of Gregg Mercede with the text 'Gregg Mercede Cloud 9 ERP Solutions'.

Reports dropdown menu with "Print Purchase Order" selected and the purchase order status showing "Open"

Step 14: Review the purchase order printout

Review the generated document for accuracy, confirming that all vendor, shipping, item, and pricing details are correct. The printout displays your company logo, vendor address, shipping address, itemized list, quantities, unit prices, and totals.

Branch	Inventory ID	Line Type	Warehouse	Line Description	UOM	Order Qty	Qty On Receipts	Unit Cost	Ext. Cost	Discount Percent	Discount Amount	Manual Discount	Discount Code	Amount	Alternate ID	Min. Receipt (%)
PRDWHOLE	AMCOM	Goods	WHOL	Acer Laptop Computer	EA	5.00	0.00	245.00	1,225.00	5.000000	61.25	✓		1,163.75		0.00
PRDWHOLE	0000002	Goods	WHOL	Motorola APX 8000	EA	3.00	0.00	150.00	450.00	0.000000	0.00			450.00		0.00
PRDWHOLE	72581172	Goods	WHOL	Friskies Chicken/Tuna 5.5oz	EA	6.00	0.00	0.32	1.92	0.000000	0.00			1.92		0.00

Printable purchase order document with company logo, vendor and shipping details, itemized list, and totals

Step 15: Send the purchase order via email

Click the **SEND** button to open the email activity window. The system automatically populates the recipient (vendor email), subject, and a default message body, and attaches the purchase order PDF.

You can customize the email template in the report form to include additional fields, such as the vendor contact name.

The screenshot displays the Cloud 9 ERP system interface. The top navigation bar includes a search bar and various system links. The left sidebar contains a menu with categories like Favorites, Data Views, Time and Expenses, Finance, Banking, Projects, Taxes, Payables, Receivables, Sales Orders, Purchases, Inventory, Production Orders, Material Requirement..., Support, Services, Marketing, and Contract Management.

The main content area shows a 'Purchase Orders' form. The 'Type' is 'Normal', 'Order No.' is 'PO000728', and 'Status' is 'Open'. The 'Vendor' is 'AAVENDOR - Data Vendor Inc.' and the 'Location' is 'MAIN - Primary Location'. The 'Currency' is 'USD' and the 'Unit Cost' is '1.00'. The 'Date' is '2/11/2019' and the 'Promised On' date is '2/11/2019'. The 'Order Total' is '1,615.67'. A dropdown menu is open, showing options like 'Vendor Details', 'Print Purchase Order', and 'View Purchase Order Receipt and Billing History'.

Below the form is a table with columns: Branch, Inventory ID, Line Type, Warehouse, Line Description, UOM, Order Qty, Qty On Receipts, Unit Cost, Ext. Cost, Discount Percent, Discount Amount, Manual Discount, Discount Code, Amount, Alternate ID, and Mto. Receipt (%). The table contains three rows of data:

