Purchase Orders

Last Modified on 04/09/2025 5:57 pm EDT

A Cross Rental – (aka Sub Rental) is a rental from an outside source to temporarily supplement your inventory during an internal shortage.

Purchase Order – is a purchase of equipment that is to be added to your inventory count.

Both Cross Rentals and Purchase Orders display on the Purchase Order Grid, and may be referred to as a Cross Rental PO or a PO respectively

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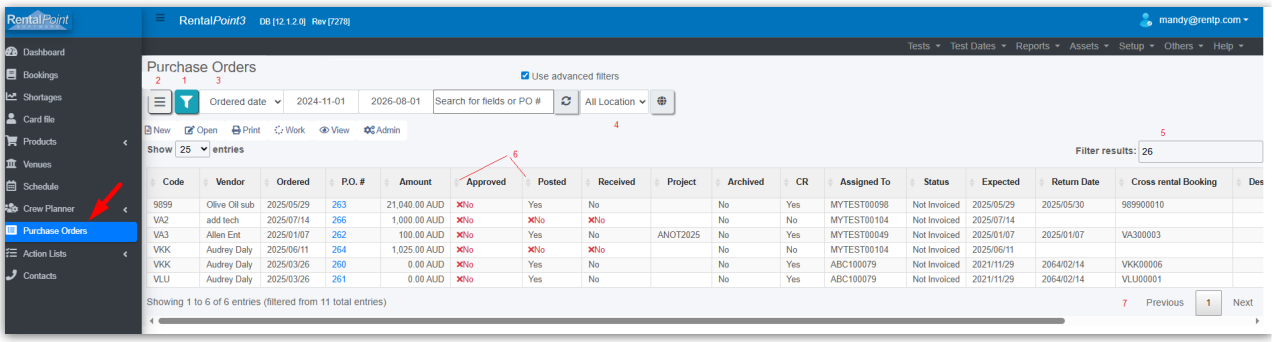
The Purchase Order Grid



The Purchase Order Grid displays all Cross Rental and Standard Purchase Orders within the filter details. See below for an explanation of the grid features

