

# Purchase Order Workflow

04/30/2025 3:23 pm CDT

## Overview

Sellercloud's **procurement management tool** allows you to create Purchase Orders, process them, manage purchased goods, and automatically update inventory costs. This article will guide you through the key steps of the **purchase order lifecycle**.

To learn more about advanced PO features available in Sellercloud, refer to [Managing POs: Additional Functions](#).

Sellercloud lets you order units from your vendors by creating Purchase Orders, which update inventory and product costs once processed. You can fully manage all aspects of your POs, including **receiving, shipping, and payment management**.

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## Manage a Purchase Order

The Purchase Order **workflow** launches once a new Purchase Order is created in the system. During PO creation and throughout its lifecycle, you may need to change PO general information or scope details on purchased items. Sellercloud allows you to make **edits** to a Purchase Order at any point. The change history for each product will be logged and displayed under the respective product's **Change Log** toolbar.

## Create a Purchase Order

You can enable the **Force user to enter Requested on Date** and **Force user to enter Expected Delivery Date** [Client Settings](#) to ensure a PO cannot be created without these dates.

To create a new Purchase Order, follow the steps below.

1. Go to the **Create New Purchase Order** page by using any of the below paths.
  - **Purchasing > Create New Purchase Order**.
  - **Purchasing > Manage POs >** click the plus icon in the bottom right corner.
  - **Purchasing > Vendors > Manage Vendors > Vendor > Toolbox > Purchase Orders >** click the plus icon in the upper right corner of the **Purchase Orders** panel.
2. Specify the appropriate **Company** and **Vendor** names. Alternatively, to create a new Vendor, refer to the instructions in [Managing Vendors](#).
3. Optional: Select the **Receiving Warehouse** where the purchased items will be delivered.
4. Optional: Indicate the **Payment Terms** within which this PO must be completed. Click the arrow to proceed to adding products.
5. Click the **Expected Delivery** box, and select the estimated date of product arrival.
6. You can log offers from vendors without actually buying them by creating a Purchase Order and selecting **Vendor**

Offer as Purchase Order Type.

The screenshot shows a form with three tabs: '1. GENERAL', '2. PRODUCTS', and '3. ADDRESS'. The '3. ADDRESS' tab is highlighted with a blue circle and an arrow pointing to it. Below the tabs is a table with the following data:

GENERAL	
Company *	Test Company
Vendor *	Test Vendor
Receiving Warehouse	Back Store Room
Description	Description
PO Type	Purchase Order
Vendor Note	Vendor Notes
Payment Terms	new test
Expected Delivery *	07/9/2021 12:00 AM

7. Click **Add Products**. For details, refer to the header below.

8. Click **Address** to proceed. Provide all required information on the address the purchased items will be shipped to. Alternatively, select the previously saved address data in the **Saved Addresses** dropdown list.

The screenshot shows the '3. ADDRESS' tab selected. The 'SHIP TO' section is highlighted with a green bar. Below the bar is a table with the following data:

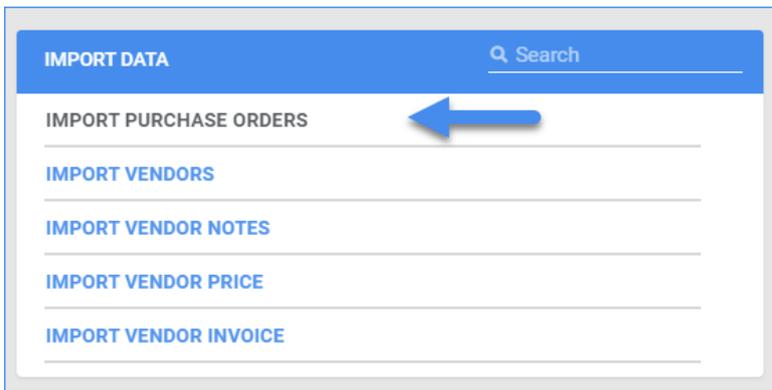
SHIP TO	
Saved Addresses	Test
First Name	First Name
Middle Name	Middle Name
Last Name	Last Name
Business	Test
Country	United States
Address	Test
	Address Line 2 (Optional)
ZIP Code	Test
City	Test
State	Select
Phone	Phone number
Fax	Fax number XXX - XXX - XXXX

