

C. 10. Optional: Transition Purchase Orders ("PO's")

What's the purpose of this setup step?

In this step we'll show you how to transfer any open PO's you might have. You can skip this step and do it after you've started using the system live in your business if you like since it does not affect the general ledger.

- 1) To transfer PO's, follow these instructions:
 - a) Look in your old accounting system. Print out the open PO's.
 - b) Now let's create those PO's in Control. Click **New**.
 - c) Click **New Purchase Order**.
 - d) Start by filling in these fields on the top of the PO:
 - **Vendor** – input the name of the vendor.
 - **Description** – input the description of what this PO is for.
 - **Initial Status on Save** – choose from the list the status you want this PO to have once you save it. The choices are **Request**, **Approved** and **Ordered**.
 - e) In the center section, fill in the information that applies, starting with **Item Type**. Choose **Expense** or, if this PO is for a part that you're ordering, you can choose **Expense** or **Part**. If you choose part, certain areas of Control will show that these parts are being ordered.
 - f) In the **Memo** field on the bottom, you ought to enter "Transfer from the old accounting system" for future reference.
 - g) Enter the **Taxes**, if it applies.
 - h) Click **Save**.
 - i) Now that PO is in Control.
 - j) Repeat the process for the other PO's that you need to enter. To create the next PO, just click **New** on the toolbar on the right side..
- 2) To see a list of the PO's in Control, follow these steps:
 - a) Click **Explorer**.
 - b) Click **Explore Purchase Orders**.
 - c) Notice there are fields and checkboxes on the left that allow you to select the criteria for which PO's you want to see. For example, to see only Approved PO's, check that check box and uncheck the others. The list of PO's will show on the right.

Now you're ready for the next transition task.