



# Purchase Order Manager User Guide

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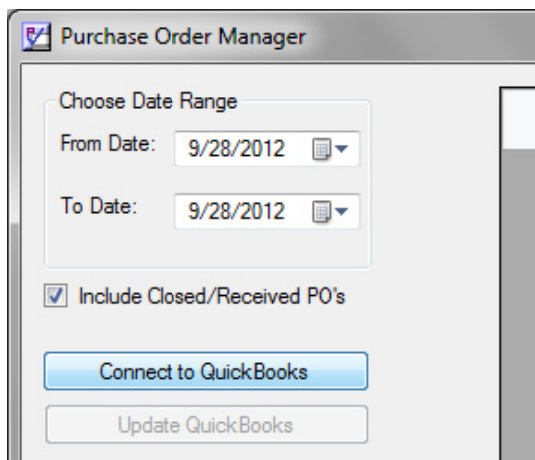


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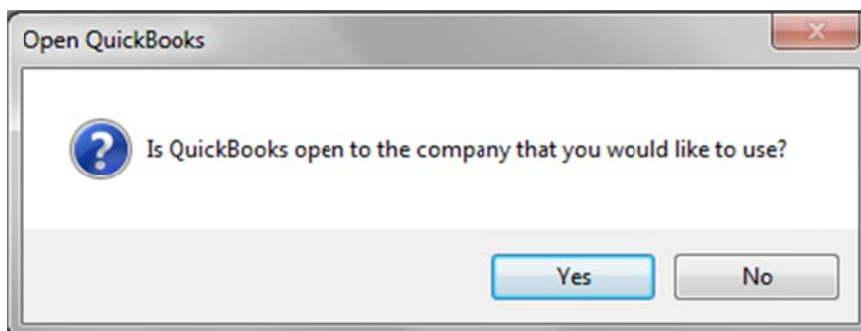
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## Getting Started

1. Download the PurchaseOrderManager.zip file and install Purchase Order Manager on the same computer where QuickBooks is installed. (See Installation Instructions)
2. Open QuickBooks, and open the company file that you want to use.
3. Start the Purchase Order Manager by double clicking the icon on the desktop or by going to Start- Programs- QB Utility – Purchase Order Manager
4. The Purchase Order Manager will open in a new window.
  - a. Enter a Date Range- only Purchase Orders in this Date Range will be retrieved from QuickBooks
  - b. You can include Include Closed/Received Purchase Orders by checking the box
  - c. Click “Connect to QuickBooks”



