

AssetOptics

Quick Start Learning Series

MRO Purchasing

Learning Objectives




1. Learn the basic structure of a Purchase Order
2. The difference between the two type of Purchase Order Lines: Stock and Service
3. How to manually create a PO or PO Request
4. How to replenish Stock Items automatically
5. How to receive Purchase Order Lines

Purchase Orders

A PO or PO Request can be created from the Purchase Orders tab (your role may not authorize you to create a PO). A Storeroom is required to create a PO for both shipping & receiving purposes and to filter the relevant Stock Items and Vendor Case Packs. Purchase Order Lines (Stock and Service) are then added.

New Purchase Order: Requisition

Information

PO #		Owner	
Description	Generator repair parts	Status	Request <small>This field is calculated upon save</small>
Vendor	 Generac	* Storeroom ID	 Chicago Warehouse <small>This field is calculated upon save</small>
Required Date	3/15/2022	Storeroom Description	
Comments		Buyer	Search People...

PO Amounts Summary


Total PO Amount	\$0.00 <small>This field is calculated upon save</small>
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System Information

Created By		Last Modified By	
Record Type	Requisition		

Cancel Save & New Save

Purchase Order Details View

 Purchase Order
PO-0003133

Vendor VSL Suppliers	Status Completed	Storeroom ID Main Storeroom	Total PO Amount \$7,983.00	Buyer	Owner  View Profile
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Details Related

Details

PO #	PO-0003133	Owner	View Profile
Description ⓘ	PO-0003133	Buyer ⓘ	
Vendor ⓘ	VSL Suppliers	Status ⓘ	Completed
Vendor Shipping Address ⓘ		Release Date	10/26/2021
Required Date ⓘ		Storeroom ID ⓘ	Main Storeroom
Comments ⓘ		Storeroom Description ⓘ	Main Storeroom

Shipping & Billing Address

Billing Street ⓘ	885 Woodstock Rd PMB 430-117	Shipping Street ⓘ	840 Harrison Ave Suite 104
Billing City ⓘ	Roswell	Shipping City ⓘ	Panama City
Billing State/Province ⓘ	GA	Shipping State/Province ⓘ	FL
Billing Zip/Postal Code ⓘ	30075	Shipping Zip/Postal Code ⓘ	32401
Billing Country ⓘ	US	Shipping Country ⓘ	US
Billing Company ⓘ	AssetOptics		

Terms

Payment Terms ⓘ	30 Days	Ship Via ⓘ	Best Way
FOB ⓘ	Shipping Point	Freight Terms ⓘ	Prepaid


Amounts Summary

Total PO Lines Amount ⓘ	\$7,938.0000	Total PO Amount ⓘ	\$7,983.00
Sales Tax ⓘ	\$0.00	Total PO Received Amount ⓘ	\$8,635.00
Shipping and Handling ⓘ	\$0.00	Total PO Open Amount ⓘ	\$0.00



Purchase Order Lines

PO Lines are of two Record Types: Stock and Service. Stock lines reference inventory items (i.e., Stock Items), whereas Service lines represent one-off purchases, miscellaneous charges, labor services, rentals, etc.





Purchase Order
PO-0004526

Vendor: [WW Grainger](#) Status: [Approved](#) Storeroom ID: [Main Storeroom](#) Total PO Amount: [\\$617.99](#) Buyer: Owner: 

Details **Related**

Purchase Order Lines (4)  


4 items • Updated 7 minutes ago

<input type="checkbox"/>	PO Line ID	Order Qua...	Unit Cost	Stock Item	Description	Total Recei...	Open Qua...	Record Type	
1	<input type="checkbox"/> POL-000781	5.00	\$25.0000	3VX250 Belt	3VX750 Belts, 2 Pack	0.00	5.00	Stock	
2	<input type="checkbox"/> POL-000783	1.00	\$60.0000	5VX750 Belt	5VX750 Belt, UOM - Box, Purchase Pack Qty - 12	0.00	1.00	Stock	
3	<input type="checkbox"/> POL-000784	1.00	\$112.9900		Banded V-Belt: 5/3V670	0.00	1.00	Service	
4	<input type="checkbox"/> POL-000785	8.00	\$40.0000		Trailer rental per hr.	0.00	8.00	Service	