1. Filters

2. Menu

3.Scope

4. Location

5. Search

6. Sort

7. Pages

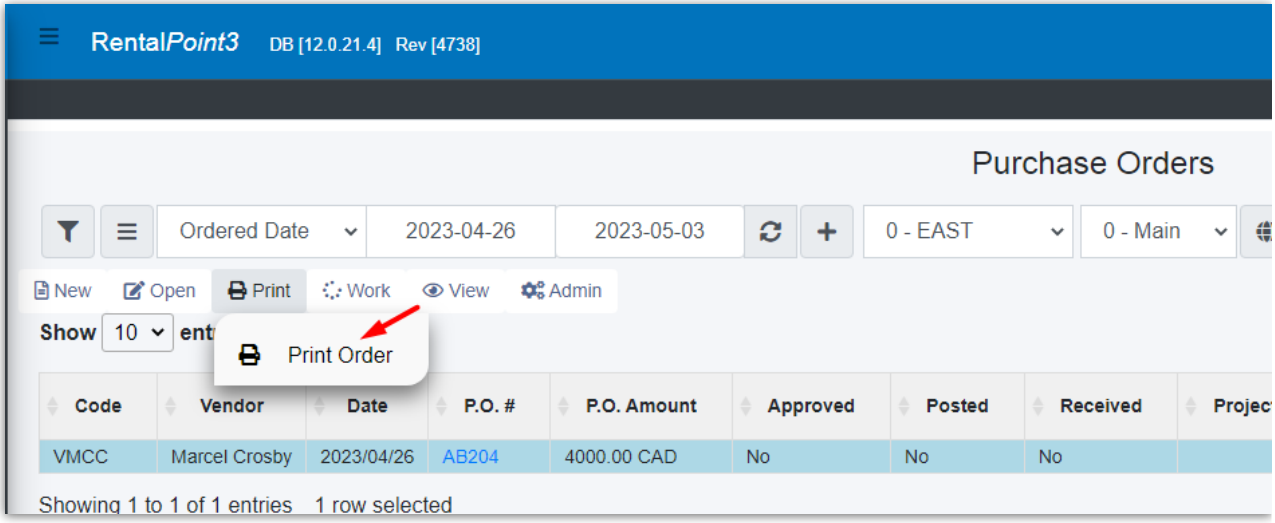
Create/Edit a Purchase Order

- Create/Edit
- Details
- Dates
- Equipment
- Delivery Address
- Notes

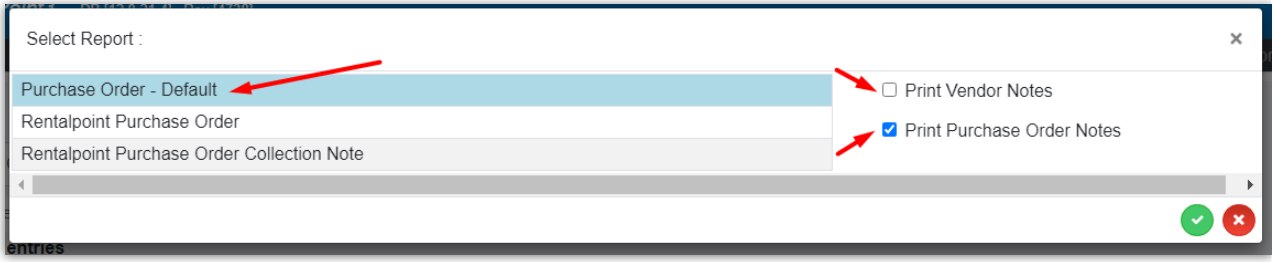
Print a Purchase Order

An option to print the Purchase Order is provided on save

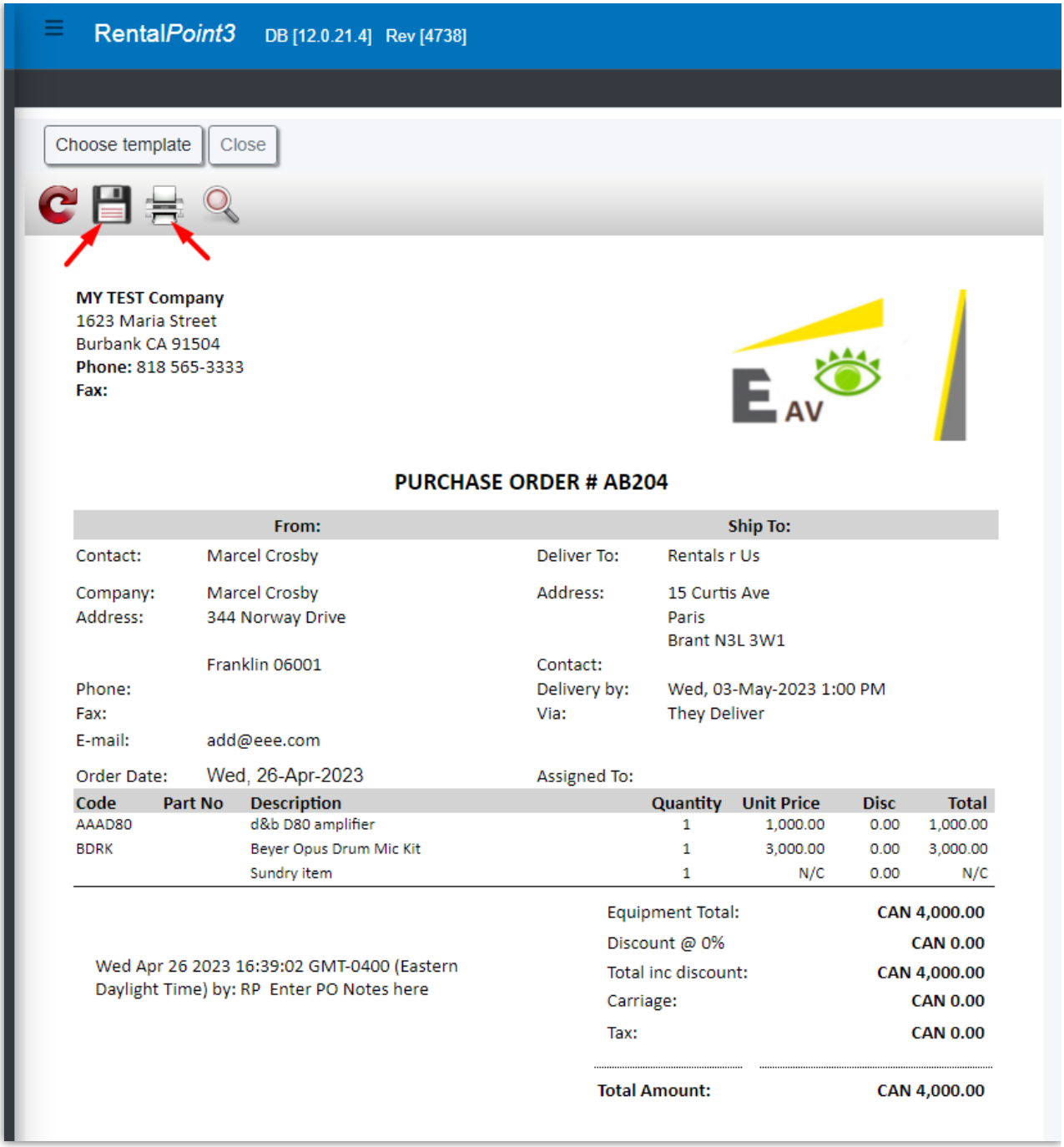
You can also print any highlighted PO from the Print menu



