



## Purchase Orders

The Purchase Order landing page in efish provides a detailed historical record of all purchase orders across all companies, locations and vendors (view is based on role/permissions). Quickly create a new purchase order here. Find a specific PO very quickly, sort PO's by ID, Date, Delivery Date, Company, Location, Vendor Name, and Total. Edit, print or send PO's out directly from this section as well as add new items that have not yet been ordered or entered in the system. It is your one stop shop for everything concerning purchase orders.

Navigate to **[Accounting > Purchase Order]**

**Creating a New Purchase Order:** you can create a new PO by Clicking on the **[Add New PO]** button above the "ID Column" or by clicking on the **green [+ Icon]** to the right of the "Total Column". This will prompt a new Pop-up in which you can fill out the required fields to create your PO starting with Company and Vendor.

The screenshot shows the 'Purchase Orders' interface. At the top, there are four filter sections: 'Start Date' (05/01/2019), 'End Date' (05/31/2019), 'Company (toggle)' (Wired Wine Bar North, BKB, Cafe Panini, Fractured Prune, Prison Rock Pizzeria), and 'Location (toggle)' (Wired Wine Bar North, BKB, Cafe Panini, Fractured Prune, Prison Rock Pizzeria). A 'Refresh' button is located below the filters. Below the filters are two buttons: 'Add New PO' (highlighted with a red box) and 'Add New Component'. To the right of these buttons is a 'Per Page' dropdown set to 50 and a page number '1'. At the bottom, there is a table header with columns: ID, Date, Delivery Date, Company, Location, Vendor Name, and Total. A green plus icon is highlighted with a red box in the Total column header.

- You can filter components by category using the **[Filters Drop-Down]** or you can type a category directly into the **[Filter Field]** to narrow down the components you see from the selected vendor. (i.e. I can type in vodka and efish will only show me vodka items from the selected vendor)
- Be sure to click **blue [Save]** when you are done making changes (this will create the PO but won't send it), you can also send the PO by clicking on the **blue [Send by email]** button or print the PO with the **blue [Print button.]**



New Purchase Order

Date: 5/20/2019    Delivery Date: 5/21/2019    Company: Select Company    Vendor: Select Vendor

Component Selection:

Filters: All Component Types    Filter    Linked Components: Select Component    All Components: Select Component

Component	Unit	Unit Price	Quantity	Total	Location
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You have unsaved changes!

Close Save Send By Email Print

**Note:** the **[Send by Email Button]** will send PO's to EDI enabled vendors via EDI or will send the PO via email for non-EDI vendors as long as there is an email on file for that vendor. To edit the vendors email, click on the **[Edit Icon]** next to the **[Vendor Drop Down]**, This will prompt a pop-up where you can edit the vendor details including email. Be sure to click **[Save]** when done.

Vendor Edit: Alliance Beverage

Company: Wired Wine Bar North    Vendor Name: Alliance Beverage    Active:

Vendor Type: Suppliers    Billing Term: Select Term    Tax ID:

Address

Address 1:    Address 2:    Address 3:

City:    State: AZ    Zip: 85018

Phone:    Alternative Phone:    Fax:

Email:

Company Name:    Contact Person:    Name On Check:    Account Number:

Cancel Save



Purchase Orders

Start Date: 04/20/2019

End Date: 05/20/2019

Company (toggle): Wired Wine Bar North, BKB, Cafe Panini, Fractured Prune, Prison Rock Pizzeria, Wedell Estate

Location (toggle): BKB, Cafe Panini, Fractured Prune

Vendor (toggle): breakthru, SYSCO

Refresh

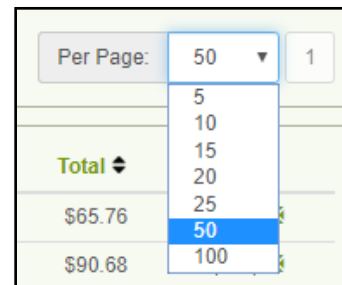
**Search:** The search feature on this page is designed to help you find what you are looking for quickly no matter how broad or narrow your search terms. Your search will automatically be updated as soon as you start making your selections.