9. Once completed, click the green flag icon.

## Import Purchase Orders

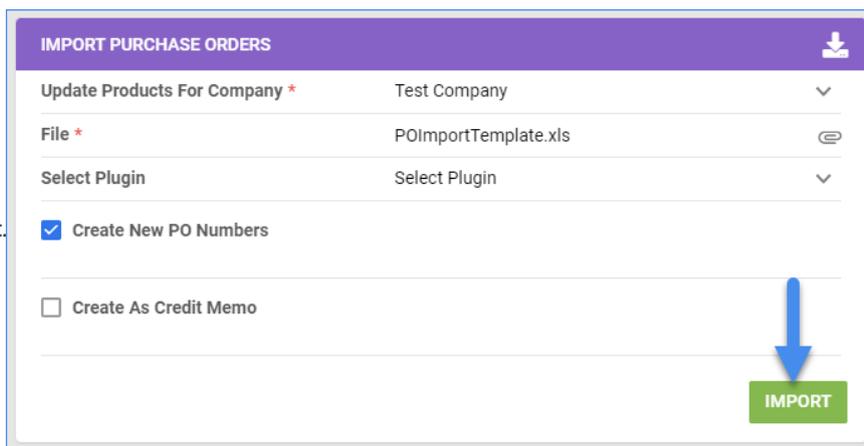
You can also add multiple Purchase Orders at once using the **Import Purchase Orders** option. To do that, follow the steps below.

1. Access **Purchasing > Tools > Import Purchase Info**.
2. Select the **Import Purchase Orders** option.



3. To download a sample template, click the download icon on the **Import Purchase Orders** panel header.
4. Complete the columns. **Save**.
5. Return to the **Import Purchase Orders** panel. Select the appropriate file. Fill in the required fields.
6. Optional: You can use an individually customized plugin for import. Contact the [Support Team](#) to request this plugin.
7. Select the **Create New PO Numbers** checkbox to allow the system apply the numbering to the newly added POs.
8. Select the **Create As Credit Memo** checkbox to mark the newly added Orders as **Credit Memos**.

9. Click **Import**.

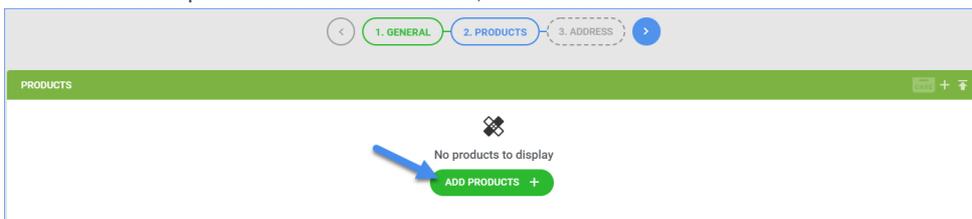


10. The import will be submitted to the **Queued Job**. Once processed, the new Purchase Orders will appear on the **Manage POs** page.

## Add Products to a Purchase Order

When adding products to a Purchase Order using the wizard, follow the steps below.

1. At the second step of the PO creation wizard, click **Add Products**.



2. Optionally, you can click the **SKU List Mode** toggle button on the top right and then quickly search for products by entering one per row. You can also enter the quantity and unit price. Then click **Search**, and once the products show

up, check the boxes to select them and click **Add & Close**.

**Add Products** SKU List Mode

Enter or paste SKUs, each on its own line. Quantity and Price are optional.

Search: wfsp1,5,15  
wfsp2,5,25

<input checked="" type="checkbox"/>	SKU	PRODUCT	PR PRICE	RETAIL PRICE	AVG COST	AVAIL. QTY	ON ORDER	UNIT PRICE	QTY
<input checked="" type="checkbox"/>	WFSP1	WFS Product One	\$15	\$25	\$4	39920	0	\$15.000	5
<input checked="" type="checkbox"/>	WFSP2	WFS Product Two	\$25	\$25	\$4	39438	0	\$25.000	5