Highlight the template you would like to use, then check/uncheck template options as needed and click to proceed



Save or send to printer



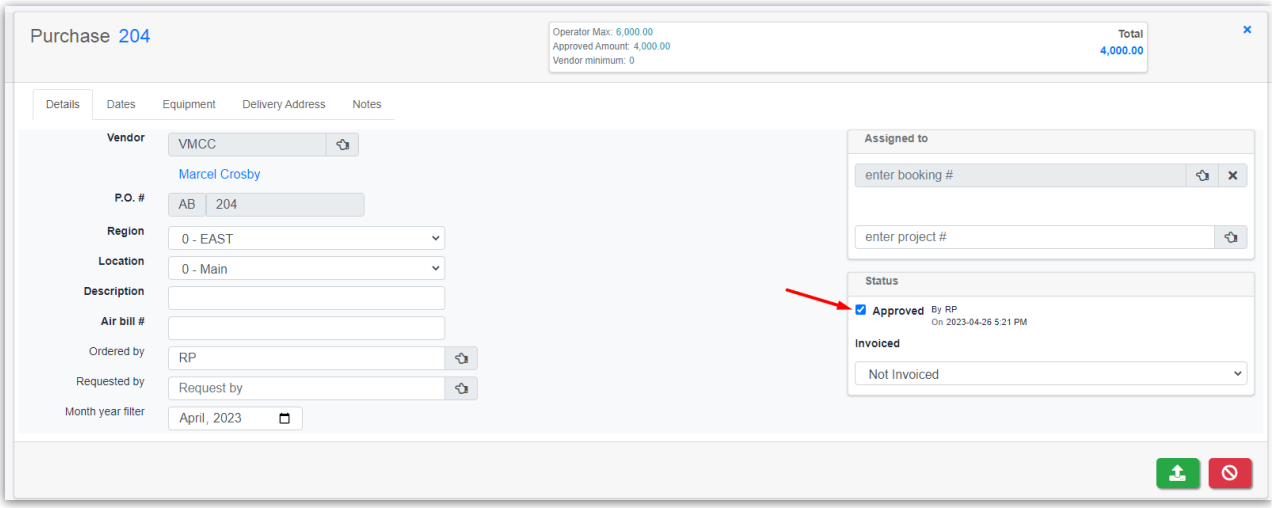
Approve a Purchase Order

There are several status levels for a purchase order:

- **Approved** – the purchase order has been reviewed and approved by the appropriate people.
- **Posted** – the purchase order is ready to be ordered from the supplying company.
- **Received** – the purchase order has been processed and received, equipment that was requested is now in stock.