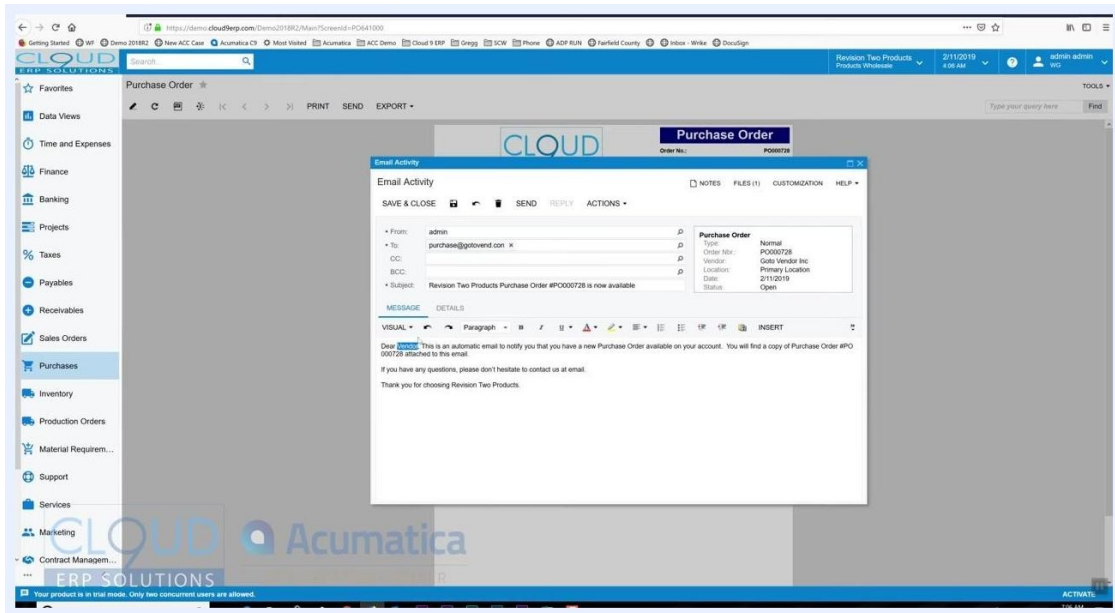
Branch	Inventory ID	Line Type	Warehouse	Line Description	UOM	Order Qty	Qty On Receipts	Unit Cost	Ext. Cost	Discount Percent	Discount Amount	Manual Discount	Discount Code	Amount	Alternate ID	Mto. Receipt (%)
PRODWHOLE	AMCOM	Goods	WHOL...	Acer Laptop Computer	EA	5.00	0.00	245.00	1,225.00	5.000000	61.25			1,163.75		0.00
PRODWHOLE	0000002	Goods	WHOL...	Makrola APX 8000	EA	3.00	0.00	150.00	450.00	0.000000	0.00			450.00		0.00
PRODWHOLE	7201171	Goods	WHOL...	Friskies Chicken/Tuna 5.5oz	EA	6.00	0.00	0.32	1.92	0.000000	0.00			1.92		0.00

At the bottom of the screenshot, there is a logo for 'CLOUD Acumatica ERP SOLUTIONS GOLD CERTIFIED PARTNER' and a photo of Gregg Mercede with the text 'Gregg Mercede Cloud 9 ERP Solutions'.

Email Activity window with populated recipient, subject, and editable message body, showing purchase order details

Step 16: Customize the email message

Edit the email body as needed — for example, add special instructions such as "Please put a rush on this." Any signature configured in your user profile appears automatically in the email. Review all details before sending.



Email Activity window with a custom message, "Please put a rush on this," added to the email body

Step 17: Send the email to the vendor

Click the **SEND** button in the Email Activity window to email the purchase order to the vendor. The vendor receives the purchase order as an attachment, along with your customized message and signature.