Displaying results 1-2 of 2

**CANCEL** **ADD SELECTED** **ADD & CLOSE (2)**

3. Without **SKU List Mode** enabled, you can just search for products and specify the **Unit Price** and **Quantity**.

4. Check the boxes next to products to select them and then click **Add & Close**.

**Add Products** SKU List Mode

Search: 123456789

<input type="checkbox"/>	SKU	PRODUCT	PR PRICE	RETAIL PRICE	AVG COST	VENDOR SKU	AVAIL. QTY	IS KIT PARENT	UNIT PRICE	QTY
<input type="checkbox"/>	11111	Product One	\$0	\$24.99	\$10		177		\$0.00	0
<input type="checkbox"/>	11112	Product One	\$0	\$24.99	\$0		41		\$0.00	0
<input type="checkbox"/>	11115	Product One	\$0	\$24.99	\$0		0		\$0.00	0
<input type="checkbox"/>	11116	Product One	\$0	\$24.99	\$0		0		\$0.00	0
<input type="checkbox"/>	1232	123456789	\$0	\$0	\$0		0		\$0.00	0
<input type="checkbox"/>	1TEST	Product One	\$0	\$24.99	\$0		11		\$0.00	0
<input checked="" type="checkbox"/>	123456789	123456789	\$0	\$0	\$7.5		7		\$0.00	0

**CANCEL** **ADD SELECTED** **ADD & CLOSE (1)**

5. Specify information on ordered quantities, price, and discounts.

6. Alternatively, you can add products via file upload. To do that, click the **Upload Products** icon in the upper right of the **Products** panel (see figure below).

1. GENERAL 2. PRODUCTS 3. ADDRESS

SKU	PRODUCT NAME	VENDOR SKU	RETAIL PRICE	SITE COST	UNIT PRICE	AVAIL. QTY	TOTAL UNITS	LINE TOTAL
123456789	123456789		\$20.00	\$28.33	\$15.00	171	8	\$120.00

To get more information about adding products to Purchase Orders, refer to [Add Products to PO](#).

## Approve and Email a PO to Vendor

The next step in the PO workflow is to **notify your vendor** about purchased products.

When PO approval is configured to be required, the relevant notification will appear once you try to email an unapproved Purchase Order. To approve a PO, follow the steps below.

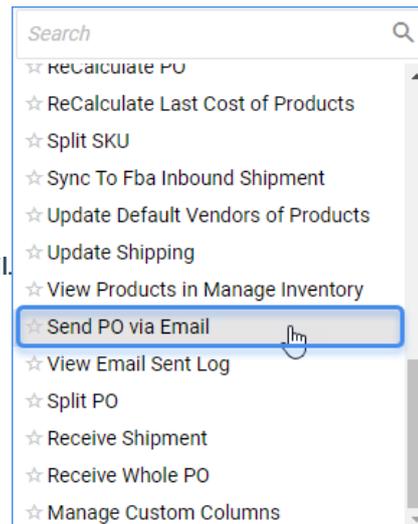
1. Go to **Purchasing > Manage POs**.
2. Select the appropriate Purchase Order.
3. In the upper right, click **Actions**, and select the **Approve Purchase Order** option.

To approve POs, the user needs to have the relevant permissions within [Employee Roles](#).

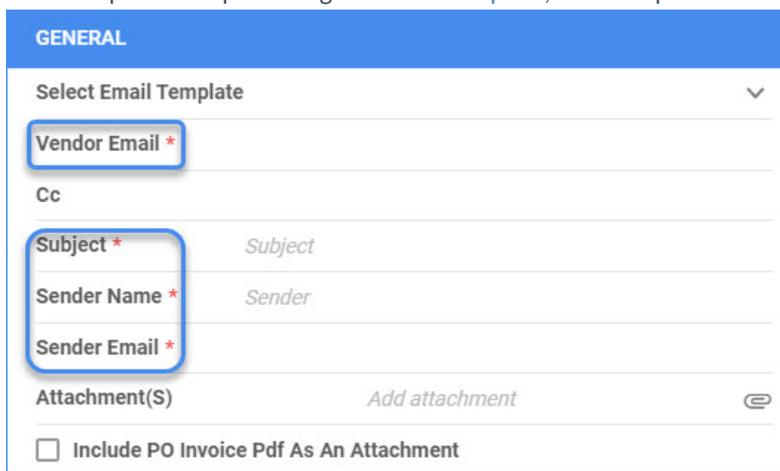
To email an approved Purchase Order to your Vendor, follow the steps below.

