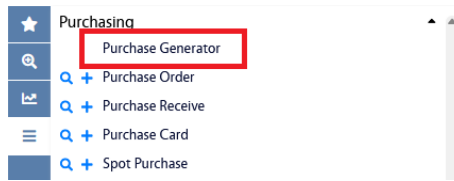


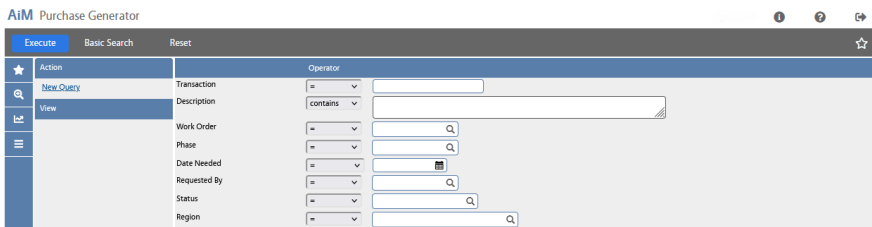
## Purchase Generator

Purchase Orders are used to purchase materials from Contractors (vendors). The Purchase Generator allows you to gather items from multiple Purchase Requests onto one Purchase Order. The Generator will show you what Contractors have unfulfilled items and let you select the one you want to put on the Purchase Order and then generate the Purchase Order for processing.

- From the menu, under **Purchasing – Purchase Generator**

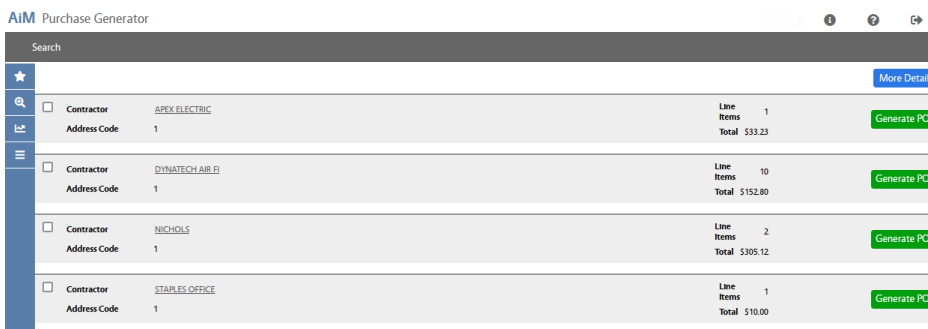


- Click Purchase Generator hyperlink.



- Enter the criteria needed to get the Purchase Requests you need. (Purchase Request statuses must be of the Finalized type. Purchase Requests that are still in an Open state are not ready for purchase.)

- Click **Execute**



- You will get a list of Contractors with outstanding items requested from them. On the right side you can see the number of items (not the quantities) and the total cost of the items.

6. To see more details about the items to be ordered, click [More Detail](#)

The screenshot shows the AIM Purchase Generator interface. At the top, there is a search bar and a 'Less Detail' button. Below, there are two contractor sections. The first contractor is 'APEX ELECTRIC' with address code '1'. It has one line item (Line Items Total: 1, Total: \$33.23) with a checkbox next to it. The item is 'CABLE HDMI CABLE 100 FT' with quantity 2, unit cost \$33.23, and line total \$33.23. The second contractor is 'DYNATECH AIR F' with address code '1'. It has two line items (Line Items Total: 10, Total: \$152.80). The first item is 'HFLNK1660 FILTERS, LINK 167X607 3 PLY POLY LINK (3-16 X207)' with quantity 1, unit cost \$7.64, and line total \$15.28. The second item is 'HFLNK1660 FILTERS, LINK 167X607 3 PLY POLY LINK (3-16 X207)' with quantity 1, unit cost \$7.64, and line total \$15.28. Each contractor section has a 'Generate PO' button.

7. To create a Purchase Order you need to select one or more of the lines for a Contractor. Clicking the checkbox next to the Contractor's name will select all items.

This screenshot shows the AIM Purchase Generator interface with a contractor 'DWYER INSTRUMENTS' (address code NA) selected. A red circle highlights the checkbox next to the contractor name. A red arrow points to the 'Generate PO' button, which is also highlighted with a red box. The table below shows one line item: '2010 DIFFERENTIAL PRESSURE GAUGE, INCH OF WATER, 9-10" RANGE, +/-2%, 2000 SERIES' with quantity 1, unit cost \$75.5900, and line total \$75.59.

8. Once you have made the selection(s) for a Contractor click [Generate PO](#)

9. You will be taken to the Purchase Order screen so that you can process the Purchase Order.

The screenshot shows the AIM Purchase Order screen. At the top, there are 'Save' and 'Cancel' buttons. The order ID is 'A001042' and it is 'AUTO GENERATED PO'. The status is 'PENDING REVIEW'. The contractor is 'DWYER INSTRUMENTS' (address code NA). The order was created on 'Oct 20, 2022 10:33 AM'. The currency is 'USD'. The subtotal is \$75.59, with tax, shipping, and markup all at \$0.00, resulting in a total of \$75.59. The 'Line Items' section shows one item: '1 NonStock DIFFERENTIAL PRESSURE GAUGE, INCH OF WATER, 9-10" RANGE, +/-2%, 2000 SERIES' with quantity 1, unit cost \$75.59, and status 'Open'. There are 'Remove', 'Load', and 'Add' buttons for the line items.

10. As part of the processing of the Purchase Order, do not forget to set the **Disbursement Defaults** on the Line Item. This can slow down the PO Issuance later.

**Commented [CP1]:** what is Disbursement Defaults ?

Subtotal	Discount	Tax 1	Tax 2	Tax Rebate	Shipping	Markup	Sequence Total
575.59	50.00	50.00	50.00	50.00	50.00	50.00	575.59

11. To generate other Purchase Orders, **SAVE** the Purchase Order and click **BACK** to return to the Purchase Generator.