- **Date:** Start by entering a Start Date in the **[Start Date Field]** & your desired End Date in the **[End Date Field]**.
- **Company:** Next choose your desired Company(s) from the **[Company Field]**  
**Note:** Clicking the **green [Toggle]** button will select all options in that field. You may also select multiple options by holding down the **{Ctrl key}** while making your selections.
- **Location:** Next choose your desired Locations(s) from the **[Location Field]**
- **Vendor:** Next choose your desired Vendor(s) from the **[Vendor Field]**

**Note:** You may Refresh your search anytime to ensure that efish only shows what you have selected most recently by clicking the **[Refresh Button]** at the bottom of the search section.

**Sort:** once you are done entering your search terms you can organize your results and sort by column to easily find what you are looking for.

- **Set the number of results you wish to see per page:** click on the **[Per Page Drop-down]** where you can select to view anywhere between 5 to 100 results on one page.



You can sort by which ever column you wish, just click on the **green [Column Title]** such as “Vendor Name” and your results will then be organized by “Vendor Name” for example.

**Note:** To reverse the order they are organized in (i.e. alphabetical order vs reverse alphabetical order) simply click the **green [Column Title]** once more.

ID ▲	Date ▼	Delivery Date ▼	Company ▼	Location ▼	Vendor Name ▼	Total ▼	⊕
236	04/25/2019	04/26/2019	Wired Wine Bar North	Wired Wine Bar North	Liquor Vendor	\$65.76	⊕   ⊖   ✕
239	04/29/2019	04/30/2019	Wired Wine Bar North	Wired Wine Bar North	Liquor Vendor	\$90.68	⊕   ⊖   ✕
242	05/01/2019	05/02/2019	Wired Wine Bar North	Wired Wine Bar North	Sysco	\$168.02	⊕   ⊖   ✕
245	05/02/2019	05/03/2019	Wired Wine Bar North	Wired Wine Bar North	Sysco	\$86.56	⊕   ⊖   ✕



Editing a Purchase Order: To edit a Purchase Order click on the green [Edit Icon] to the right of the [Total Column]



Purchase Order: #236 - 04/25/2019 Created By: AIM IT Services,

Date: 04/25/2019    Delivery Date: 04/26/2019    Company: Wired Wine Bar North    Vendor: Liquor Vendor

Component Selection:

Filters: All Component Types    Filter    Linked Components: Select Component    All Components: Select Component

Component	Unit	Unit Price	Quantity	Total	Location
Rum - Mr Barton (1111111)	Bott	\$31.05	1.00	\$31.05	Wired Wine Bar North
Grey Goose (889973)	Bott	\$34.71	1.00	\$34.71	Wired Wine Bar North
Totals:			2	\$65.76	

Close    Save    Send By Email    Print

This will open a pop up window where you can see the details of the purchase order and make changes as needed such as changing the dates, quantity's, or adding and deleting components.

Filters: Bread    Filter    Linked Components: Add Component    All Components: BREAD FLAT THIN OVEN FIRED (Ounce)

- **Adding a component to the vendor within the PO pop-up:** Select your desired filter in

Add Component To Vendor

Component: Bread    Filter    Select Component

Base Unit:    Unit: Box

Shipping Unit:    Conversion: 0

Price: 0

External ID:

Close    Save

which your component would be found in the [Filters Drop Down], you can enter a search term in the [Filter Field] if you wish, Choose "Add Component" from the [Linked Components Drop Down] and choose the desired item from the [All Components Field]. This will prompt a new Pop-up in which you will need to enter the Shipping Unit (how it is purchased), Conversion (how many individual items are in each shipping

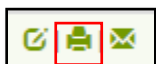
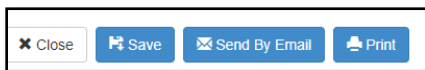


unit), Price (price of shipping unit), and External ID (the number the vendor assigns to the item to ID). Click **[save]** when done.

- **Deleting a Component within the PO Pop-up:** you can delete a Component simply by clicking on the **green [Trash Icon]** to the right.