1. Go to **Purchasing > Manage POs**.
2. Select the appropriate Purchase Order.

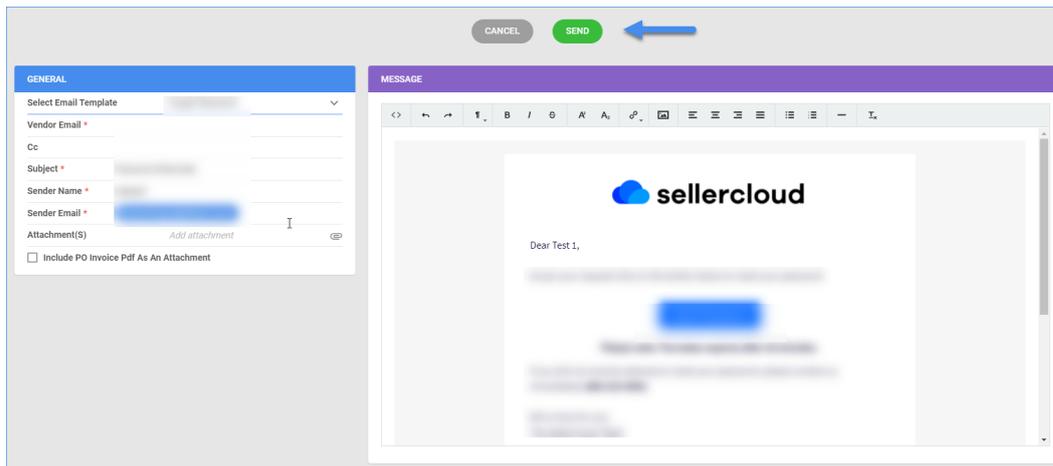
3. In the upper right, click **Actions**, and select the **Send PO via Email**.



4. On the **General** panel, specify the **Vendor Email**, **Subject**, **Sender Name**, and **Sender Email**.
5. You can opt to use a pre-configured [email template](#), or to compose a message on your own.

A screenshot of a 'GENERAL' panel in a software interface. The panel has a blue header with the word 'GENERAL' in white. Below the header, there are several input fields and a checkbox. The 'Select Email Template' dropdown menu is set to 'Vendor Email \*'. Below it is a 'Cc' field. The 'Subject \*' field is followed by a placeholder 'Subject'. The 'Sender Name \*' field is followed by a placeholder 'Sender'. The 'Sender Email \*' field is followed by a placeholder 'Add attachment' and an attachment icon. At the bottom, there is a checkbox labeled 'Include PO Invoice Pdf As An Attachment'.

6. Once the email is completed, click **Send**.

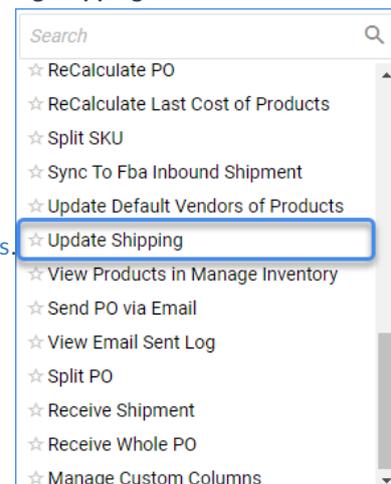


## Update PO Shipping Details

In response, the vendor will let you know about the shipping data updated. To make the relevant changes in Sellercloud, follow the steps described below.

1. Access **Purchasing > Manage POs**.
2. Open the appropriate Purchase Order.
3. In the upper-right corner of the selected PO, click **Actions** and select **Updating Shipping**. For more instructions on

updating shipping data on a PO, refer to [Purchase Order – Shipment details](#).



4. Alternatively, the PO Shipping data can be updated with **receiving Shipping Containers** which include purchased items from the requested Purchase Order.

To get detailed instructions on how to receive shipments in containers with multiple POs, refer to [Managing Shipping Containers](#).