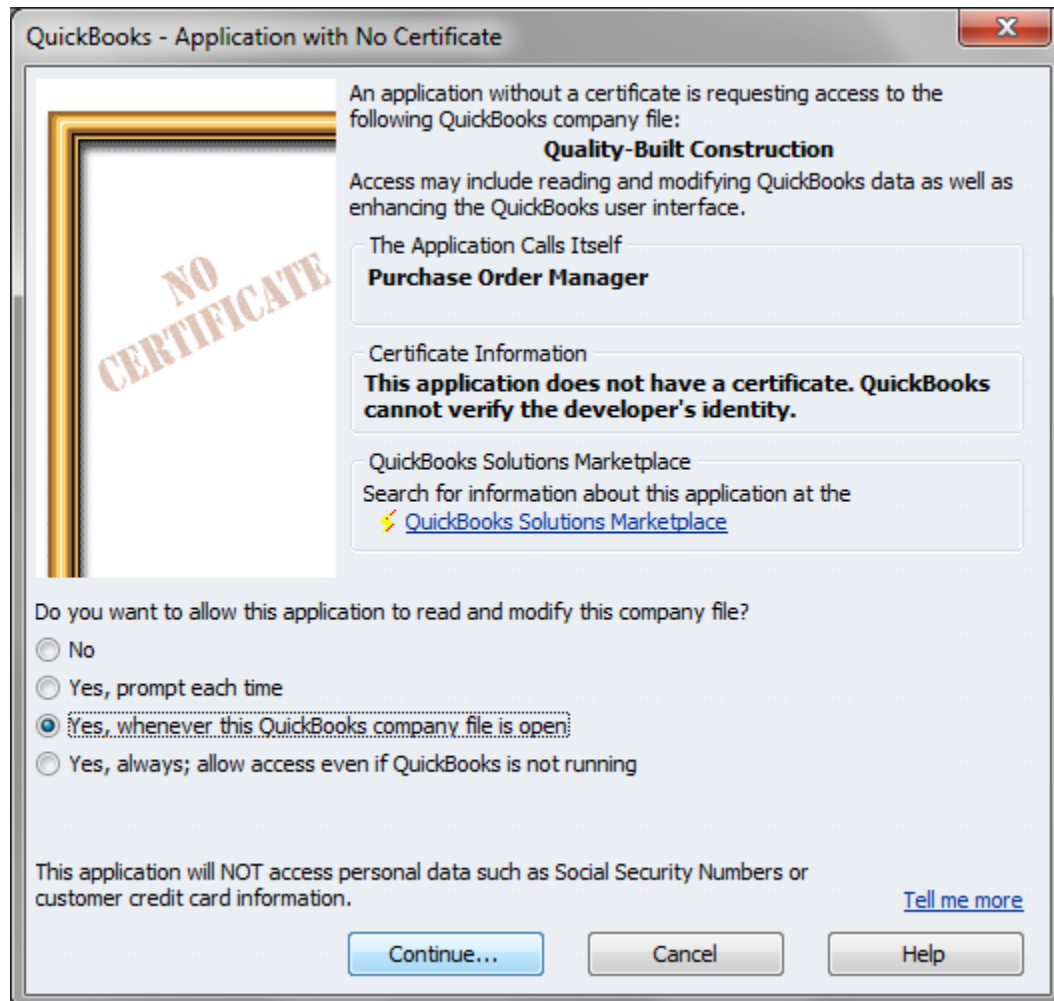
5. A window will appear asking if QB is open to the company that you would like to use. Ensure that QuickBooks is open on the company that you would like to work with, and then click “Yes”





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6. The first time you use the Purchase Order Manager, QuickBooks will require you to grant permission to the utility to access data. Select “Yes, whenever this QuickBooks company file is open” and then click “Continue”.