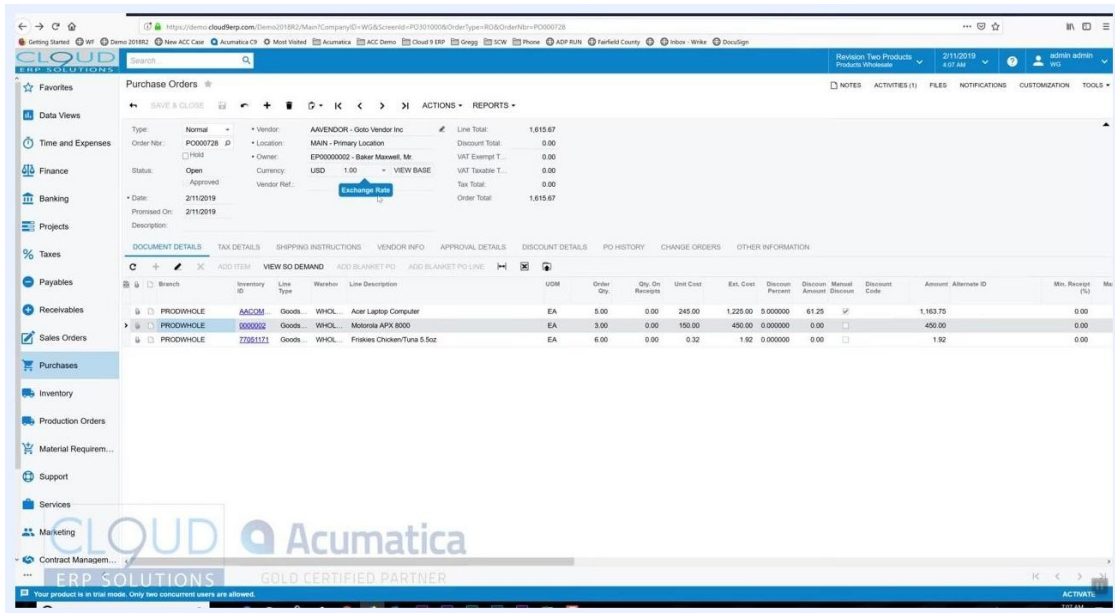
Step 18: Review purchase order details after sending

Navigate back to the Purchase Orders screen and confirm you are viewing the correct order (for example, Order Nbr: PO000728). Verify the vendor details (AAVENDOR - Goto Vendor Inc, Location: Main - Primary Location), the order status ("Open" and "Approved"), and the order date and promised date (2/11/2019 in this example).

Note the order total (1,615.67 USD) and review the line items for accuracy:

- Acer Laptop Computer: 5 units at 245.00 each, discount 61.25, total 1,163.75.
- Motorola APX 8000: 3 units at 150.00 each, total 450.00.

- Friskies Chicken/Tuna 5.5oz: 6 units at 0.32 each, total 1.92.



Purchase Orders screen showing order details, vendor, status, line items, and totals

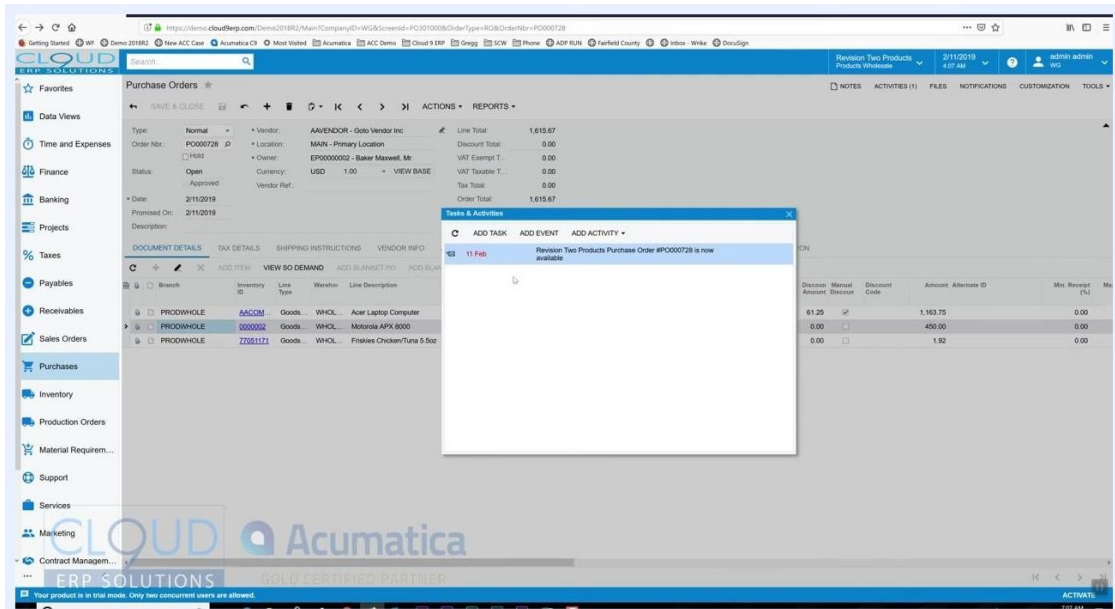
Step 19: Review activities and email tracking

Locate the **ACTIVITIES** tab at the top right of the purchase order screen. Notice the indicator showing the number of activities associated with the order (for example, 1 activity).