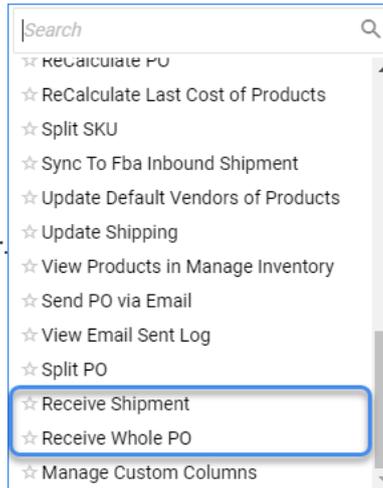
## Receive a Purchase Order

The next-to-last step in the PO workflow is to receive purchased items. To log a complete or partial shipment on a PO, follow the steps and instructions below.

1. Access **Purchasing > Manage POs**.
2. Open the appropriate Purchase Order.
3. In the upper-right corner of the selected PO, click **Actions**, and select either **Receive Whole PO** to log all purchased

items delivery or **Receive Shipment** to receive a part of a Purchase Order. For more instructions of how to make

receives, refer to **Receive a Purchase Order**.



## Cancel or Delete PO

In some cases, when the Vendor cannot ship the products or you no longer need them, you have the option to Cancel or completely Delete a PO. You can do this in bulk by selecting POs in the **Manage POs page > Actions > Delete/Change Status**. You can also go open the Actions menu on the Purchase Order Details page and click Delete PO/Cancel PO.

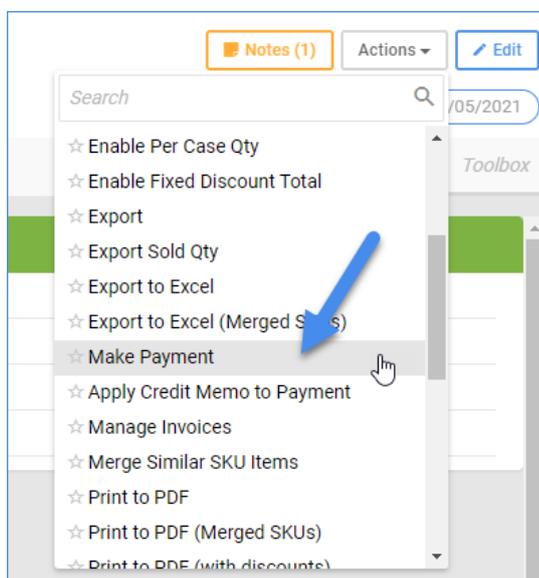
If the PO is linked to a Sales Order as part of the **Dropship** workflow, you will be prompted to confirm you want to break that link. If you do so, the Order's **Dropship status** will automatically change to **None**. This safeguard is present when updating a single PO and performing the bulk actions.

## Update PO Status

You can update **PO Status** individually by opening the PO and navigating to the Statuses Panel, or in-bulk by selecting multiple **POs** and choosing the **Change Status** action from the **Action Menu**.

## Payment Status

You can pay for purchased products before or after shipping the items. To record an outgoing payment, select **Make Payment** from the PO's **Actions** menu.



You can manually **add a payment** to a Purchase Order or apply your

previous payments to that vendor for the requested purchase order. For more information on managing vendor invoices,

refer to [Manage Vendor Invoices](#).

Once paid, the vendor will send you an Invoice. Then, you can mark your Purchase Order as **Paid** and close it. To close a PO, select the **Close** option from the PO's **Actions** menu.

## General Status

A purchase order can have different statuses, each with its own definition. Refer to the descriptions provided below for further information regarding each status:

- **Saved**
  - The PO is saved and is awaiting further action.
- **Cancelled**
  - POs with the status canceled will not be shipped by the supplier.
- **Completed**
  - The PO has been shipped, received, and invoiced.
- **Ordered**
  - This status indicates that the PO is awaiting shipment.
- **Pending**
  - The PO is created but not approved or processed yet.
- **Received**
  - The PO is received from the supplier and is ready to be processed. This can include items being received into inventory.