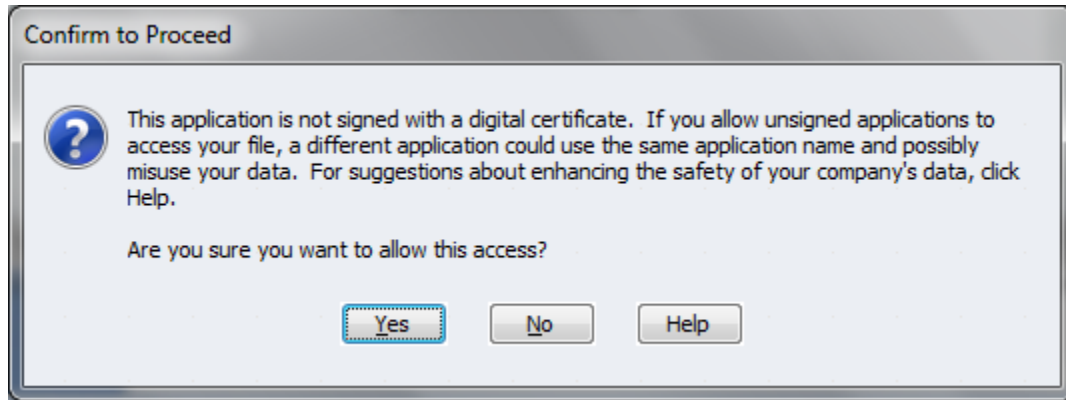




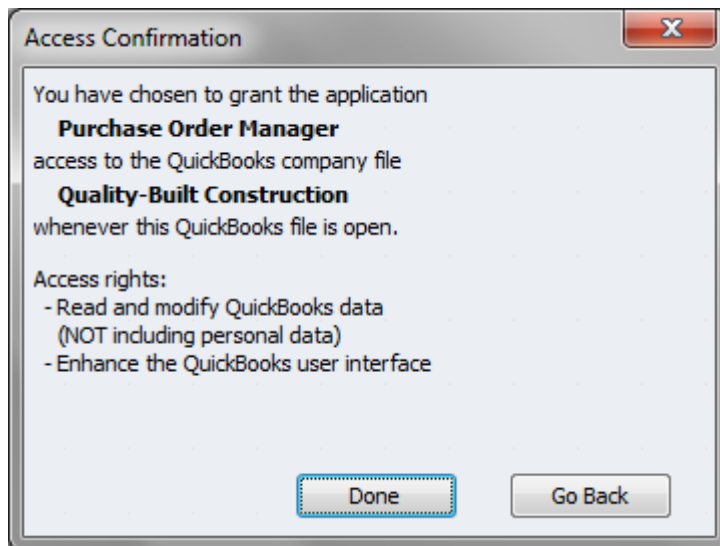
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7. A window will appear asking you to confirm, click "Yes".



8. Access Confirmation window will appear, click "Done"





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## Selecting the Purchase Orders to work with

### 1. Entering a Date Range

Select the Date Range of the Purchase Orders that you would like to work with by entering the dates in the “From Date” and “To Date” Sections

The screenshot shows the 'Purchase Order Manager' dialog box. The 'Choose Date Range' section is highlighted with a red circle. It contains two date pickers: 'From Date' set to 9/28/2012 and 'To Date' set to 9/28/2012. Below these are two buttons: 'Connect to QuickBooks' and 'Update QuickBooks'. The checkbox 'Include Closed/Received PO's' is unchecked.

### 2. Include Closed/Received Purchase Orders

If you would like to include Closed and Received Purchase Orders as well as Open Purchase Orders, check the box next to “Include Closed/Received PO’s”. To only work with Open PO’s leave the box unchecked.

The screenshot shows the 'Purchase Order Manager' dialog box. The 'Include Closed/Received PO's' checkbox is checked and highlighted with a red circle. The 'Choose Date Range' section is also visible, with 'From Date' set to 9/28/2012 and 'To Date' set to 9/28/2020. The 'Connect to QuickBooks' button is visible at the bottom.

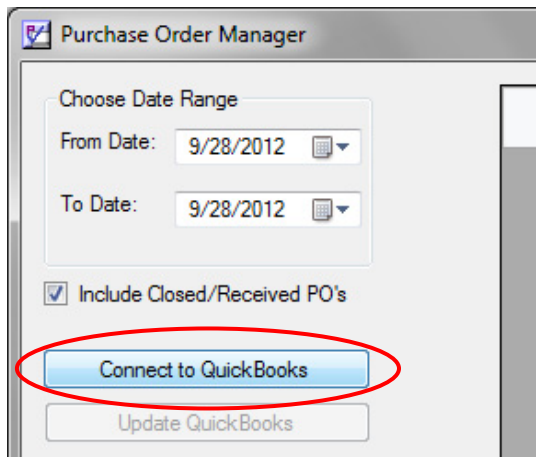


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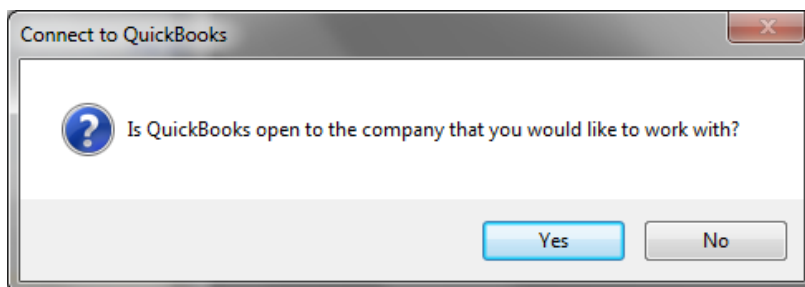
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### 3. Connecting to QuickBooks

