

Purchase Orders

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Creating a (Manual) Purchase Order in Helm

Manual Creation

1. From the sidebar go to [Purchasing->Purchase Orders](#)
2. Press the **Create Purchase Order** button
3. Select **Create Manual PO**
4. Add a PO Number
Select your supplier from dropdown (can be yourself)
Suppliers can be created on the [Contacts page](#) if needed
Set warehouse to **Warehouse**
Add an expected delivery date
5. This will load up a full Purchase Order page that should be fairly simple to understand
6. There may be no delivery address, but as it's coming to the warehouse you will want to set the details to:
Units 13-17 Riverside Industrial Park
Moody Lane
Grimsby
North Lincolnshire
DN31 2AN
7. Click **Add Inventory**, you will need to do this for each individual SKU you are adding
8. Select the relevant item that is getting sent to the warehouse
9. Set the **quantity** to the amount that is getting delivered
10. Click **Create**

Final Part

Once the PO is added and looks good/has been sent wherever it needs to be sent this needs to be set as Submitted.

To do so, select the dropdown at the top-right and choose Submitted.

Uploading a Purchase Order CSV (ASN alternative)

CSV Upload (recommended)

A CSV example directly from Helm can be downloaded from the [Import/Export Purchase Order](#) page accessed through Imports/Export->Purchase Orders

This consists of the following (but may alter, so I recommend checking the CSV download from Helm on occasion).

Name	Description	Expected Value
*Purchase Order ID	A Unique ID for the Purchase Order	
*Supplier Email	The email address of the supplier (can be own email)	
*Location ID	The location this item will be stocked to (Warehouse is 6, so choose 6)	6
Expected Delivery Date	When it should be getting to the warehouse	
*Product SKU	The SKU for the product on this line	PDT-123, etc
*Product Quantity	The amount of this product getting delivered	120
Product Name	The name of the product	
Product Line Total Discount		0
Product Expected Delivery Date		
PO Notes		
Payment Currency		GBP , etc
Product Notes		

Name	Description	Expected Value
Product Delivered Quantity		
Product Unit Price		
Custom Fields	Any custom field data for the product(s)	

Uploading/Importing

Once the PO is completed

Go to [Imports/Export->Purchase Orders](#)

Upload the file

Check the mappings are correct (if you use the template they should be, but double check for safety)

Press Submit Mapped Data

Final Part

Once the PO is added and looks good/has been sent wherever it needs to be sent this needs to be set as Submitted.

To do so, select the dropdown at the top-right and choose Submitted.

Purchase Order additional features

From the PO page, you can track deliveries related to the PO, any notes added (by yourself, or OFC), and any logs for updates of the PO.

You can also print the PO for records, or to send to suppliers, or could send the PO directly to the supplier via Helm.