Sellercloud has an advanced purchase order system to help you effectively manage vendor orders, receive inventory, and track product costs. When you receive POs, they are added to your inventory to create an efficient inventory management system. In Sellercloud, you can perform various basic and advanced functions related to your POs. Purchase orders can be created from scratch or imported directly into your Sellercloud account. Once all the basic information is there, you can perform actions such as:

- Split POs
- Add individual items and kits
- Apply payments and discounts
- Email POs to vendors
- Update shipping information

To learn about other PO functions available in Sellercloud, check out [Managing POs: Additional Functions](#).

### Navigating the Purchase Orders page

Purchase orders can be searched for, viewed, and managed in bulk from the Purchase Orders page. Here, you'll see a grid with all your POs and specific information about them in each column. To access this page:

- Click **Inventory > Purchasing**.

PO Type	PO #	Description	Created On	Units	Grand Total	Balance	Balance Not Recvd Goods	Ordered On	Vendor Invoice#	Status	Priority	Approved	Ship	Receive	Payment	Emailed	Vendor	Count Inventory
<input type="checkbox"/>	1256	85841	11/28/2016	6	\$1,500.0000	\$1,500.0000	\$0.00	12/1/2016	123								Vendor 1	
<input type="checkbox"/>	1264		11/30/2016	15	\$35.0000	\$0.0000	\$0.00	11/30/2016									Target	
<input type="checkbox"/>	1265	84379	12/1/2016	18	\$327.8200	\$0.0000	\$299.87	12/1/2016									Target	
<input type="checkbox"/>	1268		12/5/2016	10	C\$50.0000	C\$0.0000	C\$0.00	12/5/2016									Target	
<input type="checkbox"/>	1269		12/5/2016	15	\$2,062.5000	\$112.5000	\$0.00	8/16/2018									Target	
<input type="checkbox"/>	1272	PO for FBAShipment 1100	12/6/2016	5	\$50.0000	\$-450.0000	\$0.00	12/6/2016									Target	
<input type="checkbox"/>	1273	PO for FBAShipment 1099	12/6/2016	5	\$501.5000	\$0.0000	\$0.00	8/25/2017									Target	
<input type="checkbox"/>	1274	tea	12/6/2016	9	\$45.0000	\$0.0000	\$0.00	12/6/2016									Target	
<input type="checkbox"/>	1275	PO for FBAShipment 1101	12/6/2016	1	\$1.5000	\$1.5000	\$0.00	12/6/2016									Target	

You can narrow your PO search using the many available filters in the **Search**.

Company: ALL Companies Create Date: From: To:

Order Status: ALL Order Date: From: To:

Created Date Range: All Dates ETA: From: To:

Receive Date Range: All Dates Receive Date: From: To:

Receiving Warehouse: ALL Warehouses Paid Date: From: To:

Cancel by Date: From: To:

Approved: ALL Created By: ALL

Priority: ALL SKU:

Shipping Status: ALL PO #:

Received: ALL Vendor: ALL

Payment Status: ALL Vendor Invoice #:

Emailed: ALL Drop Ship: ALL

Grand Total: From: To: Description:

Units: From: To: PO Type: ALL

Serial #:  QuickBooks: ALL

Payment Terms: None Purchaser: ALL

Container: ALL Manufacturer: ALL

Brand: ALL

Tracking Number:  Exported: ALL

PO/Order Relationship: ALL

**Search**

Using the **Select Action** dropdown in the top right corner, you can perform various actions to multiple POs at once. Simply select your POs, choose an action, and click **Go**.

Save Search: Select Receive PO **Go**

Select all pages 2790 items in 56 pages

PO Type	PO #	Description	Created On	Units	Grand Total	Balance	Balance Not Recvd Goods	Ordered On	Vendor Invoice#	Status	Priority	Approved	Ship	Receive	Payment	Emailed	Vendor	Count Inven
<input checked="" type="checkbox"/>	1256	85841	11/28/2016	6	\$1,500.0000	\$1,500.0000	\$0.00	12/1/2016	123								Vendor 1	
<input checked="" type="checkbox"/>	1264		11/30/2016	15	\$35.0000	\$0.0000	\$0.00	11/30/2016									Target	
<input checked="" type="checkbox"/>	1265	84379	12/1/2016	18	\$327.8200	\$0.0000	\$299.87	12/1/2016									Target	

## Creating a PO

Check out this video tutorial about [creating POs](#) in Sellercloud.