To retrieve the Purchase Orders that meet the parameters you have set in steps one and two, click “Connect to QuickBooks”



### 4. Ensure that QuickBooks is opened to the company file you would like to work with and click “Yes”





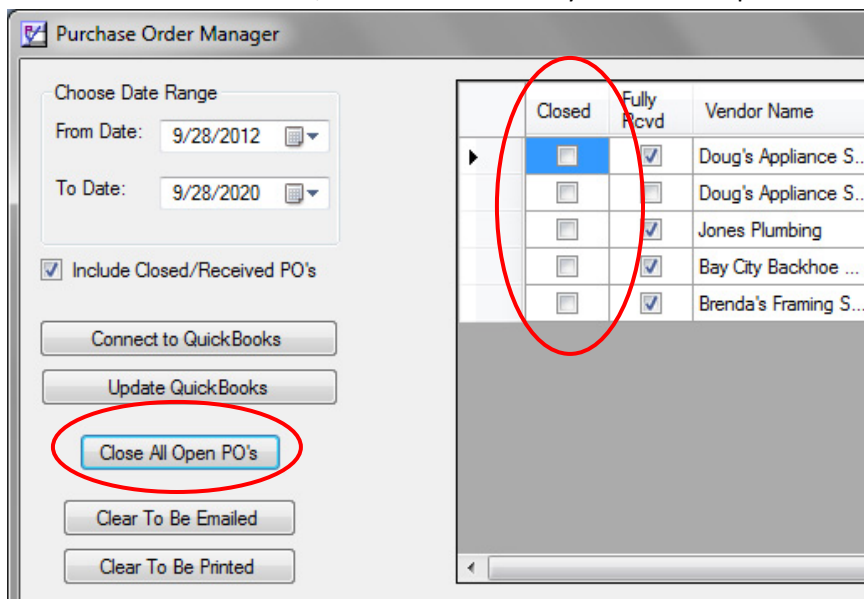
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## Working with Purchase Orders

### Close/Open Purchase Orders

If you selected “Include Closed/Received PO’s then you will see both open, manually closed, and fully received PO’s in your date range.

1. To close an open PO’s use the check boxes under the column “Closed”. To close all of the Purchase Orders in the list, click the box that says “Close All Open PO’s”



2. To open all of the Closed Purchase Orders in the list, click the box that says “Open Closed PO’s”

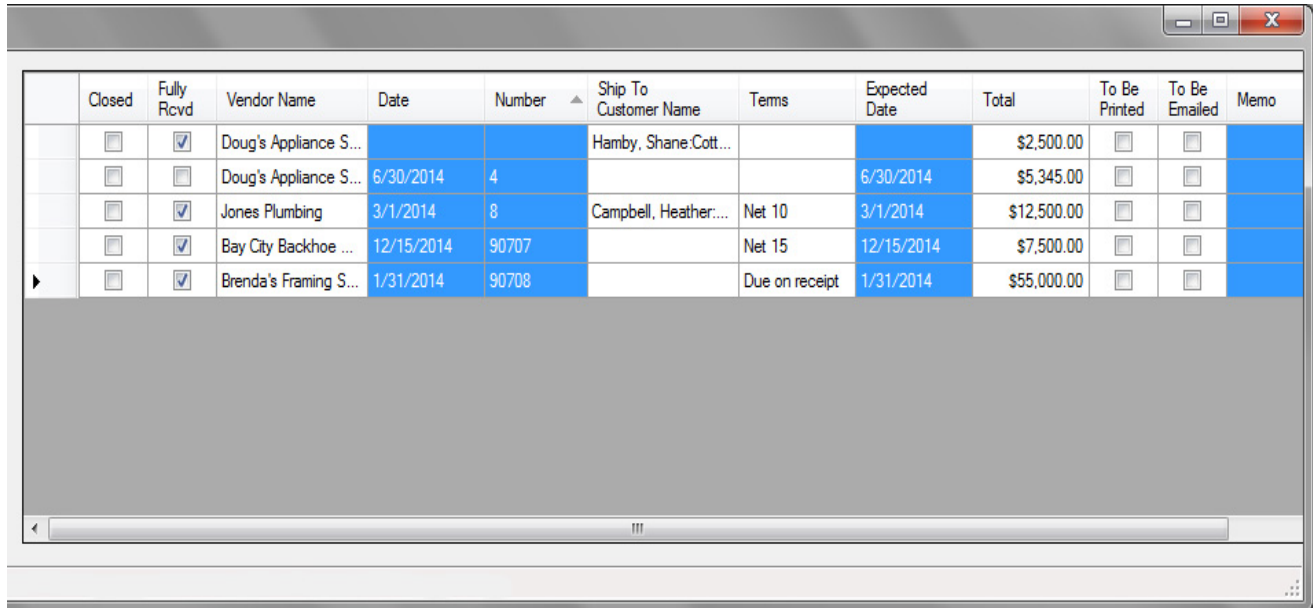
**NOTE:** The button will change between “Close All Open PO’s” and “Open All PO’s” depending on whether the Purchase Orders in your list are already closed or opened. You cannot open a PO that has been fully received in QuickBooks.