To place a purchase order into Approved status open the purchase order and click the 'Approved' checkbox. Permissions can be set to prevent unauthorized users from approving purchase orders. PO limits are set on a

per operator basis that determine how much a given operator is allowed to order.



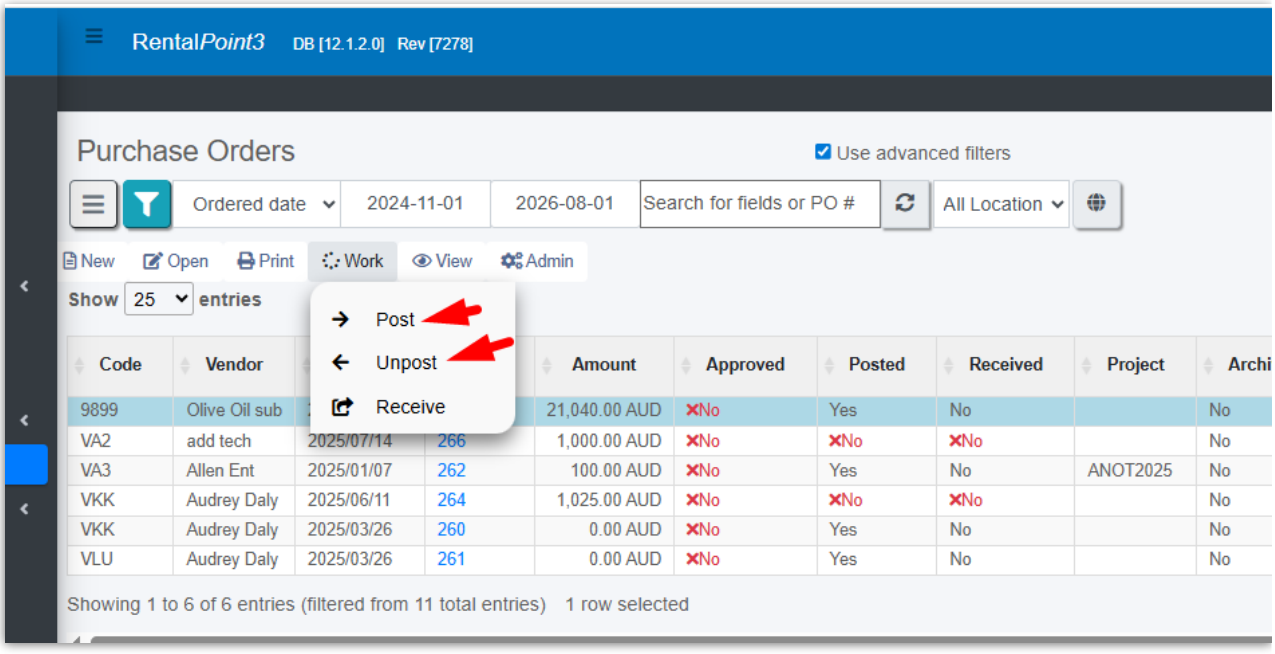
Post a Purchase Order

There are several status levels for a purchase order:

- **Approved** – the purchase order has been reviewed and approved by the appropriate people.
- **Posted** – the purchase order is ready to be ordered from the supplying company.
- **Received** – the purchase order has been processed and received, equipment that was requested is now in stock.

To place a purchase order into *Posted* status, the purchase order may need to be approved (depending on the setting for operational parameter #159)

