Working with purchase orders

Last Modified on 08/15/2026 10:19 pm EDT

Some organizations use formal purchase orders (POs) for tracking and approval.

If your organization uses purchase orders

1. Create a new purchase order and enter the vendor, items, quantities, and expected costs.
2. Route it for approval if required by your process.
3. When the items are received, mark the purchase order as received and link the new assets or expenses to it.

Not every organization uses formal purchase orders. Follow the process your leadership has established. If POs are not part of your workflow, you can simply record the resulting assets or expenses directly.