[View All](#)

New Stock Line action

Invoking the *New Stock Line* action on a Purchase Order presents the Stock Items available for the vendor-storeroom permutation on the PO

 **Add PO Line Item**

[Choose Stock Items](#)

Records per page: Page: of 1

Stock Item	Description	On Hand Qty	Stock UOM
<input type="radio"/> Utility Scissors	Utility Scissors	26	EA - Each
<input type="radio"/> Hammer-48oz	Hammer-48oz from Stock Item	8	EA - Each
<input type="radio"/> 6K197	DAYTON 1-Phase Capacitor-Start Totally Encl...	55	EA - Each
<input type="radio"/> 5/16 NC Hex Head Cap Screw 1 1/2" Length	5/16 NC Hex Head Cap Screw 1 1/2" Length	28	EA - Each
<input type="radio"/> 6203 2RSJEM	Ball Bearing, Radial, 17 mm ID, 40 mm OD, 12 ...	55	EA - Each
<input type="radio"/> Gear	Repairing Tool	25	EA - Each
<input type="radio"/> Bands	Bands, Generic	28	EA - Each
<input type="radio"/> 5NYR4	Hex Head Cap Screw: Steel, Grade 2, Black Oxi...	250	EA - Each

New Stock Line action (cont'd)

When a Stock Item is chosen, the user can select an existing Vendor Case Pack or create a new one

1

<input type="radio"/>	Utility Scissors	Utility Scissors	26	EA - Each
<input type="radio"/>	Hammer-48oz	Hammer-48oz from Stock Item	8	EA - Each
<input type="radio"/>	6K197	DAYTON 1-Phase Capacitor-Start Totally Encl...	55	EA - Each
<input type="radio"/>	5/16 NC Hex Head Cap Screw 1 1/2" Length	5/16 NC Hex Head Cap Screw 1 1/2" Length	28	EA - Each
<input checked="" type="radio"/>	6203 2RSJEM	Ball Bearing, Radial, 17 mm ID, 40 mm OD, 1...	55	EA - Each
<input type="radio"/>	Gear	Repairing Tool	25	EA - Each
<input type="radio"/>	Bands	Bands, Generic	28	EA - Each
<input type="radio"/>	5NYR4	Hex Head Cap Screw: Steel, Grade 2, Black O...	250	EA - Each

2

Choose Vendor Case Pack

Name	Description	Vendor Part Number	Primary Case Pack	Purchase Pack Qty	Recommended Order ...
<input type="radio"/>	CP-000901	23Y204-Single Pack	23Y204	1	0
<input checked="" type="radio"/>	CP-000904	10 pk	23Y210	10	0

*Order Qty

3

Create New Vendor Case Pack

Add to Purchase Order Cancel

New Service Line action

Invoking the *New Service Line* action on a Purchase Order lets the user create a PO Line for a non-Inventory Item

New Service Line

Purchase Order ⓘ
PO-0004526

Description ⓘ

Vendor Part Number ⓘ

Order Quantity ⓘ

Unit Cost ⓘ

Date Required ⓘ

Replenishing Stock Items

- Stock Item records include a field called “Reorder Point” (a.k.a. minimum stocking quantity) which is the sum of Available Qty and On Order Qty
- When the Reorder Point threshold is passed a recommended Qty to Order is calculated (subject to optionally specified EOQ)
- Purchase Requests can be generated manually or automatically
- Stock Item records include a checkbox called “Auto Order,” which enables the automatic generation of Purchase Requests
- A Preferred Vendor Case Pack is required to automatically generate Purchase Requests


Generate a Purchase Request Manually


- Stock Items to reorder can be identified via a prebuilt list view or by sorting the appropriate columns in the Stock Items tab
- A button labeled “Generate PO” will create a Purchase Request (Record Type: Requisition), which can then be submitted for approval