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## Editing Purchase Order Information

3. To edit Purchase Order Information, simply click on the field that you would like to edit (Date, Number, Expected Date, or Memo) and enter your changes.



	Closed	Fully Rcvd	Vendor Name	Date	Number	Ship To Customer Name	Terms	Expected Date	Total	To Be Printed	To Be Emailed	Memo
	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Doug's Appliance S...			Hamby, Shane.Cott...			\$2,500.00	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	Doug's Appliance S...	6/30/2014	4			6/30/2014	\$5,345.00	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Jones Plumbing	3/1/2014	8	Campbell, Heather...	Net 10	3/1/2014	\$12,500.00	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Bay City Backhoe ...	12/15/2014	90707		Net 15	12/15/2014	\$7,500.00	<input type="checkbox"/>	<input type="checkbox"/>	
▶	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Brenda's Framing S...	1/31/2014	90708		Due on receipt	1/31/2014	\$55,000.00	<input type="checkbox"/>	<input type="checkbox"/>	





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## Changing “To Be Printed” Status

4. Use the check boxes in the column “To Be Printed” to select whether Purchase Order should be marked for printing in QuickBooks. You can also click the box “Clear To Be Printed” to uncheck all of the boxes.

**Purchase Order Manager**

Choose Date Range  
From Date: 9/28/2012  
To Date: 9/28/2020

☒ Include Closed/Received PO's

Connect to QuickBooks  
Update QuickBooks  
Close All Open PO's  
Clear To Be Emailed  
**Clear To Be Printed**