Component	Unit	Unit Price	Quantity	Total	Location
Rum - Mr Barton (11111111)	Bott	\$31.05	1.00	\$31.05	Wired Wine Bar North

\*\*\*Be sure to click **blue [Save]** when you are done making changes, you can also send the PO by clicking on the **blue [Send by email]** button or print the PO with the **blue [Print button.]**\*\*\*



**Printing a Purchase Order:** To Print a PO from the results page you can simply click on the **green [Print Icon]** to the right of the **[Edit Icon]**, This will open the PO in its Printable format in a new browser tab. Right Click on the PO and choose **[Print]**

**efish** PURCHASE ORDER

PO Number: 12345  
Date: 04/20/19  
Delivery Date: 07/20/19  
Ship Date:  
Re Date:  
Delivery Time:

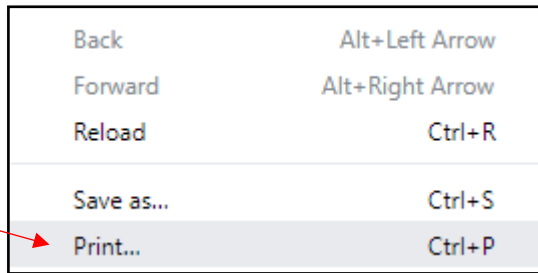
**VENDOR**  
Company Name: [ ]  
Company: [ ]  
Address: [ ]  
City/State/Zip: [ ]  
Country: [ ]  
Phone: [ ]

**BUYER TO**  
Company Name: [ ]  
Company: [ ]  
Address: [ ]  
City/State/Zip: [ ]  
Country: [ ]  
Phone: [ ]

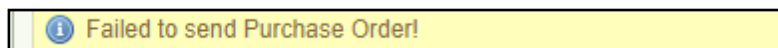
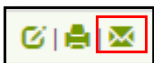
Item ID	Description	Unit	Qty	Unit Price	Amount	
111111	Rum - Mr Barton	bott	1.00	\$31.05	\$31.05	
88888	Rum - Mr Barton	bott	1.00	\$14.99	\$14.99	
					Subtotal	\$46.04
					Tax	
					Shipping	\$46.04
					Total	\$92.08

COMMENTS: [ ]

AUTHORIZED BY: [ ] CIO



**Sending a Purchase Order** click on the **[Email Icon]** to the right of the **[Print Icon]** this will automatically send your PO for you. Any issues in sending it will appear at the top of the screen as shown below.





**Adding an Item:** Say your vendor starts to carry an Item which you have never ordered before until now. You can add that item by clicking on the **[Add New Component Button]** above the “date” column. This will prompt a Pop-up where you can add that item.

- **Name:** enter the name of the item you wish to add in the **[Name Field]**
- **Category:** Enter the category the item falls into in the **[Category Drop Down]**
  - You can add a new category buy clicking on the **green [Add]** option to the right of “category” which will drop down a new field where you can enter the new category name and click the green **[Add]** button.
- **Unit of measurement:** Select the most common unit this item is measured out in for recipes, you can add a new unit of measure by clicking on the **[Edit Icon]** to the right of the **[Unit of Measure Drop Down]**. you can also add additional units of measure if you use the item in multiple ways for multiple recipes by clicking on the **[+ Icon]** to the right of the **[Unit of Measure Drop Down]**
- **Vendor:** Once you set the unit of measure scroll to the bottom of the page to set your Vendor for this item by clicking the green **[Add Vendor Link]**. This will drop down a section where you will need to enter the Company, Vendor, Unit (how you purchase it), Conversion rate (how many items/oz are in one case, box, pound etc.), Price of Unit, and External ID (the number that the vendor uses to ID the item if there is none you may enter your own starting with the first 3 letters of the vendor name and 4 additional digits. (i.e. SYS0001)



- Scroll back up to the Global Selections Section if you would like to set the same settings for this item across all locations, otherwise you may set them individually by location below the Global Selections Section.

- Select your COGS account (cost of goods account)
- Select your Inventory account
- Set the Cost of the item if there is not one set already
- Set the Amt/Cost (how much of the product do you receive for the cost entered)
- Set the Re-order Threshold (lowest amount you ever want to have in stock at any given time)
- Set the Max Stock Level (highest amount you ever want to have in stock at any given time)
- Set the Low price Threshold (when you want to be alerted about price drops)
- Set the High Price Threshold (when you want to be alerted about price increases)
- Set the Yield (the actual percentage of the item that is used in recipes not counting what is lost in waste or prep.)
- Click **[Save]** when done. **\*\* (you must fill in all fields to save) \*\***