Post/UnPost the highlighted PO from the Purchase Order Grid *Work* menu



Receive a Purchase Order

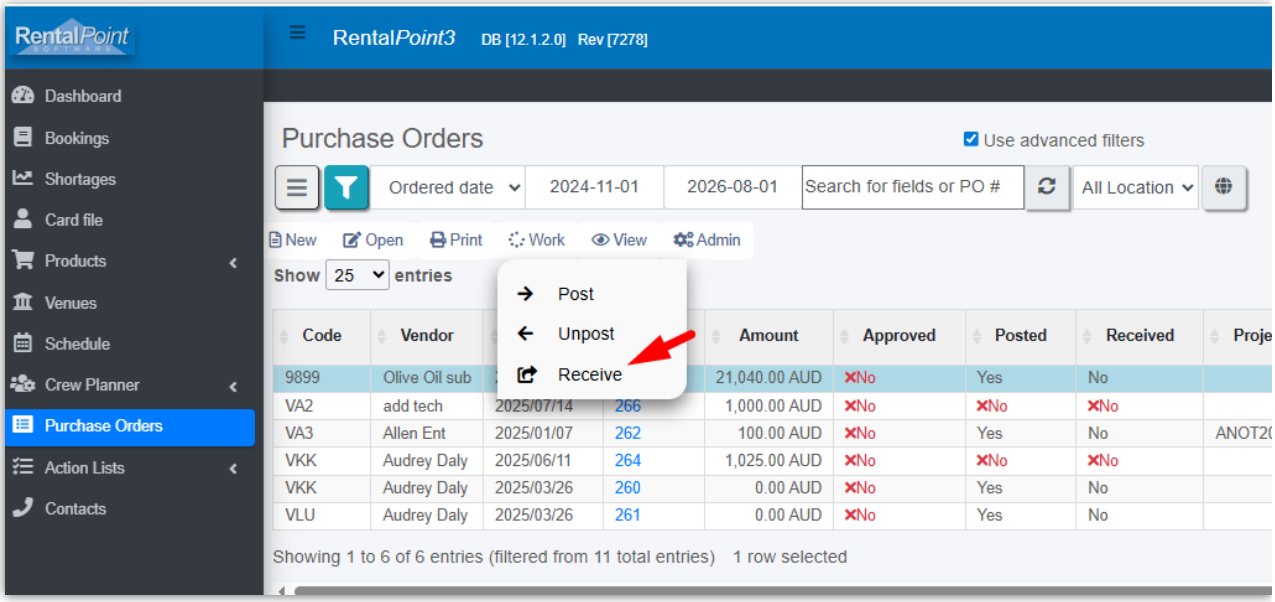
There are several status levels for a purchase order:

- **Approved** – the purchase order has been reviewed and approved by the appropriate people.
- **Posted** – the purchase order is ready to be ordered from the supplying company.
- **Received** – the purchase order has been processed and received, equipment that was requested is now in stock.

Only Posted Purchase Orders can be received.

Highlight any posted purchase order, then click *Receive* from the Work menu.

The software will increment the inventory quantity of received items

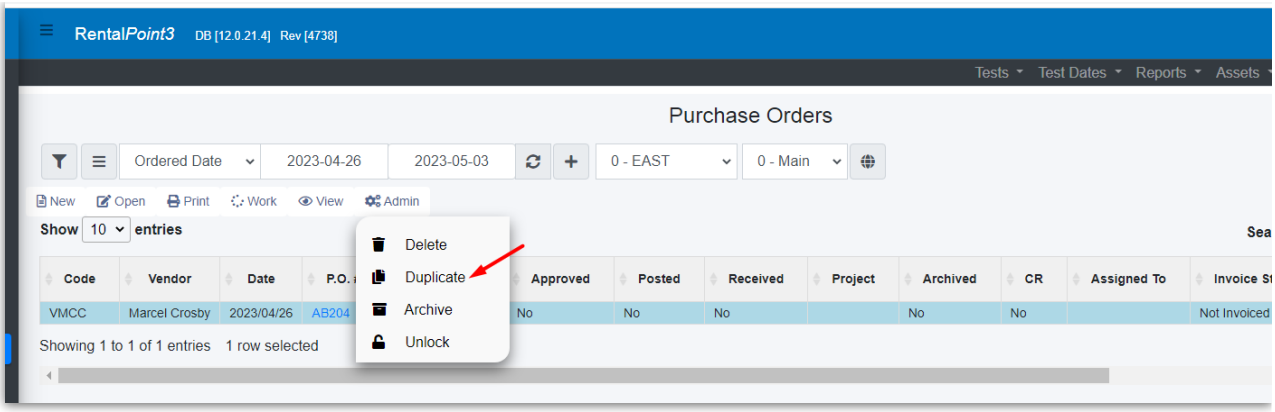


Duplicate a Purchase Order

To duplicate a Purchase Order or Cross Rental, click the duplicate option from the Admin menu

All information from the highlighted purchase order or cross rental will be copied to a new order.