The screenshot displays the AssetOptics interface for managing stock items. The top section shows a table of stock items with columns for Stock ID, Storeroom, Source Storeroom, Item Master, Reorder Point, Available Qty, On Hand Qty, On Order Qty, and Stock UOM Qty to Reorder. The first row, 'Oil Filter', is highlighted with a red box. Below the table, a navigation bar includes 'AssetOptics', 'Home', 'Chatter', 'Accounts', 'Bills of Materials', 'Dashboards', and 'Equipment/Assets'. A dropdown menu is open, showing 'LIST VIEWS' with options: 'All Stock Items (Pinned list)', 'Inter-Stores Sourced Items', 'Items to Reorder - Purchase Req' (selected), 'Items to Reorder - Transfer Order', 'Items with Open Orders', 'Recently Viewed', and 'Serialized Stock Items'. The bottom section shows a partial view of the 'Items to Reorder - Purchase Req' list view, with a table header for 'Purchase UOM Qty to Reorder' and a value of '1'.

Stock ID	Storeroom	Source Storeroom	Item Master	Reorder Point	Available Qty	On Hand Qty	On Order Qty	Stock UOM Qty to Reorder
1	Plant 1	Plant 1	Oil Filter	3	2	2	0	4
2	Plant 1	Plant 1	Motor Oil, 5W-20, Quart	6	51	51	0	0
3	Plant 1	Plant 1	FLT10000K	2	6	6	0	0
4	Plant 1	Plant 1	M621S4158T					
5	Plant 1	Plant 1	M03AP331036					
6	Plant 1	Plant 1	M03AP331034					















Purchase Request

 Purchase Order
PO-0004561


Vendor	Status	Storeroom ID	Total PO Amount	Owner
WW Grainger	Request	Main Storeroom	\$56.00	 [Name]

Details Related

∨ Information

PO #	PO-0004561	Owner	 [Name]
Description 	Fasteners, adhesives 	Status 	Request
Vendor 	WW Grainger 	Storeroom ID 	Main Storeroom 
Required Date 	2/16/2021 	Storeroom Description 	Main Storeroom
Comments 	plz expedite 	Buyer 	

∨ PO Amounts Summary

Total PO Amount 	\$56.00
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Reorder Point Calculation

Stocking Information	
On Hand Qty	28.00
Committed Qty	2
Available Qty	26.00
Primary Bin Location	01-A-01-A
Primary Bin Loc OH Qty	28.00
Secondary Bin Loc OH Qty	0.00

Storeroom	Main Storeroom
Storeroom Description	Main Storeroom
Stock UOM	EA - Each
Cycle Count Group	
Auto Delete Bins	<input checked="" type="checkbox"/>
Criticality Code	

Ordering Information	
Sourcing Type	Purchase Order
Preferred Vendor Case Pack	CP-000953

Auto Order	<input checked="" type="checkbox"/>
Reorder Point	50.00
Lead Time	0
Economic Order Quantity	1.00
On Order Qty	0.00
Stock UOM Qty to Reorder	24.00

For this Stock Item the Available Qty + the On Order Qty (=26) has fallen below the Reorder Point (50). The system calculates the Stock UOM Qty to Reorder as 24.

Purchase Order Lifecycle

- Upon approval, Purchase Requests are converted to Purchase Orders
- Custom code controls valid Status transitions on a Purchase Order
- The typical Status flow on a Purchase Order is Approved → Released → In Progress → Completed
- Receiving open PO Stock Lines automatically changes the status on a Released PO to In Progress

Receiving from a Purchase Order

- With the PO in a Status of Released or In Progress, choose a PO Stock Line and click the button “New Receipt” and enter a quantity
- PO Receipts for *Stock Lines* are made to a chosen bin location
- PO Receipts for *Service Lines* do not include a bin location as these are not inventory items

The screenshot displays a software interface for managing a Purchase Order Line (POL-000678). The main view shows details for the PO, including Stock Item (SNYR4), Order Quantity (5.00), Total Received Quantity (1.00), Open Quantity (4.00), and Purchase Unit of Measure (BX - Box). A 'New Receipt' button is visible in the top right corner. A modal window titled 'Receive Inventory' is open, allowing the user to create a receipt. The modal contains the following fields:

- Transaction Qty:** A text input field containing the value '4'.
- Comment:** A text input field.
- Bin Location:** A dropdown menu with '01-A-01-A' selected. Other options include '-- Select --', '01-A-01-A', and '02-B-02-B'.

The background interface also shows a 'Details' tab, 'Information' section, and 'Activity' section.