Click the **ACTIVITIES (1)** tab to open the "Tasks & Activities" window, which lists all activities, tasks, events, and emails associated with the order. For example, you may see an entry dated "11 Feb" with the subject "Revision Two Products Purchase Order #PO000728 is now available."

Tasks & Activities window showing an email activity for the purchase order

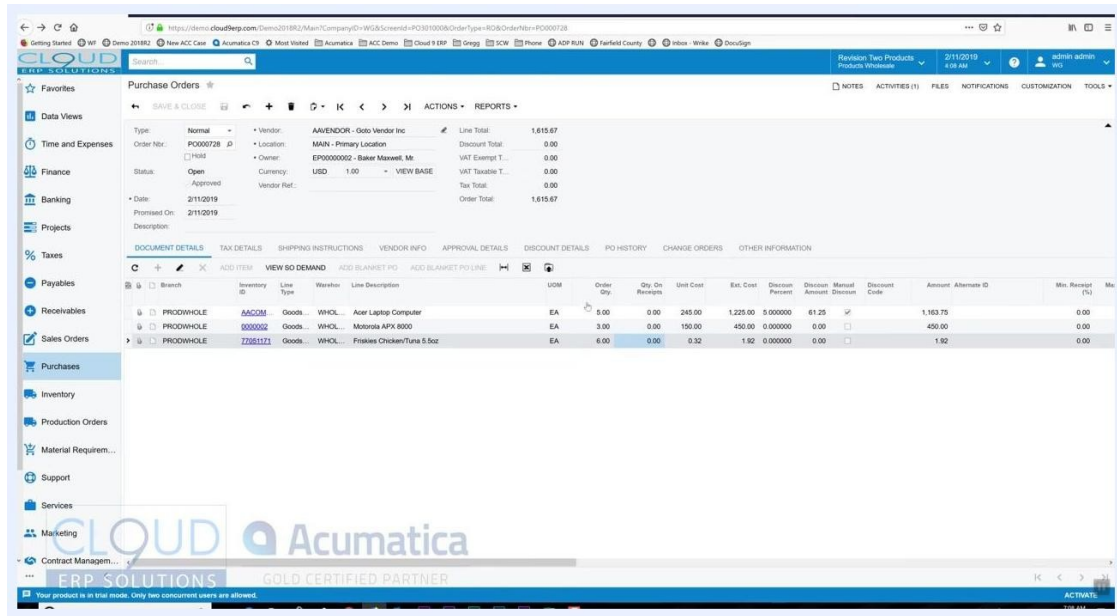
The email address attached to your user name is used to send the purchase order. In addition to the email being recorded in the system, you also receive a copy in your own inbox. Any responses from the vendor are tracked and displayed as additional entries in the "Tasks & Activities" window.



Tasks & Activities window showing a single email activity entry

Step 20: Review or update document details as needed

Return to the **DOCUMENT DETAILS** tab to review or update order line items as needed. If someone else accesses the purchase order, they can see that it has already been communicated to the vendor, which helps identify and address any discrepancies, such as an incorrect price or quantity.



Purchase Orders screen with line items highlighted, showing order quantities and costs

Summary

By following these steps, you can create a purchase order in Acumatica, add and adjust line items, route it through approval, and send it to your vendor by email. The system keeps all purchase order communications tracked, visible, and auditable, while integrating seamlessly with your email workflow.