See Purchase Order Operator Privileges if access id denied.

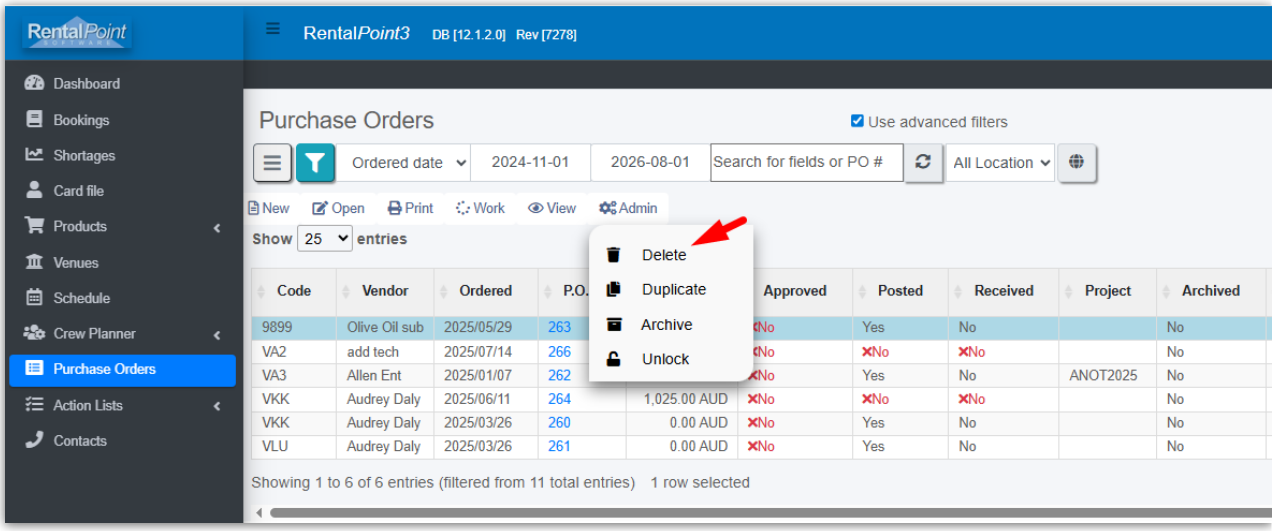


Delete a Purchase Order

First highlight the purchase order, then click the delete option from the Admin menu.

The system will prompt you for confirmation. If confirmed the purchase order will be deleted.

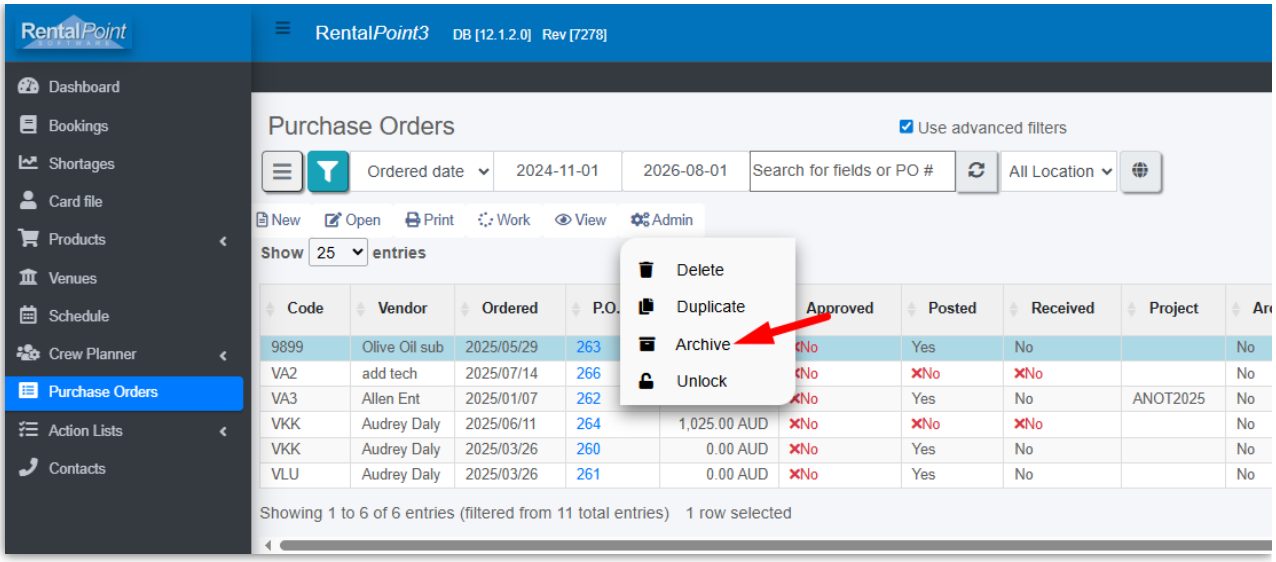
Note that both normal purchase orders and cross rental purchase orders are contained within the Purchase Order grid. The system will prevent the operator from removing cross rentals from the purchase order area. To delete a cross rental the operator must delete the cross rental from the bookings area.



