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Adding Purchase Transactions

Entering [labor hours](#) and material purchases in Work Order allows you to track the cost of a work order. These transactions open up reporting doors to help you see where resources have been allocated.

How to Enter Purchase Transactions

- On the work order form, scroll down to the Transactions sections and click on **New Purchase Transaction**.

A screenshot of a software interface showing a 'Transactions' menu. The menu is a blue-bordered box with a white background. At the top, the word 'Transactions' is written in blue. Below it, there are three red pencil icons, each followed by a text label: 'New Purchase Transaction', 'New Issue Transaction', and 'New Labor Transaction'.

- Trns Date** will automatically populate with today's date. This date can be backdated to reflect the date of the actual purchase.
- Identify the **Type** of purchase transaction from the drop down list. (Materials, Rentals, Contract Services, Material Return, or Discount)
- Choose the **Supplier** from the drop down list/binocular lookup. If the Supplier is *not* in the list, create a new one by typing the Supplier name in the field. **Once the transaction is saved, the new Supplier will be added to the list.*
- Enter the **Invoice/PO#**.
- Select the **Budget Code** associated with this transaction.
- In the **Purchased by** field, choose the name of the employee responsible for purchasing the material(s).
- Enter a **Description** of the purchase. (Materials: What was purchased? Rentals: What was rented? Contracted Services: What services were contracted out? Etc.)
- Identify the **Quantity** purchased.
- In the **Cost Each** field, enter the cost per unit and enter any **Markups** or **Discounts**. **If the quantity is 1, the Cost Each entered will be the total cost.*
- Add any additional **Sales Tax, Shipping/Freight, or Other Charges**.
- The **Amount** will automatically calculate based on the Quantity, Cost Each (Markup/Discount), Sales Tax, Shipping/Freight, and Other Charges.
- If the work order has been completed, you can change the status to Complete by checking the **Complete Work Order** box.
- Click the **Submit** button to save.

A screenshot of a 'New Purchase Transaction' form. The form is enclosed in a black border. It contains several fields with checkboxes and dropdown menus. The 'Trns Date' is checked and set to 11/5/2015. The 'Type' is checked and set to 'Materials'. There is a 'Select Supplier or type new one below.' section with a 'Select Supplier' dropdown and a text input field for 'Supplier'. Below that is an 'Invoice/PO #' field. The 'Budget Code' is a dropdown menu set to '-- Select Budget Account --'. The 'Purchased by' is a dropdown menu set to '-- Select Purchaser --'. The 'Description' is checked and contains the text '10 2x4s'. The 'Quantity' is checked and set to '10'. The 'Cost Each' is checked and set to '1.5', with fields for '% Markup' and '% Discount'. Below this is a note: '(Note: If no discount or markup, please leave blank. When used, the original cost is automatically adjusted and saved.)'. There are fields for 'Sales Tax' (set to 0), 'Shipping/Freight', and 'Other Charges'. The 'Amount' field is set to '15.0000'. At the bottom, there is a 'Complete Work Order' checkbox and a 'Submit' button.

Editing and Deleting Purchase Transactions

- To edit or delete a Purchase Transaction, click on the item description in the **Item Number Description** field from the Transactions section of the work order.

Transactions								
New Purchase Transaction								
New Issue Transaction								
New Labor Transaction								
1 - 3 of total 3 listed					« First ◀ Previous 25 Next 25 ▶ Last »			
Date	Item Number Description	Type Invoice/PO #	Labor	Qty	Cost Each	Tax	Shipping/ Other	Amount
11/5/2015	10 2x4s	Materials		10	\$1.5000	\$0.00	\$0.00 \$0.00	\$15.00

- The purchase entry page will load so you can edit the information. Click the **Submit** button to save the changes.
- To delete the transaction, click the **Delete** button at the bottom of the entry page.

Did you find this helpful?

<input type="button" value="Yes"/>	<input type="button" value="No"/>
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