1. Click **Inventory > Purchasing > New Purchase Order**.
2. Select company, PO Type, and Vendor. You can also select a Vendor and add other optional information. PO types include:
  - Purchase Order when ordering from Vendor
  - Credit Memo when returning item to vendor
  - Vendor Offer when logging offers from vendors without actually buying them.
3. Click **Save**. The PO will be created, and the PO page will open.
4. You can select a Receiving Warehouse from the dropdown. If a warehouse has been selected on the vendor's profile, it will default to that warehouse.
5. Enter an address. If a warehouse has been selected on the vendor's profile, it will default to the address of that warehouse. Alternatively, select one from the Address dropdown.
  - a. To add an address to the drop-down, click the **Manage Address Book** button. You can set an address entry to be the default address for a PO. However, a warehouse set on the vendor profile will override the default address for PO.

You can also add some other information to your POs:

- A description.

- A **note**.
- A **memo**— The Memo note for the vendor will be printed on the PO.
- An **Expected Delivery Date** and **Cancel By Date**— These are for reference only and will not affect the status of the PO. The **Cancel By Date** will print out on the PO PDF if a date is entered.
- Shipping Instructions.

You can log offers from vendors without actually buying them by creating a purchase order and selecting Vendor Offer as the purchase order type.

#### Importing a PO

Purchase orders can be bulk-imported using the PO Import template. You can even import an old purchase order that was already received by logging the date of receipt.

If you want to import a PO without using the Sellercloud template, Sellercloud developers can customize a PO import plugin to your requirements.

1. Go to **Inventory > Purchasing > Import POs**.
2. Click **Download Template**. See an explanation of its fields below.
  - a. Enter each product on a separate row. Each row must have PO information, including PO Number, PO Date, etc.
  - b. Complete the template > Save the file.
3. Return to Sellercloud > Choose a Company > **Choose File > Import Purchase Orders**.
  - a. If importing with a plugin, select the **Plugin > Import Purchase Orders**.

The template columns correspond to the fields on the Purchase Orders page. All columns must be on the PO to successfully import, but not all columns require a value.

COLUMNS	DESCRIPTIONS
	Purchase order number in your system.
<b>PONumber</b>	This can be overridden to create a new Sellercloud PO number by checking the <b>Create New PO Numbers</b> box on the Import POs page before importing. To see the <b>Create New PO Numbers</b> box, you must first enable <b>Allow to Re-use PO ID in PO Import File</b> in the Client Settings.
<b>Description</b> (optional)	Text reference field.
<b>Vendor</b>	Vendor name. Can match existing vendor or will create new vendor.
<b>Payment Term</b> (optional)	Payment term with your vendor. Must match existing term.
<b>Vendor Invoice Number</b> (optional but helpful)	The purchase order number is in your vendor's system. Often used for accounting.
<b>Memo</b> (optional)	For reference and instructions.
<b>PODate</b>	Date of PO creation. TRUE or FALSE.
<b>IsApproved</b>	Relevant when requiring POs to be approved before emailing to the vendor using the Client Setting <b>Require PO to be approved before it can be emailed</b> .
<b>ShipToName</b>	
<b>ShipToAddress</b>	
<b>ShipToCity</b>	
<b>ShipToState</b>	
<b>ShipToCountry</b>	

**ShipToZipCode**

**ShippingInstructions**

**ProductID** ProductID must be in the Catalog before importing.

**ItemName** Product name.

**UnitPrice** Vendor price. The amount the vendor is charging for the purchase of the item.

**Discount**

**AdjustedUnitPrice**

**QuantityOrdered** Qty of units ordered.

**QuantityReceived** Qty of units received.

**QuantityReceivedOn** Date the shipment was received. If nothing is entered, the date will default to the date of import.

If set to TRUE, no inventory calculating will be done when creating and receiving the PO. Inventory

**DontCountInventory** can be calculated later from the Action Menu on the Manage Inventory page. This can speed up the import.

**CaseQtyOrdered** Enter value when ordering by case.

**CostPerCase** Enter value when ordering by case.

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