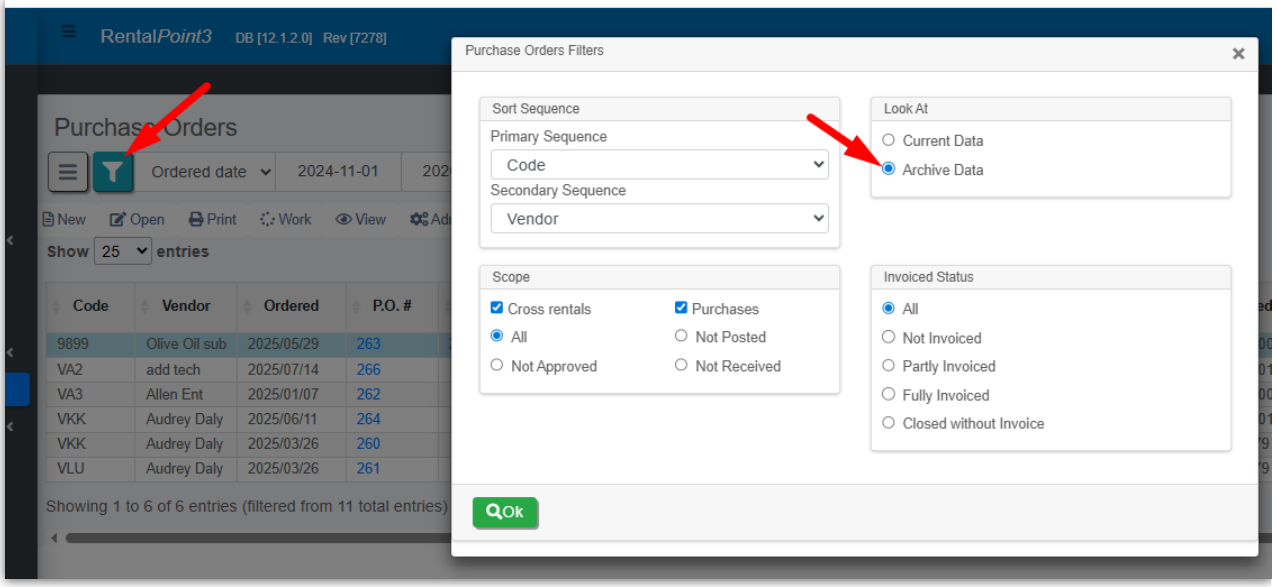
Archive a Purchase Order

Archiving is a tool designed to improve performance and remove the clutter of non-relevant or old items in the RentalPoint system database.

Archive a single received purchase order from the Purchase Order Grid via the Admin menu



Archived POs are still visible on the archive grid



Operator Privileges & Parameters

- Purchase Order Group Privileges
- Purchase Order Operator Privileges
- Purchase Order Parameter Settings