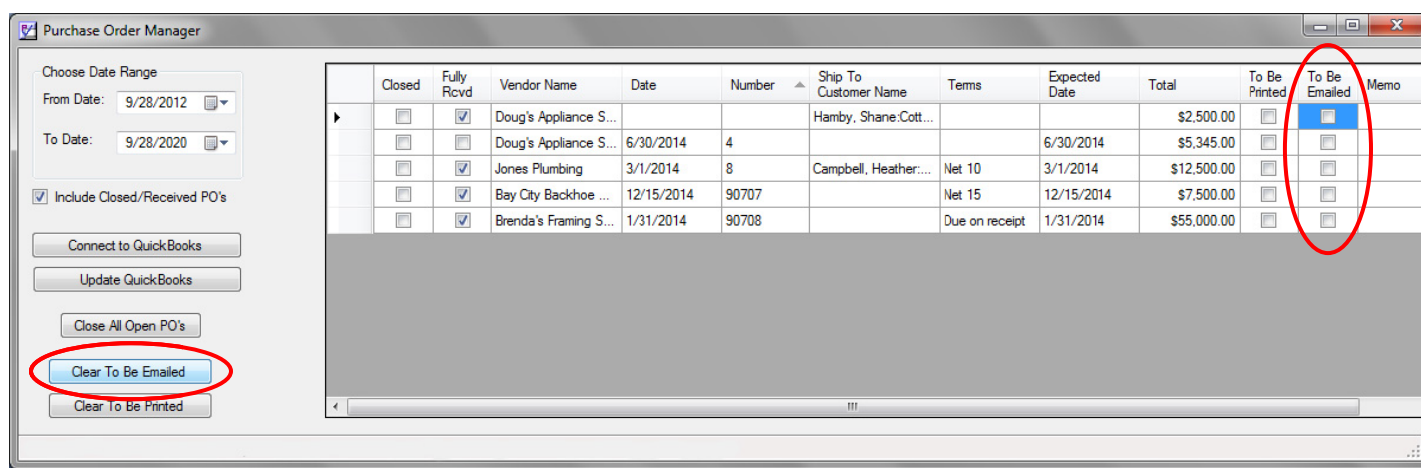
	Closed	Fully Rcvd	Vendor Name	Date	Number	Ship To Customer Name	Terms	Expected Date	Total	To Be Printed	To Be Emailed	Memo
▶	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Doug's Appliance S...			Hamby, Shane/Cott...			\$2,500.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	Doug's Appliance S...	6/30/2014	4			6/30/2014	\$5,345.00	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Jones Plumbing	3/1/2014	8	Campbell, Heather...	Net 10	3/1/2014	\$12,500.00	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Bay City Backhoe ...	12/15/2014	90707		Net 15	12/15/2014	\$7,500.00	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Brenda's Framing S...	1/31/2014	90708		Due on receipt	1/31/2014	\$55,000.00	<input type="checkbox"/>	<input type="checkbox"/>	



# Purchase Order Manager User Guide

## Changing “To Be Emailed” Status

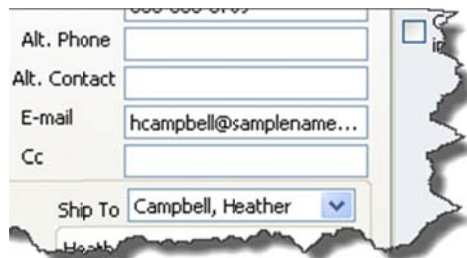
5. Use the check boxes in the column “To Be Emailed” to select whether Purchase Orders should be marked for sending via email in QuickBooks. You can also click the box “Clear To Be Emailed” to uncheck all of the boxes.



**NOTE:** A Vendor’s email address must be on file in QuickBooks or you will not be able to use Purchase Order Manager to mark a PO as To Be Emailed. Purchase Orders marked To Be Emailed without a valid email address on file will be skipped when updating QuickBooks.

### To update the Vendor’s email address in QuickBooks:

1. In QuickBooks click “Vendors” and select Edit Vendor for the vendor that you would like to update.
2. Enter a valid email address in the Email field



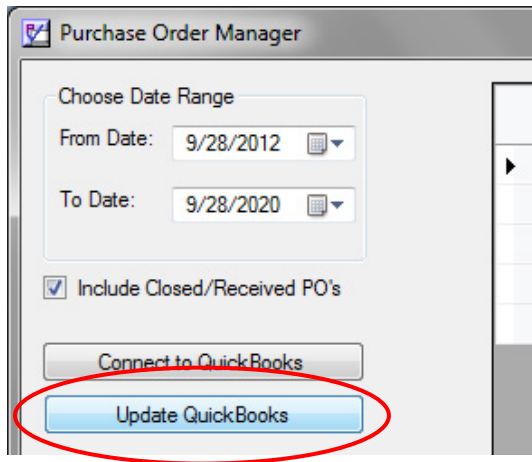


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## Updating QuickBooks

1. To save your changes to QuickBooks, click “Update QuickBooks”.



**Note:** To clear any changes you have made without updating QuickBooks, Click “Connect to QuickBooks” to refresh the list of Purchase Orders from QuickBooks.

For information or help with Purchase Order Manager please visit our website at [www.QButility.com](http://www.QButility.com), or email us [support@qbutility.com](mailto:support@qbutility.com).

**Thank you for using Purchase Order Manager!**